D – PSB Audience Impact

PSB Report 2011 – Information pack
July 2011
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Background
Background (1)

• This document reports the views of audiences in the UK and includes data on the perceived importance of the PSB purposes and characteristics as well as the perceived delivery of these by the main PSB channels.

• Data is collected in Ofcom’s PSB Tracker survey:
  – Full years of fieldwork from 2007 to 2010 daily across four months – January, April, July and October
  – Around 7,000 viewers interviewed each year by telephone
  – Interviews were carried out by GfK NOP.

• The survey asked (self-defined) regular viewers of each PSB channel their opinion of the delivery of PSB purposes and characteristics. Regular viewers are the focus in order to minimise hearsay and perception. Self-definition as a regular viewer (rather than a definition using the number of hours viewed on a particular channel) is used because viewers’ opinions on the channel can be driven by regular viewing of programmes regardless of how many or few hours this involves.

• Since July 2008 the questionnaire has asked parents about the BBC’s digital children’s channels in relation to Children’s television in particular.
Based on the public service purposes presented in the 2003 Communications Act, Ofcom developed a range of PSB purposes and characteristics in its first PSB review in 2005*. The PSB channels are expected together to fulfil the purposes and characteristics, although it is also acknowledged that each PSB channel has a specific remit.

The PSB purposes and characteristics were put into everyday language for the PSB Tracker survey, which asked respondents to give their opinions on the PSB statements, both in terms of the importance of these and the delivery of these by the PSB channels (see next slides).

Regular viewers of each channel were asked to rate the channel on the statements using a 10-point scale. Within this report a rating of 7, 8, 9 or 10 has been taken as a positive response indicating that a viewer sees the channel/channels as delivering against this purpose/characteristic.

Regular and occasional viewers of each channel were also asked to rate the delivery of the purposes and characteristics when thinking about the PSB channels as a whole.

Respondents were also asked to rate how important it is that the PSB channels together fulfil the PSB purposes and characteristics, again using a 10-point scale.

Throughout this document, only statistically significant differences will be reported within the text and also highlighted on the charts. Reported differences between survey figures are significant at the 99% level to accommodate the impact of sample design and weighting. This means that there is high level of confidence that any reported differences reflect a true attitudinal or behavioural change rather than being caused by a change in sample methodology or profile. In previous reports, significance testing was performed at the 95% level so this represents a more robust approach to reporting.

More detail on the methodology can be found in the appendix.

### Background (3)

<table>
<thead>
<tr>
<th>PSB purposes and characteristics</th>
<th>PSB Tracker statements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose 1:</strong> To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas</td>
<td>Its news programmes are trustworthy. Its programmes help me understand what’s going on in the world today. Its news programmes for people in (nation) provide a wide range of good quality news about (nation) (asked in the devolved nations). Its regional news programmes provide a wide range of good quality news about my area (asked in England).</td>
</tr>
<tr>
<td><strong>Purpose 2:</strong> To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning</td>
<td>It shows interesting programmes about history, sciences or the arts. As a result of watching its programmes I’ve become more interested in particular subjects.</td>
</tr>
<tr>
<td><strong>Purpose 3:</strong> To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences</td>
<td>It covers big national events well, like sports, music events or major news stories. It shows high quality Soaps or Drama made in the UK. Provides a wide range of high quality and UK-made programmes for children. Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation. It portrays my region well to the rest of the UK. Its entertainment and factual programmes show people from different parts of the UK.</td>
</tr>
<tr>
<td><strong>Purpose 4:</strong> To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere</td>
<td>Its programmes show different kinds of cultures within the UK*. Its programmes offer a range of opinions on subjects and issues*.</td>
</tr>
</tbody>
</table>

* Two statements included from Q3 2008 to provide more detail than previously collected using the single statement ‘Its programmes show different kinds of cultures and opinions within the UK’
### Background (4)

<table>
<thead>
<tr>
<th>PSB purposes and characteristics</th>
<th>PSB Tracker statements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High quality</strong> – well-funded and well-produced</td>
<td>It shows well-made, high quality programmes.</td>
</tr>
<tr>
<td><strong>Original</strong> – new UK content rather than repeats or acquisitions</td>
<td>It shows enough new programmes, made in the UK.</td>
</tr>
<tr>
<td><strong>Innovative</strong> – breaking new ideas or re-inventing exciting approaches, rather than copying old ones</td>
<td>It shows programmes with new ideas and different approaches.</td>
</tr>
<tr>
<td><strong>Challenging</strong> – making viewers think</td>
<td>It shows programmes that make me stop and think.</td>
</tr>
<tr>
<td><strong>Engaging</strong> – remaining accessible and attractive to viewers</td>
<td>It shows programmes I want to watch.</td>
</tr>
<tr>
<td><strong>Trust</strong></td>
<td>I trust this channel.</td>
</tr>
</tbody>
</table>
Overview of PSB
Overview of PSB (1)

• This section gives a broad overview of claimed regular viewing among the UK population and the delivery of all the PSB purposes and characteristics.

Key themes

• In 2010 a higher proportion of the adult population said they were regular viewers of BBC One, BBC Two, BBC Three, BBC Four and BBC News in comparison to 2007, although BBC Four was the only channel to record a year on year increase in regular viewers. The proportion of the UK population claiming to be regular viewers of ITV1 has remained broadly similar over the past four years, with a similar pattern also recorded for Channel 5. However, significantly fewer people said they are regular viewers of Channel 4 in 2010 in comparison to 2007. Overall, the proportion of the UK population claiming to be regular viewers of any of the PSB channels has remained stable versus 2007.

• Ratings of the perceived importance of each of the PSB purposes remained high in 2010 with no significant declines either year on year or versus 2007. The only increases seen were an increased perception of the importance of Purpose 2, with the statements ‘it shows interesting programmes about the history, science or the arts’ (69% to 73%) up year on year and versus 2007, and ‘as a result of its programmes I’ve become more interested in particular subjects’ (61% to 65%) up since 2007.

• Ratings of the perceived importance of each of the PSB characteristics also remained high in 2010, with significant increases recorded since 2007 for the statements ‘high quality’ (84% to 87%), ‘enough new programmes made in the UK’ (72% to 76%) and ‘it shows programmes with new ideas and different approaches’.
There were no significant changes in the ratings of the delivery of the PSB channels together against the PSB purposes and characteristics from 2009 to 2010. However, a number of longer term trends were recorded since 2007 – most notably an increase in the perceived delivery of the PSB channels combined against purpose 2 (in line with increased importance), as well as elements of purpose 1 and 3.

In terms of the PSB characteristics, audiences’ opinions of the delivery of ‘high quality’ (59% to 64%) and ‘innovative’ (44% to 49%) programmes increased from 2007 to 2010 for the PSB channels combined. However, perceptions of the delivery of ‘original’ programmes for the PSBs combined remained unchanged versus 2007, despite a significant increase in importance since 2007 on the same measure.

Figure 9 illustrates the difference in opinion between perceived importance and delivery of the purposes and characteristics for the PSB channels combined. The most notable differences between importance and delivery relate to regional programming and the statements; ‘it’s regional news programmes provide a wide range of good quality news about my area’, ‘it portrays my region well to the rest of the UK’ and ‘aside from news, it provides a wide range of high quality programmes about my region/nation, made for people in my region/nation.’
Fig 1 Proportion of UK sample that are self-claimed regular viewers

Overview of PSB

Base: All respondents 7192, 6845, 6981, 6964
Source: Ofcom PSB Tracker, GfK NOP
### Fig 2 Demographic breakdown of regular viewers by channel

<table>
<thead>
<tr>
<th>Total regular viewers (%)</th>
<th>Channel</th>
<th>Channel</th>
<th>Channel</th>
<th>Channel</th>
<th>Channel</th>
<th>Channel</th>
<th>Channel</th>
<th>Channel</th>
<th>Channel</th>
<th>Any PSB Channel</th>
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<tbody>
<tr>
<td></td>
<td>ONE</td>
<td>TWO</td>
<td>4</td>
<td>THREE</td>
<td>NEWS</td>
<td>PAR</td>
<td></td>
<td></td>
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<td>0</td>
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<td>-2</td>
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<td>0</td>
<td>3</td>
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<td>-1</td>
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<td>1</td>
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<td>1</td>
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<td>-1</td>
<td>n/a</td>
<td>0</td>
<td>n/a</td>
<td>0</td>
</tr>
</tbody>
</table>

**Base** = Self-reported regular viewers of each channel (amalgamated data: January, April, July, October 10)

**Base for ‘All PSB Channels’** = those who ever watch any of the PSB channels asked about

**As proportion of regular viewers** – difference from 2009 to 2010

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**Overview of PSB**
Its news programmes are trustworthy

Its programmes help me understand what’s going on in the world today

Its regional news programmes provide a wide range of good quality news about my area

It shows interesting programmes about history, sciences or the arts

As a result of watching its programmes I’ve become more interested in particular subjects

Purpose 1

Purpose 2

Fig 3 The importance of PSB purposes 1 and 2

2010 Importance rating 10/9/8/7

2009 Importance rating: 10/9/8/7

2008 Importance rating: 10/9/8/7

2007 Importance rating: 10/9/8/7

Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”


Amalgamated data: (Jan-Dec 07, Jan-Dec 08, Jan – Dec 09, Jan-Dec 10)
It covers big national events well, like sports, music events or major news stories.

Its entertainment and factual programmes show people from different parts of the UK.

It shows high quality soaps or dramas made in the UK.

It portrays my region well to the rest of the UK.

Aside from news, it provides a range of good quality programmes about my region/nation, made for people in my region/nation.

It provides a wide range of high-quality and UK-made programmes for children.

Its programmes show different kinds of cultures within the UK.

Its programmes offer a range of opinions of subjects and issues.

Purpose 3

Purpose 4

Fig 4 The importance of PSB purposes 3 and 4

Overview of PSB

Extent to which the characteristics is important, where 10 means ‘extremely important’ and 1 means “not at all important.”

Base = All respondents. 2007 = 5357, 2008 = 3403, 2009 = 3532, 2010 = 3569

Amalgamated data: (Jan-Dec 07, Jan-Dec 08, Jan – Dec 09, Jan-Dec 10)
It shows well-made, high quality programmes

It shows enough new programmes, made in the UK

It shows programmes with new ideas and different approaches

It shows programmes that make me stop and think

It shows programmes I want to watch
(Q1-Q3 only in 2010)

Its programmes reflect the interests and concerns of people like me

I trust this channel
(statement added in Q407)
(Q1-Q3 only in 2010)

Extent to which the characteristics is important, where 10 means “extremely important” and 1 means “not at all important”

Base = All respondents. 2007 = 5357, 2008 = 3403, 2009 = 3532, 2010 = 3569

Amalgamated data: (Jan-Dec 07, Jan-Dec 08, Jan – Dec 09, Jan-Dec 10)

Fig 5 The importance of PSB characteristics
Fig 6 The delivery of PSB purposes 1 and 2

**Purpose 1**
- Its news programmes are trustworthy
- Its programmes help me understand what’s going on in the world today
- Its (nations/regions) news programmes provide a wide range of good quality news about my (nation/regions)

**Purpose 2**
- It shows interesting programmes about history, sciences or the arts
- As a result of watching its programmes I’ve become more interested in particular subjects

Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.
Base = All respondents who ever watch any PSB channels. All Channels Combined 2006 = 937, 2007 = 7105, 2008 = 6798, 2009 = 6947, 2010 = 6909; Amalgamated data: (Dec 2006, Jan-Dec 07, Jan-Dec 08, Jan – Dec 09, Jan-Dec 10)
It covers big national events well, like sports, music events or major news stories

It shows high quality soaps or dramas made in the UK

It provides a wide range of high quality UK-made programmes for children

Its entertainment and factual programmes show people from different parts of the UK

It portrays my region well to the rest of the UK

Aside from news, it provides a range of good quality progs about my region/nation for my region/nation

Its programmes show different kinds of cultures within the UK

Its programmes offer a range of opinions of subjects and issues

Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest. Base = All respondents who ever watch any PSB channels. All Channels Combined 2006 = 937, 2007 = 7105, 2008 = 6798, 2009 = 6947, 2010 = 6909. Amalgamated data: (Dec 2006, Jan-Dec 07, Jan-Dec 08, Jan–Dec 09, Jan-Dec 10). Data for P4 statements is from Q3/Q3 2008.
Fig 8 The delivery of PSB characteristics

Extent to which the characteristic applies to the channels together, where 10 is the highest score and 1 is the lowest.
Base = All respondents who ever watch any PSB channels. All Channels Combined 2006 = 937, 2007 = 7105, 2008 = 6798, 2009 = 6947; 2010 = 6909
Amalgamated data: (Dec 2006, Jan-Dec 07, Jan-Dec 08, Jan – Dec 09, Jan-Dec 10)
Data for ‘TRUST’ added from Q407

Source: Ofcom PSB Tracker, GfK NOP

2007 Shows direction of significant differences from 2007/2009 to 2010, 99% level)
## Fig 9 Importance and delivery of PSB purposes and characteristics

<table>
<thead>
<tr>
<th>Purposes</th>
<th>Importance</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Its news programmes are trustworthy</td>
<td>86%</td>
<td>68%</td>
</tr>
<tr>
<td>Its programmes help me understand what’s going on in the world today</td>
<td>84%</td>
<td>70%</td>
</tr>
<tr>
<td>It covers big national events well, like sports, music events or major news stories</td>
<td>80%</td>
<td>68%</td>
</tr>
<tr>
<td>Its regional news programmes provide a wide range of good quality news about my area</td>
<td>79%</td>
<td>52%</td>
</tr>
<tr>
<td>Its programmes show a range of opinions of subjects and issues</td>
<td>75%</td>
<td>55%</td>
</tr>
<tr>
<td>It shows interesting programmes about history, sciences or the arts</td>
<td>73%</td>
<td>53%</td>
</tr>
<tr>
<td>Its entertainment and factual programmes show people from different parts of the UK</td>
<td>68%</td>
<td>56%</td>
</tr>
<tr>
<td>Its programmes show different kinds of cultures within the UK</td>
<td>68%</td>
<td>49%</td>
</tr>
<tr>
<td>As a result of watching its programmes I’ve become more interested in particular subjects</td>
<td>65%</td>
<td>52%</td>
</tr>
<tr>
<td>It portrays my region well to the rest of the UK</td>
<td>62%</td>
<td>33%</td>
</tr>
<tr>
<td>Aside from news, it provides a range of good quality programmes about my region/nation, made for people in my region/nation</td>
<td>60%</td>
<td>35%</td>
</tr>
<tr>
<td>It shows high quality soaps or dramas made in the UK</td>
<td>58%</td>
<td>54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Characteristics</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>It shows well-made, high quality programmes</td>
<td>87%</td>
<td>64%</td>
</tr>
<tr>
<td>I trust this channel</td>
<td>85%</td>
<td>59%</td>
</tr>
<tr>
<td>It shows programmes I want to watch</td>
<td>82%</td>
<td>54%</td>
</tr>
<tr>
<td>It shows programmes that make me stop and think</td>
<td>78%</td>
<td>52%</td>
</tr>
<tr>
<td>It shows enough new programmes, made in the UK</td>
<td>76%</td>
<td>45%</td>
</tr>
<tr>
<td>It shows programmes with new ideas and different approaches</td>
<td>74%</td>
<td>49%</td>
</tr>
<tr>
<td>Its programmes reflect the interests and concerns of people like me</td>
<td>71%</td>
<td>47%</td>
</tr>
</tbody>
</table>

% of respondents rating 7/8/9/10  
Base = All respondents who ever watch any PSB channels / All respondents in sample A. All Channels Combined = 6909; Importance = 3569
PSB nations/regions news

- The focus of this section is on opinion of PSB nations/regions news programming in the UK nations, which is reflected in the statement ‘it’s regional news programmes provide a wide range of programmes about my area’.

- This statement is one element of Purpose 1 – ‘to inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas’.

Key themes

- Views in the nations about the provision of nations/regions news vary:

  - All Channels Combined
    - From 2007 to 2010, opinions of the delivery of nations/regions news for all channels combined became less positive since 2007 in each devolved nation, while remaining static in England.

  - BBC One
    - From 2007 to 2010, opinions of the delivery of BBC One’s nations/regions news among its regular viewers has remained stable in England, Wales, Scotland, and Northern Ireland.

  - ITV1
    - From 2007 to 20010, opinions of the delivery of ITV1’s nations/regions news among its regular viewers became less positive since 2007 in each devolved nation, while remaining static in England.
Fig 10 ‘Its national / regional news programmes provide a wide range of good quality news about my area’

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for ‘all channels combined’: All respondents who ever watch any PSB channels = 937, 7105, 6798, 6947, 6909
Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 06, Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08, Jan, Apr, Jul, Oct 09, Jan, Apr, Jul, Oct 10) BBC1 = 5220, 4938, 4850, 5024, 4998; ITV1 = 4027, 3724, 3587, 3540, 3518;

Source: Ofcom PSB Tracker, Gfk NOP
Fig 11 ‘It’s regional news programmes provide a wide range of good quality news about my area (in England)’

PSB nations/regions news

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for ‘all channels combined’: All respondents in England who ever watch any PSB channels = 4062, 3850, 3953, 3942
Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan, Apr, Jul, Oct 07, Jan, Apr, Jul, Oct 08, Jan, Apr, Jul, Oct 09, Jan, Apr, Jul, Oct 10) BBC1 = 2969, 2813, 2759, 2907, 2861  ITV1 = 2165, 2039, 1941, 1945, 1944 (those in England only).

Source: Ofcom PSB Tracker, GfK NOP
Fig 12 ‘Its news programmes for people in Scotland provide a wide range of good quality news about Scotland’

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel
Base for ‘all channels combined’ = all respondents in Scotland who ever watch any PSB channels: 1022, 997, 999, 984
Base for importance: 772, 499, 478, 531 (half sample for Q1 and Q4 of 2007 and half sample for all of 2008 and 2009)
Base for individual channels: Self-reported regular viewers of each channel in Scotland BBC1 = 757, 698, 687, 680, 698; ITV1 = 599, 534, 508, 482, 481
NB Before July 08 this statement was asked to all as ‘Its regional news programmes provide a wide range of good quality news about my area’ but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP
Fig 13 ‘Its news programmes for people in Wales provide a wide range of good quality news about Wales’

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for ‘all channels combined’ = all respondents in Wales who ever watch any of the nine channels: 1006, 975, 997, 996
Base for importance: 752, 488, 515, 502 (half sample for Q1 and Q4 of 2007 and half sample for all of 2008 and 2009)
Base for individual channels: Self-reported regular viewers of each channel in Wales BBC1 = 791, 744, 741, 751, 758; ITV1 = 616, 568, 596, 533, 511;
NB Before July 08 this statement was asked to all as ‘Its regional news programmes provide a wide range of good quality news about my area’ but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP
Fig 14 ‘Its news programmes for people in Northern Ireland provide a wide range of good quality news about Northern Ireland’

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

Base for ‘all channels combined’ = all respondents in Northern Ireland who ever watch any PSB channels: 1015, 976, 998, 987
Base for importance: 748, 483, 509, 520 (Half sample for Q1 and Q4 2007 and half sample for all of 2008 and 2009)
Base for individual channels: Self-reported regular viewers of each channel in Northern Ireland BBC1 = 703, 683, 663, 686, 681; ITV1 = 647, 583, 542, 580, 582
NB Before July 08 this statement was asked to all as ‘Its regional news programmes provide a wide range of good quality news about my area’ but was changed for greater clarity for those in the devolved nations. Source: Ofcom PSB Tracker, GfK NOP
Channel summaries
The following charts summarise audience opinion of the delivery of each of the purposes and characteristics for the five main PSB channels among regular viewers of each channel.

Key themes

- **BBC One** has recorded significant increases for approximately half of all the PSB purposes and characteristics between 2007 and 2010. The only area where BBC One has recorded a significant decline since 2007 is for children’s programming – however, this is likely to be driven by the migration of children’s content from BBC One to the dedicated children’s channels CBeebies and CBBC.

- In line with improvements seen across the BBC TV portfolio as a whole, **BBC Two** has recorded long terms gains on a number of purposes and characteristics, most notably purpose 2 (*to stimulate our interest and knowledge of the arts, science, history*) and elements of purpose 3 (*to reflect and strengthen our cultural identity through original programming*).

- Opinion of delivery of the purposes and characteristics among viewers of **ITV1** is more varied. Whilst ITV has recorded improvement on six out of the 20 PSB statements since 2007, including the characteristics of ‘quality’ and ‘innovation’, it has also seen a decline in two out of the three elements relating to Purpose 1 (*to inform ourselves and others through news*) over the corresponding period.
PSB channel summaries (2)

- Despite a decline in the proportion of self claimed regular viewers since 2007, **Channel 4** has seen positive long term improvements on over half of the PSB purpose and characteristics. In particular, regular viewers of Channel 4 gave a higher rating for the delivery of six out of the seven PSB characteristics in 2010 compared to 2007.

- The only changes in the purposes and characteristics for **Channel 5** relate to Purpose 1 *(to inform ourselves and others through news)*. Whilst it has recorded a year-on-year improvement in the statement ‘its news programmes are trustworthy’, it has also recorded an 11% decline since 2007 for ‘helps me understand what’s going on in the world.’
News programmes are trustworthy
Helps me understand what's going on in world
Regional news progs provide good quality news
Interesting programmes about history/science/arts
Watching programmes - more interested in subjects
Covers big national events well
Ent/factual programmes - people from different parts of UK
High quality soaps/dramas made in UK
Portrays my region well to rest of UK
Aside from news, provides good quality progs about my region
wide range high-quality UK-made programmes for children
Offers range of opinions of subjects/issues
Shows different kinds cultures within UK
Shows well-made, high quality programmes
Enough new programmes, made in UK
Shows programmes with new ideas/different approaches
Shows programmes that make me stop and think
It shows programmes I want to watch
Reflects interests/concerns of people like me
I trust this channel

Base: Self-reported regular viewers of BBC1 (4998)
Amalgamated data (Jan, Apr, July, Oct 10)

% Rating 10/9/8/7

PSBs combined

2007 Shows direction of significant differences from 2006/2009 to 2010, 99% level)
News programmes are trustworthy
Helps me understand what's going on in world
Aside from news, provides good quality progs about my region
Interesting programmes about history/science/arts
Watching programmes - more interested in subjects
Covers big national events well
Ent/factual programmes - people from different parts of UK
High quality soaps/dramas made in UK
Portrays my region well to rest of UK
Wide range high-quality UK-made programmes for children
Offers range of opinions of subjects/issues
Shows different kinds cultures within UK
Shows well-made, high quality programmes
Enough new programmes, made in UK
Shows programmes with new ideas/different approaches
Shows programmes that make me stop and think
It shows programmes I want to watch
Reflects interests/concerns of people like me
I trust this channel

Base = Self-reported regular viewers of BBC2 (2586)
Amalgamated data (Jan, Apr, July, Oct 10)

Shows direction of significant differences from 2006/2009 to 2010, 99% level)
### PSB channel summaries

#### Fig 17 ITV1

<table>
<thead>
<tr>
<th>Attribute</th>
<th>% Rating 10/9/8/7</th>
<th>PSBs combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>News programmes are trustworthy</td>
<td>70</td>
<td>68</td>
</tr>
<tr>
<td>Helps me understand what’s going on in world</td>
<td>63</td>
<td>70</td>
</tr>
<tr>
<td>Regional news progs - good quality</td>
<td>60</td>
<td>52</td>
</tr>
<tr>
<td>Interesting programmes about history/science/arts</td>
<td>31</td>
<td>53</td>
</tr>
<tr>
<td>Watching programmes - more interested in subjects</td>
<td>47</td>
<td>52</td>
</tr>
<tr>
<td>Covers big national events well</td>
<td>66</td>
<td>68</td>
</tr>
<tr>
<td>Ent/factual programmes - people from different parts of UK</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>High quality soaps/dramas made in UK</td>
<td>66</td>
<td>54</td>
</tr>
<tr>
<td>Portrays my region well to rest of UK</td>
<td>37</td>
<td>33</td>
</tr>
<tr>
<td>Aside from news, provides good quality progs about my region</td>
<td>40</td>
<td>35</td>
</tr>
<tr>
<td>Wide range high-quality UK-made programmes for children</td>
<td>39</td>
<td>60</td>
</tr>
<tr>
<td>Offers range of opinions of subjects/issues</td>
<td>51</td>
<td>55</td>
</tr>
<tr>
<td>Shows different kinds cultures within UK</td>
<td>42</td>
<td>49</td>
</tr>
<tr>
<td>Shows well-made, high quality programmes</td>
<td>67</td>
<td>64</td>
</tr>
<tr>
<td>Enough new programmes, made in UK</td>
<td>46</td>
<td>45</td>
</tr>
<tr>
<td>Shows programmes with new ideas/different approaches</td>
<td>44</td>
<td>49</td>
</tr>
<tr>
<td>Shows programmes that make me stop and think</td>
<td>44</td>
<td>52</td>
</tr>
<tr>
<td>It shows programmes I want to watch</td>
<td>57</td>
<td>33</td>
</tr>
<tr>
<td>Reflects interests/concerns of people like me</td>
<td>46</td>
<td>47</td>
</tr>
<tr>
<td>I trust this channel</td>
<td>63</td>
<td>59</td>
</tr>
</tbody>
</table>

**Base** = Self-reported regular viewers of ITV1 (3518) Amalgamated data (Jan, Apr, July, Oct 10)

*Shows direction of significant differences from 2006/2009 to 2010, 99% level*
Fig 18 Channel 4

% Rating 10/9/8/7

PSBs combined

News programmes are trustworthy 62
Helps me understand what's going on in world 50
Interesting programmes about history/science/arts 54
Watching programmes - more interested in subjects 54
Covers big national events well 49
Ent/factual programmes - people from different parts of UK 57
High quality soaps/dramas made in UK 44
Portrays my region well to rest of UK 24
Wide range high-quality UK-made programmes for children 21
Offers range of opinions of subjects/issues 58
Shows different kinds cultures within UK 59
Shows well-made, high quality programmes 67
Enough new programmes, made in UK 47
Shows programmes with new ideas/different approaches 61
Shows programmes that make me stop and think 62
It shows programmes I want to watch 62
Reflects interests/concerns of people like me 50
I trust this channel 63

Base = Self-reported regular viewers of Channel 4 (2305)
Amalgamated data (Jan, Apr, July, Oct 10)

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### PSB channel summaries

**Fig 19 Channel Five**

<table>
<thead>
<tr>
<th>Feature</th>
<th>% Rating 10/9/8/7</th>
<th>PSBs combined</th>
</tr>
</thead>
<tbody>
<tr>
<td>News programmes are trustworthy</td>
<td>46</td>
<td>68</td>
</tr>
<tr>
<td>Helps me understand what’s going on in world</td>
<td>33</td>
<td>70</td>
</tr>
<tr>
<td>Interesting programmes about history/science/arts</td>
<td>26</td>
<td>53</td>
</tr>
<tr>
<td>Watching programmes - more interested in subjects</td>
<td>38</td>
<td>52</td>
</tr>
<tr>
<td>Covers big national events well</td>
<td>31</td>
<td>68</td>
</tr>
<tr>
<td>Ent/factual programmes - people from different parts of UK</td>
<td>36</td>
<td>56</td>
</tr>
<tr>
<td>High quality soaps/dramas made in UK</td>
<td>32</td>
<td>54</td>
</tr>
<tr>
<td>Portrays my region well to rest of UK</td>
<td>20</td>
<td>33</td>
</tr>
<tr>
<td>Provides wide range high-quality UK-made programmes for children</td>
<td>33</td>
<td>60</td>
</tr>
<tr>
<td>Offers range of opinions of subjects/issues</td>
<td>33</td>
<td>55</td>
</tr>
<tr>
<td>Shows different kinds cultures within UK</td>
<td>32</td>
<td>49</td>
</tr>
<tr>
<td>Shows well-made, high quality programmes</td>
<td>50</td>
<td>64</td>
</tr>
<tr>
<td>Enough new programmes, made in UK</td>
<td>26</td>
<td>45</td>
</tr>
<tr>
<td>Shows programmes with new ideas/different approaches</td>
<td>37</td>
<td>49</td>
</tr>
<tr>
<td>Shows programmes that make me stop and think</td>
<td>39</td>
<td>52</td>
</tr>
<tr>
<td>It shows programmes I want to watch</td>
<td>51</td>
<td>33</td>
</tr>
<tr>
<td>Reflects interests/concerns of people like me</td>
<td>34</td>
<td>47</td>
</tr>
<tr>
<td>I trust this channel</td>
<td>45</td>
<td>59</td>
</tr>
</tbody>
</table>

Base = Self-reported regular viewers of five (1331), Amalgamated data (Jan, Apr, July, Oct 10)

↑ 2007  ↑ 2009  Shows direction of significant differences from 2006/2009 to 2010, 99% level)
Summary: S4C (1)

The Welsh Authority had the statutory responsibility to provide S4C (analogue) and S4C Digidol (digital) services for viewers in Wales. However, the S4C analogue service ceased broadcasting at midnight 30 March 2010 when digital switchover process was completed in Wales.

The Communications Act specifies that the S4C services must include News and Current Affairs programming. There is no requirement for S4C regarding Children’s programmes, however in its 2008 Annual Report, S4C sets its own target is 140 hours of originated Children’s programmes per year.

- In order to provide relevant information about audience views relating to S4C programming in Welsh, the PSB Tracker has been boosted in Wales from January 2006. Opinions are based on regular viewers of Welsh language programming on S4C. The PSB Tracker results reported here are based on the Welsh boost sample.

- The PSB Tracker asks viewers of Welsh language programming on S4C how they rate S4C on achieving the PSB purposes and characteristics, and how they rate the PSB channels together on the same measures. It should be remembered that the PSB channels together are required to deliver the range of purposes and characteristics, rather than any channel alone. However, the remit of S4C and its role in a devolved nation mean that opinions relating to purpose 1 informing our understanding of the world and purpose 3 reflecting UK cultural identity are particularly relevant.
Summary: S4C (2)

Key themes

• For regular viewers of S4C Welsh language programming in 2010, the strongest PSB associations with the channel continued to be connected to purpose 1 and purpose 3, for example:
  – Purpose 3 – non-News: Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation (82%)
  – Purpose 1 – News: Its news programmes for people in Wales provide a wide range of good quality news about Wales (74%)
  – Purpose 1 – News: Its news programmes are trustworthy (72%)
  – Purpose 3 – Portrayal: It portrays Wales well to the rest of the UK* (74%)
  – Purpose 3 – UK Culture: It covers big national events well, like sports, music events or major news stories (72%)

• Regular viewers of Welsh language programmes on S4C also tended to say that they trusted the channel (80%) and that they saw the channel as providing high quality programmes (71%).

*S4C Digital is available across the UK on digital satellite systems, and so while this statement may not seem particularly applicable to the S4C channel, nonetheless responses show that viewers of its Welsh language programmes feel this is achieved by the channel. It may also be the case that respondents simply focused their response on the first part of the statement.
Fig 20 Welsh language viewer opinions of delivery of PSB purposes 1 and 2, 2009

Purpose 1
- Its programmes help me understand what’s going on in the world today: 87% PSB, 58% S4C
- Its news programmes are trustworthy: 83% PSB, 72% S4C
- Its news programmes for people in Wales provide a wide range of good quality news about Wales: 64% PSB, 74% S4C

Purpose 2
- It shows interesting programmes about history, sciences or the arts: 72% PSB, 52% S4C
- As a result of watching its programmes I’ve become more interested in particular subjects: 73% PSB, 60% S4C

Extent to which the characteristic applies to the channel(s), where 10 means ‘applies completely’ and 1 means ‘does not apply at all’

Base = Self-reported regular viewers of S4C (194); All channels combined (203) (amalgamated data: January 10, April 10, July 10, October 10
Source: PSB Tracker, GfK NOP
Fig 21 Welsh language viewer opinions of delivery of PSB purposes 3 and 4, 2009

**Purpose 3**

- Aside from news, provides range of good quality progs about region/nation, made for people in region/nation
  - PSB channels: 10/9/8/7: 57%
  - S4C: 10/9/8/7: 82%
- It covers big national events well, like sports, music events or major news stories
  - PSB channels: 10/9/8/7: 87%
  - S4C: 10/9/8/7: 72%
- Its entertainment and factual programmes show people from different parts of the UK
  - PSB channels: 10/9/8/7: 75%
  - S4C: 10/9/8/7: 52%
- It portrays Wales well to the rest of the UK
  - PSB channels: 10/9/8/7: 48%
  - S4C: 10/9/8/7: 74%
- It shows high quality soaps or dramas made in the UK
  - PSB channels: 10/9/8/7: 66%
  - S4C: 10/9/8/7: 57%

**Purpose 4**

- Its programmes show different kinds of cultures within the UK
  - PSB channels: 10/9/8/7: 70%
  - S4C: 10/9/8/7: 41%
- Its programmes offer a range of opinions on subjects and issues
  - PSB channels: 10/9/8/7: 73%
  - S4C: 10/9/8/7: 55%

Extent to which the characteristic applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'

Base = Self-reported regular viewers of S4C (194); All channels combined (203) (amalgamated data: January 10, April 10, July 10, October 10). Source: PSB Tracker, GfK NOP
**Fig 22 Welsh language viewer opinions of delivery of PSB characteristics, 2009**

**Characteristics**

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>PSB channels: 10/9/8/7</th>
<th>S4C: 10/9/8/7</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRUST - I trust this channel*</td>
<td>76%</td>
<td>80%</td>
</tr>
<tr>
<td>QUALITY - It shows well-made, high quality programmes</td>
<td>86%</td>
<td>71%</td>
</tr>
<tr>
<td>ENGAGING - It shows programmes I want to watch</td>
<td>67%</td>
<td>64%</td>
</tr>
<tr>
<td>ORIGINAL - It shows enough new programmes, made in the UK</td>
<td>65%</td>
<td>53%</td>
</tr>
<tr>
<td>ENGAGING - Its programmes reflect the interests and concerns of people like me</td>
<td>73%</td>
<td>64%</td>
</tr>
<tr>
<td>INNOVATIVE - It shows programmes with new ideas and different approaches</td>
<td>69%</td>
<td>45%</td>
</tr>
<tr>
<td>CHALLENGING - It shows programmes that make me stop and think</td>
<td>45%</td>
<td>54%</td>
</tr>
</tbody>
</table>

**Extent to which the characteristic applies to the channel(s), where 10 means ‘applies completely’ and 1 means ‘does not apply at all’**

Base = Self-reported regular viewers of S4C (194); All channels combined (203) (amalgamated data: January 10, April 10, July 10, October 10). Source: PSB Tracker, GfK NOP
Overall satisfaction with PSB
Respondents are asked to rate how satisfied they are that all of the main PSB channels put together are providing the Purposes and Characteristics. This section looks at overall satisfaction among the total sample as well split by the various demographic sub-groups and methods of watching TV.

Key themes

Overall satisfaction with PSB broadcasting remains high, with almost three quarters (71%) of those who ever watch any PSB channel claiming to be either quite or very satisfied. Satisfaction with PSB broadcasting overall is unchanged year-on-year and also versus 2007.

Among the different age groups, satisfaction with PSB broadcasting in 2010 is higher among 16-24 year olds (80%) compared to all respondents (71%) but significantly lower among respondents aged 55-64 years old (67%). Respondents in the DE social economic group claim to be more satisfied than the average (73% vs. 71%), whilst those in the social economic group AB claim to be less satisfied (66%).

When asked their level of satisfaction compared to one year ago, 13% claim to have increased satisfaction compared to the previous year which is in line with levels recorded in 2009. However, significantly fewer people claim to be ‘less satisfied’ compared to the results for this question last year (18% vs. 21%). Key reasons for declining satisfaction include ‘too many repeats’ (39%) and ‘not enough quality programmes’ (24%). In addition, one in ten (12%) respondents claiming to be less satisfied versus the previous year cite ‘too many reality programmes’ as a reason for declining satisfaction.
A greater proportion of respondents who have conducted any non-linear viewing (either through a DVR, online or via TV on-demand) claim to have the same or increased satisfaction versus the previous year compared to respondents who have not used these services. This indicates that the increased choice and flexibility offered by non-linear viewing may be resulting in increased satisfaction over time.

The above hypothesis is supported by recent qualitative research conducted by Ofcom into PSB broadcasting. The findings indicate that technology is inextricably linked with TV viewing for younger viewers and that they are generally more positive about TV overall as a result of the benefits offered by advancements in technology. In contrast, older, less technologically savvy viewers are more likely to perceive an overall decline in standards and tend to be more daunted by the prospects of using technology in relation to TV viewing.
Q6d. And now, if you think about ALL the main channels put together - in other words BBC1, BBC2, ITV1, Channel 4 (S4C), Channel 5, BBC3, BBC4, BBC News and BBC Parliament - how satisfied are you that TOGETHER they provide these elements?

Base = All respondents who ever watch any PSB channel. 2007 (7157), 2008 (6824), 2009 (6947), 2010 (6909)
Fig 24 Overall satisfaction with PSB by age and Socio-economic group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% claiming to be quite / very satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>71%</td>
</tr>
<tr>
<td>16-24</td>
<td>80%</td>
</tr>
<tr>
<td>25-34</td>
<td>71%</td>
</tr>
<tr>
<td>35-44</td>
<td>74%</td>
</tr>
<tr>
<td>45-54</td>
<td>69%</td>
</tr>
<tr>
<td>55-64</td>
<td>67%</td>
</tr>
<tr>
<td>65+</td>
<td>69%</td>
</tr>
<tr>
<td>AB</td>
<td>66%</td>
</tr>
<tr>
<td>C1C2</td>
<td>71%</td>
</tr>
<tr>
<td>DE</td>
<td>73%</td>
</tr>
</tbody>
</table>

Q6d. And now, if you think about ALL the main channels put together - in other words BBC1, BBC2, ITV1, Channel 4 (S4C), Channel 5, BBC3, BBC4, BBC News and BBC Parliament - how satisfied are you that TOGETHER they provide these elements? (net satisfied shown here)

Base = All who ever watch any PSB channels (6909), amalgamated data: Jan 10, Apr 10, Jul 10, Oct 10
Male (3212); Female (3697); 16-24 (676); 25-34 (1239); 35-44 (1169); 45-54 (1304); 55-64 (1161); 65+ (1351); AB (1553); C1C2 (3367); DE (1860); England (3942); Scotland (984); Wales (996); N. Ireland (987); White (6425); MEG (428)
Q. Thinking again about these channels (BBC1, BBC2, ITV1, Channel 4, (S4C), Channel 5, BBC3, BBC4, BBC News (formerly BBC News 24) and BBC Parliament), do you think you are more satisfied, less satisfied or have the same satisfaction with these as a year ago.

When asked their level of satisfaction with the PSBs as a whole compared to one year ago, the proportion of respondents saying they are more satisfied has remained stable compared to last year, with 13% saying their satisfaction has increased.

However, significantly fewer people claimed to be ‘less satisfied’ compared to the results for this question last years (18% vs. 21%).

Base: All respondents who are less/more satisfied that a year ago (1263/863)
Fig 26 Reasons for declining overall satisfaction with PSB compared to one year ago

Among those who said they were less satisfied than a year ago, they were asked why they said this.

<table>
<thead>
<tr>
<th>Reasons for declining overall satisfaction</th>
<th>All</th>
<th>55-64</th>
<th>AB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Too many repeats</td>
<td>39%</td>
<td>43%</td>
<td>32%</td>
</tr>
<tr>
<td>No quality programmes anymore/removed programmes that I liked</td>
<td>24%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Not enough new programmes/need more variety</td>
<td>16%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Too many reality programmes</td>
<td>12%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>A lot of the programmes do not interest me</td>
<td>9%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Do not watch it / get bored / nothing to watch</td>
<td>7%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Not enough good dramas (without sex/violence)</td>
<td>5%</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>
Fig 27 Overall satisfaction with PSB by viewing platform

% claiming to be quite / very satisfied

- **Total**: 71%
- **Terrestrial only**: 64%
- **Digital TV**: 72%
- **Multichannel TV**: 72%
- **Cable/Satellite**: 72%
- **Freeview Only**: 71%
- **Freeview/Freesat Only**: 72%

Base = All respondents who ever watch any PSB channels (6909, amalgamated data: Jan 10, Apr 10, Jul 10, Oct 10)
Terrestrial only (532); Digital TV (6294); Multichannel TV (6346); Cable/Satellite (4153); Freeview Only (2141); Freeview/Freesat Only (2301)
Fig 28 Overall Satisfaction with PSB by Linear Viewing and DVR Usage

<table>
<thead>
<tr>
<th>Category</th>
<th>% Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any non-linear viewing</td>
<td>71%</td>
</tr>
<tr>
<td>No non-linear viewing</td>
<td>71%</td>
</tr>
<tr>
<td>Use DVRs</td>
<td>71%</td>
</tr>
<tr>
<td>Use TV on demand</td>
<td>73%</td>
</tr>
<tr>
<td>Use Online viewing</td>
<td>71%</td>
</tr>
<tr>
<td>Total sample</td>
<td>71%</td>
</tr>
</tbody>
</table>

% claiming to be quite / very satisfied

Shows significant differences between categories (99% level – A/B/C/D/E/F)

Base: All who ever watch any PSB channels: Any non-linear viewing (4671), No non-linear viewing (2238), Use DVRs (3325), Use TV on demand (1702), Use Online viewing (2359), Age 16-24 (676), 25-34 (1239), 35-44 (1169), 45-54 (1304), 55+ (2512), Total (6909)
Fig 29 Overall satisfaction with PSB compared to one year ago by linear viewing and non-linear viewing

% claiming the same/increased satisfaction compared to one year ago

<table>
<thead>
<tr>
<th>Category</th>
<th>Same satisfaction</th>
<th>More satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any non-linear viewing</td>
<td>66%</td>
<td>13%</td>
</tr>
<tr>
<td>No non-linear viewing</td>
<td>61%</td>
<td>12%</td>
</tr>
<tr>
<td>Use DVRs</td>
<td>66%</td>
<td>13%</td>
</tr>
<tr>
<td>Use TV on demand</td>
<td>68%</td>
<td>14%</td>
</tr>
<tr>
<td>Use Online viewing</td>
<td>67%</td>
<td>15%</td>
</tr>
<tr>
<td>Total</td>
<td>64%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Shows significant differences between categories (99% level – A/B/C/D/E/F)

Base: All who ever watch any PSB channels: Any non-linear viewing (4671), No non-linear viewing (2238), Use DVRs (3325), Use TV on demand (1702), Use Online viewing (2359), Age 16-24 (676), 25-34 (1239), 35-44 (1169), 45-54 (1304), 55+ (2512), Total (6909)
Children’s PSB
Children’s PSB (1)

- This section looks in detail at Children’s PSB. Children’s programming is broadcast on the five main PSB channels while dedicated children’s channels are also available from the PSB broadcasters and commercial broadcasters via digital TV. Note: CiTV, Nickelodeon and Disney channels are only included as context, as these are not PSB channels.

- In the PSB Tracker, parents/carers are asked about their opinions of Children’s programming. Before July 2008 parents or guardians of children aged under 16 were asked to rate the PSB channels, excluding CBBC and CBeebies, on having a range of high quality and UK-made programmes for children. Parents were asked about channels that they themselves regularly viewed, to get an informed opinion.

- However, in order to improve this measurement, from July 2008 parents or guardians were asked to give opinions on CBBC and CBeebies in addition to the five main PSB channels, and parents were asked their opinions of the channels that their child regularly watched. While the former data are included in the overview sections of this report, in order to give a view over time, within this section we focus only on data from 2008.
Children’s PSB (2)

Key themes

• Parents/carers of children under the age of 15 years continue to rate the delivery of PSB children’s programming as important (85%).

• The dedicated children’s channels, CBBC and CBeebies, continued to receive high ratings on offering a wide range of high-quality and UK-made programmes for children from the parents/carers of children regularly watching these in 2010 as in 2009. In 2010 75% rated CBBC highly on this measure and 83% rated CBeebies highly.

• Just under half of parents/carers of children watching BBC One rated the channel highly on offering a wide range of high-quality and UK-made programmes for children (49%). BBC Two (31%) and Five (33%) were rated similarly to each other, with around a third rating them highly on this measure. ITV1 received higher ratings in 2010 compared to 2009 increasing from 33% to 39% rating the channel highly on this aspect.

• In order to provide context for the findings for CBBC and CBeebies, parents were also asked about their views on CiTV, the Disney channels generally and the Nickelodeon channels as a whole. Note that the non-PSB channels’ output is not necessarily UK focused. In 2010, fewer of the parents see the commercial Children’s channels as offering a wide range of high-quality and UK-made programmes for children compared to CBBC (75%) and CBeebies (83%). Six in 10 respondents rated CiTV (60%) highly on this measure, while closer to half rated the Disney channels (52%) and Nickelodeon (48%) channels highly on this.
Fig 30 Parents’ opinions on the importance of Children’s PSB

‘It provides a wide range of high quality, UK-made programmes for children’

<table>
<thead>
<tr>
<th>Year</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>83</td>
</tr>
<tr>
<td>2009</td>
<td>81</td>
</tr>
<tr>
<td>2010</td>
<td>85</td>
</tr>
</tbody>
</table>

Base = (Q4 08 only)- Those with any children in household (219, 999, 1024) 0-4 years old (93*, 383, 419); 5-11 years old (125, 534, 555); 12-15 years old (81*, 443, 421).

* Small base size – 2008 data should be viewed as indicative only

General Importance ratings (% rating 10/9/8/7)

↑ 2008  ↑ 2009  Shows direction of significant differences from 2008/2009 to 2010, 99% level)
Fig 31 Parents’ opinions on the delivery of Childrens’ PSB

‘It provides a wide range of high quality, UK-made programmes for children’

Extent to which the purpose/characteristics applies to the channel(s), where 10 means is the highest score and one is the lowest. Amongst parents whose children are regular viewers of each channel

Base for ‘all PSB channels’: All respondents whose children regularly watch at least one channel (Q4 2008 only)= 357, 1513, 1448
Base for individual channels: Those whose children are regular viewers of each channel: (July, October 08, Jan, Apr, Jul, Oct 09, Jan, Apr, Jul, Oct 10). CBBC = 403,837,805 CBeebies = 416, 829, 782 BBC1 = 446, 937, 906 BBC2 = 246, 540, 477 ITV1 = 386, 882, 767 Channel 4 = 309, 650, 570 Five = 235, 596, 574
Digital channels
Fig 32 BBC Three

% Rating 10/9/8/7

- **News programmes are trustworthy**: 47%
- **Helps me understand what's going on in world**: 32%
- **Interesting programmes about history/science/arts**: 41%
- **Watching programmes - more interested in subjects**: 48%
- **Covers big national events well**: 39%
- **Ent/factual programmes - people from different parts of UK**: 49%
- **High quality soaps/dramas made in UK**: 53%
- **Portrays my region well to rest of UK**: 23%
- **Offers range of opinions of subjects/issues**: 44%
- **Shows different kinds cultures within UK**: 50%
- **Shows well-made, high quality programmes**: 65%
- **Enough new programmes, made in UK**: 56%
- **Shows programmes with new ideas/different approaches**: 57%
- **Shows programmes that make me stop and think**: 46%
- **It shows programmes I want to watch**: 60%
- **Reflects interests/concerns of people like me**: 45%
- **I trust this channel**: 60%

2009 Shows direction of significant differences from 2006/2009 to 2010, 99% level)

Base = Self-reported regular viewers of BBC3 (690)

Amalgamation of Jan, Apr, July, Oct 10
News programmes are trustworthy
Helps me understand what's going on in the world
Interesting programmes about history/science/arts
Watching programmes - more interested in subjects
Covers big national events well
Ent/ factual programmes - people from different parts of UK
High quality soaps/dramas made in UK
Portrays my region well to the rest of UK
Offers range of opinions of subjects/issues
Shows different kinds of cultures within UK
Shows well-made, high quality programmes
Enough new programmes, made in UK
Shows programmes with new ideas/different approaches
Shows programmes that make me stop and think
It shows programmes I want to watch
Reflects interests/concerns of people like me
I trust this channel

% Rating 10/9/8/7

Fig 33 BBC Four

Base = Self-reported regular viewers of BBC4 (454)
Amalgamated data (Jan, Apr, July, Oct 10)
Shows direction of significant differences from 2006/2009 to 2010, 99% level)
News programmes are trustworthy: 84%
Helps me understand what's going on in world: 88%
Watching programmes - more interested in subjects: 63%
Covers big national events well: 73%
Portrays my region well to rest of UK: 41%
Offers range of opinions of subjects/issues: 69%
Shows different kinds cultures within UK: 58%
Shows well-made, high quality programmes: 74%
Enough new programmes, made in UK: 53%
Shows programmes with new ideas/different approaches: 51%
Shows programmes that make me stop and think: 66%
It shows programmes I want to watch: 60%
Reflects interests/concerns of people like me: 63%
I trust this channel: 78%
Fig 35 BBC Parliament

% Rating 10/9/8/7

News programmes are trustworthy 80
Helps me understand what's going on in world 72
Offers range of opinions of subjects/issues 73
Shows well-made, high quality programmes 65
Enough new programmes, made in UK 52
Shows programmes with new ideas/different approaches 39
Shows programmes that make me stop and think 65
It shows programmes I want to watch 66
I trust this channel 74

Base = Self-reported regular viewers of BBC Parliament (108)
Amalgamated data (Jan, Apr, Jul, Oct 10)

2009 Shows direction of significant differences from 2006/2009 to 2010, 99% level)
### Fig 36 ITV2

#### Watching programmes - more interested in subjects

<table>
<thead>
<tr>
<th>Activity</th>
<th>Rating 10/9/8/7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covers big national events well</td>
<td>42</td>
</tr>
<tr>
<td>Ent/factual programmes - people from different parts of UK</td>
<td>33</td>
</tr>
<tr>
<td>High quality soaps/dramas made in UK</td>
<td>45</td>
</tr>
<tr>
<td>Portrays my region well to rest of UK</td>
<td>27</td>
</tr>
<tr>
<td>Offers range of opinions of subjects/issues</td>
<td>37</td>
</tr>
<tr>
<td>Shows different kinds cultures within UK</td>
<td>34</td>
</tr>
<tr>
<td>Shows well-made, high quality programmes</td>
<td>54</td>
</tr>
<tr>
<td>Enough new programmes, made in UK</td>
<td>40</td>
</tr>
<tr>
<td>Shows programmes with new ideas/different approaches</td>
<td>43</td>
</tr>
<tr>
<td>Shows programmes that make me stop and think</td>
<td>36</td>
</tr>
<tr>
<td>Shows programmes that I want to watch</td>
<td>54</td>
</tr>
<tr>
<td>Reflects interests/concerns of people like me</td>
<td>40</td>
</tr>
<tr>
<td>I trust this channel</td>
<td>49</td>
</tr>
</tbody>
</table>

Base = Self-reported regular viewers of ITV2 (390)

Amalgamated Ofcom (Apr, Oct 10)
Watching programmes - more interested in subjects

Ent/factual programmes - people from different parts of UK

High quality soaps/dramas made in UK

Portrays my region well to rest of UK

Offers range of opinions of subjects/issues

Shows different kinds cultures within UK

Shows well-made, high quality programmes

Enough new programmes, made in UK

Shows programmes with new ideas/different approaches

Shows programmes that make me stop and think

It shows programmes I want to watch

Reflects interests/concerns of people like me

I trust this channel

Base = Self-reported regular viewers of E4 (559)

Amalgamated data (Apr, Oct 10)
Fig 38 More 4

- News programmes are trustworthy
- Helps me understand what's going on in world
- Interesting programmes about history/science/arts
- Watching programmes - more interested in subjects
- Covers big national events well
- Ent/factual programmes - people from different parts of UK
- High quality soaps/dramas made in UK
- Portrays my region well to rest of UK
- Offers range of opinions of subjects/issues
- Shows different kinds cultures within UK
- Shows well-made, high quality programmes
- Enough new programmes, made in UK
- Shows programmes with new ideas/different approaches
- Shows programmes that make me stop and think
- It shows programmes I want to watch
- Reflects interests/concerns of people like me
- I trust this channel

Base = Self-reported regular viewers of More 4 (274)

Amalgamated data (Apr, Oct 10)

% Rating 10/9/8/7
Helps me understand what's going on in the world

Interesting programmes about history/science/arts

Watching programmes - more interested in subjects

Entertainment/ factual programmes - people from different parts of the UK

Portrays my region well to rest of UK

Offers range of opinions of subjects/issues

Shows different kinds of cultures within the UK

Shows well-made, high quality programmes

Enough new programmes, made in the UK

Shows programmes with new ideas/different approaches

Shows programmes that make me stop and think

It shows programmes I want to watch

Reflects interests/concerns of people like me

I trust this channel

Base = Self-reported regular viewers of Yesterday (301)
Fig 40 Sky1

**Purpose 2**
- Interesting programmes about history/science/arts
- Watching programmes - more interested in subjects

**Purpose 3**
- Covers big national events well
- Ent/factual programmes - people from different parts of UK
  - High quality soaps/dramas made in UK
  - Portrays my region well to rest of UK

**Purpose 4**
- Offers range of opinions of subjects/issues
- Shows different kinds cultures within UK

**Characteristics**
- Shows well-made, high quality programmes
- Enough new programmes, made in UK
- Shows programmes with new ideas/different approaches
- Shows programmes that make me stop and think
- It shows programmes I want to watch
- Reflects interests/concerns of people like me
- I trust this channel

Base = Self-reported regular viewers of Sky One (481)
Purpose 1

News programmes are trustworthy
Helps me understand what's going on in world

Purpose 2

Watching programmes - more interested in subjects

Purpose 3

Covers big national events well
Portrays my region well to rest of UK

Purpose 4

Offers range of opinions of subjects/issues
Shows different kinds cultures within UK

Characteristics

Shows well-made, high quality programmes

Enough new programmes, made in UK

Shows programmes with new ideas/different approaches
Shows programmes that make me stop and think
It shows programmes I want to watch
Reflects interests/concerns of people like me
I trust this channel

Base = Self-reported regular viewers of Sky News (429)
Fig 42 Discovery

**Purpose 1**
- Helps me understand what's going on in world: 80%

**Purpose 2**
- Interesting programmes about history/science/arts: 89%
- Watching programmes - more interested in subjects: 79%

**Purpose 3**
- Ent/factual programmes - people from different parts of UK: 48%
- Portrays my region well to rest of UK: 29%
- Offers range of opinions of subjects/issues: 69%

**Purpose 4**
- Shows different kinds cultures within UK: 53%
- Shows well-made, high quality programmes: 88%

**Characteristics**
- Enough new programmes, made in UK: 41%
- Shows programmes with new ideas/different approaches: 75%
- Shows programmes that make me stop and think: 82%
- It shows programmes I want to watch: 84%
- Reflects interests/concerns of people like me: 66%
- I trust this channel: 79%

Base = Self-reported regular viewers of Discovery Channel (447) Apr, Oct 09
Fig 43 Living

**Purpose 2**  
Watching programmes - more interested in subjects

**Purpose 3**  
Ent/factual programmes - people from different parts of UK  
High quality soaps/dramas made in UK  
Portrays my region well to rest of UK

**Purpose 4**  
Offers range of opinions of subjects/issues  
Shows different kinds cultures within UK

**Characteristics**  
Shows well-made, high quality programmes  
Enough new programmes, made in UK  
Shows programmes with new ideas/different approaches  
Shows programmes that make me stop and think  
It shows programmes I want to watch  
Reflects interests/concerns of people like me  
I trust this channel

% Rating 10/9/8/7

- Watching programmes - more interested in subjects: 51%
- Ent/factual programmes - people from different parts of UK: 37%
- High quality soaps/dramas made in UK: 40%
- Portrays my region well to rest of UK: 18%
- Offers range of opinions of subjects/issues: 42%
- Shows different kinds cultures within UK: 34%
- Shows well-made, high quality programmes: 67%
- Enough new programmes, made in UK: 29%
- Shows programmes with new ideas/different approaches: 52%
- Shows programmes that make me stop and think: 43%
- It shows programmes I want to watch: 67%
- Reflects interests/concerns of people like me: 45%
- I trust this channel: 52%
Trend analysis
Key driver analysis

- Additional analysis was undertaken to explore trends in the data over time and understand how respondent demographics influence their responses. Two types of analysis were undertaken:
  - The first was regression analysis which explained how much variation in respondents' answers can be explained by demographic differences, i.e., age, socio-economic group (SEG), and TV platform.
  - The second analysis was comparing mean scores by age, SEG, and TV platform between 2010 and 2007.

- The regression analysis compared results for different demographic groups.
- It found that age, TV platform, and socio-economic group all had some impact on how respondents answered. The general trends were as follows:
  - **TV platform**
    - Respondents with Terrestrial only TV tended to be less positive across 12 of the 20 statements.
    - Respondents with satellite TV tended to give higher scores on statements relating to high-quality soaps and dramas, provision of well-made, high-quality programmes, programmes that make them stop and think, and programmes that they want to watch.
    - Those with Freeview tended to be less satisfied about the provision of nations/regions news and other programmes about their nation/region.
  - **SEG**
    - Respondents in AB households were less satisfied with 17 of the statements. The exceptions were trustworthiness of news and for people in A households, programmes that explain what is going on in the world or offer a range of opinions on subjects and issues.
  - **Age**
    - Those respondents who were 55+ were more positive about the provision of nations/regions news and other nations/regions programmes, as well as how their nation/region is portrayed.
Mean scores over time

- The mean score analysis presented on the following 3 slides show results for 2007 compared to 2010 for respondents by TV platform, age and socio economic group.

- The results suggests that those respondents with multichannel TV tended to be more positive over time on statements relating to their level of engagement e.g. showing programmes they want to watch or that reflected their interests compared to those with Terrestrial only television.

- Over time, those using Freeview tended to be more positive about the provision of programmes that are well-made, high-quality, make them stop and think, and that they wanted to watch, compared to those with Terrestrial only television.
## Mean Scores for PSB Purposes and Characteristics
### 2010 vs. 2007 by TV Platform

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Its programmes help me understand what’s going on in the world today</td>
<td>7.15</td>
<td>7.05</td>
<td>7.05</td>
<td>-0.30</td>
<td>7.14</td>
<td>7.05</td>
<td>6.88</td>
<td>-0.07</td>
<td>-0.13</td>
</tr>
<tr>
<td>Its news programmes are trustworthy</td>
<td>6.85</td>
<td>6.63</td>
<td>7.05</td>
<td>0.20</td>
<td>6.73</td>
<td>6.56</td>
<td>6.68</td>
<td>0.08</td>
<td>0.14</td>
</tr>
<tr>
<td>Its regional news programmes provide a wide range of good quality news about my area</td>
<td>6.65</td>
<td>6.48</td>
<td>7.19</td>
<td>0.50</td>
<td>6.68</td>
<td>6.47</td>
<td>6.48</td>
<td>-0.02</td>
<td>0.09</td>
</tr>
<tr>
<td>It shows high quality soaps or dramas made in the UK</td>
<td>6.42</td>
<td>6.48</td>
<td>7.17</td>
<td>-0.05</td>
<td>6.47</td>
<td>6.42</td>
<td>6.48</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>It shows interesting programmes about history, science or the arts</td>
<td>5.90</td>
<td>5.70</td>
<td>7.17</td>
<td>0.20</td>
<td>5.97</td>
<td>5.75</td>
<td>6.48</td>
<td>0.21</td>
<td>0.06</td>
</tr>
<tr>
<td>It portrays my region/nation well to the UK</td>
<td>5.09</td>
<td>6.00</td>
<td>7.05</td>
<td>0.06</td>
<td>6.00</td>
<td>6.57</td>
<td>6.38</td>
<td>-0.14</td>
<td>-0.14</td>
</tr>
<tr>
<td>As a result of watching its programmes, I’ve become more interested in particular subjects</td>
<td>5.89</td>
<td>6.53</td>
<td>7.03</td>
<td>0.14</td>
<td>6.53</td>
<td>6.13</td>
<td>6.28</td>
<td>0.05</td>
<td>0.05</td>
</tr>
<tr>
<td>It shows big national events well, like sports, music events or major news stories</td>
<td>5.01</td>
<td>6.00</td>
<td>7.03</td>
<td>0.02</td>
<td>5.97</td>
<td>6.13</td>
<td>6.28</td>
<td>-0.15</td>
<td>-0.15</td>
</tr>
<tr>
<td>It covers entertainment and factual programmes that make me stop and think</td>
<td>5.12</td>
<td>5.97</td>
<td>7.03</td>
<td>0.04</td>
<td>5.97</td>
<td>6.13</td>
<td>6.26</td>
<td>0.03</td>
<td>0.03</td>
</tr>
<tr>
<td>It shows programmes about topics that interest me</td>
<td>5.04</td>
<td>5.97</td>
<td>7.04</td>
<td>0.04</td>
<td>5.97</td>
<td>6.13</td>
<td>6.26</td>
<td>0.03</td>
<td>0.03</td>
</tr>
<tr>
<td>It portrays my region/nation well to the rest of the UK</td>
<td>0.12</td>
<td>0.14</td>
<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
<td>0.04</td>
<td>0.04</td>
</tr>
<tr>
<td>It portrays my region/nation well to the rest of the UK</td>
<td>0.14</td>
<td>0.14</td>
<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
<td>0.04</td>
<td>0.04</td>
</tr>
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<td>It portrays my region/nation well to the rest of the UK</td>
<td>0.14</td>
<td>0.14</td>
<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
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<td>0.04</td>
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<td>7.04</td>
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<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
<td>0.04</td>
<td>0.04</td>
</tr>
<tr>
<td>It portrays my region/nation well to the rest of the UK</td>
<td>0.14</td>
<td>0.14</td>
<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
<td>0.04</td>
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<td>0.14</td>
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<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
<td>0.04</td>
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<td>0.14</td>
<td>0.14</td>
<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
<td>0.04</td>
<td>0.04</td>
</tr>
<tr>
<td>It portrays my region/nation well to the rest of the UK</td>
<td>0.14</td>
<td>0.14</td>
<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
<td>0.04</td>
<td>0.04</td>
</tr>
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<td>It portrays my region/nation well to the rest of the UK</td>
<td>0.14</td>
<td>0.14</td>
<td>7.04</td>
<td>0.06</td>
<td>0.12</td>
<td>0.14</td>
<td>6.26</td>
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<td>0.14</td>
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</tr>
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<td>0.14</td>
<td>7.04</td>
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<td>It portrays my region/nation well to the rest of the UK</td>
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©Ofcom
## Mean Scores for PSB Purposes and Characteristics 2010 vs. 2007 by Age

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>16-24</td>
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<td>6.58</td>
<td>6.57</td>
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</tr>
</tbody>
</table>

All of the statements are measured based on a scale of 1 to 10, with the exception of the satisfaction question. The results for this question are presented here based on a 5 point scale.
# Mean Scores for PSB Purposes and Characteristics
## 2010 vs. 2007 by socio economic group

<table>
<thead>
<tr>
<th>Social grade</th>
<th>Mean Scores 2010</th>
<th>Mean Scores 2007</th>
<th>Trend 2010 vs. 2007</th>
<th>Trend 2010 vs. 2007</th>
<th>Year of Research</th>
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<tr>
<td>A</td>
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</tr>
<tr>
<td>B</td>
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<td>2010</td>
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<td>7.37</td>
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<td>+0.16</td>
<td>0.16</td>
<td>2010</td>
</tr>
<tr>
<td>E</td>
<td>7.07</td>
<td>7.00</td>
<td>+0.07</td>
<td>0.07</td>
<td>2010</td>
</tr>
</tbody>
</table>
Appendices
Methodology

• Telephone interviews (CATI) with UK adults aged 16+.
• Interview length – 25 minutes.
• Fieldwork each year spread over 1 month, four times a year (i.e. quarterly).
• 1,750 interviews in total conducted each quarter (1,000 in England; 250 in Scotland; 250 in Wales; 250 in Northern Ireland).
• Quotas are applied and survey data is weighted to be nationally representative of adults 16+. Weights applied to: Gender, Age, Region, Social grade and Ethnicity.
• An additional ‘Welsh Boost’ survey of 50 interviews is conducted each quarter, among respondents living in Wales who watch the Welsh language programmes on S4C.
• Unless stated otherwise, analysis is based on self-defined regular viewers of each channel.
Questionnaire design

• Respondents are asked to rate specific TV channels on each of the PSB purposes and characteristics relevant to that channel.

• Grouped into four different aspects of broadcasting (such as ‘Programme quality' or ‘Reflecting real people in today’s society’), so as to focus respondents’ minds and make survey more manageable.

• Respondents are asked to rate each of the nine ‘PSB’ channels separately for each of the statements (BBC1, BBC2, ITV1, Channel 4 / S4C, Five, BBC3, BBC4, BBC News, BBC Parliament). Respondents were only asked to rate the PSB channels that they watched regularly.

• They were asked to rate on a 10 point scale the degree to which they felt the statement applied, where 10 means “highest score” and 1 is “lowest score.” Respondents were instructed to answer ‘don’t know’ if they were unsure about a particular channel or statement.

• Respondents were then asked to rate the provision of each statement across all of the main PSB channels combined, and the importance of the main PSB channels performing each statement.

Note: Respondents were asked to rate each channel, all channels combined, and importance for the first statement, and then rate them for the second statement, etc.

The order of statements and channels within each section rotated to prevent order bias.

• From July 2007 onwards, respondents in multi-channel households were asked to rate some digital channels that they watched: ITV2, E4, More 4, Yesterday, Sky One, Sky News, Discovery Channel, MTV, Living. (MTV removed in Q4 2008).

• Since October 2007, we have asked half the sample to rate how important generally they thought it was that the PSB channels meet each of the statements, and asked the other half to rate how important they thought it was both to them personally, and to society as a whole.
Use of On Demand services

Qex2: “Do you watch any programmes ‘on demand’ through your TV service? By this I mean pay-per-view programmes or using the TV catch-up services that allow you to watch some of the programmes shown in the last week. I do not mean watching programmes that you have personally recorded onto your hard-drive e.g though Sky+ or a PVR/DVR. Base = All in 2010 (6964) Q3 and Q4 09 (3490) 16-24 (685, 320), 25-34 (1257, 647), 35-44 (1176, 607), 45-54 (1312, 648), 55+ (2525, 1263).”

Shows direction of significant differences from 2009 to 2010, 99% level)
Online viewing

Qex3: “Do you ever use the internet to watch or download programmes or films?”
Base = All in 2010 (6964) Q3 and Q4 09 (3490) 16-24 (685, 320), 25-34 (1257, 647), 35-44 (1176, 607), 45-54 (1312, 648), 55+ (2525, 1263)

2009 Shows direction of significant differences from 2009 to 2010, 99% level)
Qex1: “Do you use a recorder for your TV service that allows you to record programmes onto a hard drive, and pause and rewind live TV. Sky Plus, V Plus, BT Vision V-Box all have this as part of the service? Alternatively a digital recorder can be a separate set-top-box (DVR)?”

Base = All in 2010 (6964), Q3 and Q4 09 (3490), 16-24 (685, 320), 25-34 (1257, 647), 35-44 (1176, 607), 45-54 (1312, 648), 55+ (2525, 1263)
Any non-linear viewing (DVR, TV on demand or online viewing)

Qex1,2 and 3 combined.
Base = All in 2010 (6964), Q3 and Q4 09 (3490), 16-24 (685, 320), 25-34 (1257, 647), 35-44 (1176, 607), 45-54 (1312, 648), 55+ (2525, 1263)

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‘It portrays my region well to the rest of the UK’

Importance rating - % saying 10/9/8/7 out of 10

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<tr>
<th>Region</th>
<th>Rating</th>
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<tr>
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<tr>
<td>England</td>
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</tr>
<tr>
<td>Scotland</td>
<td>76</td>
</tr>
<tr>
<td>Wales</td>
<td>72</td>
</tr>
<tr>
<td>NI</td>
<td>80</td>
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</table>

Base = All respondents sample A (3569)
Amalgamated data (Jan 10, Apr 10, July 10, Oct 10)
‘It portrays my region well to the rest of the UK’

Delivery rating - % saying 10/9/8/7 out of 10

<table>
<thead>
<tr>
<th>Region</th>
<th>Delivery Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>33</td>
</tr>
<tr>
<td>England</td>
<td>33</td>
</tr>
<tr>
<td>Scotland</td>
<td>30</td>
</tr>
<tr>
<td>Wales</td>
<td>39</td>
</tr>
<tr>
<td>NI</td>
<td>35</td>
</tr>
</tbody>
</table>

Base = All respondents (6909)
Amalgamated data (Jan 10, Apr 10, July 10, Oct 10)
‘Aside from news, it provides a range of good quality programmes about my region, made for people in my region’

Base = All respondents in sample A (3569)
Amalgamated data (Jan, Apr, July, Oct 10)
‘Aside from news, it provides a range of good quality programmes about my region, made for people in my region’

Extent to which the channel is rated as 10/9/8/7 out of 10 in relation to the purpose/characteristic by regular viewers of each channel

- **UK**: BBC One 43, BBC Two 40, ITV 1 30
- **England**: BBC One 42, BBC Two 28, ITV 1 28
- **Scotland**: BBC One 44, BBC Two 38, ITV 1 40
- **Wales**: BBC One 52, BBC Two 43, ITV 1 41
- **NI**: BBC One 54, BBC Two 33, ITV 1 33

Base = Self-reported regular viewers of each channel in each nation; UK:4998, 2586, 3518, ; England:2861, 1528, 1944; Scotland:698, 350, 481; Wales:758, 406, 511; NI: 681, 302, 582

Amalgamated data (Jan, Apr, Jul, Oct 10)

Source: Ofcom PSB Tracker, GfK NOP
Teletext – Q3 2010 research
Q1 Which of these services on your television have you ever accessed?
Base: All (1749)
Q2 And which of these services have you accessed in the last 6 months?
Base: All who have ever accessed any text services (1332)
Q3 Which of the following types of information have you ever used Teletext for?

Base: All who have ever used analogue/digital Teletext (913)
Since the end of last year changes have been made to the Teletext services you receive on your television. The editorial services such as the news, weather and sport are no longer available. Can I just check, have you noticed these changes to the services?

Base: All who have ever used analogue/digital Teletext (913)
Q5 Which of the following best describe how you feel about the Teletext services that are no longer available?

Base: All who have ever used analogue/digital Teletext (913)

Opinions on removal of Teletext services

- I miss them a lot
- I miss them a little
- I do not miss them at all

Net: Miss a little/lot
Q6 You mentioned that you previously used Teletext. What are you using instead for Teletext services that are no longer available, for example news, weather and sport information, now that Teletext no longer provides it?

Base: All who have ever used analogue/digital Teletext (913)
Q7 Which of these statements best describes how you feel these other services compare with Teletext?
Base: All who now use another source for information Teletext used to provide (835)
Qualitative research
Qualitative research objectives and method

- The following charts provide a short summary of a small-scale, exploratory qualitative study commissioned by Ofcom. The findings presented in this slide pack should be considered in this context.

- In November 2010 Kantar Media undertook a small scale qualitative research study for Ofcom to:
  - help understand factors influencing viewers’ opinions of PSB programming;
  - explore potential reasons why opinions on some aspects of PSB provision have become more positive for some over time (as identified in our PSB Tracker), within the context of an overall decrease in spending on PSB programmes; and
  - cognitively test the current PSB tracker statements.

- Participants were asked about their claimed viewing behaviours, their opinions about television, each of the PSB channels, the role of new technologies (e.g. catch up services) and how their opinions about television may/may not have changed in the last 4 years. At the end of the discussion groups, participants were informed that spending on PSB programming had declined over the last 4 years and asked their opinion on whether they thought TV on BBC One, BBC Two, ITV1, Channel 4 and Channel 5 had got better or worse over time.

- There were 8 group discussions of 5 to 6 respondents each, lasting 1½ hours each, with pre-tasks including a channel collage and media diary.

- Participants were recruited by use of technology, life stage, socio economic group and location, as outlined below.

<table>
<thead>
<tr>
<th>TV SET-UP</th>
<th>LIFESTAGE / AGE</th>
<th>SEG</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Lower-tech</td>
<td>Family (30-49)</td>
<td>C1C2</td>
<td>London</td>
</tr>
<tr>
<td>2 Higher-tech</td>
<td>Young (25-29)</td>
<td>ABC1</td>
<td>London</td>
</tr>
<tr>
<td>3 Lower-tech</td>
<td>Older family / empty nester (50+)</td>
<td>Mix</td>
<td>Manchester</td>
</tr>
<tr>
<td>4 Higher-tech</td>
<td>Family (30-49)</td>
<td>C1C2</td>
<td>Manchester</td>
</tr>
<tr>
<td>5 Lower-tech</td>
<td>Family (30-49)</td>
<td>Mix</td>
<td>Cardiff</td>
</tr>
<tr>
<td>6 Higher-tech</td>
<td>Older family / empty nester (50+)</td>
<td>Mix</td>
<td>Cardiff</td>
</tr>
<tr>
<td>7 Lower-tech</td>
<td>Older family / empty nester (50+)</td>
<td>C2DE</td>
<td>Glasgow</td>
</tr>
<tr>
<td>8 Higher-tech</td>
<td>Young (18-24)</td>
<td>Mix</td>
<td>Glasgow</td>
</tr>
</tbody>
</table>
• The TV diaries from the pre-task indicated that viewing behaviour varied by age, both in terms of content and in terms of the technology used.

• Non-linear viewing was more widespread among the younger cohort – many of the participants said that they were making use of catch-up services on both TV and PCs. Non linear viewing among the older groups was more confined to DVR use.
  – Younger viewers in the sample were more familiar and more comfortable with technology and they referred to technology more readily when describing TV change. Content and technology were entwined when they were discussing their views on what had changed about TV in the last 4 years. Viewing was habitual, but they said that they took advantage of technology to actively search for their favourite programmes in a time and place that suited them.
  – Among older viewers in the sample, viewing tended to be more passive. When asked their opinion on what had changed about TV in the last 4 years, they tended to describe change in terms of content, which overall they considered separately from the means of access.
  – The research found that technology was inextricably linked with enjoyment of content for younger viewers, whereas older viewers tend to consider technology a separate topic from content. Overall, technology appeared to improve the TV experience for many participants.
  – The research found that younger viewers in the sample tended to be more positive about television; more likely to use technology and more inclined to find programmes they want to watch from across the range of channels and platforms (including online). ‘High-tech’ older viewers tended to use technology in a more limited way – they said that they recorded/paused TV but tended to be more likely to watch live TV and be guided by the schedule.

• The generally more positive opinion on the part of the younger participants extended to the increase in numbers of channels, the wider choice of programmes, the expansion of reality TV and the ‘X-Factor’ phenomenon. The oldest in the sample seemed generally less satisfied with TV. Some expressed nostalgia for the past in terms of perceived higher standards. The research found the younger participants tended to watch more reality TV while the older participants were less attracted by this genre and more inclined to say that they watched more factual programmes.
Perceived changes in TV over time

**MORE CHANNELS**
- Almost all were aware of more channels
- For some, this meant more choice, though some saw no need

**MORE CHOICE**
- Participants mentioned lots of favourite programmes, ranging from soaps, dramas and comedy to news and documentaries
- But some questioned whether this was quantity at expense of quality across so many channels
- Perception of lots of repeats
- And perception of more ads
- But younger participants generally more positive overall

**MORE REALITY TV**
- Perception of more reality TV nowadays—seen to be emblematic of TV
- Guilty pleasure for some, but too much for many
- For some it represented “dumbing down”; it was seen to be formulaic, and “cheap to make”

**X-FACTOR PHENOMENON**
- X factor was mentioned by many participants. Nb fieldwork took place when the programme was on air
- For some, it was a ‘must-see’ show
- It was both entertaining and a talking point
- Event TV is time-bound and counters the timeless non-linear viewing talked about mainly by younger participants.
Most participants were aware of developments in TV technology. Developing technologies appeared to improve the TV experience for many.

**More Control**

- Many participants talked about the greater control offered by different technologies, such as:
  - Record/pause live TV (however, some were uninterested)
  - Series link
  - On demand on computer
  - Content on the internet (even illegally)
  - 4oD and BBC iPlayer, and e.g. channels on BT Vision
- These services appeared to really improve the TV viewing experience for many participants

**Improved TV Services**

- Participants were aware of better quality picture, e.g.:
  - HD (esp. for sport, documentaries), though some saw no difference
  - 3D coming, a few participants were enthusiastic

**Improved TV Sets**

- Most participants were aware of better quality TV sets (even if they did not own them), e.g.:
  - Larger, flat screen, wall mounted
  - Better quality picture and sound
- But participants thought the impact could fade – and the viewing experience becomes normal

**Multiple Sets**

- Multiple sets were thought to be more common
  - Allowing individual viewing
  - This appeared to have more impact among younger people in the sample.
Choice of channels perceived to improve TV experience for some participants, but not all

“I love the fact that you can go onto other channels. That’s what I like: there’s more channels.”
(London, 30-49, low-tech)

“There are a lot more channels and a lot more choice now. You just really are spoilt for choice.”
(Manchester, 30-49, high-tech)

“There are more channels but not necessarily quality channels. You can be drawn into watching stuff that’s mediocre just because it’s there.”
(Manchester, 30-49, high-tech)

“You might have more channels but it doesn’t mean it’s better quality or better variety.”
(Cardiff, 30-49, low-tech)

“I still don’t use a great many channels if I’m being honest, not me.”
(Cardiff, 50+, high-tech)
There were mixed reactions on whether TV programmes were perceived to be improving, but younger participants generally more positive

“I prefer the American stuff on Channel 4. It feels as if it's got a bit more quality to it – better acting, looks richer. It's like money is no object” (Glasgow, 18-24, high-tech)

“A lot of reality TV [now]... You could go to anybody at your work and [ask] ‘did you see X-Factor last night?’... Four years ago you watched your soaps, but it wasn't really a talking point” (Glasgow, 18-24, high-tech)

“I watch The Jungle solely because I can get into conversation with the younger generation. If you don’t watch it then you’ve got no idea what they’re telling you” (Cardiff, 50+, high-tech)

“Some of the programmes do look a bit cheap. They look like they’ve been made on a shoestring.... Nanny 911 and stuff like that, that’s rubbish” (Cardiff, 30-49, low-tech)

“I think there are too many Celebrity get me out of here. I think there is too much of that now. I think it's just overkill now” (Manchester, 50+, low-tech)

(Repeats) “The pot has been spread more thinly, hasn’t it?” (Cardiff, 50+, high-tech)

“I like it that it looks better [the picture quality] but most of the programming I think is dreadful” (Manchester, 50+, low-tech)
Ofcom’s PSB tracker research has shown that respondents rated some aspects of public service broadcasting as higher compared to results from 2007. However, this is within the context of a decrease in overall spend on programming over the same time period. We put this to our participants through a form of deliberative exercise. First, we presented this statement to be debated spontaneously within the groups. Subsequently we split the groups into two parties with the task to form an argument in favour or against the statement that “TV on these [PSB] channels has got better in the last 4 years despite a decrease in programme spending”. The channels listed were BBC One, BBC Two, BBC Three, BBC Four, ITV1, Channel 4 and Channel 5.

Broadly, we found that younger people were more likely to perceive an improvement, while older participants said they were less satisfied. The middle age range was more divided. Though the ‘golden age’ syndrome is a well known phenomenon (‘in the past things were better’), the response seemed to be more than nostalgia: current formats – particularly reality TV – seemed to be less relevant for the older age groups, while technological innovation looks to have has less of an impact on their perceptions.

Younger participants tended to be surprised to find that spending on TV (PSB) channels had decreased over time. Many were ready to attribute the decrease to efficiency, thanks to improved technology, with no detriment to quality.

Older participants tended to disagree on the improvements, and referred to their perceived decline in content quality/content relevant to them as evidence to the contrary. However, there was some acknowledgement of increased choice.
Younger participants tended to agree that TV on the PSB channels had improved and were surprised to learn of decreased spend

“They’ve spent less? You wouldn’t know it at all” (London, 25-29, high-tech)

“I think they’ve got better” (Glasgow, 18-24, high-tech)

“Is that a fact?” (Glasgow, 18-24, high-tech)

Some asked if decreased spend could result from efficiency through improved technology

“I don’t think there’s a direct relationship with quality of a programme and the amount you spend on it. Technology has got better so you can do things on the cheap” (London, 25-29, high-tech)

“Technology is getting better. I don’t know, that might make a difference to how programmes are made” (Cardiff, 30-49, low-tech)
However, older participants tended to be surprised and disagree. There was a sense of alienation due to views that the content was less relevant …

“They’re not looking at quality, they’re looking at quantity… Younger people have got these reality programmes.” (Cardiff, 50+, high-tech)

“You used to get a lot of nature programmes. You don’t get much of that now.” (Glasgow, 50+, low-tech)

“Television has done a lot for younger viewers rather than older viewers.” (Cardiff, 50+, high-tech)

“I would agree that the technology has got better but the content has got worse” (Manchester, 30-49, high-tech)

“Everything is geared at the moment… to making you phone in, like Saturday with Ant and Dec… it’s too much! If you go back 20 years there used to be The Two Ronnies…There are no proper comedies any more” (Manchester, 50+, low-tech)

“More repeats than ever now!” (Cardiff, 50+, high-tech)

“These days they don’t tend to put on good films anymore” (London, 30-49, low-tech)

“Television has done a lot for younger viewers rather than older viewers.” (Cardiff, 50+, high-tech)
“Soaps are on more often these days. It used to be just once or twice a week but they’re on like once or twice a day now. So if you like soaps then I think that’s a plus” (Cardiff, 50+, high-tech)

“The variety is probably better – something for everybody, more choice” (Cardiff, 30-49, low-tech)
In discussing whether TV on the PSB channels had got better, younger participants readily pointed to the benefits of technology…

**Improved usability**

“Definitely a lot more convenient. It fits around you rather than you have to fit around it”  
(London, 25-29, high-tech)

**Main channels look good against plethora of new digital channels**

“When you’ve got so many channels and you’re flicking – you start to look at the blue screen, then you go back to the start – you’ll just shove on whatever’s on Channel 4 maybe… can’t be bothered looking to see what’s on everything else”  
(Glasgow, 18-24, high-tech)

**Making choices about what to watch**

“I only watch specific programmes now… I’ve taken the best out of Channel 4. All I’m seeing it for is shows I like to watch”  
(London, 25-29, high-tech)

“More pleasurable because you’re watching exactly what you want to watch”  
(London, 25-29, high-tech)

“Being able to record and catch up, channels kind of become irrelevant. Because in a way you’re creating your own channel”  
(London, 25-29, high-tech)

“Being able to make your own TV… that is why I think TV has improved. Because I can do what the hell I want. I don’t have to watch what’s dictated”  
(London, 25-29, high-tech)

(New digital channels) “It’s made us [feel] stronger I think towards these [main] ones”  
(Glasgow, 50+, low-tech)
...though all do acknowledge technology improvements

- Others did acknowledge the beneficial role of technology, but this was not as salient for them.

**Quality - choice**

“I think the thing is with the technology now you can basically… just make your day up with different programmes, you know” (Manchester, 50+, low-tech)

“I don’t think they’re any better or any worse, it’s just that there’s so much choice now… You haven’t got to watch what they’re putting on, that’s the thing” (Cardiff, 30-49, low-tech)

**Quantity - choice**

“Maybe the variety is better: something for everybody; more choice; maybe the quality. Technology is getting better” (Cardiff, 30-49, low-tech)

**Individual choice**

“There are that many TVs in the house now… My daughter will go upstairs and watch the TV in her bedroom. I will go and watch a bit of TV in the back lounge and the wife will watch it on the main TV. So, you know, people don’t sit down and watch it as a family these days” (Manchester, 50+, low-tech)

**Immersive audio visual**

“HD as well… that might make programmes better to watch. I know they had to remake all the set of Eastenders because they’re filming in HD now!” (Cardiff, 30-49, low-tech)

“[In news programmes, technology] brings Afghanistan and places like that into your front parlour, doesn’t it really, you know?” (Cardiff, 50+, high-tech)
Qualitative research summary

• The following areas emerged during the discussions as explanations for improved PSB rating, although this was more noticeably among younger viewers:

  – Constant availability of up-to-date news;
  – Glitzy, big event TV (e.g. X-Factor) is compelling;
  – Voting is improving viewer engagement;
  – Great US imports (especially for younger viewers);
  – Wider choice because of plethora of channels and accessibility;
  – Repeats and niche appeal of digital channels boost main channels;
  – And some fondness for them especially among older viewers;
  – Technology allowing a tailored channel experience;
  – Technology delivering an improved viewing experience;
  – And cheaper to stay in with TV (e.g. justifying TV subscription costs).