

# Views in the nations

**A summary of the qualitative and quantitative  
audience research carried out for  
Phase 3 of the PSB Review**

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# 1 Introduction

*“We’re totally different to the rest of the UK, so therefore we do need our own TV programmes, stuff that reflects our area” (Belfast)*

*“These programmes make us feel we’re not forgotten” (Cardiff)*

*“We are a country and we need to have our own television” (Glasgow)*

As part of Ofcom’s Review of Public Service Television Broadcasting, we have conducted throughout the last 12 months a number of pieces of audience research to help inform policy development. For Phase 3 of the Review, we have focused on the issue of programming for the devolved nations of the UK – Scotland, Wales, and Northern Ireland. As we set out in our Phase 2 report, we felt it important to consult further and carry out more analysis before making specific proposals for programming in the nations<sup>1</sup>. We have conducted two new pieces of audience research to examine how viewers in each nation feel about dedicated programmes<sup>2</sup>. The main issues that we wanted to examine are as follows.

## 1 Dedicated programme genres

- The relative importance of dedicated news, current affairs and different types of content across both ITV and the BBC
- The importance of language provision – Welsh, Scots Gaelic, Irish language, Ulster Scots

## 2 Scheduling and programme budgets

- The importance of peak-time scheduling of dedicated programmes on ITV1
- The importance of programme quality – and by extension, programme budget - in particular genres

## 3 “Footprint” of programmes

- The extent to which UK-wide reflection of each nation exists, or is desirable
- The relative importance of programmes for the nation, and for the region(s) within each nation

## 4 The future

- The desirability and role of more local TV services
- The relative importance of TV provision in relation to other (new) media forms

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<sup>1</sup> Our decision to focus in this Phase 3 audience research upon the nations of the UK, rather than the English regions, is twofold. First, there has been much audience research conducted on the subject of regional television, and the results from the studies, taken together, show what we set out in Phase 2: non-news regional programmes achieve lower levels of interest and appreciation relative to other genres in the English regions, notwithstanding a broad north-south differential. Second, previous research on the subject of regional TV has tended to look at the issue from a UK-wide perspective, which as a result has meant less direct focus on the nations. For Phase 3, in order to develop our proposals for the nations, we were keen to hear from the public in Scotland, Wales and Northern Ireland in more detail.

<sup>2</sup> The terminology used in this report needs clarification. “Dedicated” programming means those programmes that are made for and about Wales, Northern Ireland or Scotland (in the case of Scotland, including programmes from STV, Grampian and Border). “Nation-specific” programming is used as a way of differentiation from “region-specific” output. Elsewhere, “region” is on occasion used to indicate administrative regional areas within each of the nations.

## 2 Methodology

We conducted two pieces of research. First, a series of deliberative workshops, carried out by MORI, which gave participants the time to discuss and reflect upon the issues thoroughly (MORI's full report detailing the findings from the workshops is published on our website). Second, a telephone survey conducted by ICM, with robust samples in each nation.

While there are of course some differences in response due to the very different methodologies – one which provided viewers with in-depth information, and one which registered 'top-of-mind' responses - findings are largely comparable.

### Deliberative workshops

A series of 3 half-day workshops was held in each of the three devolved nations during November – December 2004.

Northern Ireland	Wales	Scotland
Belfast Derry/Londonderry Enniskillen	Cardiff Caernarfon Aberystwyth	Glasgow Inverness Dumfries

Around 20 participants came to each workshop. Half the participants in each workshop were recruited as "regular" viewers of nations' programming, in order to ensure we captured the views of those with most interest or involvement in it. We were keen in this research to ensure that we gave a voice to those who were familiar with the type of programmes under discussion.

We also recruited so as to ensure a spread of socio-economic background; age range – with a particular emphasis on young people; multichannel ownership; interest in new media; rural and urban location, and where applicable language speakers and religion (for a full breakdown please see *Programmes in the Nations* from MORI, available at [www.ofcom.org.uk](http://www.ofcom.org.uk)).

Each half-day workshop was structured as follows:

- *Introduction and warm-up*
- *Current Provision:* Participants discussed the dedicated television programming currently shown in their nation to get top-of-mind reactions, likes and dislikes, and to gauge their knowledge of the dedicated programmes. In this session the role of other media was also explored and definitions were established of 'localness'.

- *Trade-off exercise*: This session identified which elements of dedicated programming were felt to be important for licensees to provide, by asking participants to make a series of trade-offs between different genres of dedicated programme and different scheduling times. Indicative, simplified costs of the different dedicated genres were given to participants.
- *Future provision* across a range of media. In this session participants outlined the key changes in media provision that they expected over the next 5-10 years and explored how their preferences for changes in dedicated provision of entertainment/information could encompass these. A number of indicative future scenarios were also presented to participants for their comment and evaluation.

### **Telephone survey**

We also conducted a telephone survey across the three nations. ICM<sup>3</sup> interviewed a random sample of 2,237 adults aged 16+ by telephone in December 2004 and January 2005. Interviews were conducted across the nations of Scotland (n = 1236), Wales (n =501) and Northern Ireland (n=500). Two regions in Scotland - Borders and Grampian - were oversampled to enable statistical representation. The results have been weighted, by nation, to the profile of all adults in that nation.

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<sup>3</sup> ICM is a member of the British Polling Council and abides by its rules. Further information can be found at [www.icmresearch.co.uk](http://www.icmresearch.co.uk)

# 3 Executive summary

## 1 Dedicated programme genres

- News bulletins are viewers' most important priority, and plural supply of news and current affairs is seen as vital
- Social affairs documentaries/current affairs and comedy/entertainment are also seen as key areas of genres that reflect the nation and regions within each nation
- Dedicated-language programmes and channels are appreciated by viewers where available. However, in our quantitative survey, in comparison with other genres, it is seen as least important for the terrestrial channels to provide

## 2 Scheduling and programme budgets

- Peak-time slots for dedicated programming on ITV1 are preferred, even when respondents were reminded that ITV1 could be showing network drama and entertainment at these times instead
- Viewers feel that such programmes need higher budgets to ensure that programme quality matches UK-wide output, and that more signposting for such programmes should be provided. In exchange, fewer programmes are acceptable
- Some out-of-peak, lower-budget programmes are also desirable, especially for younger people

## 3 “Footprint” of programmes

- The quantitative survey highlights a desire for programmes to have more visibility – that it is important that programmes reflecting each nation are shown UK-wide rather than only in each nation
- However, the qualitative workshops emphasised that UK-wide provision shouldn't dilute cultural specificity or be used to replace nation-specific programmes
- Programmes for regions within the individual nations as well as for each nation as a whole are seen as important

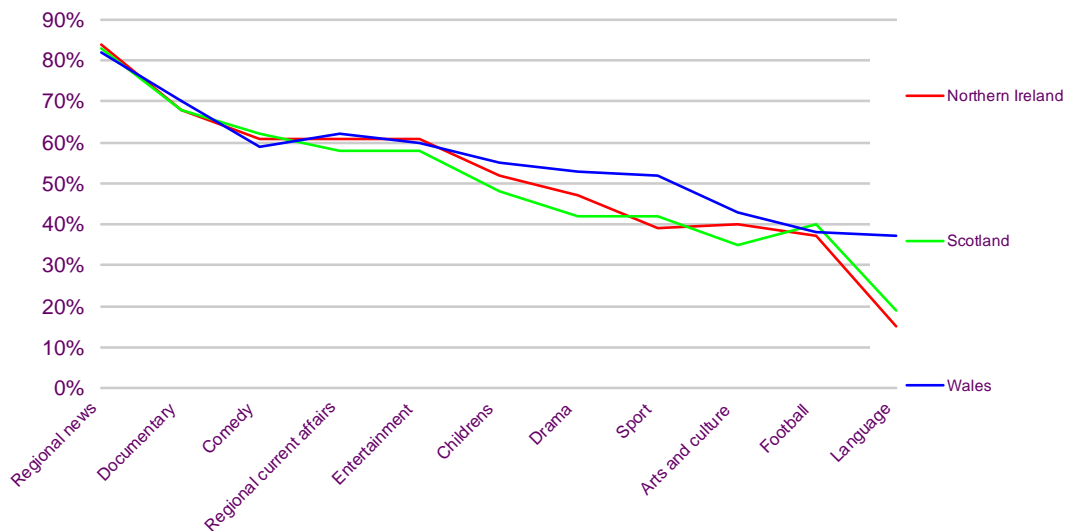
## 4 The future

- Workshop participants are open-minded about the possibilities of broadband provision of more localised services, but feel that such services are still some way off
- More localised TV programming within each nation is welcomed - as long as quality standards are maintained

## 4 Dedicated programme genres

As part of our telephone survey, we asked respondents how important they felt it was that the main television channels regularly showed different types of nation- or region-specific programme<sup>4</sup>.

Figure 1: Which genres are most important to people?



Q: For the following possible types of regional programmes, how important to society would you say it is that these are shown regularly on the main TV channels? Please answer on a 5-point scale with 1 being Not at all important and 5 being Very important

Note: "net" importance is shown – the combination of responses 4 and 5.

Source: Ofcom/ICM December/January 2004-5 Telephone survey n = 2,237

There was a high level of consistency between the nations in these survey responses, with the exception of sport and language provision, which Wales seems to find more important than the other nations.

### Dedicated News

First, dedicated news provision is consistently, and overwhelmingly, held to be the most important element of programming for each nation, in both the qualitative and quantitative research.

In the workshops, news was always first mentioned as the vital programming which reflected and enhanced the life of the community in the region or nation. It was felt to play a special role in reiterating the existence and importance of the nation, by providing

<sup>4</sup> To mitigate some of the inherent methodological difficulties in asking about "regional programming", respondents were first told in general terms that the survey was about "television programmes in [Scotland/Wales/Northern Ireland]". They were subsequently told "we're interested in your views on regional programmes, that is, those programmes that are made for and about your part of the UK". Finally, they were given examples of different kinds of nation-specific programme, collated from those programmes that had proved most popular during the workshops.

immediate feedback on political and social issues, and by giving a sense that the nation is 'taken seriously'.

In Scotland, workshop participants tended to feel under-served by UK-wide news bulletins, and were interested by the concept of replacing a main UK-wide bulletin with one giving a Scottish perspective on both national and international news.

Plural supply of nation-specific news and current affairs programmes was seen to be vital in the workshops, to ensure competition between the broadcasters and to allow different views to be aired. Our survey showed strong support for plural supply more generally, even when respondents were reminded that their ITV station could be showing network drama and entertainment instead of dedicated programming – over two-thirds in each nation wanted provision on both the BBC and their ITV station.

### **Dedicated social documentary and current affairs**

In the workshops, current affairs was initially interpreted by participants as political discussion, or extended news journalism.

*“Like an extended, more detailed news bulletin” (Aberystwyth)*

However, a wider definition of current affairs was also prevalent. Participants often saw it as 'social documentary'. When it came to prioritising the most valuable elements of programming, this *wider* genre of relevant, up-to-date social discussion and reporting was very highly valued across the nations.

Workshop participants also tended to blur current affairs with investigative consumer programmes. Programmes like *The Ferret* in Wales were seen to do a valuable job, and were seen as both useful and entertaining.

*“If anything goes wrong in your life, you could say ‘Right, I’m taking you to The Ferret!’” (Cardiff)*

Our survey results show this too: “documentaries” were defined to respondents as “investigative reporting of local issues” to see the extent to which views tallied with our workshop findings. As Figure 1 shows, these were an important genre to our respondents in all three nations.

### **Entertainment**

Viewers also value comedy, seeing their sense of humour as a key definer of national – and regional - identity.

*“Other people would enjoy Chewin’ the Fat, but they wouldn’t get the humour the way we get it... It comes from the grassroots of Glasgow, the actual people. And unless you’ve actually stayed in Glasgow, you wouldn’t understand it” (Glasgow)*

All in our workshops agreed that entertainment could play an important role in maintaining high quality, original programming specifically for the nations. It was felt to contribute to a sense of national pride in television and even to social cohesion. Participants could imagine discussing these programmes with friends afterwards.

Younger age-groups (those under 35) tended to include in this genre magazine-style programmes, comedy, music, light factual programmes, talk shows, original drama and soaps.

In our telephone survey, there are expected differences in response to some of the genres – for example, women are more likely than men to feel that drama is important to show, and younger people think comedy and entertainment to be more important than those over 45.

## **Sport**

While not a priority for respondents in our quantitative survey, sport was the focus of much debate in the workshops. In the Belfast workshop, sports provision was seen as limited, and some argued that this meant there should be more. Across the rest of Northern Ireland, sport was valued but was not, in a trade-off, the highest priority.

In the Scottish workshops, sport was consistently valued more highly than the other nations. This may be to do with the popularity of football and a desire to see more of the Scottish leagues. Short round-ups of results from games across divisions were felt to be a good (and inexpensive) way of bringing a more local and regional feel to Scottish sport. It was suggested that these could simply be added to news bulletins.

In Wales, workshop participants were keen for more sports provision, although many felt that this could be achieved through extended news bulletins.

In all the workshops, the idea that sports discussion could form part of a more quirky, possibly late-night entertainment offering was raised. The scheduling of sport was seen as the most important element in how well it served the public, even more than the quality or budget of the show itself. Many pointed out that there is a need for sports coverage to be fresh and relevant, which means showing results soon after all the weekend games.

Overall, football was the highest priority for sports coverage and other sports were seen as ‘nice to have’ rather than essential to provide in each nation.

## **Dedicated language provision**

Language provision is particularly important in Wales, and in the workshops was felt to be well covered by S4C. S4C was seen as a central part of Welsh culture, contributing to the plurality of other genres by showing interesting entertainment, youth programming, news and current affairs in Welsh.

*“There’s a tendency to forget the language, and local news bulletins in both languages helps you. And you get a different point of view” (Aberystwyth)*

S4C’s programming was also seen to keep Welsh alive in the minds of viewers, showing different styles and situations of Welsh usage.

*“The programme like Question Time in Welsh, they use a purer Welsh there, they use words properly and it helps with your language usage” (Caernarfon)*

In our survey, young people in Northern Ireland are more positive about Irish language programming than people over 35 – almost twice as many 16-24s in comparison to the total adult sample say it is important to provide (27% v. 15%). However, in the workshops, there was felt to be little pressing need for Irish language programmes on UTV. The fact that some channels from the Republic of Ireland broadcast in Irish meant that for most, there was no need to replicate this on UTV. For those with a Catholic background, there was greater interest in the role of Irish programming to suggest the history and heritage which is relevant to both the Republic and Northern Ireland. There was little awareness of Ulster Scots from participants, although when the context was explained, there was acknowledgement that if there were going to be programmes in Irish, there should also be programmes for the Ulster Scots community.

In Scotland, respondents in the Grampian television region, which covers Highlands and Islands, were no more likely to be favourable to Gaelic (20%) than the other ITV television regions of STV (18%) and Border (20%). The workshops identified quite strong support for Gaelic programming, even among non-speakers, especially the possibility of scheduling it for children. However, while our survey showed strong levels of interest from (self-reported) Gaelic speakers, it ranks low on non-speakers' list of programme priorities for the main channels (see Figure 1 above).

## 5 Scheduling and programme budgets

These two factors are reported together, as we found them to be inherently connected in the workshop discussions.

Peak-time scheduling of dedicated programming is most popular overall with viewers. When we asked our survey sample which time of day they preferred for ITV to show their nation-specific (or, in the case of Scotland, their region-specific) programmes, the majority of those with an opinion wanted them on during peak time (see Figure 2)<sup>5</sup>. However, a sizeable minority were also keen on other slots. The late evening was particularly popular in Northern Ireland, with little difference between the age-groups – 25% of 16-24s were keen on this slot, but so too were 21% of the 55-64s. The afternoon slot tended to be seen more favourably in Wales. 28% of 16-24s preferred this time, compared to 8% of 45-54s, and 16% of the over-65s (16% overall).

Figure 2: What time of day do people say they want to watch dedicated programmes?



Q: When would you prefer [ITV station] to show regional programmes given that [they] could be showing UK-wide drama and entertainment at these times instead?

Source: Ofcom/ICM December/January 2004-5 Telephone survey n = 2,237

In the workshops, peak-time scheduling was closely connected to issues of programme quality and budget. It was argued that for the key dedicated programme genres like entertainment or social documentaries, peak-time slots were critical, in order to build audience awareness, and to be equally visible alongside UK-wide programmes.

For example, in Northern Ireland, the existing dedicated entertainment slot on UTV at 9pm on Fridays was widely recognised by participants, and it was felt very useful to maintain this, and build upon it.

<sup>5</sup> To offset the likely preference of most people to watch during peak hours, we reminded respondents in the question that their ITV licensee could be showing UK-wide drama and entertainment at these times instead

There was some counter-argument to this prevailing view by some who were concerned that prime-time scheduling of these programmes might result in losing convenient access to UK-wide programmes.

If dedicated programmes were to do well in these peak-time slots, participants felt strongly that programme quality had to be on a par with network provision.

*“Things that are national [i.e. UK-wide] have been put on nationally because they know they’re good, because they know people will watch them. So you have to make your regional programme as good as a national programme” (Dumfries)*

They were pragmatic about budget constraints, arguing that given the relative sizes of audiences available to view, then nation- or region-specific programming will always tend to be lower budget in comparison to network programming; that home-grown talent will always migrate wherever possible to the network.

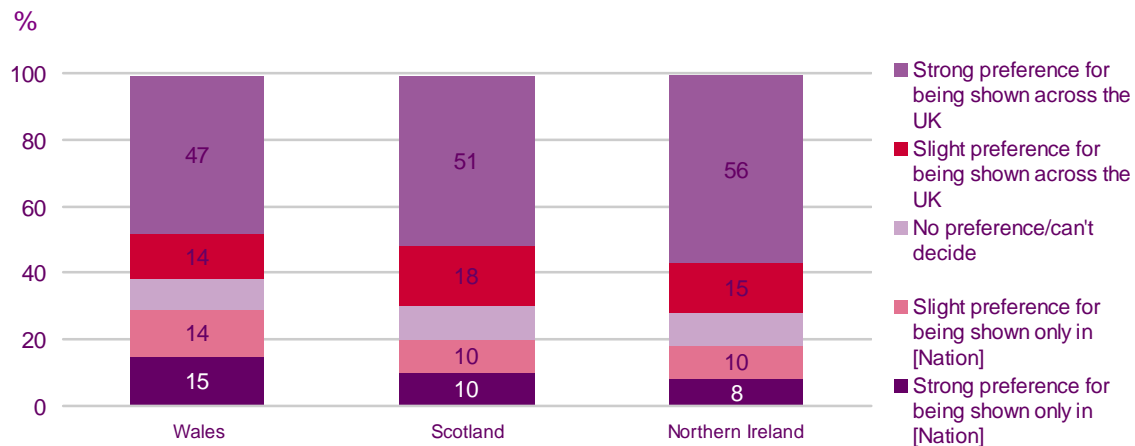
That said, some participants were also keen on ensuring a place in the schedule for lower-budget programming in addition to higher-budget output. This tended to be the view of either regular current viewers, who preferred a wide range of programmes, and also younger people, who arguably are both less concerned about programme quality for some types of output (listings or magazine-style programmes) and also more willing and able to watch at off-peak times.

Participants argued that it was important that any increased resources for certain types of programme should not only be spent on production budgets, but also should be used to ensure that the programmes are given regular time slots and supported by trailers and appropriate continuity. If these shows are to bring the nation together, argued participants, then the licensees needed to make the nation more aware of them and make it easy for people to watch them. Visibility of programming is critical.

## 6 “Footprint” of programmes

There is considerable support in our quantitative survey for representation of the nations to other parts of the UK. Over 70% of those in Scotland and in Northern Ireland feel it more important to show programmes about their nation across the UK rather than only to their nation.

Figure 3: Reflecting the nation to other parts of the UK is important



Q: Thinking about programmes for and about [Wales/Scotland/Northern Ireland], is it more important to have them shown across the UK as a whole, or shown only in [Wales/Scotland/Northern Ireland]?

Source: Ofcom/ICM December/January 2004-5 Telephone survey n = 2,237

In Wales, frequent viewers of dedicated programmes (self-defined as daily/almost daily viewers) are less likely (46%) to prefer UK-wide provision than the overall sample (62% - slight and strong preferences combined). They are also more likely (45%) to prefer that such programmes are shown only in Wales compared to the overall sample (30%). Women also appear to be more likely to prefer UK-wide showings (65%) than men (58%).

In Scotland, again women (73%) tend to be more likely than men (66%) to support UK-wide showings, while (self-defined) Gaelic speakers tend to be less likely (51%) than the overall sample (70%).

In Northern Ireland, DEs (77%) are more keen on UK-wide provision than ABs (56%), while (self-defined) Irish language speakers and non-speakers are equally in favour (71%).

Workshop participants were also keen for such programmes to be seen UK-wide, not least as current representation on the network was held to be in some cases poor and stereotypical.

*“I think a lot of people would be shocked to see just how developed Cardiff is. My sister’s just moved to Cambridge, and when she moved down there people just*

*expected her to live you know in the valleys, almost as if you've got a sheep in your garden, does your dad still work down the mines?!" (Cardiff)*

This concern was particularly prevalent in Northern Ireland.

However, some caution was also expressed, as participants were aware that nations programming tailored to a UK-wide audience might miss out local nuances or be unrepresentative.

In Wales, both our qualitative and quantitative results show that viewers in Wales are slightly more keen than the other nations on a more localised focus for programming – be it for the region rather than the nation, or the nation rather than the UK as a whole.

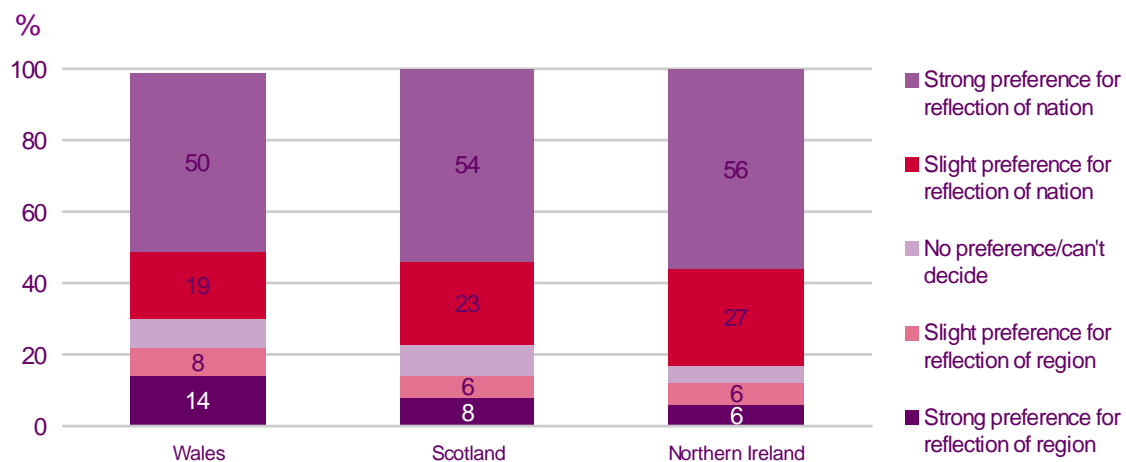
It was striking that in all three nations, workshop participants commented that hearing their accent on television made them feel embarrassed or awkward – despite being used to local radio provision – which perhaps indicates that there is still some way to go in ensuring a more rounded reflection of the UK on network programmes.

*"When you hear a Northern Irish accent on the TV, it sounds really bad – you turn it off! But it only sounds bad because we haven't been hearing it" (Belfast)*

It was felt that an increase in UK-wide provision should not be a replacement for nation-specific, or region-specific, programming.

We also asked respondents in our quantitative survey for their views on whether they would prefer TV to show programmes that reflected their *region* of their nation, or their nation as a whole.

Figure 4: Reflecting the nation is preferred to reflecting the region



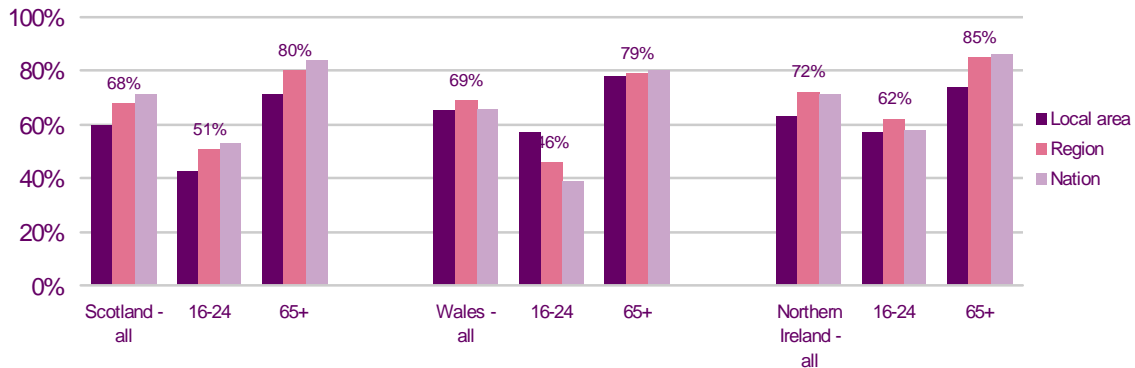
Q: Would you prefer television to show programmes that reflect your region of [nation], or to show programmes that reflect [nation] as a whole?

Source: Ofcom/ICM December/January 2004-5 Telephone survey n = 2,237

A significant majority chose nation-wide reflection. This is not to say that region-specific programming isn't valued – we also asked in the survey how interested people were in

watching TV programmes about their region (see Figure 5), and there was strong approval, especially from older viewers (and it is of note that 16-24s in Northern Ireland are more interested than their counterparts in either Wales or Scotland). However, in an artificial trade-off situation, people seem to prefer that they get programmes about their nation as a whole, rather than a more localised focus.

Figure 5: Interest in programmes about the nation, region and local area



Q: How interested are you in watching TV programmes about your village/town or city; about your region of [nation]; about [nation]?

Source: Ofcom/ICM December/January 2004-5 Telephone survey n = 2,237

Turning to the workshops, participants felt that both nation-specific and region-specific programmes were necessary. They tended to be pragmatic about the viability of region-specific programmes both in terms of subject matter and also in terms of programme budget, and therefore programming for the whole of the relevant nation was seen as likely to be more sustainable, with clear benefits. However, some genres were noted as lending themselves particularly well to more localised provision – news was a leading example, as were some kinds of magazine-style listings programmes for younger audiences.

In Northern Ireland, there was less perceived need for more localised programming given its size, and participants were concerned instead that programming for the whole of Northern Ireland ensured that focus was given not just to issues of concern to Belfast.

Similarly, in Scotland, participants were emphatic that Scottish programming should not focus solely on the Central Belt – a tendency they felt was there in some programming. In Wales, too, some participants felt that some of the bigger cities like Swansea and Cardiff dominate.

In some cases, participants argued that beyond the reflection of their national culture, what they wanted was more recognition across television as a whole of non-city lifestyles.

## 7 The future

In all the workshops there was support for more localised TV programming<sup>6</sup>. As mentioned above, many felt that the political and/or economic centres of their nations currently dominate nation-specific or more regional coverage.

*“Unless an incident’s happened, everything’s centred on Swansea and Cardiff”  
(Caernarfon)*

*“I’m not really bothered about Aberdeen or Glasgow or Edinburgh. I’d rather have the content to be completely local, rather than outwith the region” (Inverness)*

However, people were also pragmatic about the inevitability of this, and some questions were raised about the sustainability of an entire channel, for instance, devoted to local programming, even if it only broadcast a few hours each day. There were also concerns about the likely levels of programme quality. Those in Northern Ireland with experience of Derry/Londonderry’s Channel 9 were generally supportive of it, especially its targeting of a variety of age groups and interests, although noted again the difficulty of finding enough content to fill its schedules.

Despite being unsure how it would work in practice, localised content was felt to have a number of advantages. Firstly, those that were living away from their home area would be able to pick it up on digital television and keep in touch with local events. Furthermore, it could become a way of promoting and developing local talent and allowing it room to experiment before moving onto more mainstream channels.

*“For independent programmes to come through... good ones could maybe come through and shine” (Belfast)*

Benefits to tourism were also mentioned, whereby visitors would be able to access the localised service to find out about the area. Some participants also believed that seeing local councillors discuss issues with members of the community was of potential interest.

*“Seeing our officials being grilled by people from this area on issues that affected us all, that’ll be quite good” (Inverness)*

Participants felt with the proliferation of digital channels, a local TV channel could usefully be of benefit to local communities, even if only servicing a minority.

New media alternatives to TV provision were greeted with some interest in our workshops, but the infrastructure is seen as not yet widely available. For many participants in all of the nations, such technologies were believed to be out of reach and unlikely to affect their day-to-day lives in the short- to medium-term. Participants acknowledged that digital TV take-up was increasing (and indeed recruitment ensured

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<sup>6</sup> Questions about the future of localised services were not put to our quantitative survey respondents, although as we saw in Figure 5, there is solid interest in the possibility of TV programmes about the local area. These responses are not quite as emphatic as those in our Phase 2 quantitative survey. This may be an outcome of differences in question-wording: our Phase 3 question might have implied interest in present provision, of which there is very little that is local, while our Phase 2 question was phrased as a hypothetical question to gauge potential interest.

that both terrestrial and digital viewers were represented). However, there was some concern that a digital divide might become wider, especially for those in more rural areas and for older people.

Younger people in particular were able to imagine accessing local, regional and nation-specific content through more new media methods in the future, for instance mobile phones, interactive television, or broadband delivery. Some participants liked the possibility of viewing and choosing programmes on demand.

*“Because it’s all there, you access it when you feel like it and find something you’re interested in, you’ve got time to look through it and then decide”  
(Caernarfon)*

And some were very positive about the possibilities such provision might eventually bring.

*“Change leads to creativity. It makes people come forward with new ideas. Innovation like this I would say would lead to people creating new programmes with new ideas” (Derry)*