

F - The Ofcom Media Tracker survey: 2010 survey results

PSB Report 2011 – Information pack
July 2011

The survey explores attitudes and opinion covering a number of media areas:

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Background

- Ofcom's Media Tracker survey explores public attitudes and opinion on a range of media areas. Some data goes as far back as 1990.
- The survey origins are from the ITC's 'Public's View' survey. In 2005 this became Ofcom's Residential Tracker survey.
- At the start of 2008, Ofcom's Residential Tracker split into 2 separate surveys :
 - i) Ofcom's Media Tracker survey
 - ii) Ofcom's Technology Tracker survey
- This section covers data from the Media Tracker survey. Data is published as part of Ofcom's Public Service Broadcasting Annual Report.

Current Methodology

- UK representative quota sample of approx. 2,100 adults (aged 16+).
- Interviews are face to face using Paper and Pencil interviewing (PAPI) technique.
- Questionnaire conducted in two dip-stick waves (to counter seasonality issues)
- typically Wave 1 in April; Wave 2 in October.

Significant historical changes to methodology

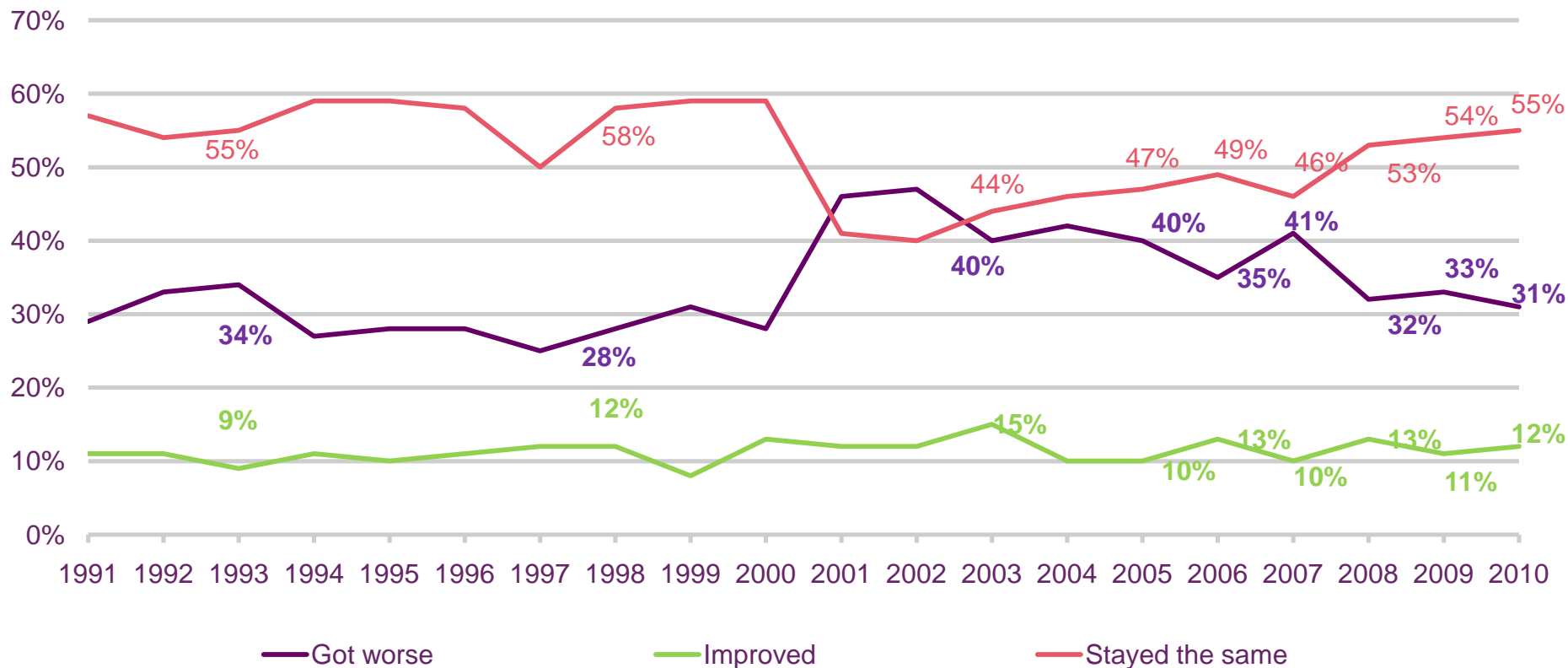
- Pre 2001 - ITC's 'Public's View' survey. Typically one dip-stick wave.
- 2005 - Ofcom's Residential Tracker. Continuous fieldwork throughout the year.
- 2008 - Residential Tracker splits into two surveys (Media Tracker and Tech Tracker)
 - Fieldwork moves back from continuous to two dip-stick waves (May/ Oct)
 - Also changes from CAPI (Computer assisted) to PAPI (Paper and Pencil)

Quality & standards within programmes

- **Opinions about television programmes in general**
(Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?)
- **Reasons given for saying standards have got worse**
(Q - In what ways do you think that the television programmes have got worse over the past year?)
- **Reasons given for saying standards have improved**
(Q - In what ways do you think that the television programmes have improved over the past year?)

Opinion on programme standards over the last 12 months

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

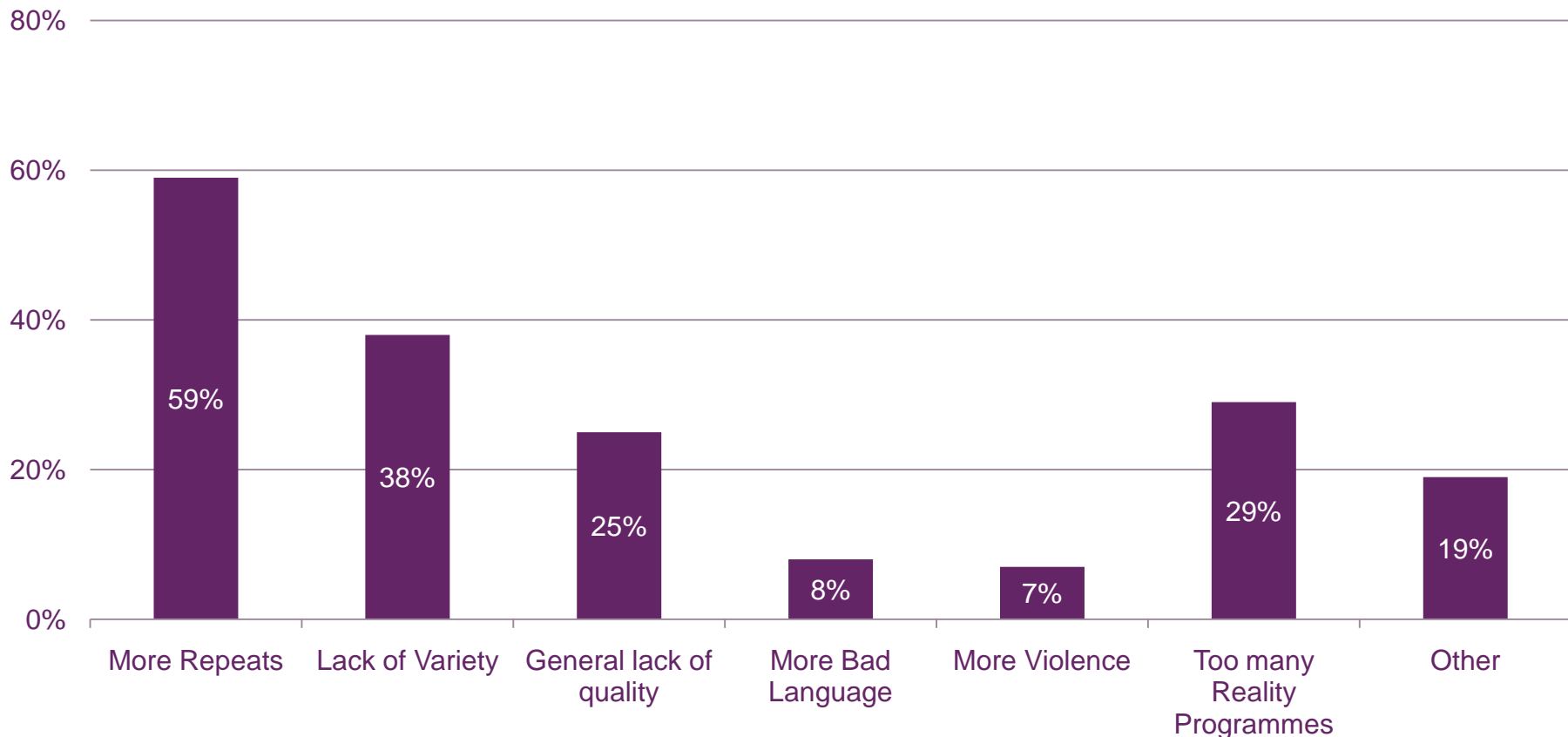


Source: Ofcom Media tracker. Base: All respondents.

Top reasons given for programmes getting worse - 2010

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

Base: All who say standards have got worse

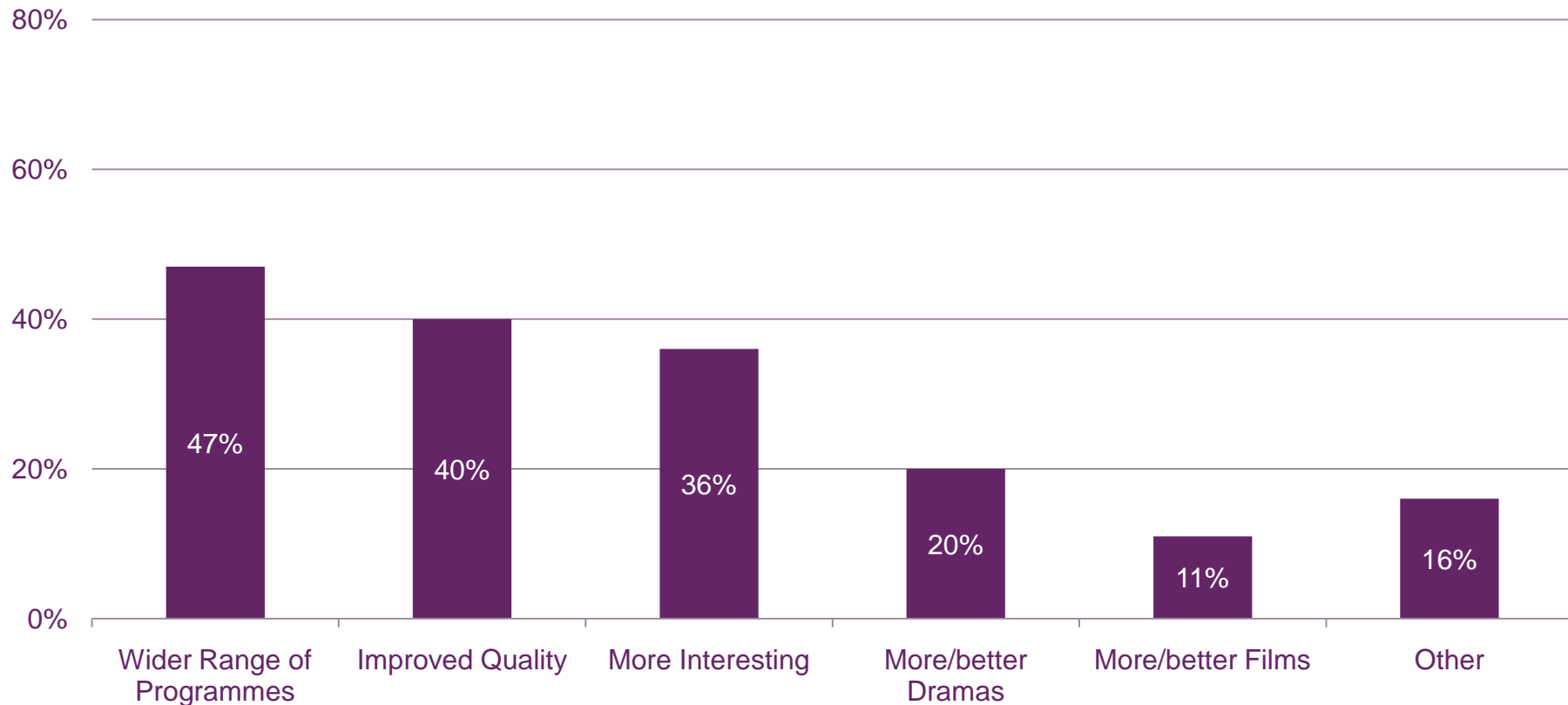


Source: Ofcom Media tracker. Base: All who say standards have got worse (673). Unprompted. Multicode. Only top individual responses are charted.

Top reasons given for programmes having improved - 2010

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

Base: All who say standards have improved



Source: Ofcom Media tracker. Base: All who say standards have improved (257). Unprompted. Multicode. Only top individual responses are charted.

Attitudes to Advertising

- **Awareness of different types of promotional messages**
(Q - Which of the following are you aware of on television – programme sponsorship, trailers or promotions for programmes, for channels, for online services, product placement)

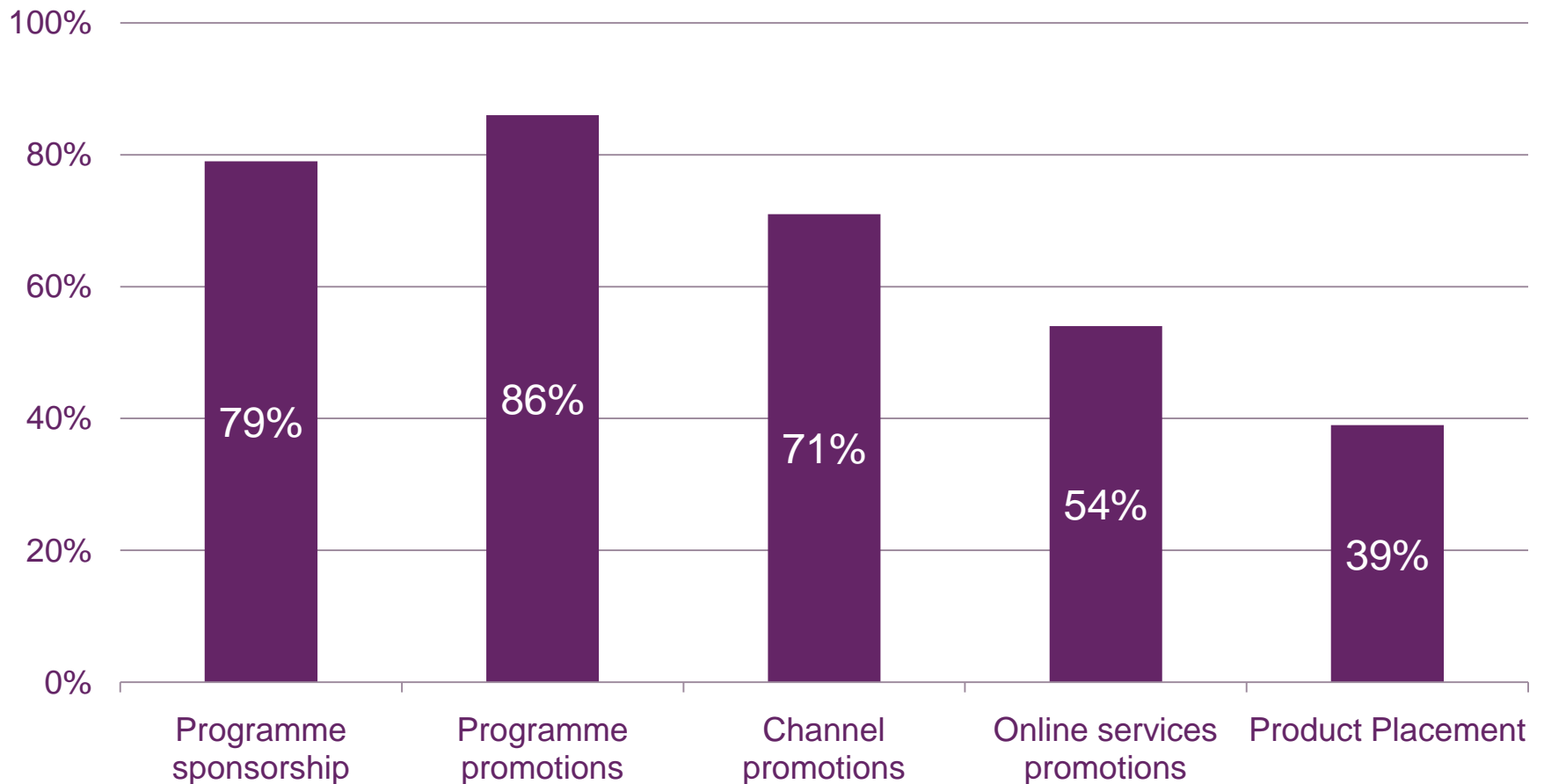
- **Opinions about the amount of current advertising and sponsorship**
(Opinion on 'frequency' and 'length' of ad breaks on 'main' and 'other' channels)

(Opinion on amount of programme sponsorship on TV channels as a whole and on amount of programme trailers/promos for programmes on ITV1/C4/Five)

(Opinion on how useful trailers/promotions to (i) another TV channel and (ii) online services are)

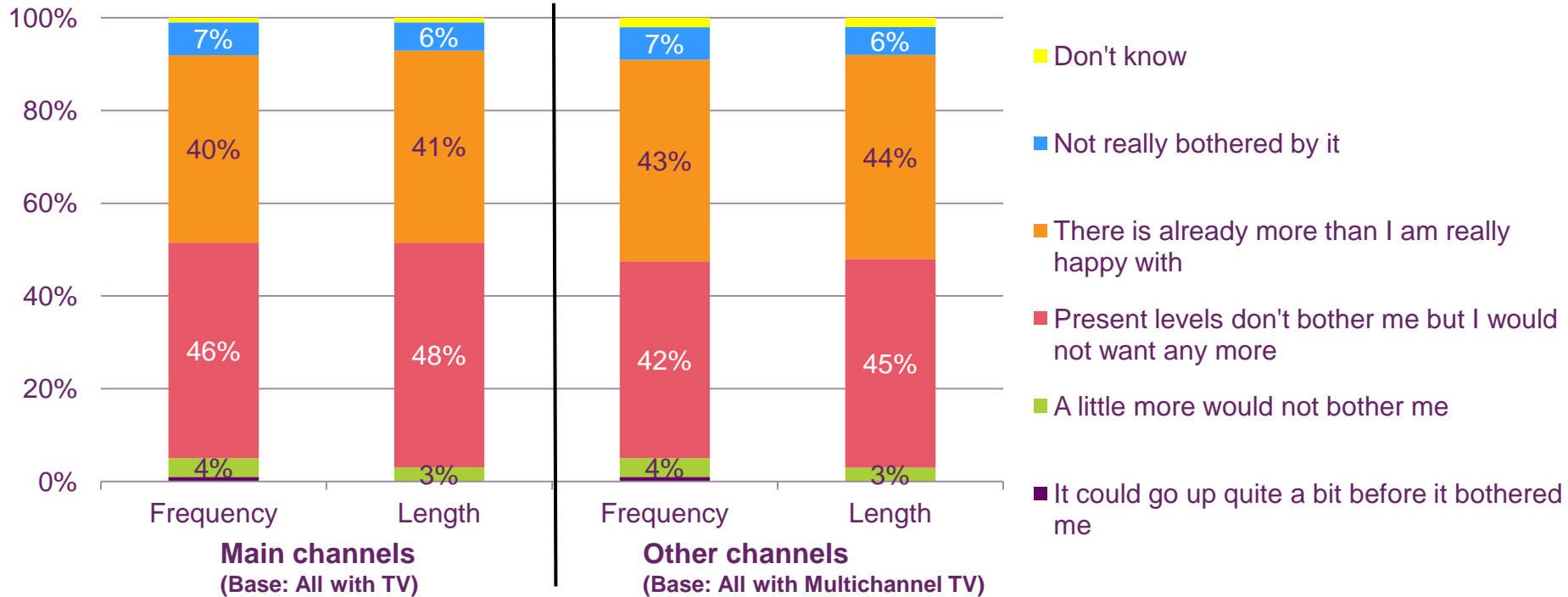
Awareness of promotional messages

Q - Which of the following are you aware of on television?



Source: Ofcom Media tracker 2010. Base: All respondents.

Opinion on 'frequency' and 'length' of TV ad breaks



Introduction to question:

Advertising and sponsorship provides revenue for commercial TV channels. Without advertising revenue, free-to-air channels like ITV1 or Five may not exist, while pay TV channels might have fewer new programmes.

Q - Which of these statements best describes how you feel about how **often** ad breaks are on the 'main commercial free to air channels'?

Q - Which of these statements best describes how you feel about how **long** the ad breaks last for on ITV1, Channel 4 and Five?

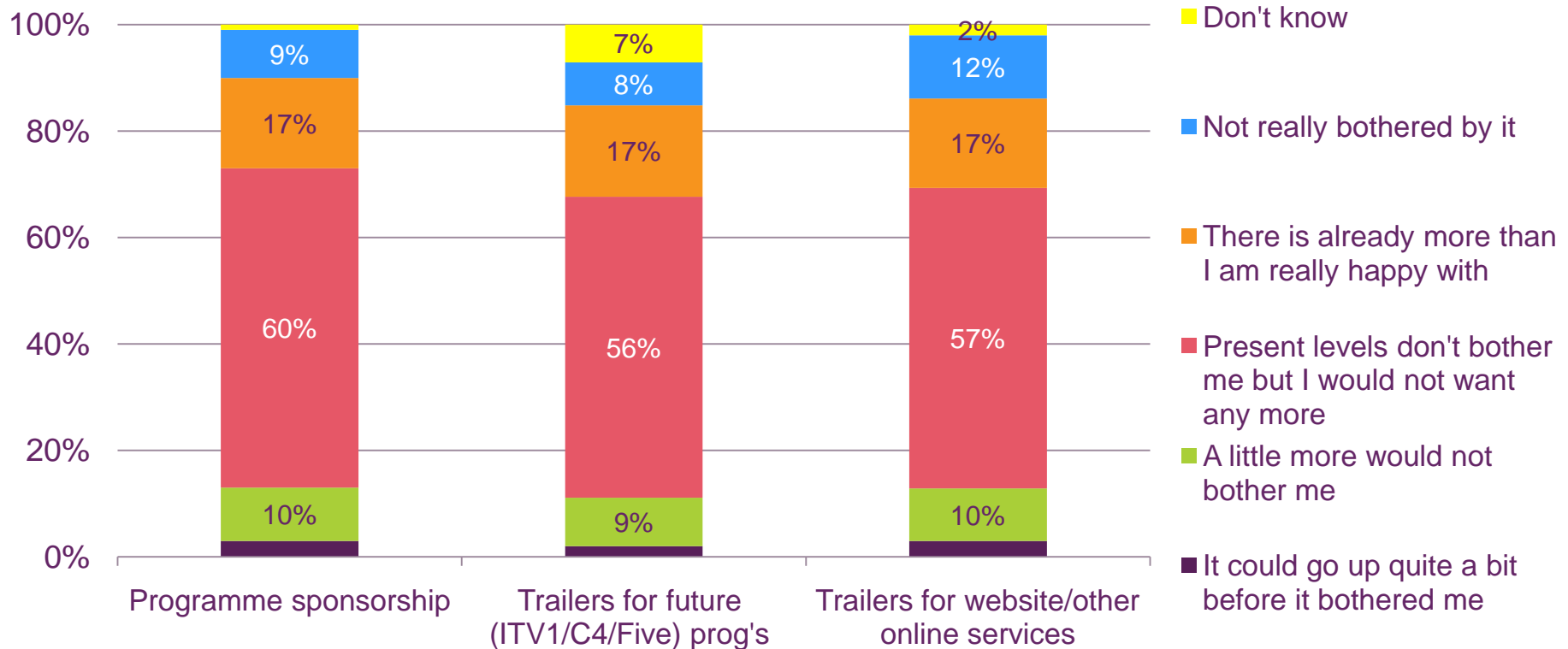
(**Note:** Question wording repeated for 'other commercial channels'. Where necessary it was explained: 'Other commercial channels' are "all the other channels with adverts except for ITV1, Channel 4 or Five. For example, ITV2, E4, Sky One, The Discovery Channel, MTV")

Source: Ofcom Media tracker 2010 (Base: 'Main' - All respondents; 'Other' - All with Multichannel TV)

Note: 'Main' channels = ITV1, C4, Five. 'Other' = All other channels.

Opinion on amount of programme sponsorship and trailers/promotions

- Q - Which of these statements best describes how you feel about the amount of.....
- (i) programme sponsorship on TV channels as a whole?
 - (ii) trailers or promotions for future programmes on ITV1, Channel 4 and Five?
 - (iii) trailers/promotions on TV channels that direct you towards another TV channel?

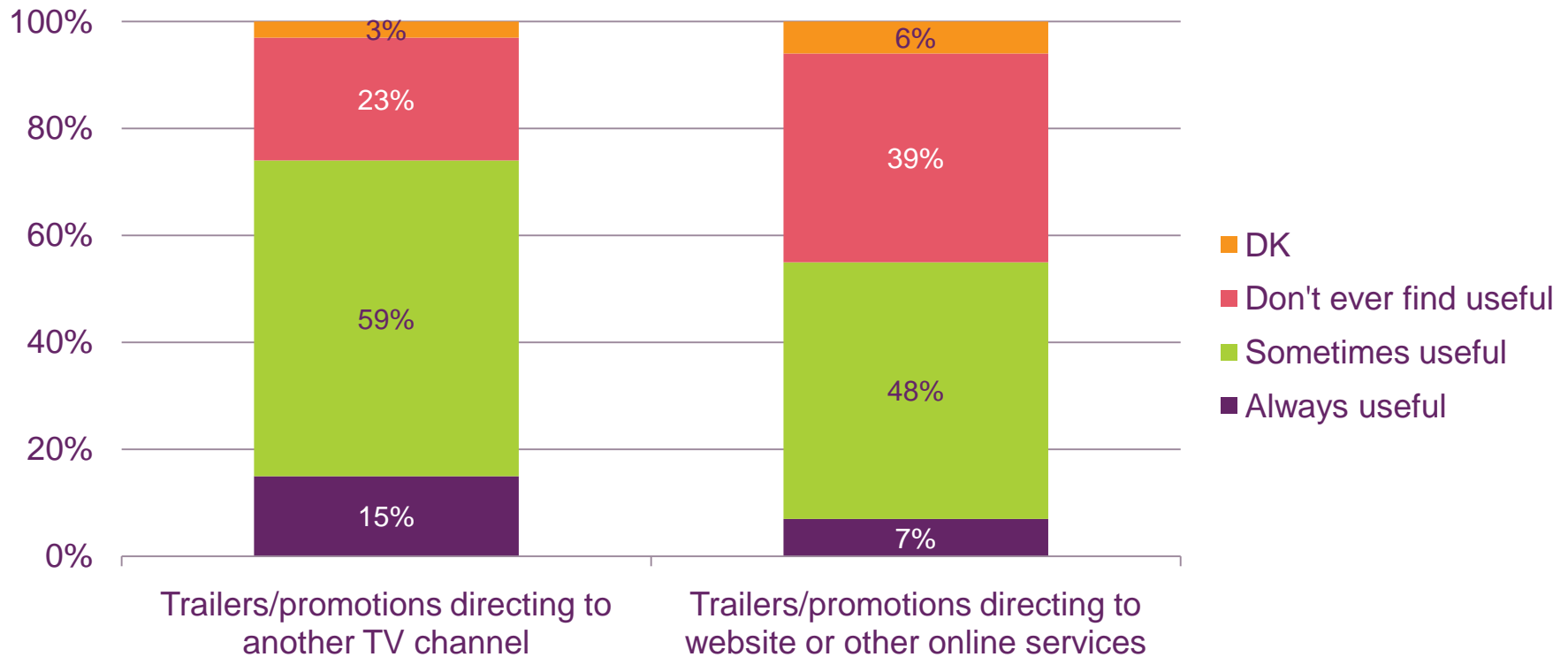


Source: Ofcom Media tracker 2010. Base: All aware of....programme sponsorship (1,657); trailers/promotions for future programmes on ITV1/C4/Five (1,783); trailers/promotions for website/other online services (1,100).

Opinion on how helpful trailers/promotions are

Q - Which of these statements best describes what you think about....

- i) trailers/promotions on TV channels that direct you towards another TV channel? For example, this could be announcements on ITV1 telling you about a programme on ITV2.
- ii) trailers or promotions on TV channels that direct you towards their website or other online services that they provide?



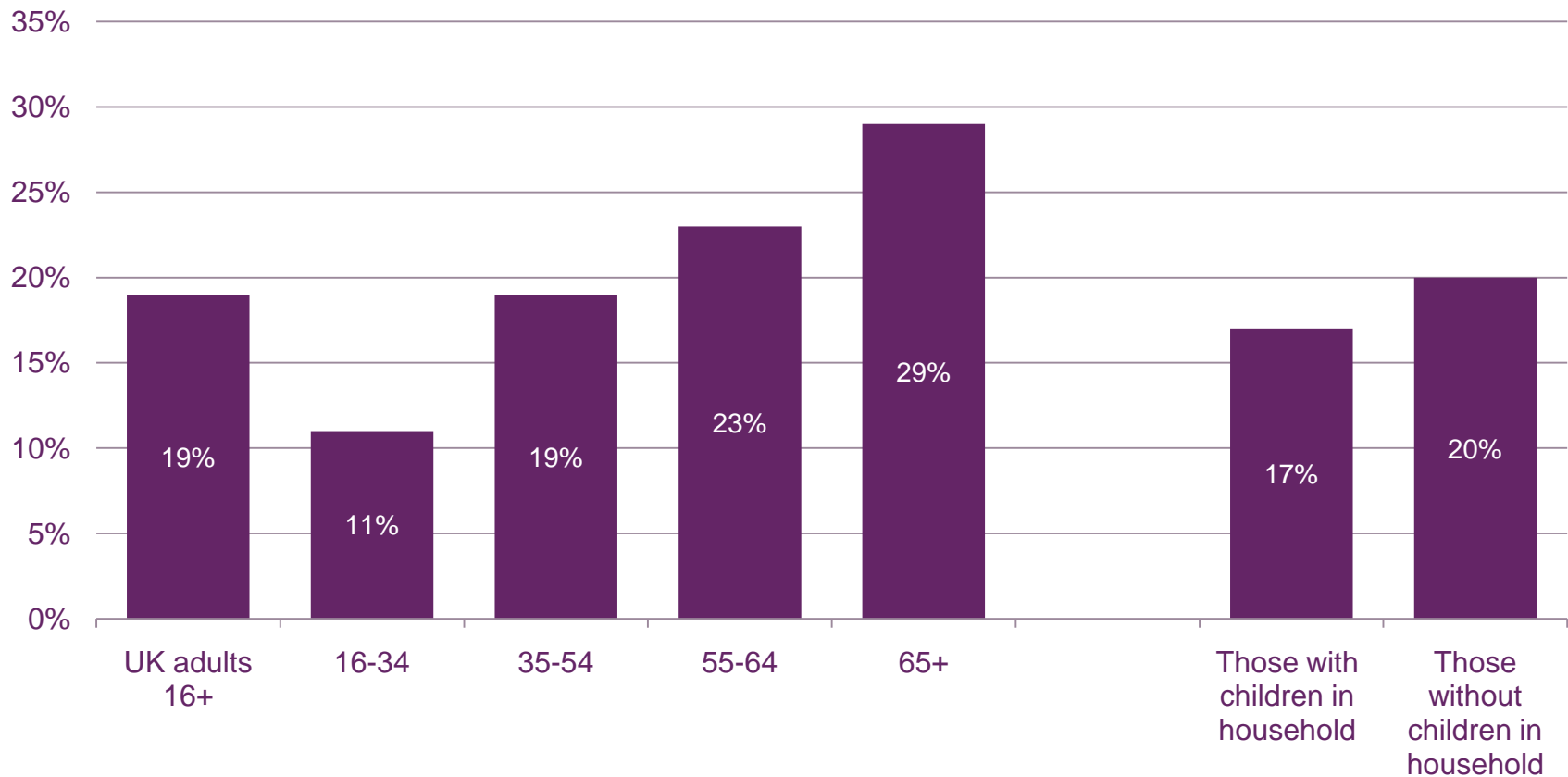
Source: Ofcom Media tracker 2010. Base: All aware of trailers/promos to another TV channel (1,486); All aware of trailers/promotions directing to website or other online services (1,100).

Harm and Offence

- **Overall levels of offence**
(Q - Have you personally ever found anything on television to be offensive?)
- **Nature of offensive material**
(Q - What kind of thing offended you?)
(Q - Can you say what type of programme it was?)
- **Opinions about the amount of coverage of 3 aspects on television**
(Q - Do you think, in general, that there is too much, too little or about the right amount of each of the following on television?)
- **Reactions to and attitudes towards offensive material**
(Q - How do you generally react when you are offended by what you hear or see on television)
(Q - Which of these statements best describes your attitude towards the things which have offended you on TV in the last 12 months?)
- **Reactions to offensive material**
(Level of agreement with a number of statements relating to potentially offensive material on TV)

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

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

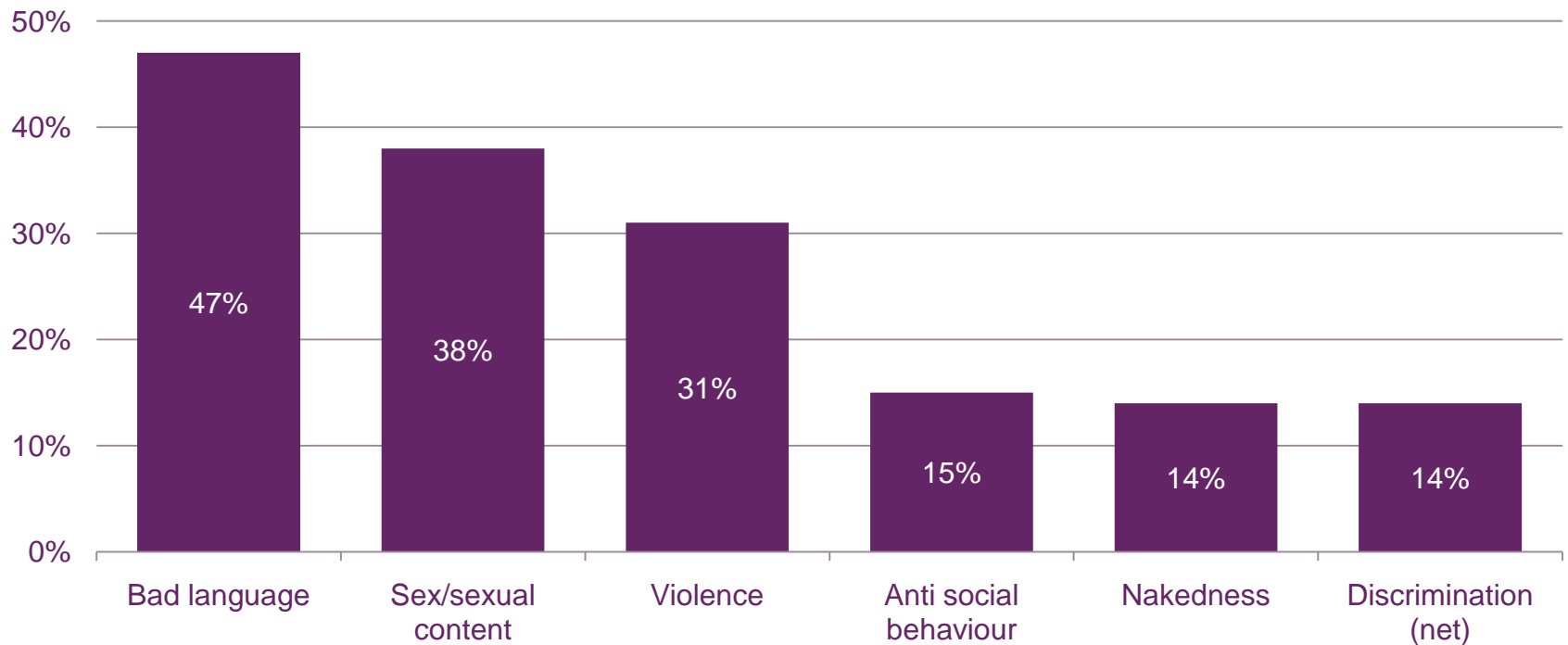


Source: Ofcom Media tracker. Base: All respondents.

Type of material which offended

Q – What kind of thing offended you?

Base: All who said they'd seen something offensive in last 12 months (415 respondents)

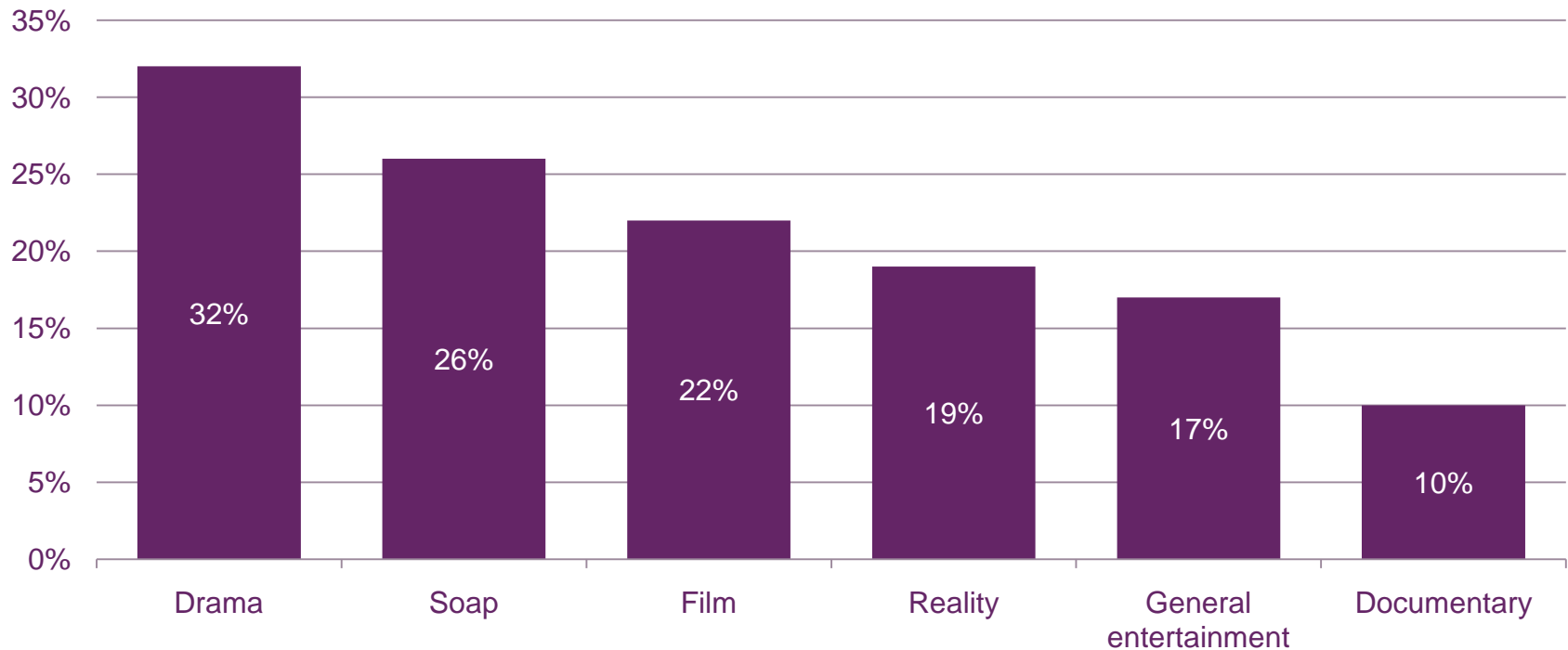


Source: Ofcom media tracker 2010 (Base: 415 respondents). Multicode, unprompted. Top reasons charted

Type of programme named as a source of offence

Q – Can you say what type of programme it was, looking at this list?

Base: All who said they'd seen something offensive in last 12 months (415 respondents)



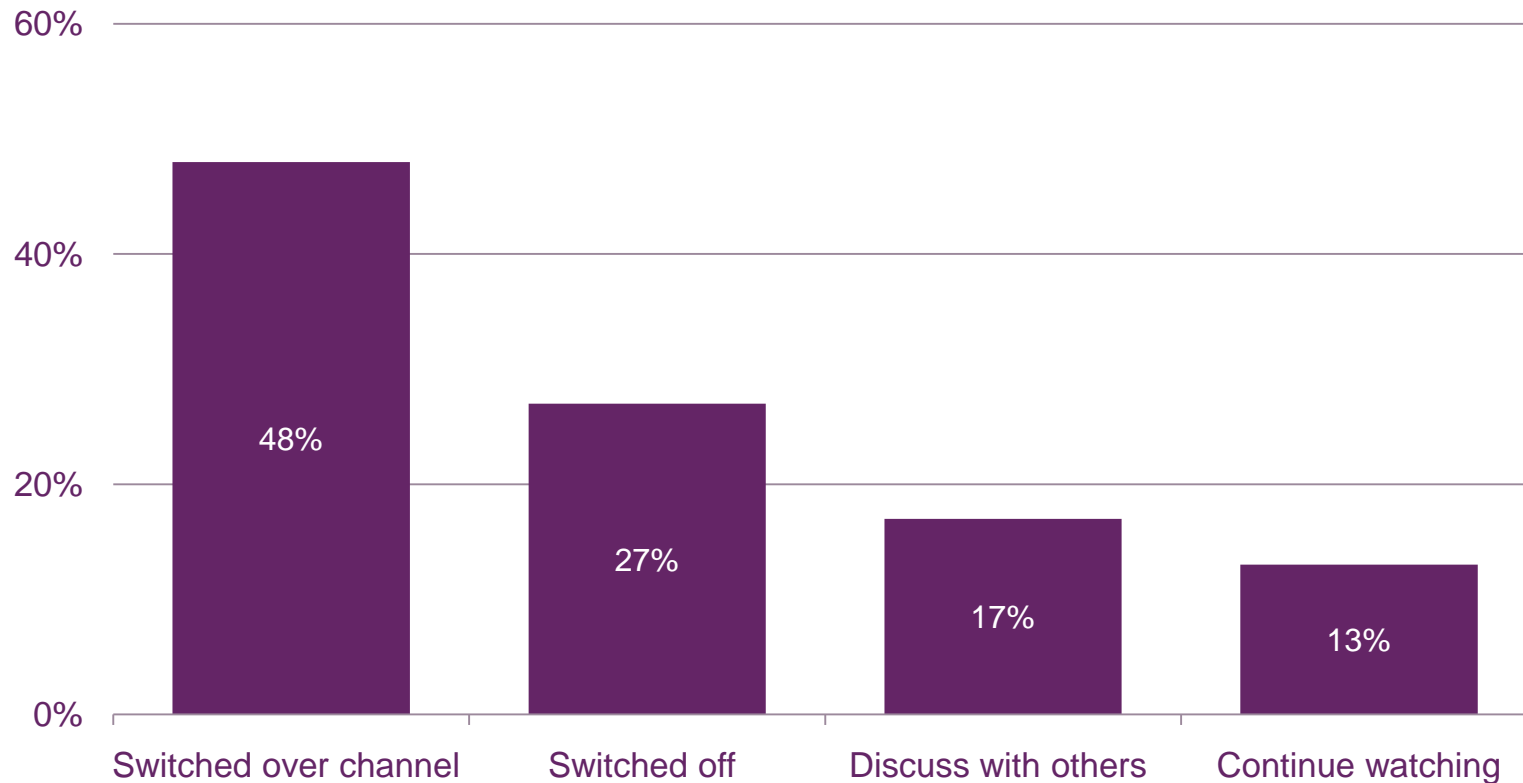
Source: Ofcom media tracker 2010 (Base: 415 respondents). Top responses =<10%. Multicode

Note: Among parents who said they saw something offensive, they are more likely to cite soaps compared to UK adults as a whole (35% vs. 26%).

Reaction following offence by something on TV

Q - How do you generally react when you are offended by what you hear or see on television? In other words what do you do?

Base: All who said they'd seen something offensive in last 12 months (415 respondents)



Source: Ofcom Media tracker 2010 (Base: 415 respondents).

Attitudes towards offensive material

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

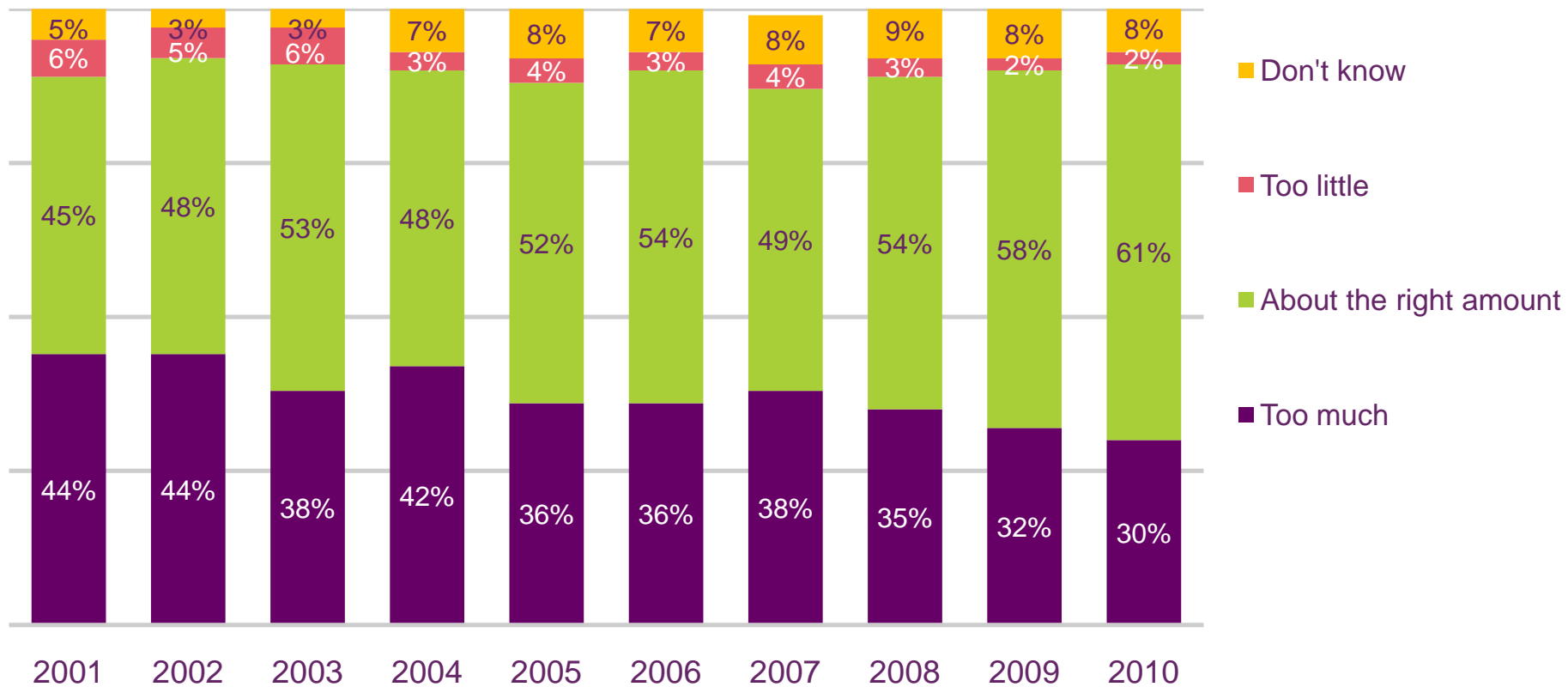
Base: All who said they had seen something offensive in last 12 months

Which of these statements best describes your attitude towards the things which have offended you on TV in the last 12 months?	%
The thing that personally offended me should not be shown	22%
Even though I was offended, I accept that others should be allowed to see these things	38%
I think such things should only be shown when viewers are likely to expect them (e.g. after a clear warning)	33%

Source: Ofcom media tracker 2010. (Base: 415 respondents).

Opinion on the amount of sex on TV

Q – Do you think, in general, that there is too much, too little or about the right amount of each of the following on television:
a) Sex?



Source: Ofcom Media tracker. Base: All respondents.

Opinion on the amount of violence on TV

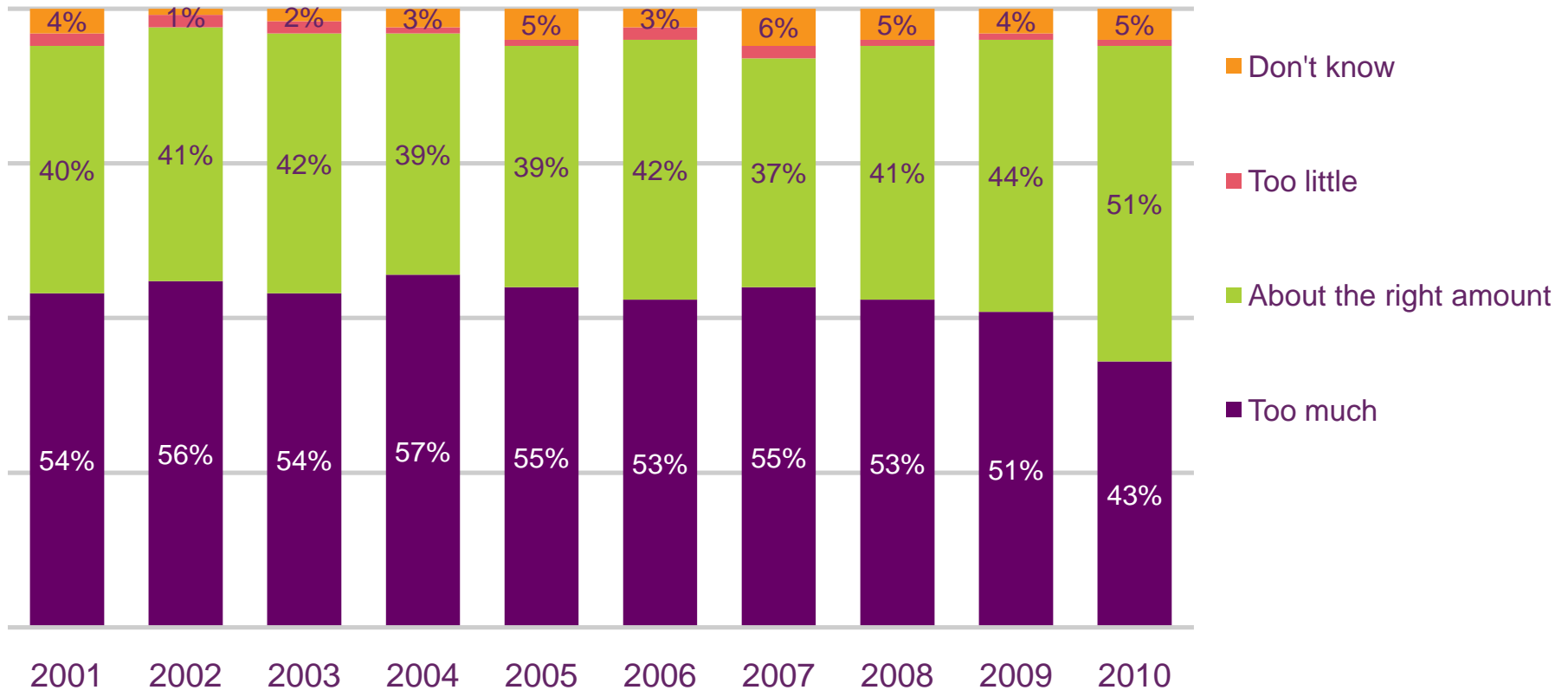
Q – Do you think, in general, that there is too much, too little or about the right amount of each of the following on television:
a) Violence?



Source: Ofcom Media tracker. Base: All respondents.

Opinion on amount of swearing on TV

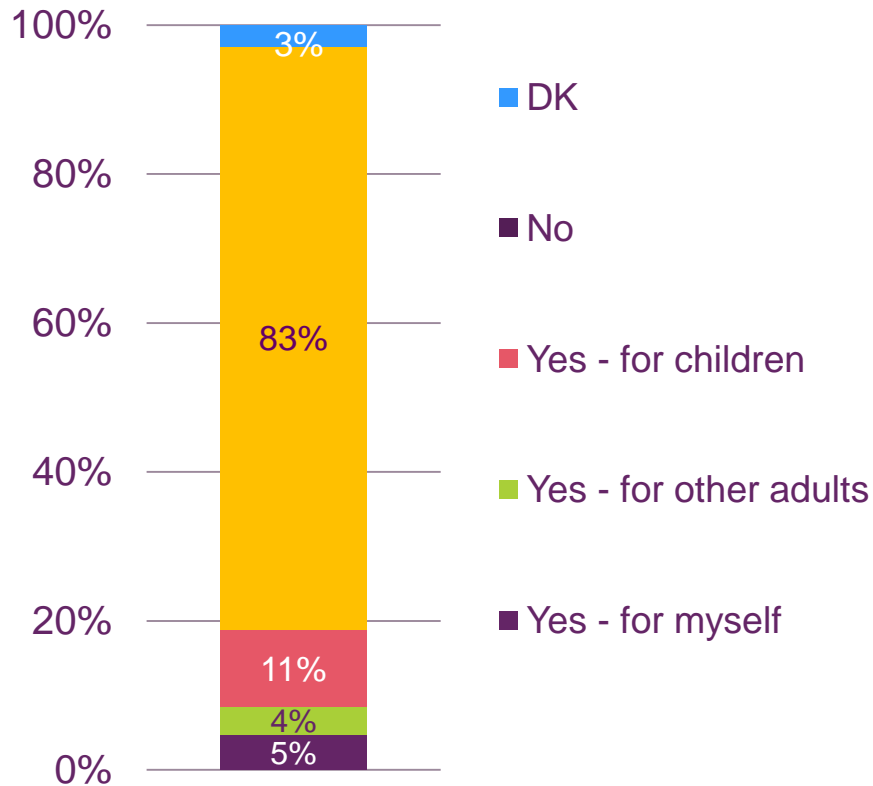
Q – Do you think, in general, that there is too much, too little or about the right amount of each of the following on television:
a) Swearing?



Source: Ofcom Media tracker. Base: All respondents.

Overall % of respondents who have seen something on TV they consider harmful

Q - Have you seen anything on TV in the last 12 months that you thought was harmful either to yourself, other adults or children?



Summary = 14% of respondents said 'Yes'

What was harmful?	%
Violence	56%
Antisocial behaviour	30%
Alcohol/Substance abuse	13%
Portrayal of suicide	7%
Portrayal of Self harm	5%
Cult/Paranormal	3%
Medical/Health advice	3%
Other	27%
DK	6%

Base: All those who reported seeing something harmful

Source: Ofcom Media tracker 2010. Base: All respondents; All who'd seen something harmful on TV (297).

Agreement with statements relating to potentially offensive material on TV



Q - I am going to read out some statements and I would like you to tell me how much you agree or disagree with them.

	Agree	Neither agree nor disagree	Disagree	Not stated/ No opinion
Sexually explicit programmes should never been shown on TV	25%	20%	51%	4%
If people want to watch sexually explicit programmes they should be allowed to but ONLY on subscription channels	54%	17%	25%	3%
Sexually explicit channels in the 'adult' section of the electronic programme guide (EPG) don't bother me. I can block them if I want	60%	20%	12%	9%
Sexually explicit programmes should be freely available on any channel after 9PM	23%	18%	55%	5%
If people want to watch particularly violent programmes they should be allowed to but ONLY on subscription channels	48%	18%	29%	5%
Particularly violent films should be freely available on any channel after 9PM	27%	18%	51%	4%

Source: Ofcom Media tracker 2010. Base: All respondents.

Protection of children

- **Responsibility for children's viewing**
(Q - Do you think it is mainly the responsibility of parents, broadcasters or both equally, to make sure that children don't see unsuitable programmes?)

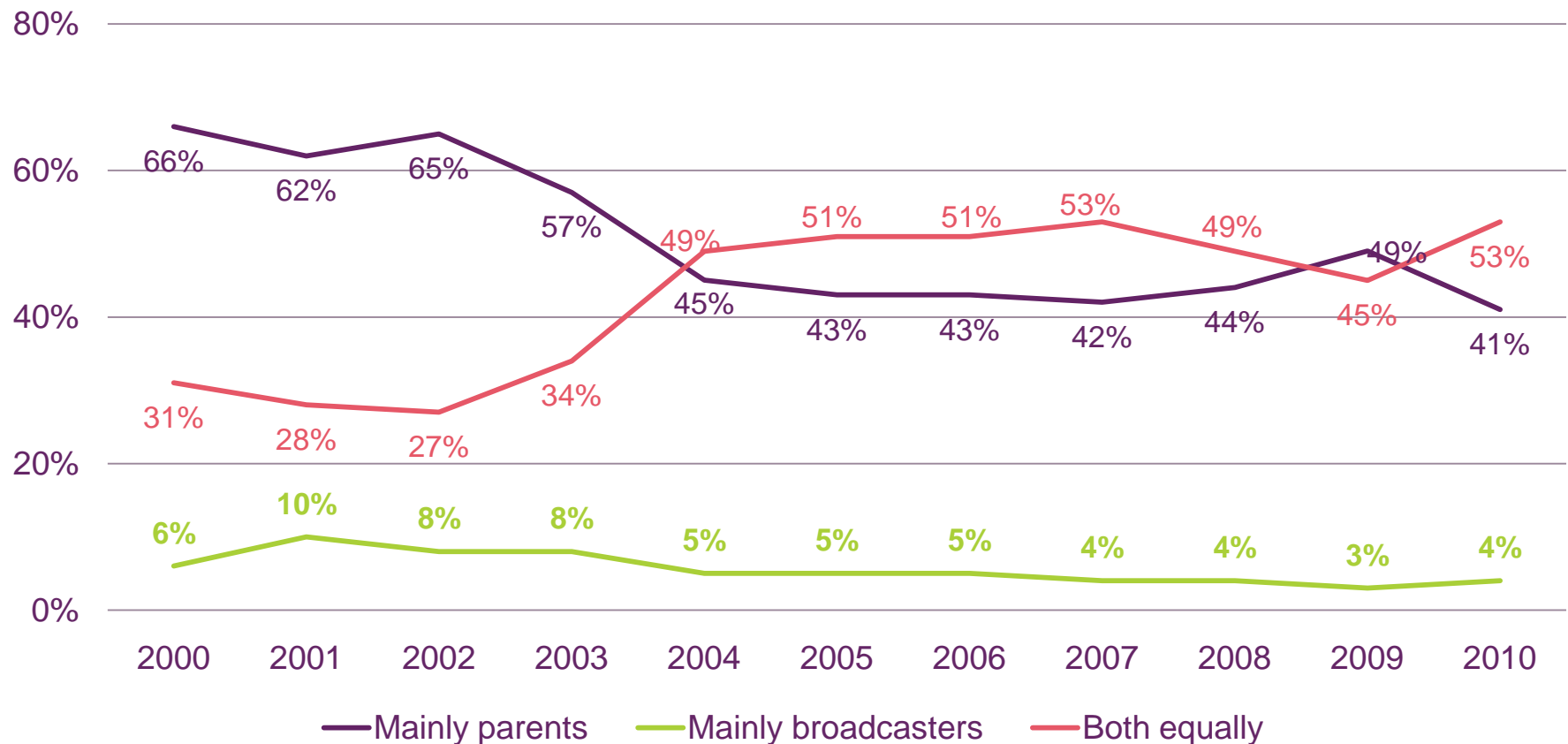
- **Awareness of and opinions about the watershed**
(Q - Broadcasters are required to show television programmes which are not suitable for children only after a certain time in the evening. Before now, were you aware of this?)

(Q - On terrestrial TV channels the time after which programmes which are not suitable for children can be shown is 9pm – usually known as the 9pm watershed. Do you think that this is too early, too late or about right?)

- **Awareness of rules and guidelines to protect the welfare of children and young people**
(Q - Before today, were you aware that there are guidelines to protect the welfare of children and young people under eighteen when taking part in programmes on television?)

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

Q - Do you think it is mainly the responsibility of parents, broadcasters or both equally, to make sure that children don't see unsuitable programmes?



Source: Ofcom Media tracker. Base: All respondents.

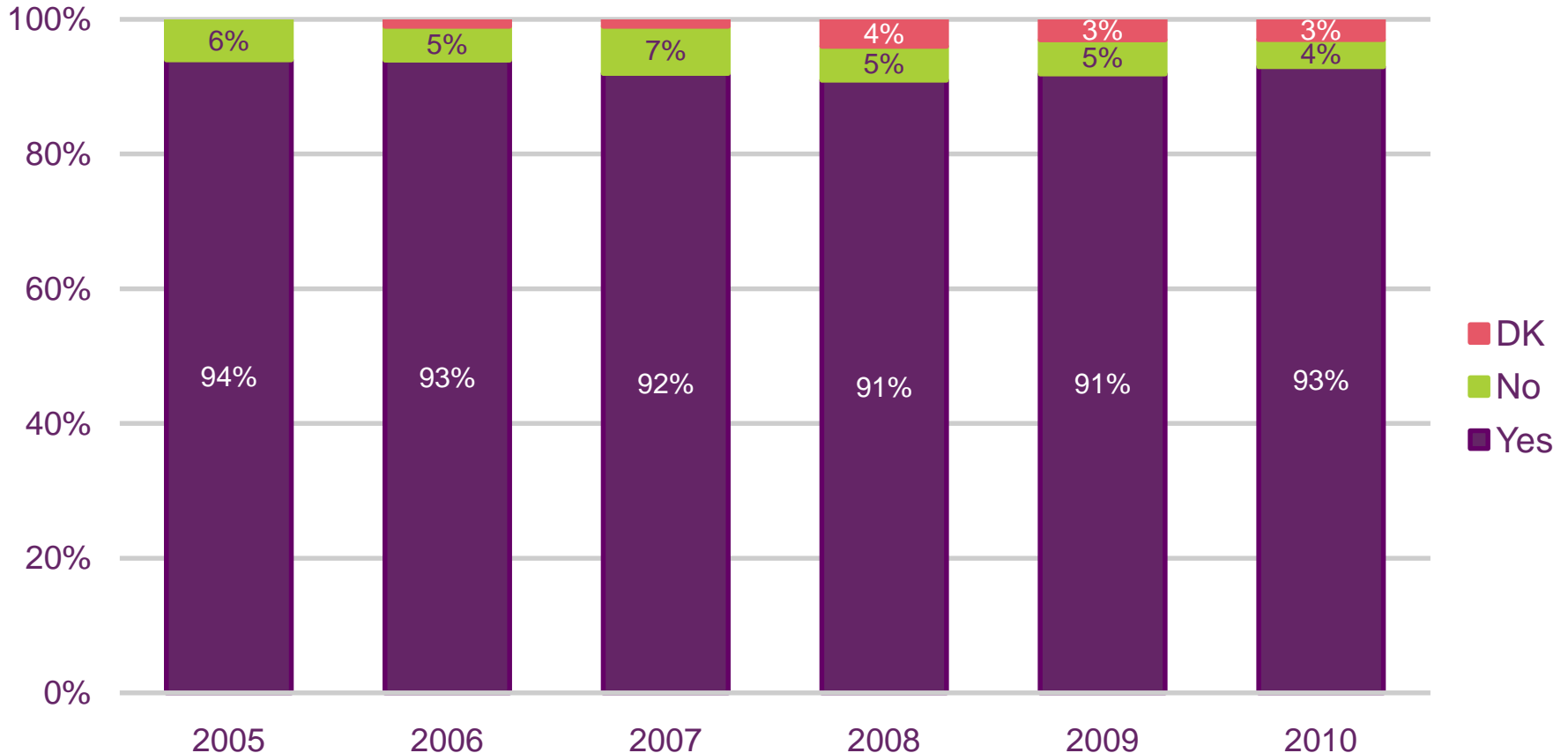
Awareness that broadcasters are only allowed to show programming unsuitable for children after a certain time



Intro to question:

Broadcasters are required to show television programmes which are not suitable for children only after a certain time in the evening.

Q - Before now, were you aware of this?



Source: Ofcom Media tracker. Base: All respondents.

Opinion on current time of the watershed



Intro to question: On TV channels the time after which these programmes unsuitable for children may be shown is 9pm - usually known as the 9 o'clock watershed.

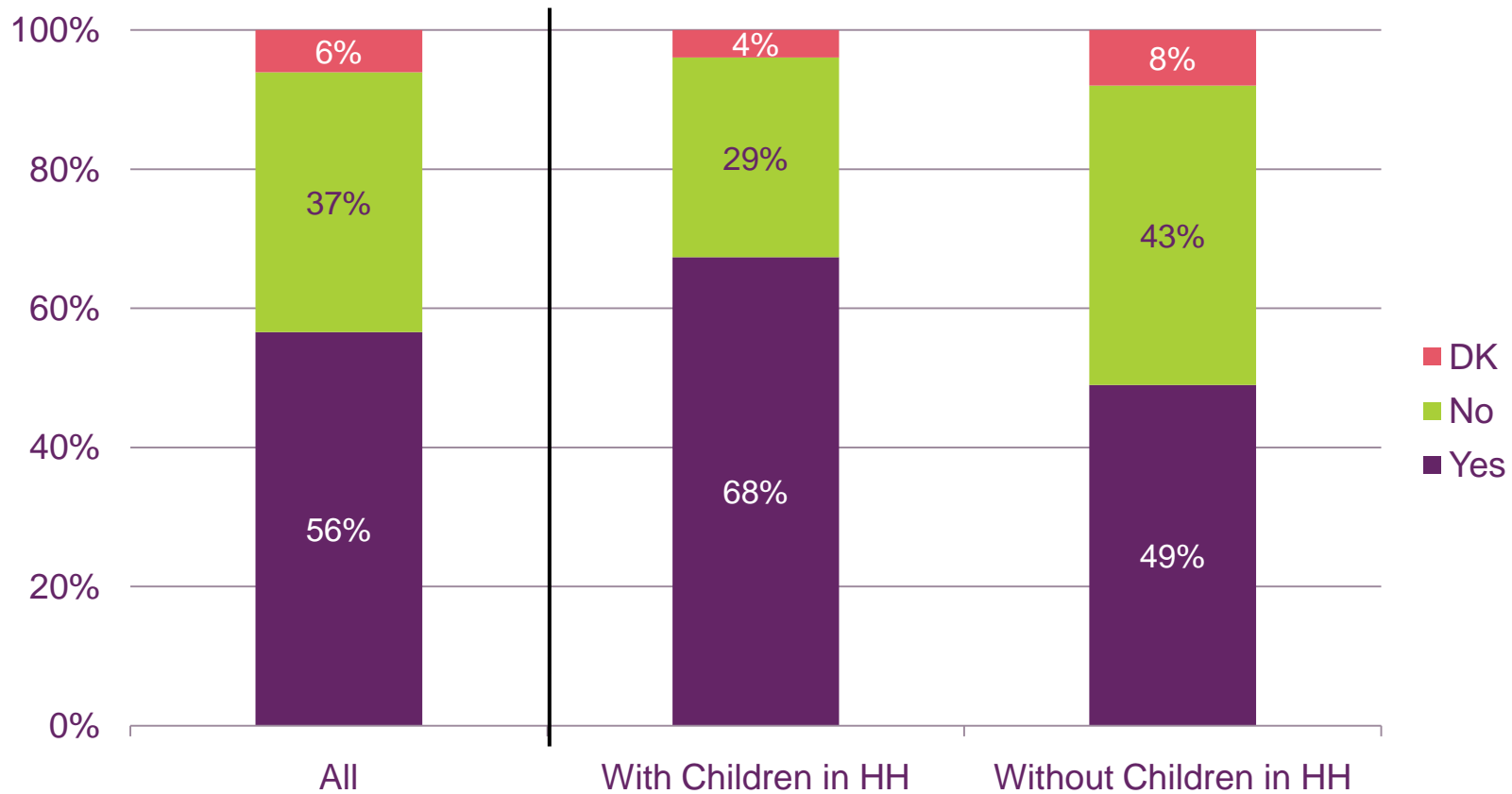
Q - Do you think this is....?



Source: Ofcom Media tracker. Base: All respondents

Awareness of any features blocking access to certain TV channels/programmes

Q - Are you aware of any features which enable you to block access to certain channels on your TV?

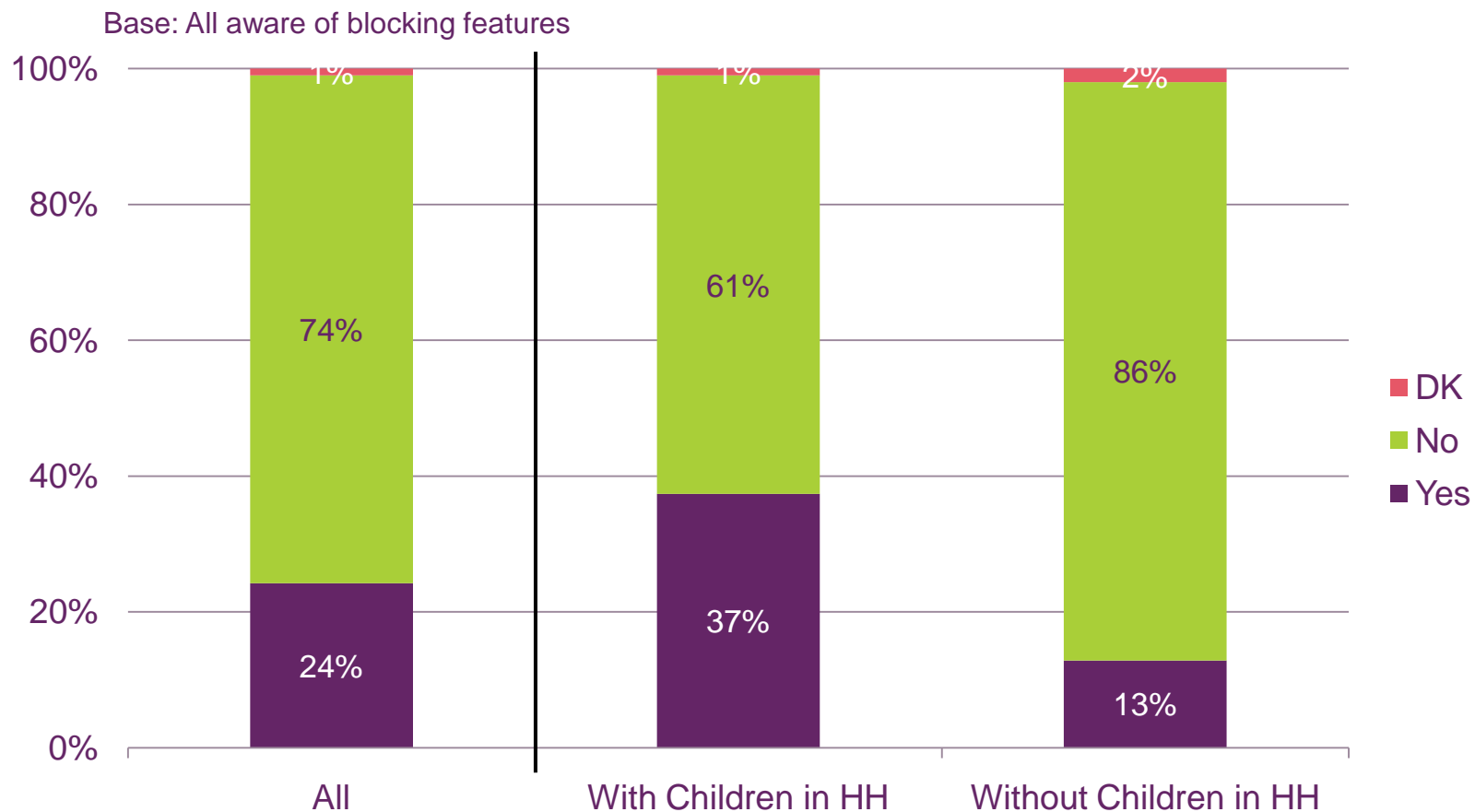


Source: Ofcom Media tracker 2010.

Base: All with Multichannel TV (1,926); MC with Ch in HH – 711; MC Without Ch in HH – 1215.

Use of features blocking access to certain TV channels/programmes

Q - Have you ever used this blocking system?



Source: Ofcom Media tracker 2010.

Base: All with Multichannel TV and aware of blocking features (1,051); With Ch – 479; Without Ch – 572.

Awareness of rules protecting children/young people when participating in TV programmes

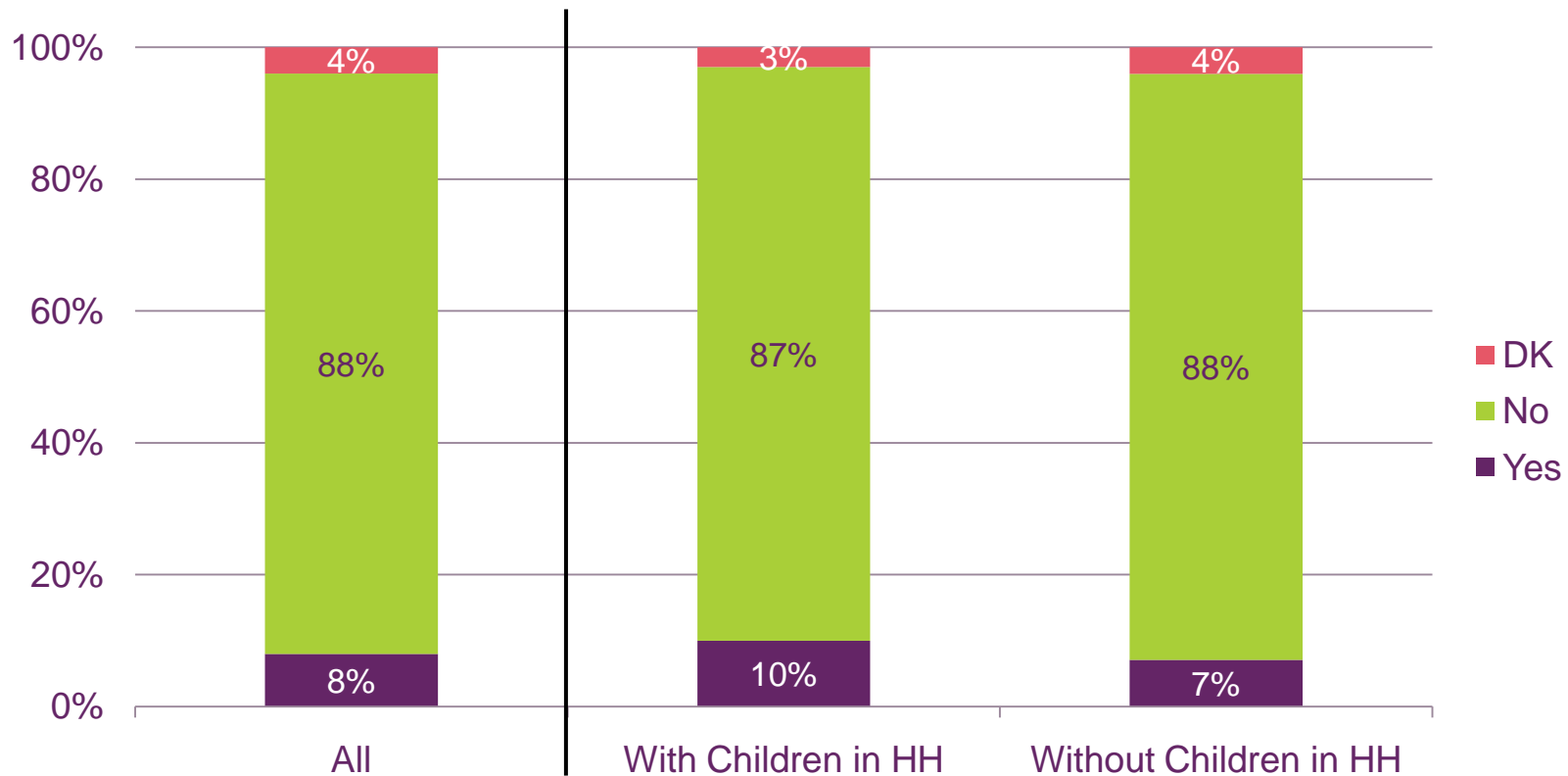
Q - Before today, were you aware that there are guidelines to protect the welfare of children and young people under eighteen when taking part in programmes on television?



Source: Ofcom Media tracker 2010. Base: All respondents; With Ch in HH – 742; Without Ch in HH – 1,362.

% who have felt concerned for the welfare of children taking part in TV programmes in the last 12 months

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



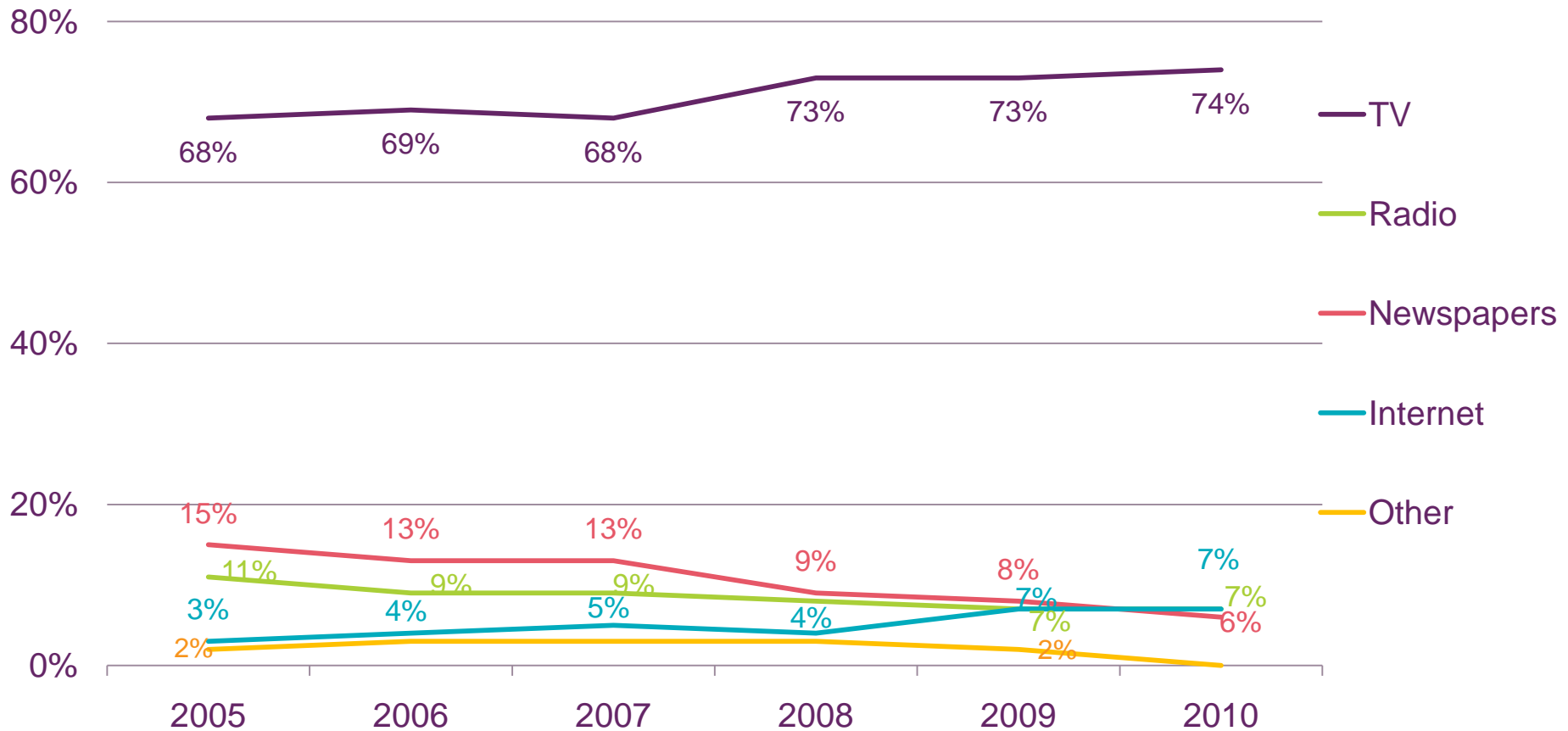
Source: Ofcom Media tracker 2010. Base: All respondents; With Ch in HH – 742; Without Ch in HH – 1,362.

News

- **Main source of UK News**
(Q- Can you tell me what, if anything, is your main source of news about what is going on in the UK?)
- **Trust of UK News sources**
(Q - Still thinking about news concerning events in the UK, which one of these sources do you trust the most to present fair and unbiased news coverage?)
- **Main source of World News**
(Q - Can you tell me what, if anything, is your MAIN source of news about what is going on in the WORLD today?)
- **Trust of World News sources**
(Q - Thinking about news concerning WORLD events, which, if any, of these sources do you trust the most to present fair and unbiased news coverage?)
- **Importance of Impartiality**
(Q- How important do you personally think it is that news in/on....xxx.. is impartial)
- **Opinion on Impartiality**
(Q- How impartial do you think.....xxx...as a news sources is?)

Respondents main media source for UK news

Q - Can you tell me what, if anything, is your main source of news about what is going on in the UK

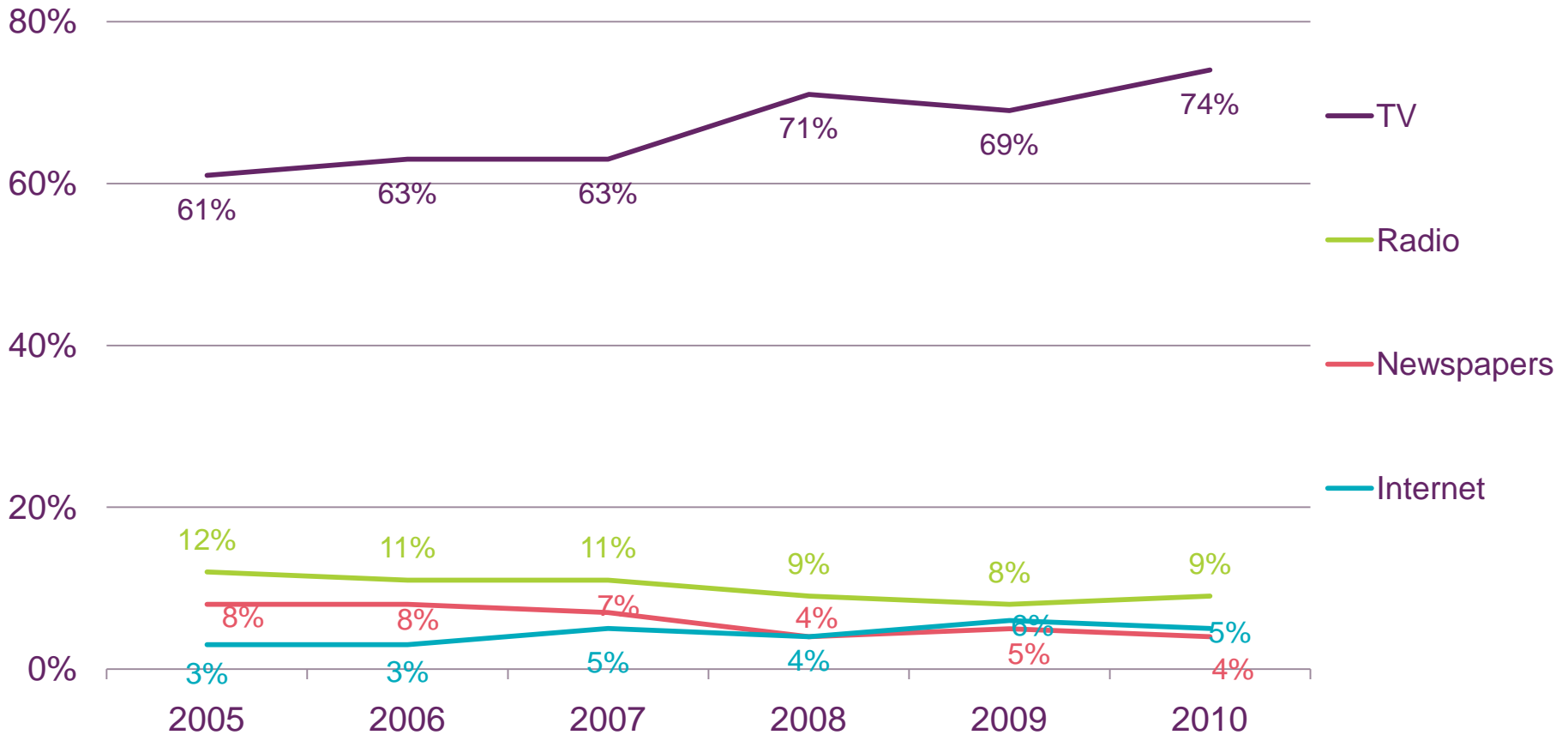


Source: Ofcom Media tracker. Base: All respondents.

Media source respondents trust the most to present fair and unbiased UK News coverage



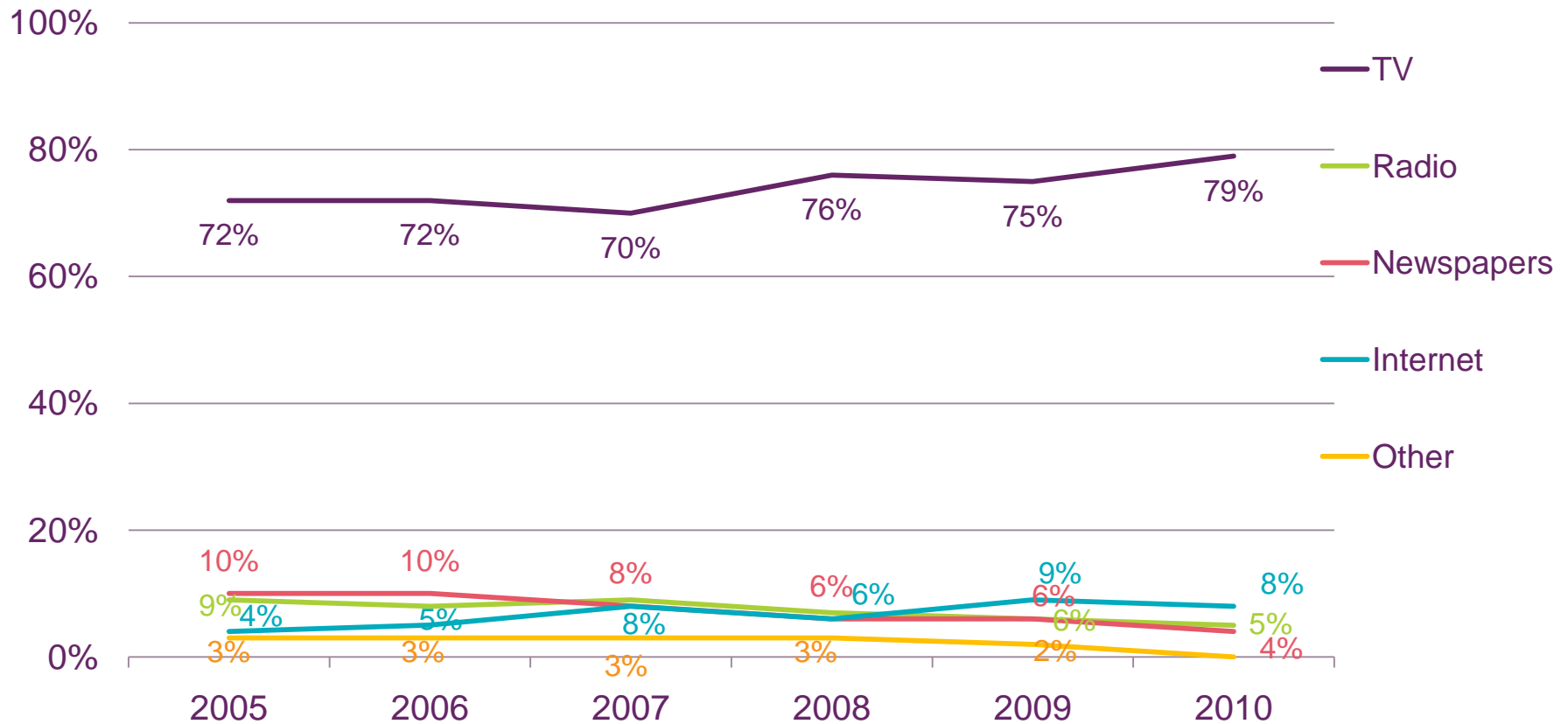
Q – Still thinking about news concerning events in the UK, which one, if any, of these sources do you trust the most to present fair and unbiased news coverage?



Source: Ofcom Media tracker. Base: All respondents.

Respondents main media source of world news

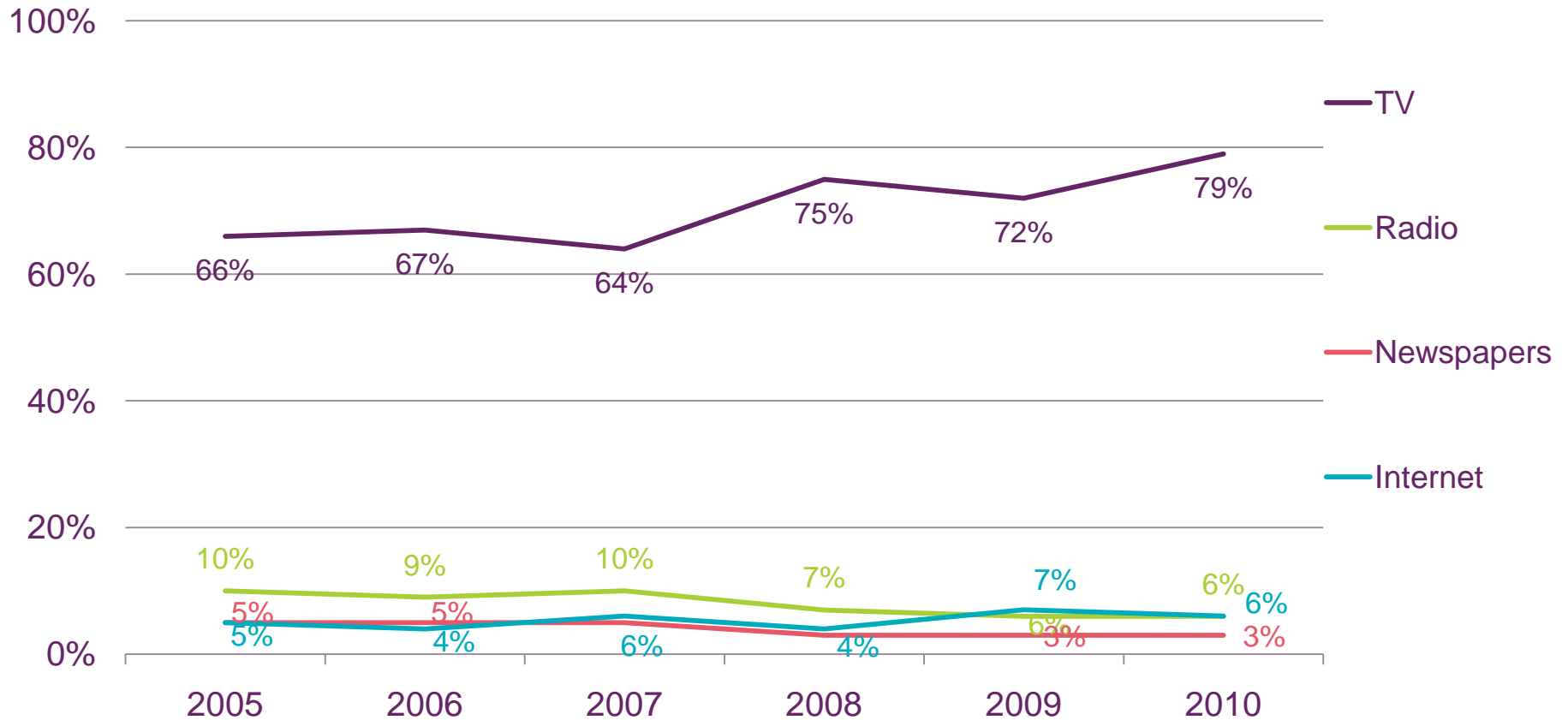
Q - Can you tell me what, if anything, is your MAIN source of news about what is going on in the WORLD today?



Source: Ofcom Media tracker. Base: All respondents.

Media source respondents trust the most to present fair and unbiased world news coverage

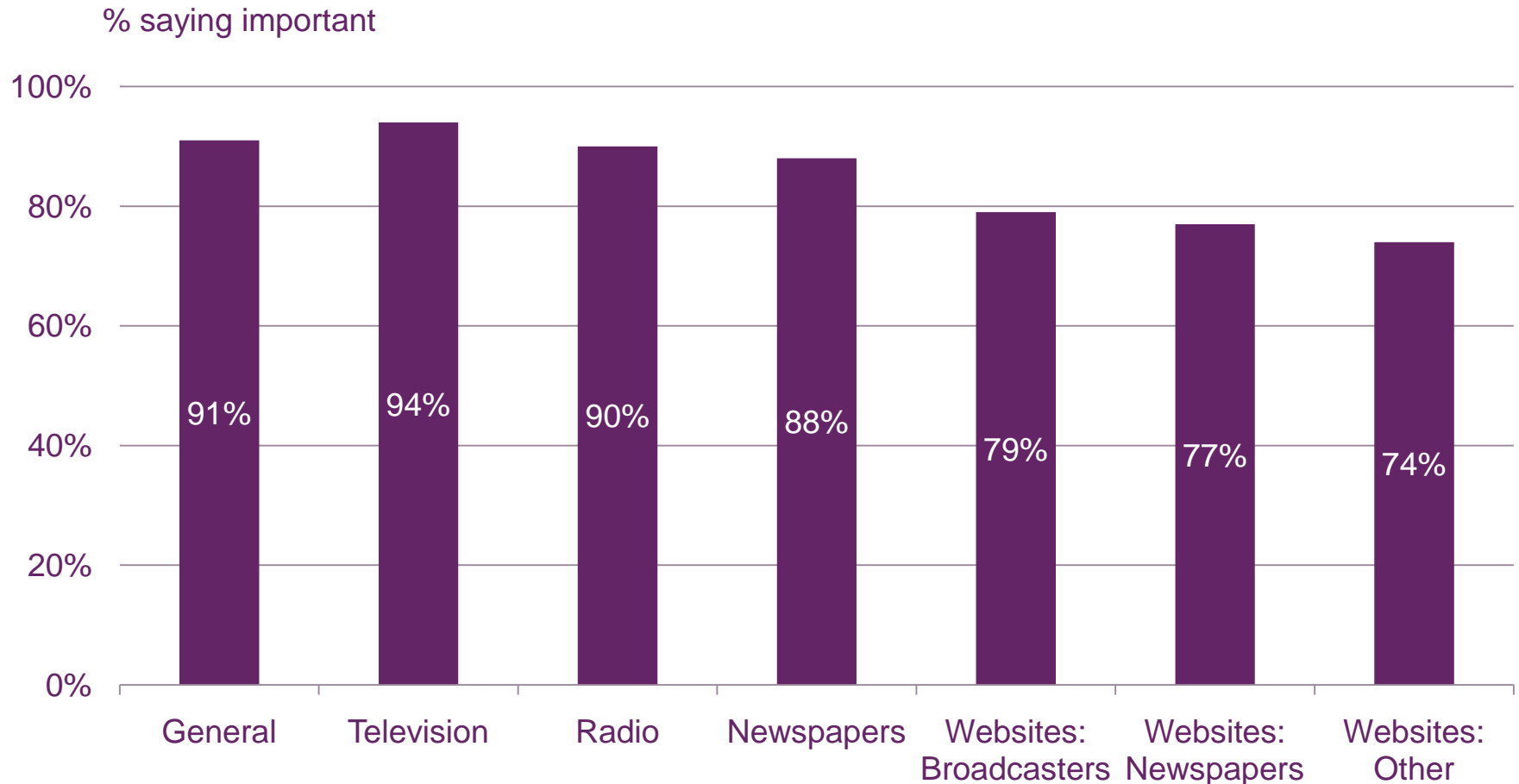
Q - And still thinking about news concerning WORLD events, which, if any, of these sources do you trust the most to present fair and unbiased news coverage?



Source: Ofcom Media tracker. Base: All respondents. Note: Only top 4 responses charted.

Opinion on importance of impartiality of news by source

Q - How important do you personally think it is that news in/on [media type/general] is impartial?

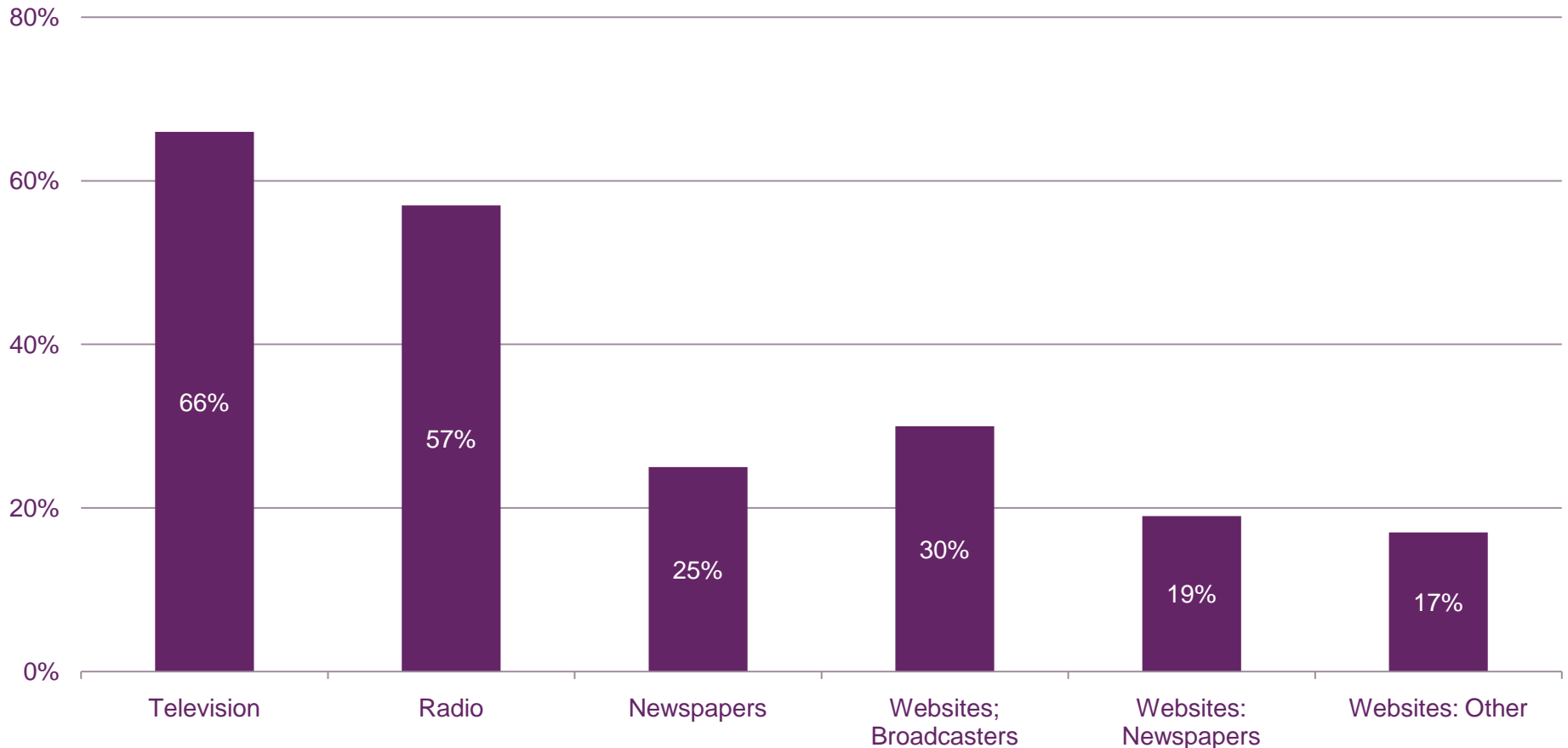


Source: Ofcom Media tracker 2010. Base: All respondents.

Opinion on impartiality of each news source

Q - Using a scale from 1 to 5, where 1 is very impartial and 5 is very biased, how impartial do you think each of the following news sources is?

% saying impartial (= a score of 1 or 2 out of 5)



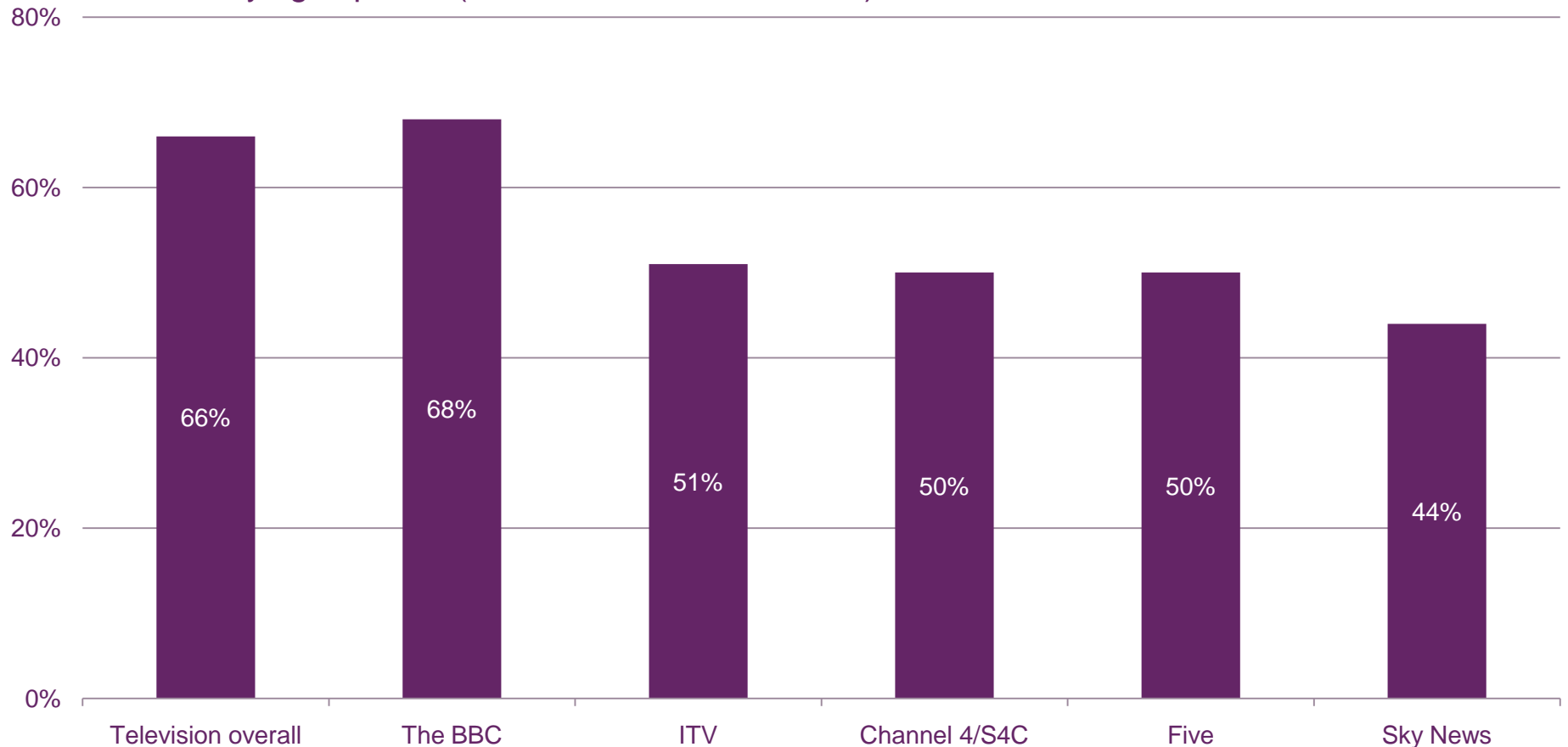
Source: Ofcom Media tracker 2010. Base: All respondents.

Opinion on impartiality of TV news sources



Q - Using a scale from 1 to 5, where 1 is very impartial and 5 is very biased, how impartial do you think each of the following news sources is?

% saying impartial (= a score of 1 or 2 out of 5)



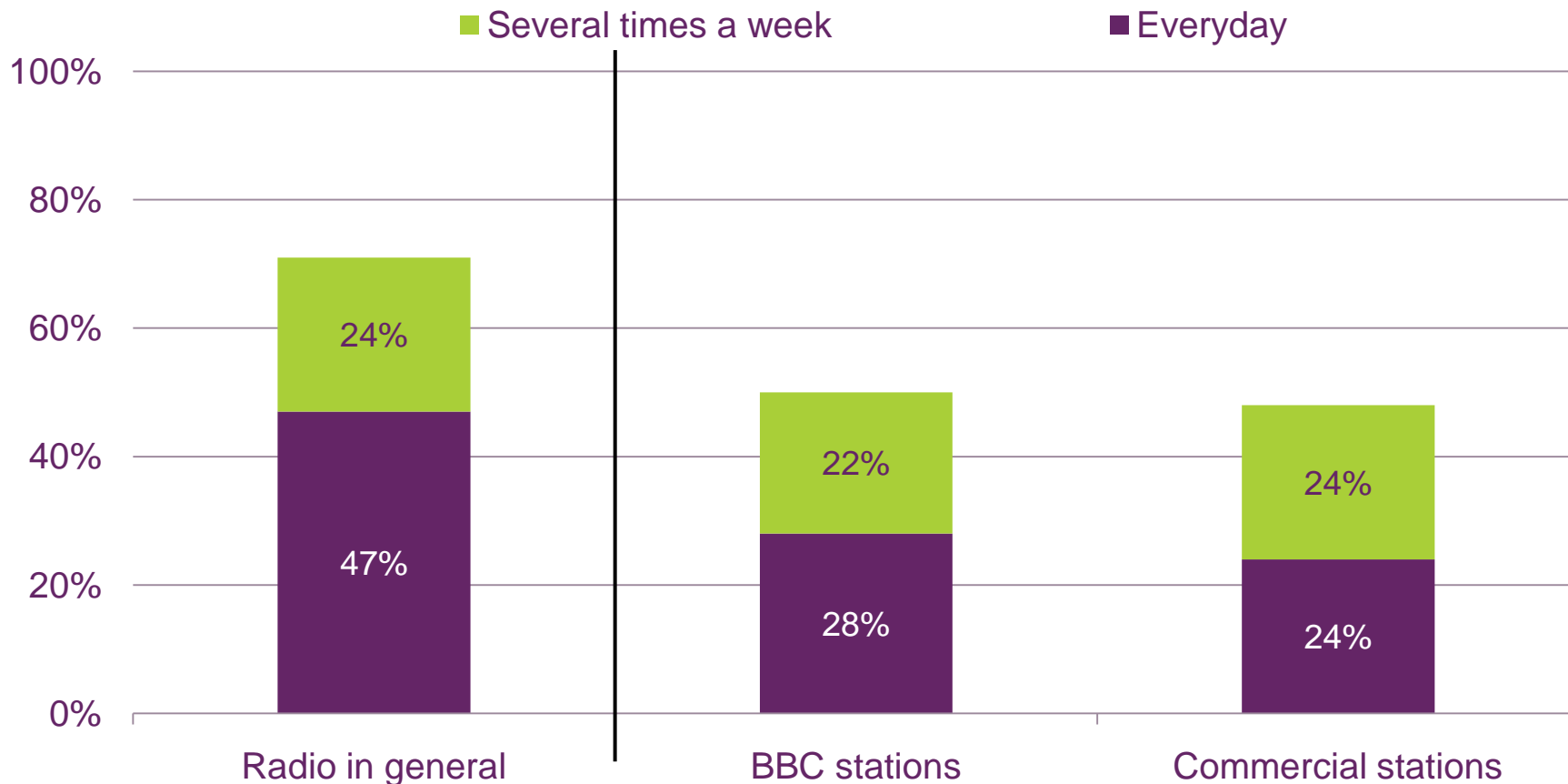
Source: Ofcom Media tracker 2010. Base: All respondents. The BBC = BBC1, BBC2, BBC News.

Radio

- **Frequency of listening to the radio**
(Q - How often, if at all do you listen to the following types of radio – Radio in general / BBC stations / Commercial stations?)
- **Main reasons for listening to radio**
(Q - What is your main reason for listening to Radio in general / BBC stations / Commercial stations?)
- **Overall levels of offence**
(Q - How often, if ever, have you found anything on radio to be offensive?)
- **Reliance on BBC/Commercial stations for local issues and events**
(Q - To what extent do you personally rely on BBC / Commercial radio stations for coverage of the following local issues and events?)
- **Opinion on amount of advertising on commercial stations**
(Q - Which of these statements best describes how you feel about the amount of advertising on commercial radio stations?)

Frequency of radio listening

Q - How often, if at all do you listen to the following types of radio (including listening at home, at work, in the car, via a mobile phone, TV set or via the computer)?



Source: Ofcom Media tracker 2010. Base: All respondents.

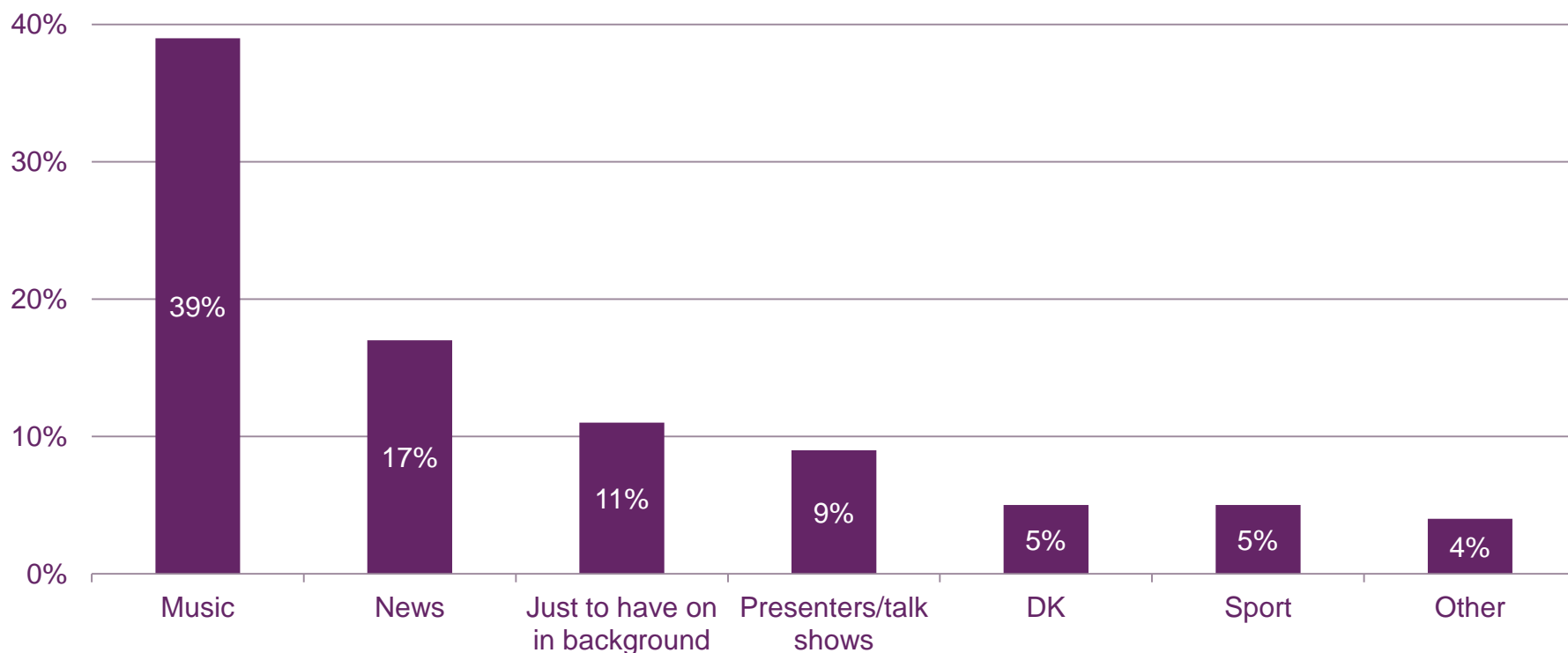
Main reasons for listening to radio in general



Q - What is your main reason for listening to each of the following:

i) Radio in general?

Base: All who listen to radio



Source: Ofcom Media tracker 2010. Base: All respondents who listen to radio (1,653).

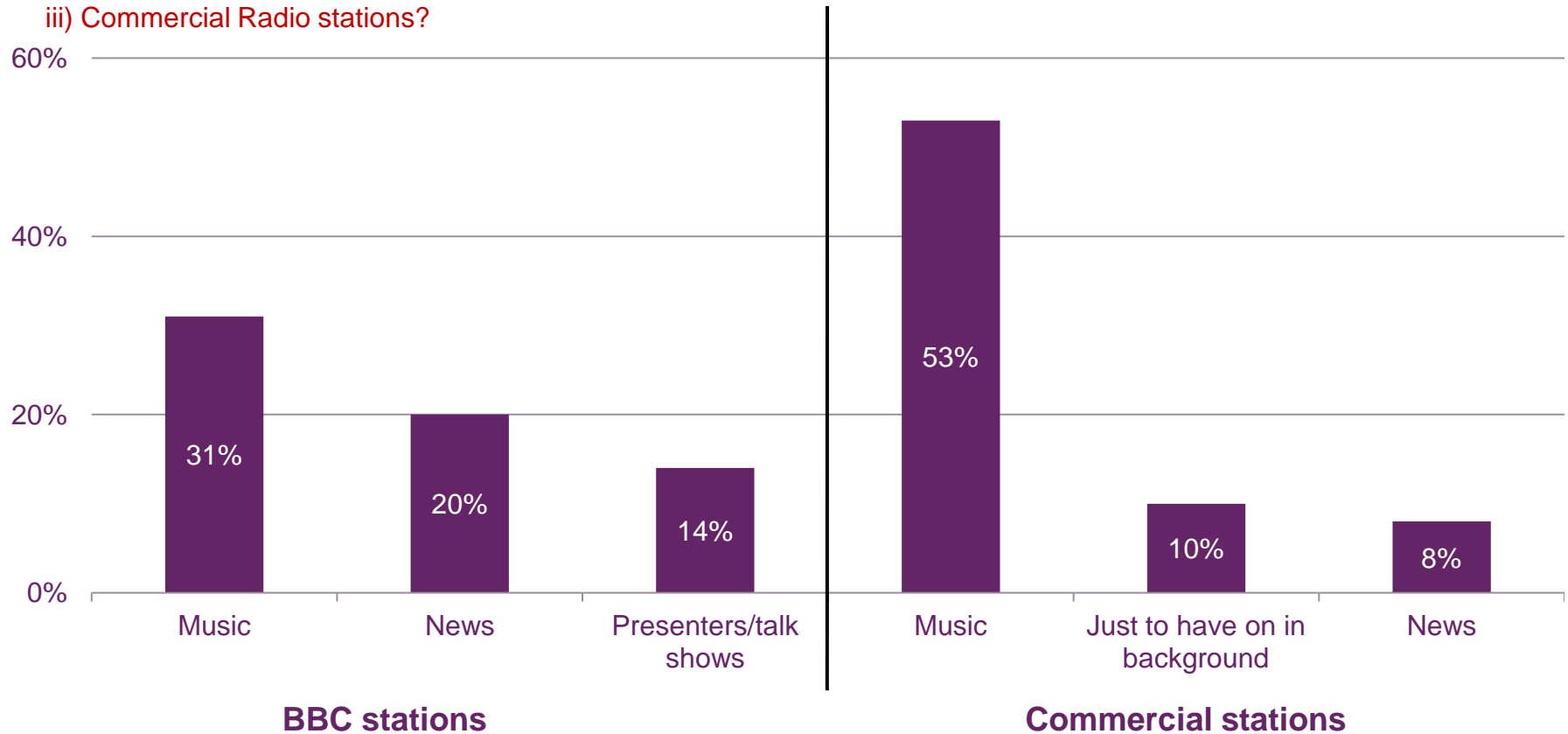
Note: Only responses $\geq 4\%$ charted. Responses unprompted.

Main reasons for listening to BBC and commercial stations

Q - What is your main reason for listening to the following:

ii) BBC Radio stations?

iii) Commercial Radio stations?

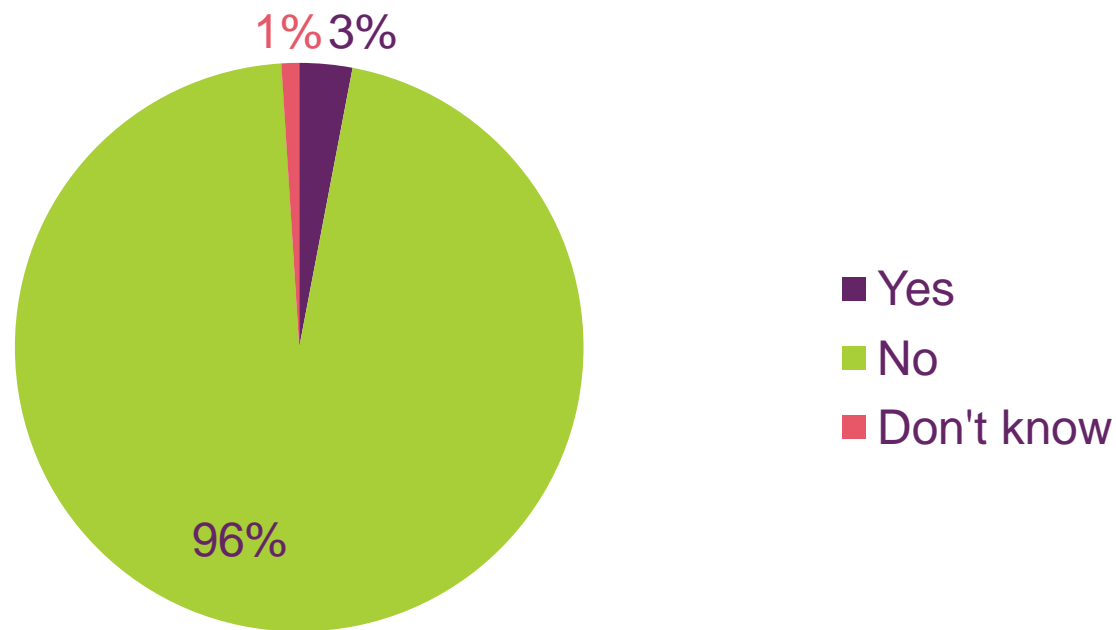


Source: Ofcom Media tracker 2010. Base: All respondents who listen to...BBC (1,298); Commercial (644)

Note: Only top 3 responses for each charted. Responses unprompted.

Overall levels of offence on radio

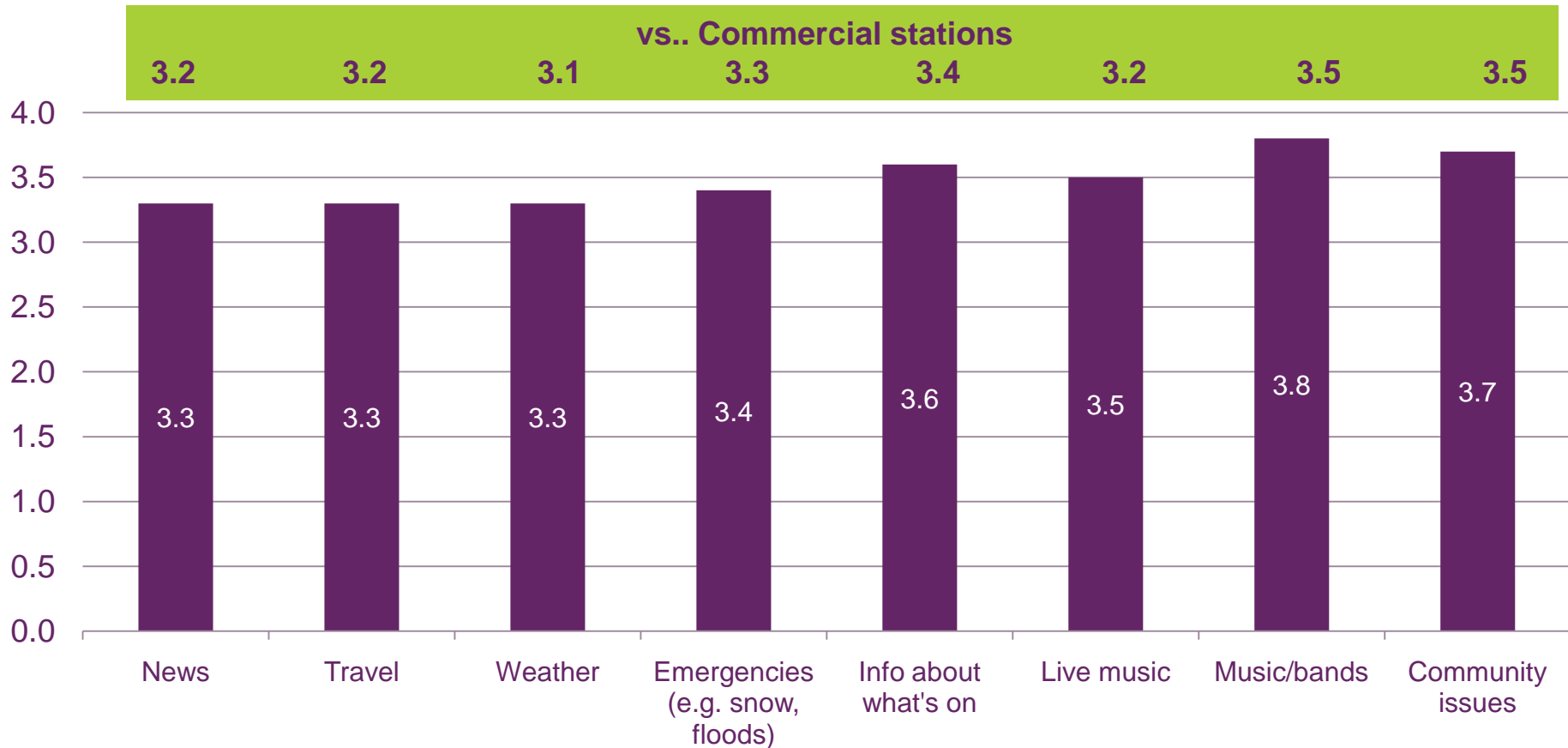
Q - In the last 12 months, have you personally heard anything on the radio you have found offensive?



Source: Ofcom Media tracker 2010. Base: All respondents who listen to radio (1,692).

Reliance on BBC stations for coverage of local issues

Q- Now, using a scale from 1 to 5 where 1 is completely rely on and 5 is do not rely on at all, to what extent do you personally rely on BBC radio stations for coverage of the following local issues and events?

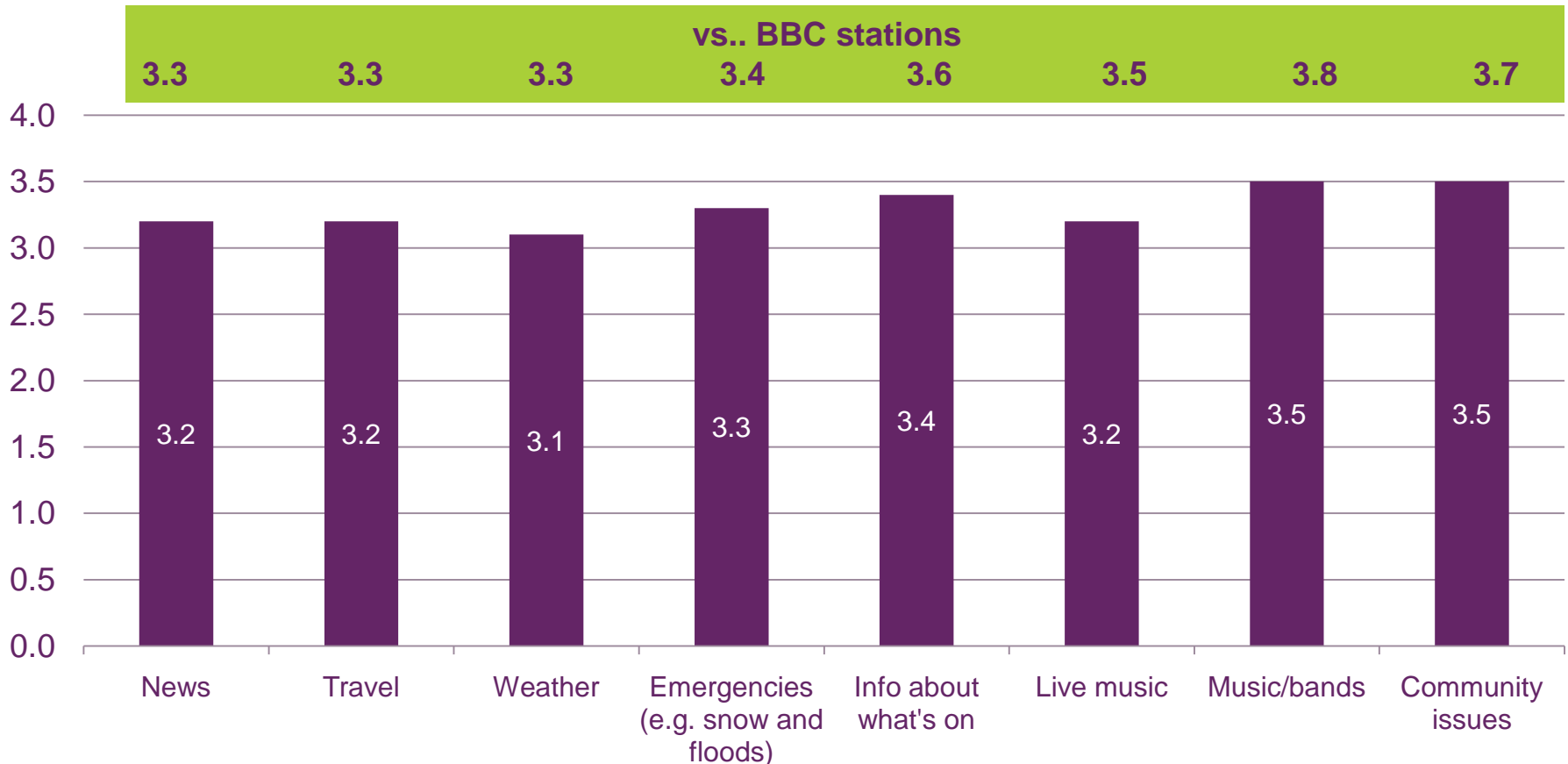


Source: Ofcom Media tracker 2010. Base: All who listen to BBC Radio stations – 1,298.

Note: Mean scores

Reliance on commercial stations for coverage of local issues

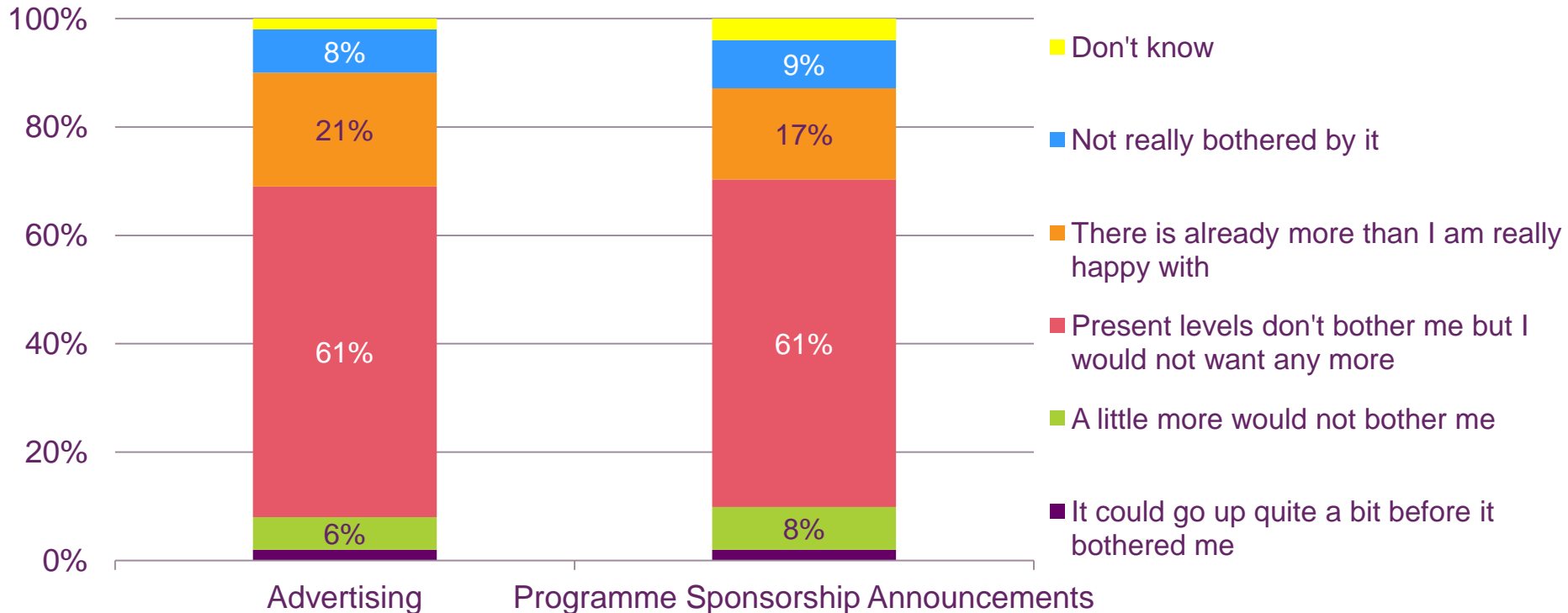
Q- Now, using a scale from 1 to 5 where 1 is completely rely on and 5 is do not rely on at all, to what extent do you personally rely on commercial radio stations for coverage of the following local issues and events?



Source: Ofcom Media tracker 2010. Base: All who listen to Commercial radio stations – 1,275.

Note: Mean scores

Opinion on amount of commercial activity on radio



Intro before question: Advertising and sponsorship provide revenue for commercial radio stations. Without the money from advertising and sponsorship, commercial radio stations may not exist.

Q - Which of these statements best describes how you feel about the amount of advertising on commercial radio stations?

Q - Now thinking about programme sponsorship announcements (e.g. sponsorship of the weather or a competition). Which statement best describes what you think about the amount on commercial radio stations?

Source: Ofcom Media tracker 2010. Base: All who listen to Commercial radio stations – 1,275.

Privacy

- **Level of agreement with statements about TV programmes based on people's lives**
(Q - To what extent do you agree or disagree with each of the following statements:
 - i) TV broadcasters should be free to show programmes about people's lives
 - ii) People's privacy should be protected on television programmes)

- **Intrusion in to the lives of people in the public eye – by media**
(Q - Do you think in/on [general/media type] there is too much, too little or about the right amount of intrusion into the lives of celebrities, politicians and public figures on television?)

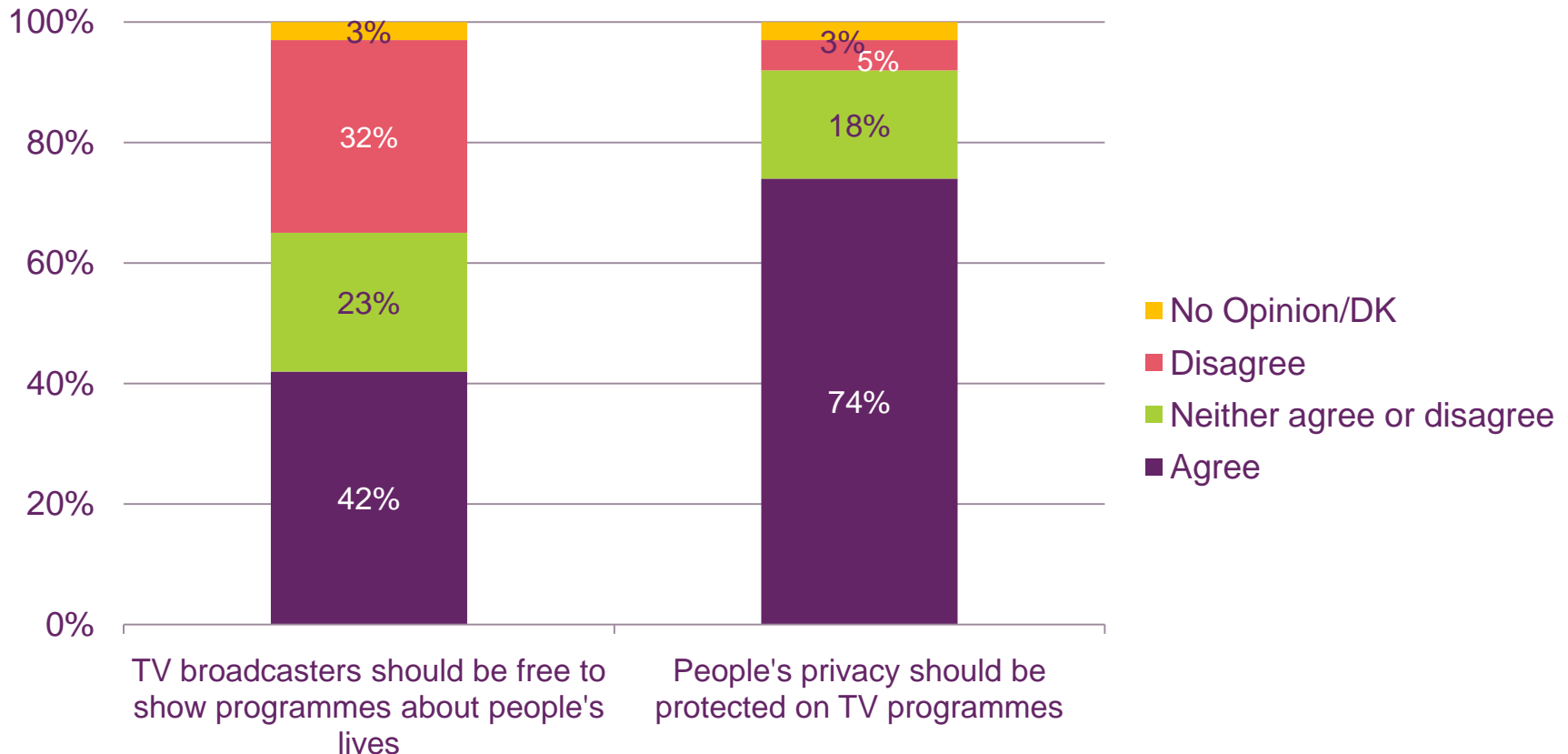
- **Intrusion in to the lives of members of the general public – by media**
(Q - Do you think in/on [general/media type] there is too much, too little or about the right amount of intrusion into the lives of members of the general public?)

Level of agreement with statements relating to TV programmes about peoples lives

Q - Please can you tell me to what extent do you agree or disagree with each of the following statements I'm going to read out?

i) TV broadcasters should be free to show programmes about people's lives

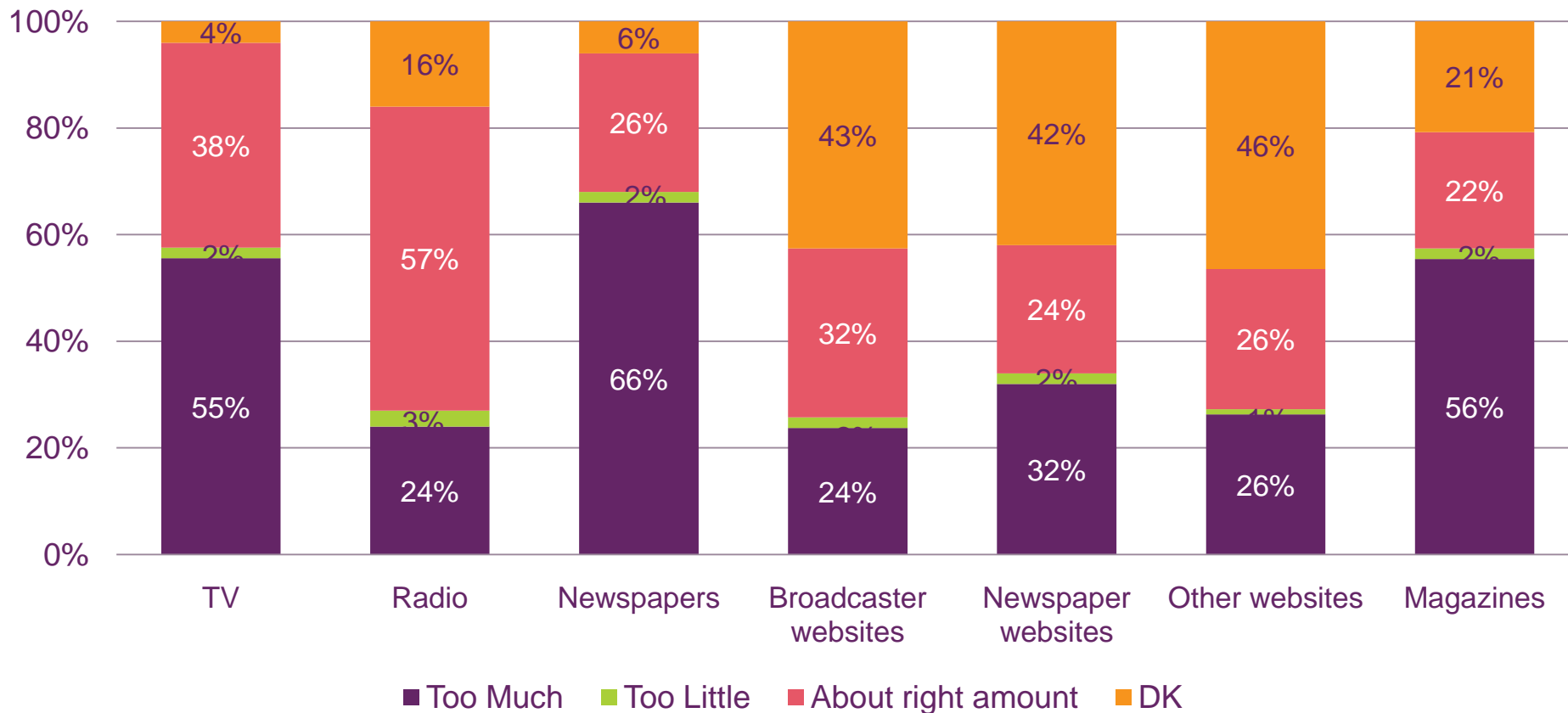
ii) People's privacy should be protected on television programmes.



Source: Ofcom Media tracker 2010. Base: All respondents.

Opinion on the level of intrusion into the lives of celebrities, politicians and other public figures

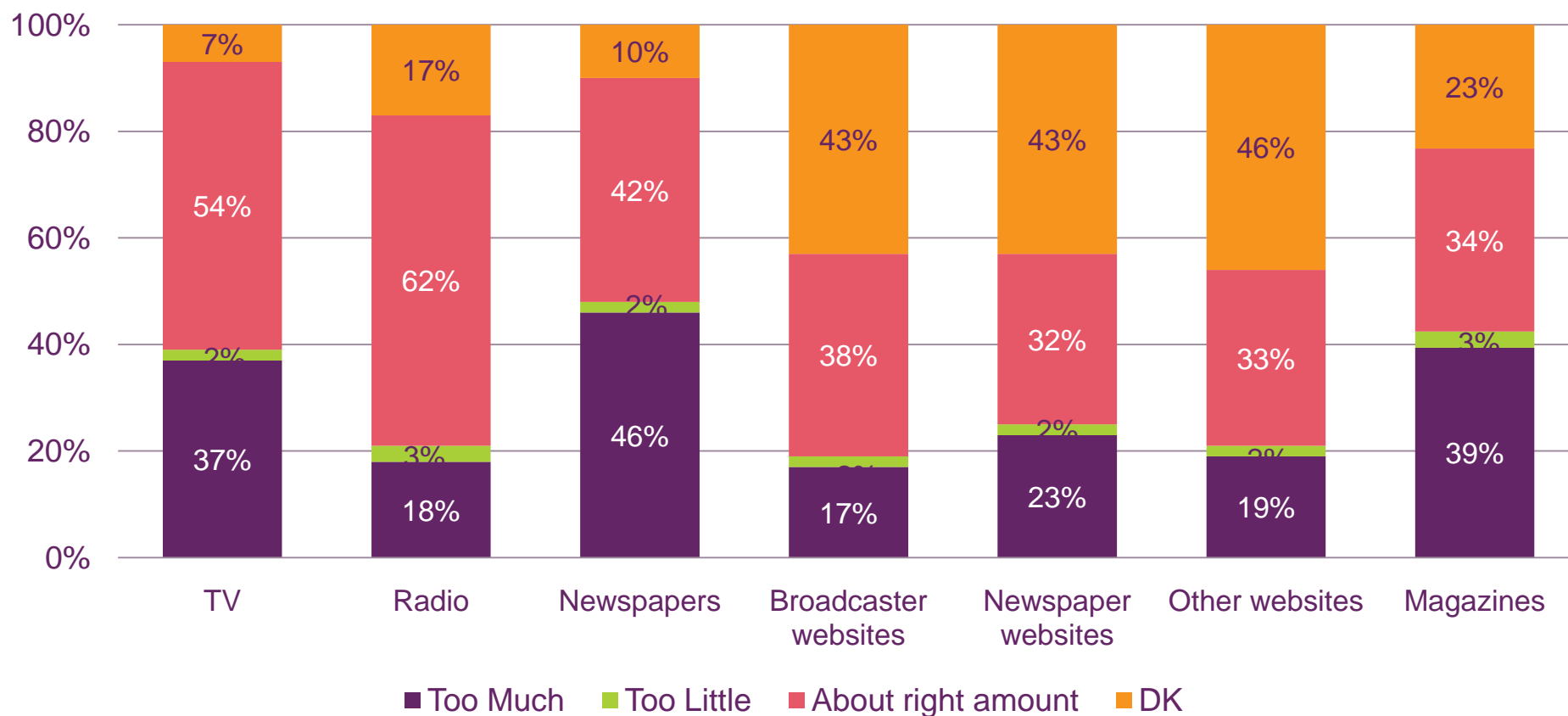
Q – Thinking specifically about people in the public eye (that is celebrities, politicians and other public figures), do you think in/on [general/media type] there is too much, too little or about the right amount of intrusion into the lives of celebrities, politicians and public figures on television?



Source: Ofcom Media tracker 2010. Base: All respondents.

Opinion on the level of intrusion into the lives of members of the general public

Q – Thinking about members of the general public, do you think in/on [general/media type] there is too much, too little or about the right amount of intrusion into the lives of members of the general public?



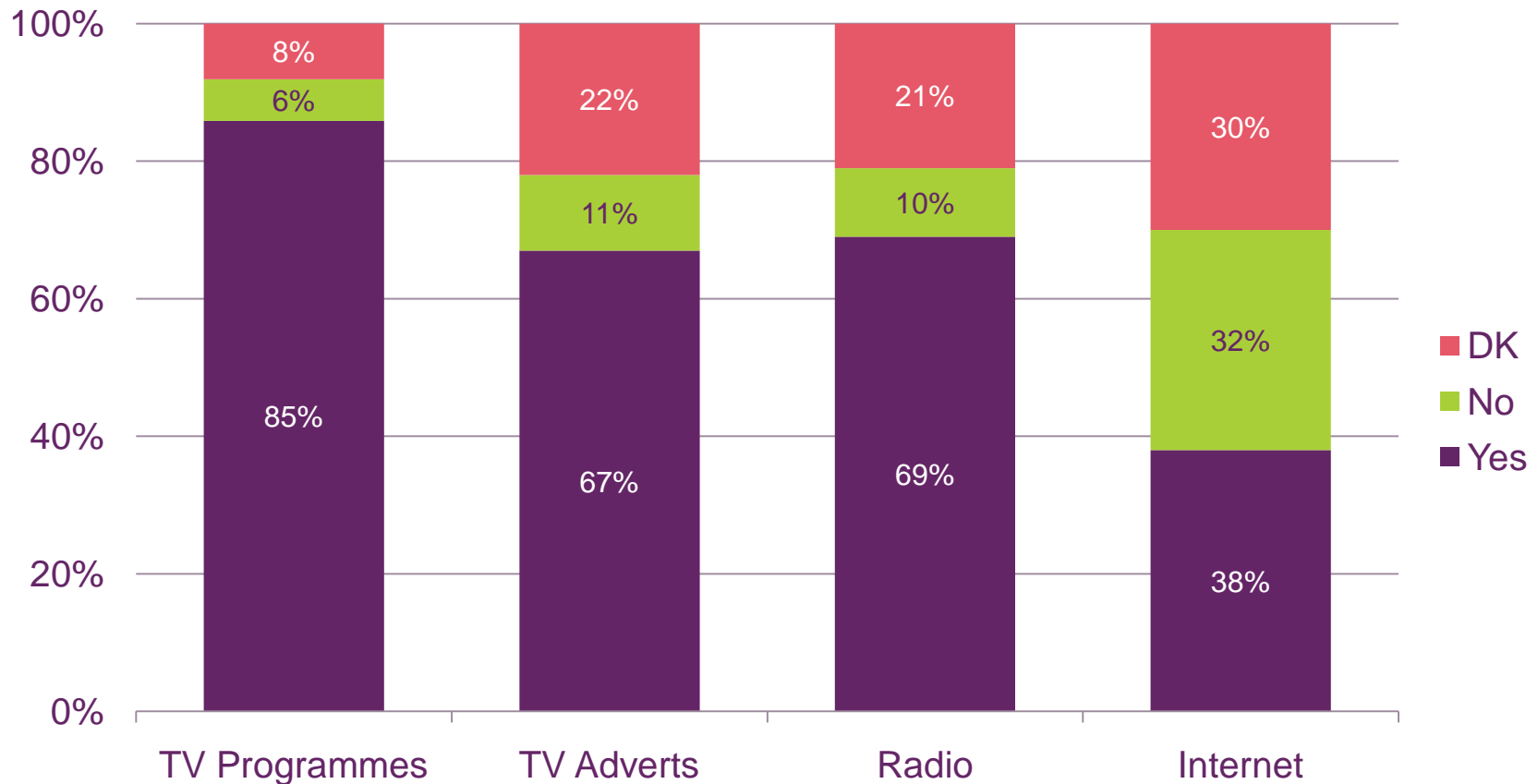
Source: Ofcom Media tracker 2010. Base: All respondents.

Regulation

- **Awareness of regulation**
(Q - As far as you know are TV programmes / TV adverts / radio / the internet regulated?)
- **TV Programme Regulation**
(Q- Who do you think TV regulation is aiming to protect?)
- **Opinion on who regulates**
(Q - Who do you think is responsible for regulating TV programmes / TV adverts / radio / the internet?)
- **Opinion on current levels of Regulation**
(Q - Thinking about TV programmes / TV adverts/ radio / the internet, do you think the amount of regulation is too much, too little, or about the right amount?)
- **Internet Regulation**
(Q - Reason for opinion given on current levels of Internet regulation)

Awareness of whether regulation currently exists

Respondents were asked in separate questions whether they were aware if each of the different media types were regulated? (When needed note was used to define – “By Regulation I mean rules or guidelines about what can and cant be shown”)

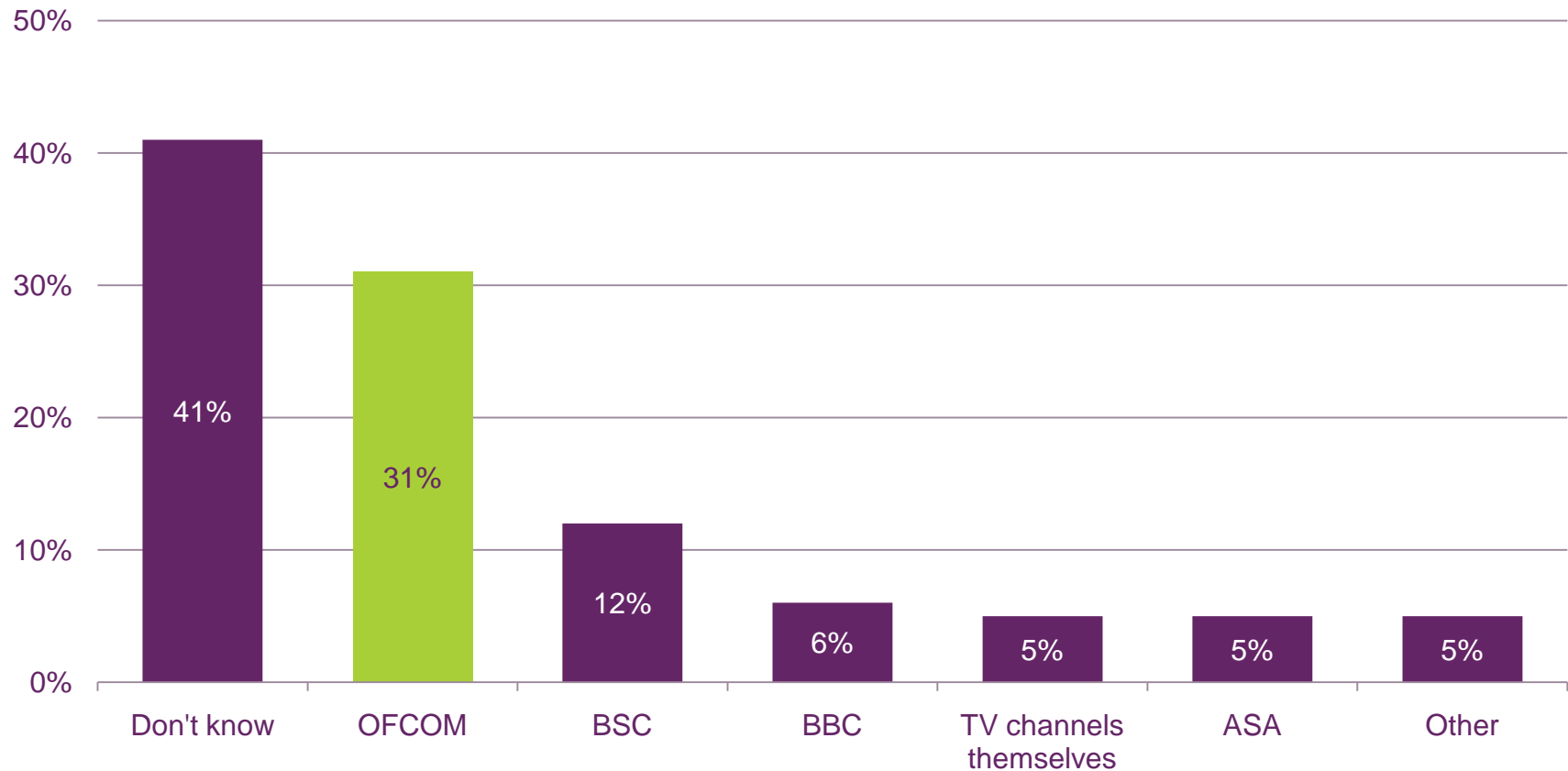


Source: Ofcom Media tracker 2010. Base: All respondents.

Opinion on who regulates TV programmes



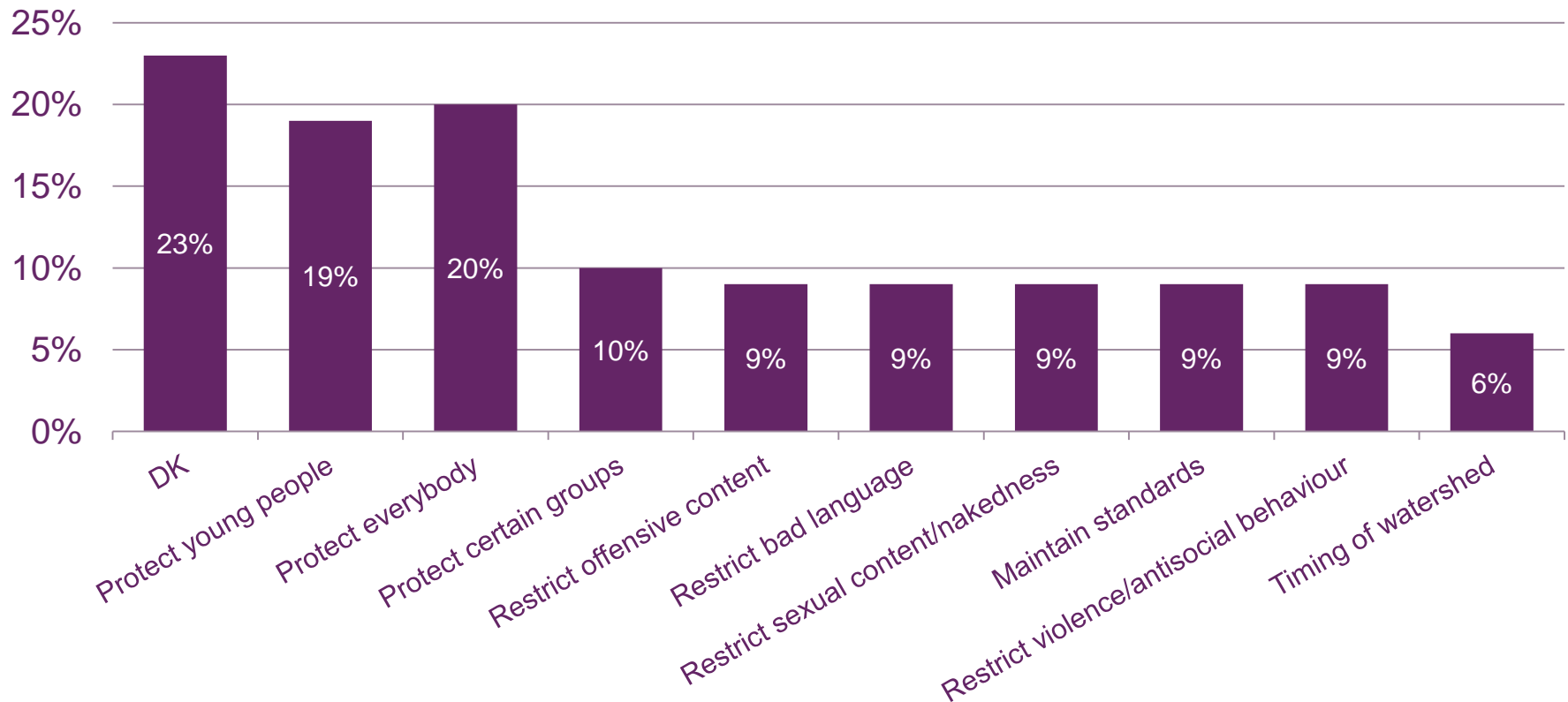
Q - Who do you think is responsible for regulating TV programmes?



Source: Ofcom Media tracker 2010. Base: All respondents aware/unsure of TV programme regulation (1,994). Note: Only responses $\geq 5\%$ charted. All responses unprompted.

Opinion on why TV programme regulation exists

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

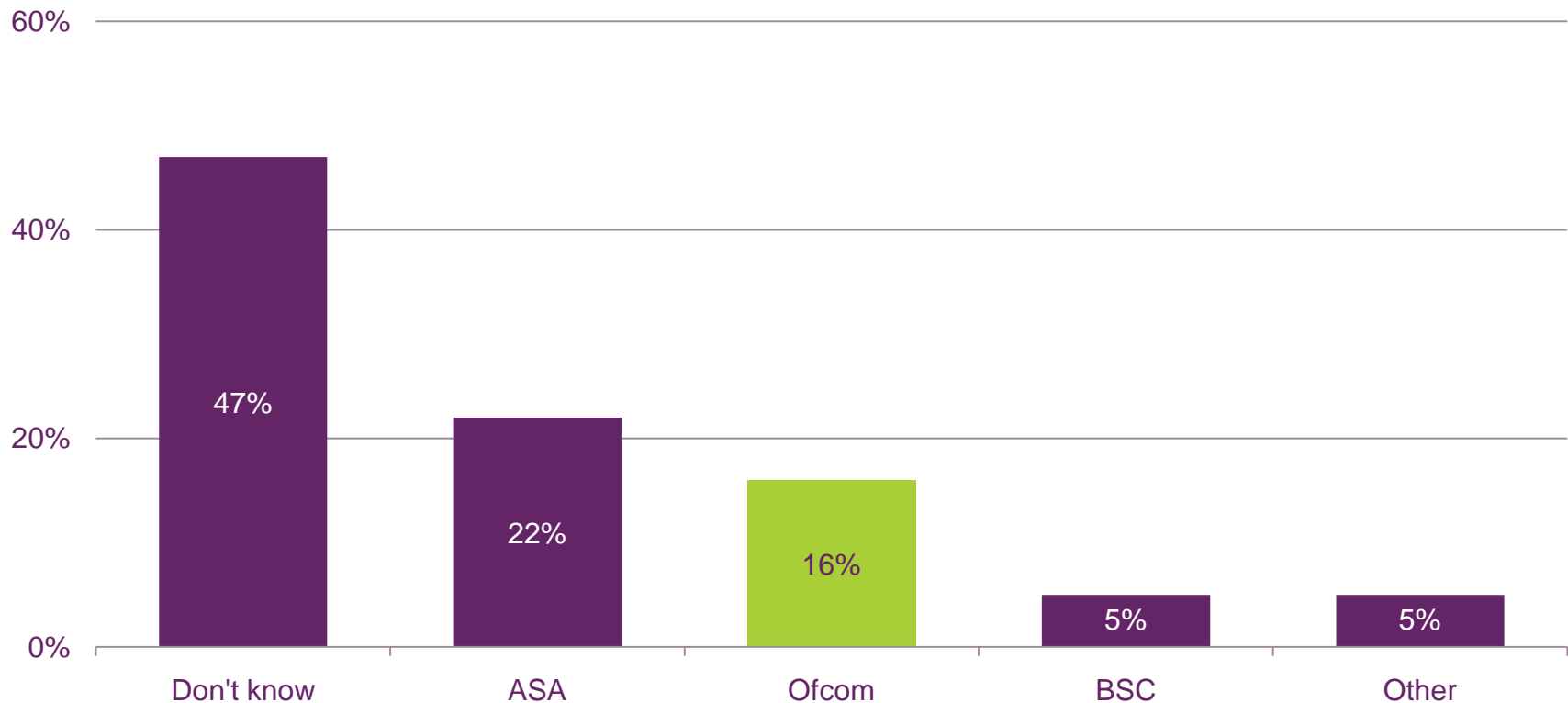


Source: Ofcom Media tracker 2010. Base: All respondents

Note: Only responses \geq 5% charted. All responses unprompted.

Opinion on who regulates TV adverts

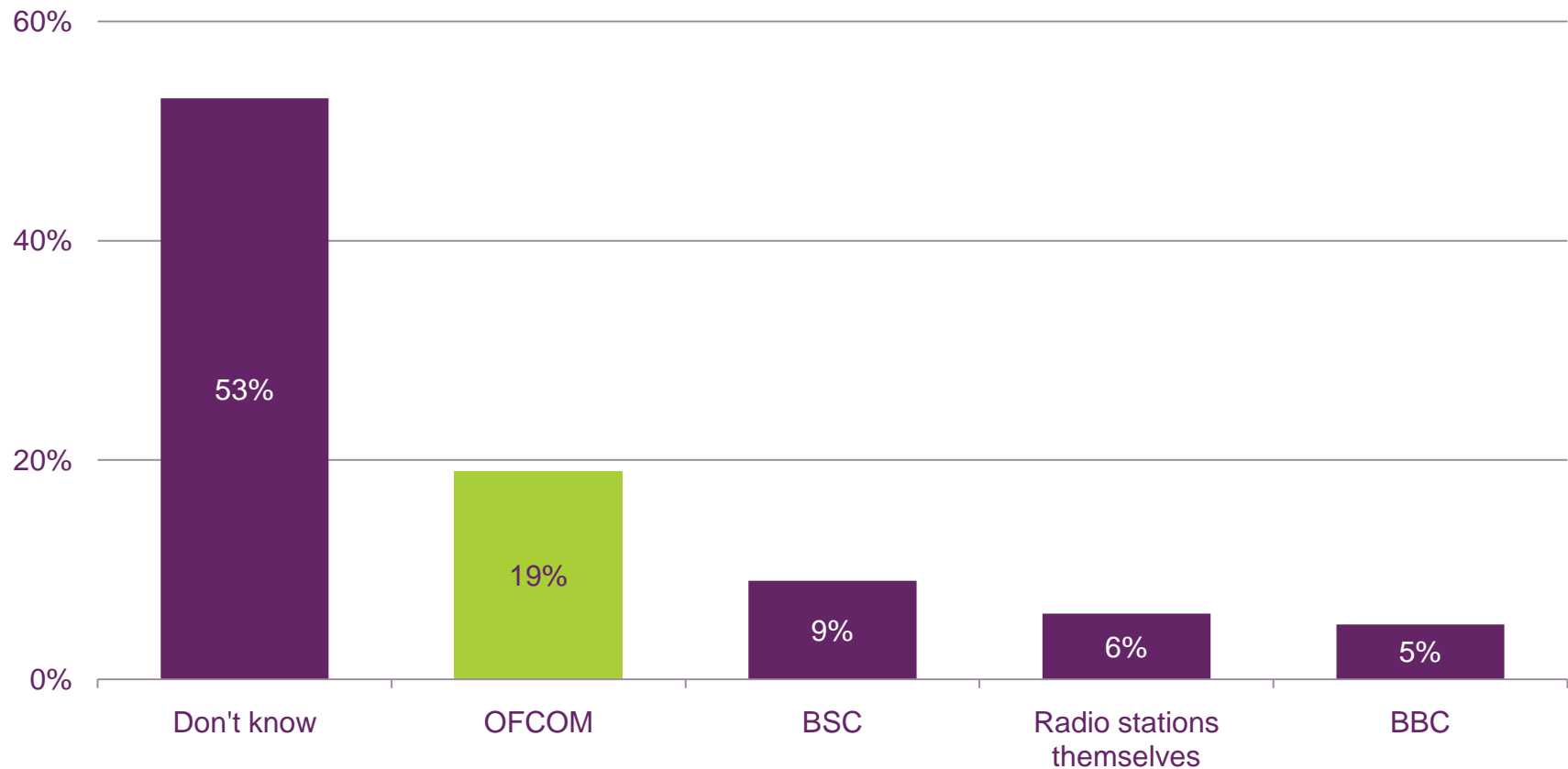
Q - Who do you think is responsible for regulating adverts on television?



Source: Ofcom Media tracker 2010. Base: All respondents aware/unsure of TV ad regulation (1,893).
 Note: Only responses ≥ 5% charted. All responses unprompted.

Opinion on who regulates radio

Q - Who do you think is responsible for regulating radio?



Source: Ofcom Media tracker 2010. Base: All respondents aware/unsure Radio regulated (1,914).

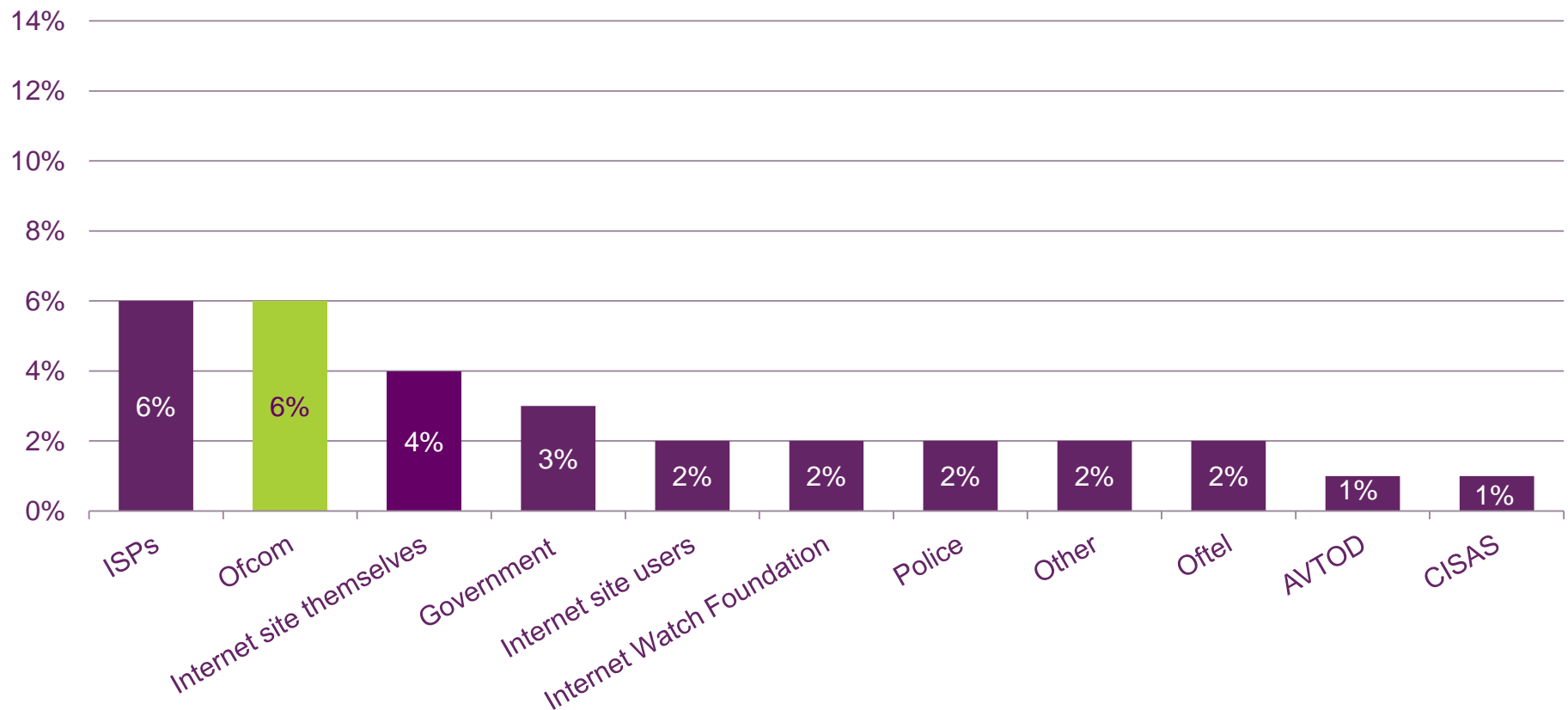
Note: Only responses > 5% charted. All responses unprompted.

Opinion on who regulates the internet



Q - Who, if anyone, do you think is responsible for regulating the internet?

Note: "Don't know" who regulates internet = 76%



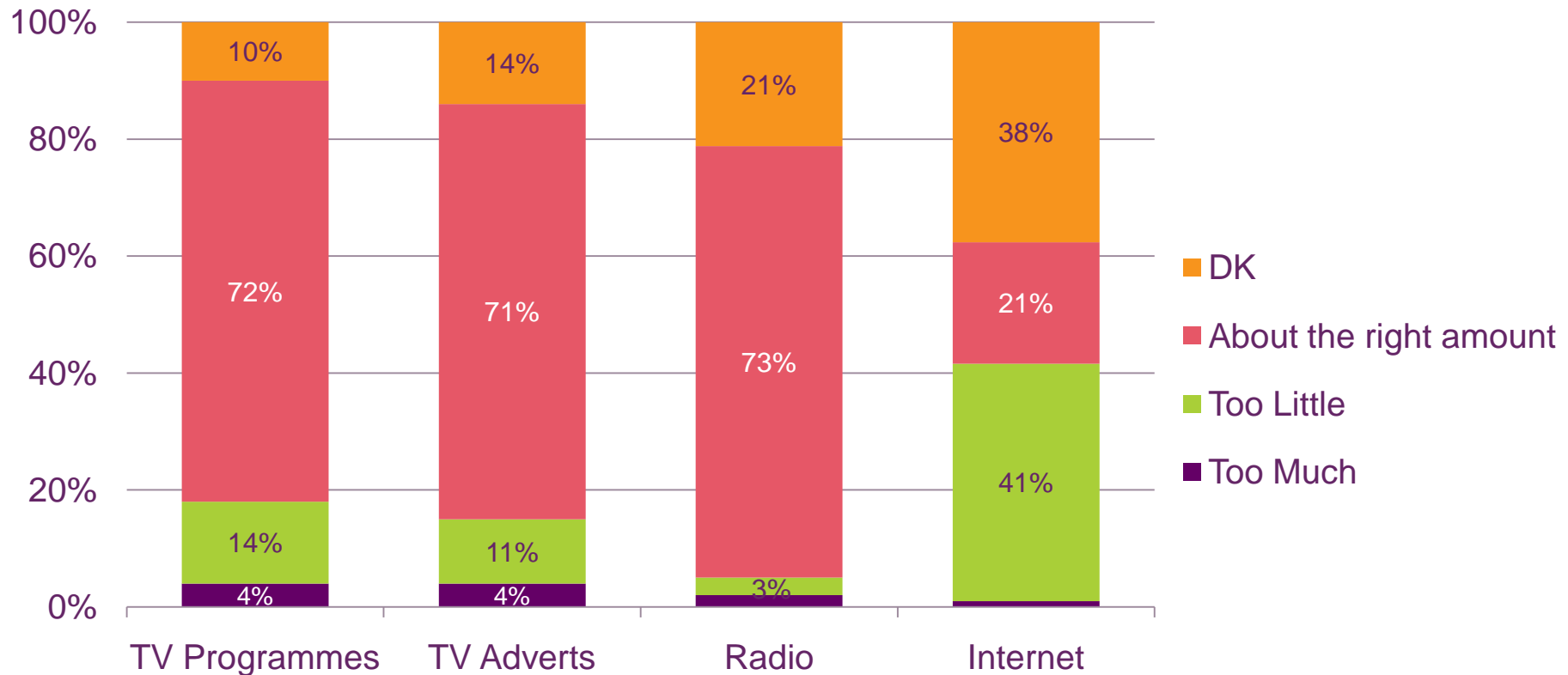
Source: Ofcom Media tracker 2010. Base: All respondents aware/unsure Internet regulated (1,472).

Note: All responses unprompted.

Opinion on current levels of regulation

Q- Do you think the amount of regulation for [media type] is:

- i) Too much?
- ii) Too little?
- iii) About the right amount ?

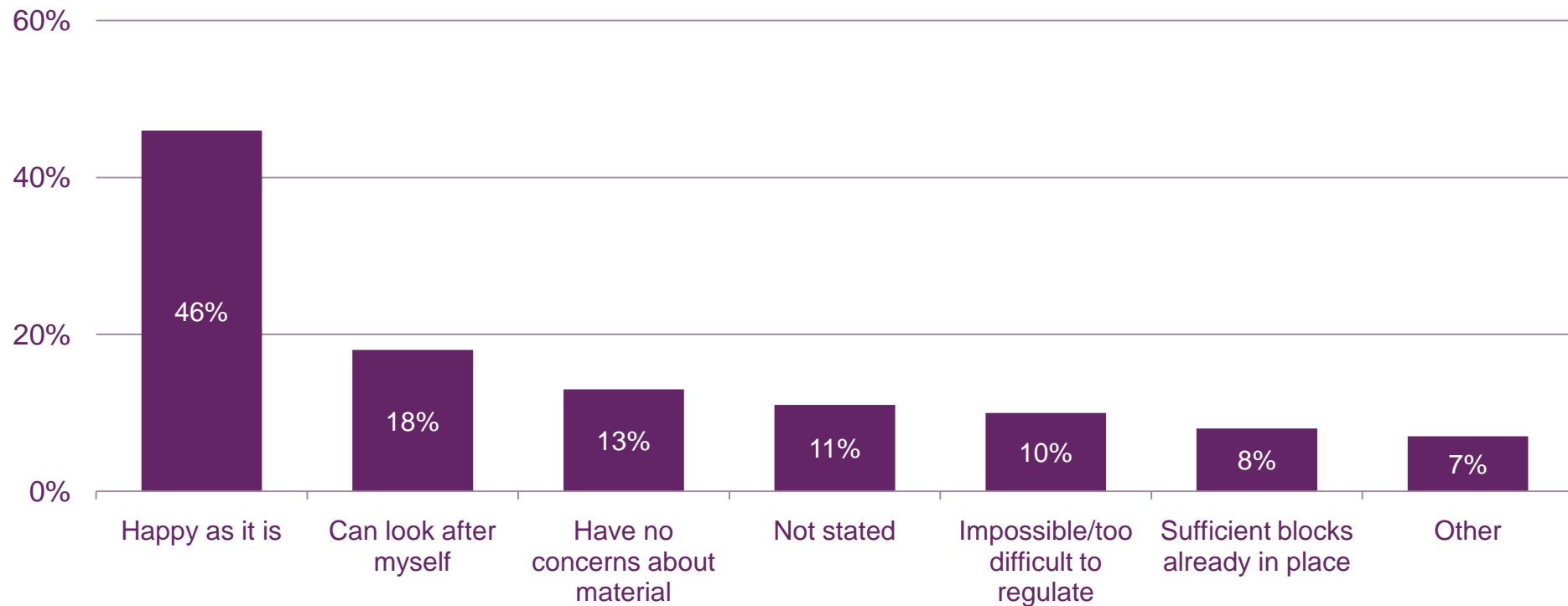


Source: Ofcom Media tracker 2010. Base: All respondents.

Reasons for opinion level of internet regulation ‘about right’

Q - Why do say that? [Asked to all those who stated they felt current level of internet regulation “about right”]

Reminder: 21% of all respondents felt current level of internet regulation ‘about right’



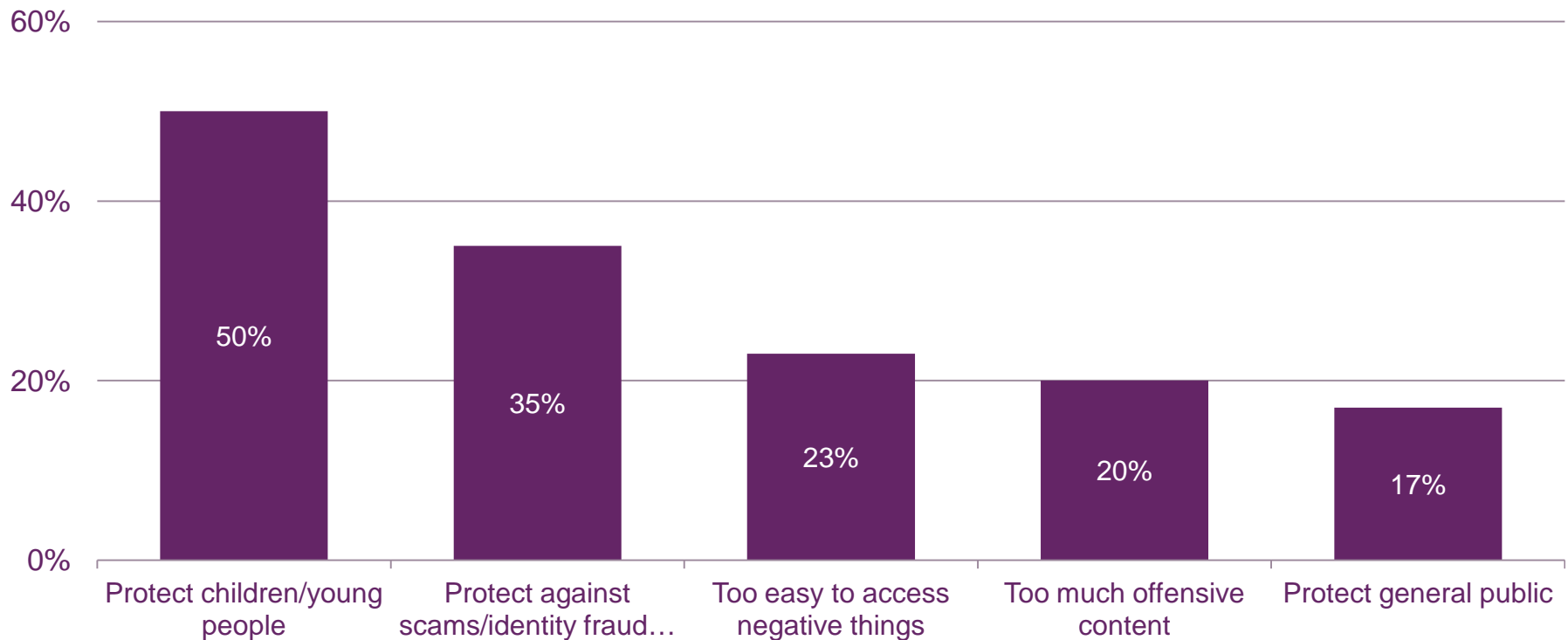
Source: Ofcom Media tracker 2010. Base: All who think current internet regulation level ‘about right’ (428).

Note: All responses unprompted.

Reasons for opinion level of internet regulation ‘too little’

Q - Why do say that? [Asked to all those who stated they felt current level of internet regulation “too little”]

Reminder: 41% of all respondents felt current level of internet regulation ‘too little’



Source: Ofcom Media tracker 2010. Base: All who think currently ‘too little’ internet regulation (852).

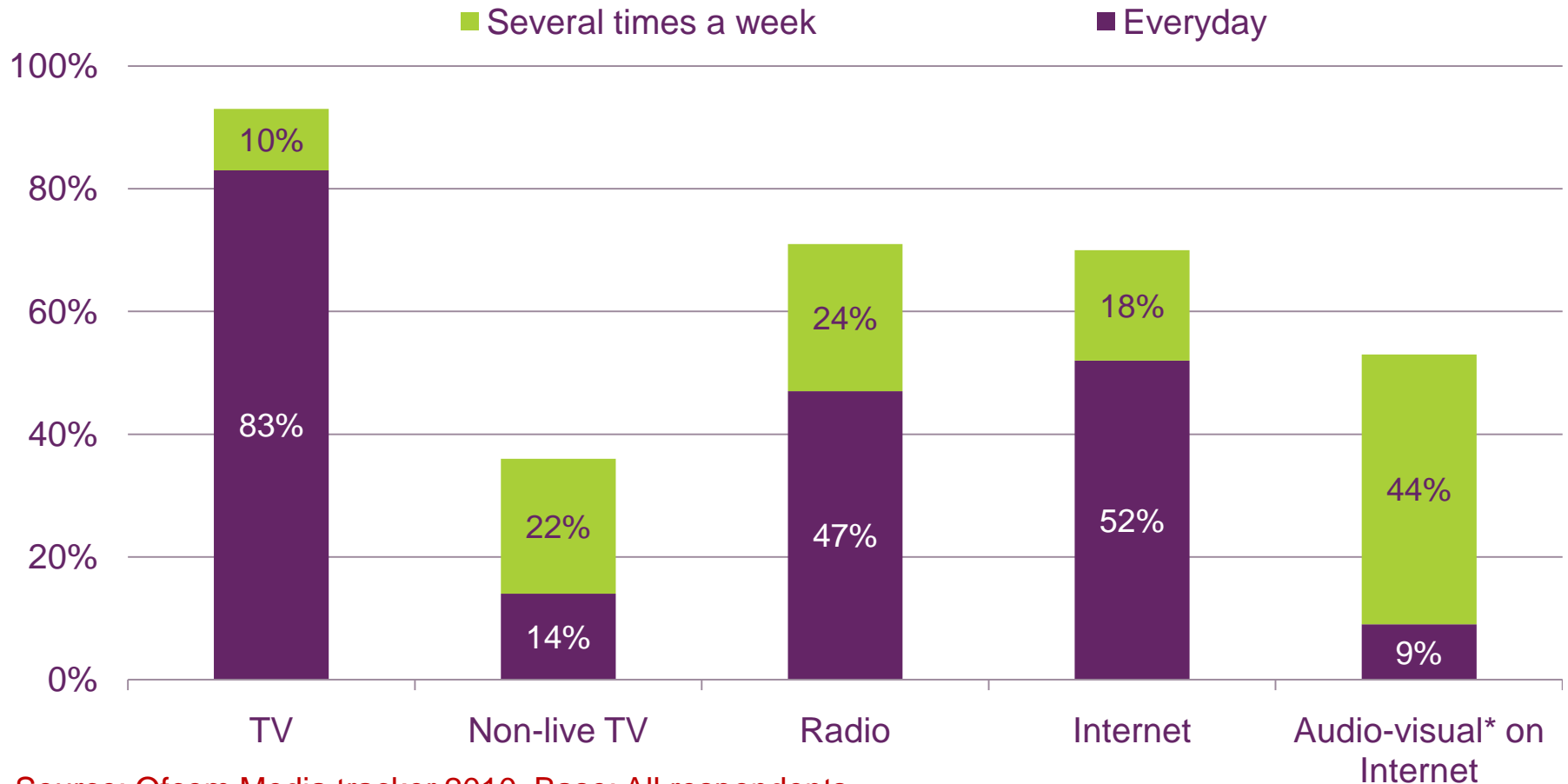
Note: Only responses ≥ 15% charted. All responses unprompted

Annex

Frequency of media use

Q- On average, how often, if at all, do you watch/listen/use the [media type] (via any device)?

[Scale: Every day / Several times a week / At least once a month / Several times a year / Never / Don't know]

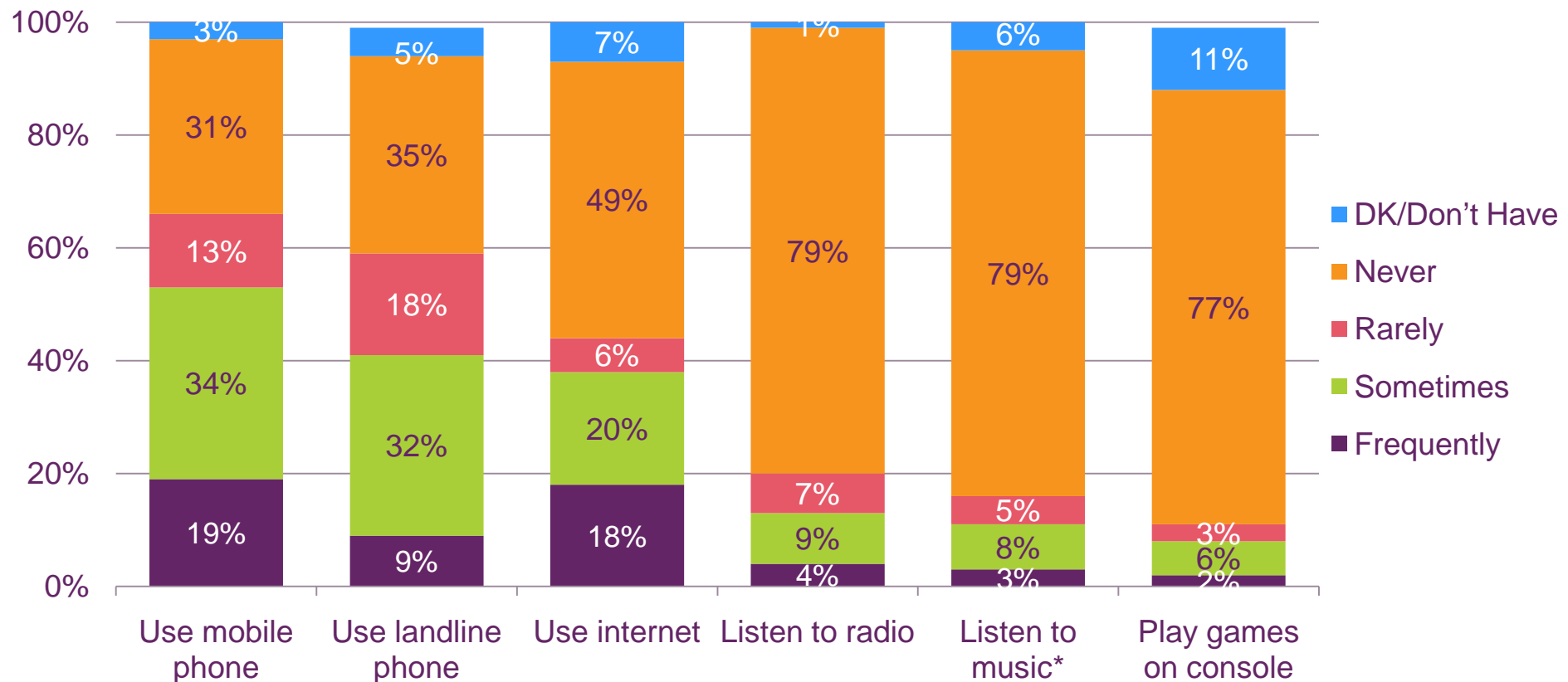


Source: Ofcom Media tracker 2010. Base: All respondents

*Audio-visual on Internet = TV programmes/films/video clips.

Simultaneity: Frequency of using other media whilst watching TV on a TV set

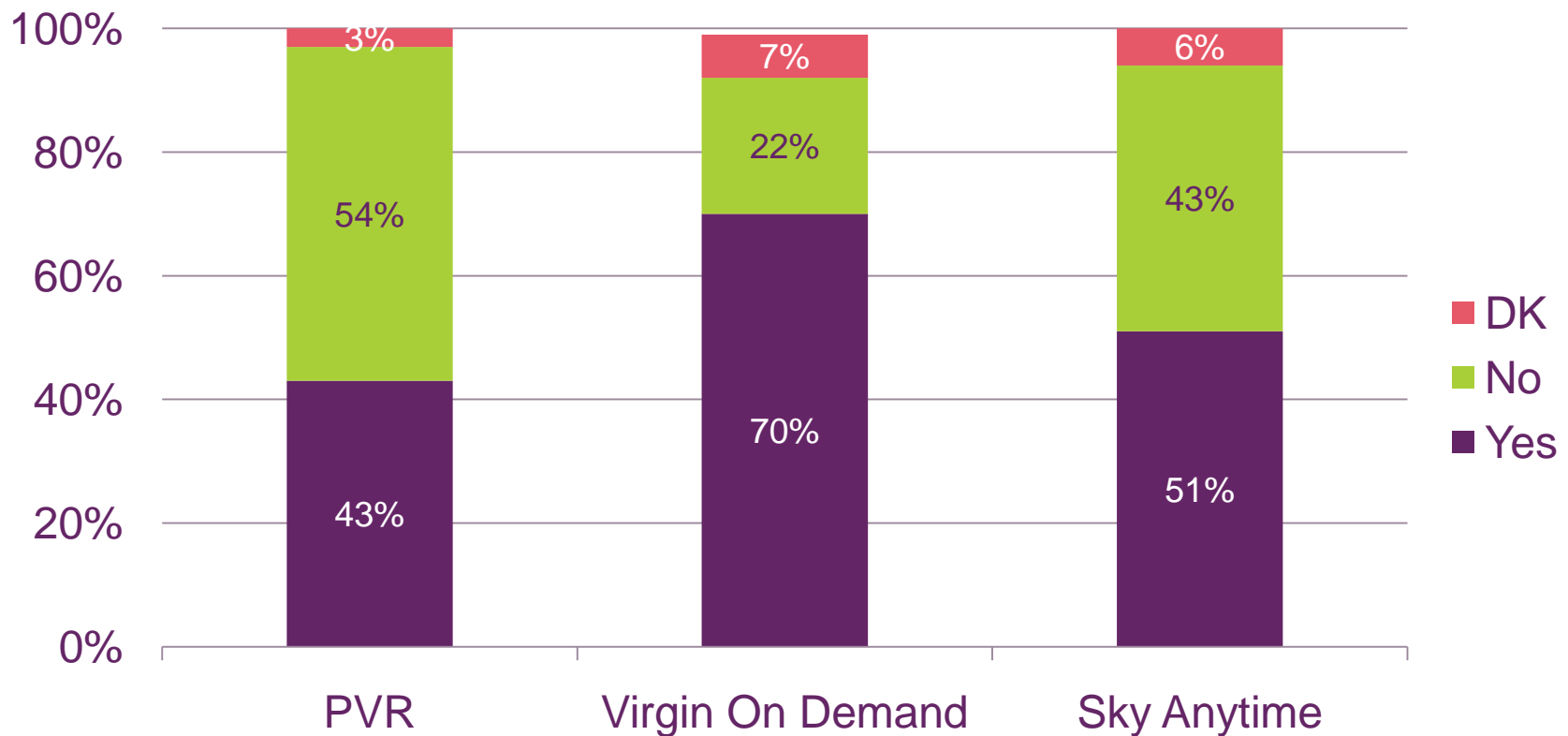
Q - At the same time as watching TV on your TV set, how frequently, if at all, do you also do any of the following activities?



Source: Ofcom Media tracker 2010 Base: All respondents

* On stereo or MP3 player or mobile phone or computer.

Ownership: PVRs/Virgin on Demand/Sky Anytime



Source: Ofcom Media tracker 2010.

Bases: PVR - All with Multichannel TV (1,926); All with Virgin (307); All with Sky (865).