



UK audience attitudes to the broadcast media

A summary of findings

Research Document

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Section 1

Background

This document provides a summary of findings from Ofcom's Annual Media Tracker survey. The research explores UK adults' attitudes and opinions towards television and radio broadcasting, and related areas such as news consumption and privacy.

The Media Tracker was commissioned in its current form in 2008, but some of the questions and topics have been monitored on an annual basis since the early 90s, when the Independent Television Commission, one of Ofcom's predecessor bodies, ran the survey. Some of the pre- 2008 results are reported here in the interest of making the information publicly available in one place. However, comparisons over time should be made with caution, due to methodological changes over the period.

The Media Tracker research provides a valuable source of information on consumers' attitudes, and helps inform Ofcom's work on broadcasting standards. Under the Communications Act 2003, Ofcom has a duty to draw up, and from time to time revise, a Code for television and radio services covering programme standards, including the protection of under eighteens, the application of generally accepted standards to provide adequate protection from the inclusion of harmful or offensive material, sponsorship, product placement in television programmes, and fairness and privacy. This is known as the Broadcasting Code ('the Code') and came into effect in July 2005.

Ofcom recognises that generally accepted standards are subject to change over time and should be underpinned by consumer research. Ofcom's Media Tracker is one of the range of consumer research sources which Ofcom draws on in undertaking its duties in relation to standards on television and radio.

Section 2

Methodology

Fieldwork for the Media Tracker study was conducted for Ofcom by the research agency BDRC Continental. It employed face-to-face interviews conducted in respondents' homes. The questionnaire was conducted in two waves (April and October) to counter seasonality issues. Over both halves of fieldwork a sample of 1,700 adults aged 16+ was interviewed and then weighted to be representative of the UK. The data presented here are based on the weighted sample.

Time series data

Some of the data in the report were collected before 2005 and were published in the ITC's 'Public's View' survey. Please see

http://www.ofcom.org.uk/static/archive/itc/uploads/The_Publics_View_2002.pdf

for further details on the 'Public's View' survey's content, results and methodology.

In 2005 this survey became Ofcom's Residential Tracker, which in 2008 split into two separate surveys – the Technology Tracker and the Media Tracker. Key changes in the methodology between the 2005 and 2008 surveys include switching from continuous research to two dip-stick waves, and moving from computer-assisted personal interview (CAPI) to paper-assisted personal interview (PAPI).

Where relevant, we have made some broad high-level comparisons between the 2005 and 2011 data. However, these comparisons must be treated with caution as variances in the results may be due in part to changes in the methodology, and not necessarily indicate a shift in consumer attitudes.

The pre 2005 data is presented in this chart pack in the interest of providing all the available data in a single place. Due to methodological changes, please view these trends as indicative only.

Section 3

Summary of findings

This section provides a summary of the findings set out in Annex 1

Annex 1 provides a chart pack analysis of questions asked

<http://stakeholders.ofcom.org.uk/binaries/research/tv-research/uk-audience-attitudes.pdf>

Quality and standards within TV programmes (see Annex 1: Slides 4 to 10)

- Over half (55%) of adults said that the standard of TV programmes has 'stayed the same' over the previous 12 months (a rise from 47% in 2005¹). The proportion of adults saying standards have 'got worse' fell from 40% in 2005, to under a third (31%) in 2011. And the proportion saying standards have improved remained relatively steady, at just over one in ten (12% in 2011 compared to 10% in 2005).
- Older respondents were more likely to feel that standards had got worse (46% among those aged 65+), while the youngest respondents (16-34 year olds) were more likely to feel they had improved (18%).
- Among those who thought programmes were getting worse, the top two reasons given were 'more repeats' (71%, up from 60% in 2010) and 'lack of variety' (43%), while the top two reasons for programmes getting better were 'wider range of programmes' (59%, up from 47% in 2010) and 'improved quality' (46%).

Levels of offence on TV (see Annex 1: Slides 11 to 20)

- Almost a fifth (19%) of respondents said they had been offended by something on TV in the previous 12 months – a similar proportion to the 2010 results.
- Older respondents were more likely than younger people to say they had been offended (30% of over 65s compared to 11% among 16-34s).
- As in 2010, among those offended, language (47%), sexual content (38%) and violence (34%) were the most common causes of offence.
- Among those who had been offended, 17% agreed with the statement that "it should not have been shown", 32% agreed that "others should be allowed to see these things" and 48% said "such things should only be shown when viewers are likely to expect them" (e.g. after a clear warning).
- The main reaction on seeing something that offends is to switch channel (56%). Almost a quarter (23%) said they switch off, 16% continue watching the programme and 12% discuss it with others.
- At a broad level, comparison with 2007 results suggests that audiences today are less likely to switch off (42% in 2007) and more likely to continue watching (9% in 2007).

¹ Please note, comparisons with data prior to 2008 should be seen as indicative only as there have been a number of methodological changes in the survey's sample, timing and question order since then, which may mean changes in the data may not be due to attitudinal changes alone.

Attitudes towards sex, violence, swearing and harmful content on TV (see Annex 1: Slides 21 to 32)

- The majority of respondents felt that current levels of sex (66%), violence (57%) and swearing (57%) on TV are 'about right'. One in four (25%) respondents felt there was 'too much' sex and just over 1 in 3 felt there was 'too much' violence (36%) and swearing (37%). This compares to 36% of adults saying there was too 'too much' sex on TV in 2005, with 56% for violence and 55% for swearing.
- Older respondents were more likely than younger respondents to think levels were 'about right' for each type of content.
- However, the proportions stating that levels of sex, violence and swearing on TV were 'too much' has significantly decreased since 2010.
- The results suggest that over time, attitudes towards the amount of sex, violence and swearing on TV have changed, with the proportion of respondents stating "about the right amount" having steadily increased since 2005 and the proportion stating "too much" having declined.
- Fifteen per cent of respondents said they have seen something on TV in the last 12 months that they thought was harmful, either to themselves, to other adults or children; a similar proportion as in 2010.

Protection of children and the TV watershed (see Annex 1: Slides 33 to 41)

- Half (50%) of respondents felt it was the responsibility of both broadcasters and parents to make sure that children do not see unsuitable programmes. Just under half (45%) felt it was 'mainly parents' responsibility and 4% 'mainly broadcasters'.
- Parents were more likely than those without childcare responsibility to feel it was the responsibility of 'both broadcasters and parents' to ensure that children do not see unsuitable programmes (57% vs 47%), and less likely to say 'mainly parents' (40% vs 47%).
- Most (96%) were aware that broadcasters are required to show television programmes that are not suitable for children only after a certain time in the evening.
- Over three quarters (77%) of respondents thought that the 9pm TV watershed was 'about right', a rise from 64% in 2005².
- Three in five (61%) were aware of features blocking access to certain TV channels/programmes (rising to 75% among parents), and 17% of respondents claimed currently to use the blocking system (rising to 33% among parents).

² See footnote 2

Attitudes towards TV advertising, sponsorship, product placement and promotions (see Annex 1: Slides 42 to 44)

- Almost nine in ten (88%) of respondents were aware of programme promotions, eight in ten (81%) were aware of programme sponsorship and seven in ten (72%) were aware of channel promotions.
- Product placement in films and international programmes (such as US drama series) has been allowed on UK television for many years. From 28 February 2011 TV programmes made for UK audiences can contain product placement as long as they comply with [Ofcom's rules](#)³. In line with this there was a significant increase in awareness of product placement, from 39% in 2010 to 47% in 2011.
- Almost half of respondents (49%) stated that present levels of advertising on the five main TV channels “don’t bother me but I would not want any more”. Just over a third (37%) agreed there was “already more than I am really happy with”.
- Among those who had multichannel TV, 45% stated that the amount of ad breaks on the ‘other commercial channels’ “doesn’t bother me but I would not want any more” and 40% agreed “there is already more than I am really happy with”.
- Among those who were aware of programme sponsorship, 58% stated that present levels of programme sponsorship “don’t bother me but I would not want any more”, with 10% stating “a little more would not bother me” and 19% saying “there is already more than I am really happy with”.

News – sources used and attitudes towards impartiality (see Annex 1: Slides 45 to 56)

- For all respondents TV was the main source of news about what is going on in the UK and around the world (76%), followed by newspapers (8%) and the internet (7%). Older respondents were more likely to say TV is their main source of UK/world news (84% of those aged 55+ compared to 68% of 16-34s).
- Those aged 16-34 were the group most likely to say the internet was their main source of UK and world news (13%).
- TV was also the main source of news about what is going on in the local area (53%, an increase from 49% in 2008), followed by newspapers (15%, a decrease from 23% in 2008) and radio (10%).
- Respondents in Scotland and Wales (77% and 76% respectively) were more likely than respondents in Northern Ireland (67%) to say that TV was their main media source for nation’s news. A fifth (21%) of respondents in Northern Ireland said that their main media source for their nation’s news was radio (compared to 8% of respondents from Wales and 5% of respondents from Scotland).
- The majority of respondents thought it was important for news sources to be impartial (94% television, 88% radio, 88% newspapers).

³ For more information see <http://consumers.ofcom.org.uk/2011/02/product-placement-on-tv/>

- Over half (59%) of respondents felt that TV is an 'impartial' news source, with the BBC seen as the most impartial. Radio was seen as the second most impartial news medium (52%), followed by broadcasters websites (29%), newspapers (24%), newspapers' websites (20%) and other websites (19%).
- TV and radio both saw significant declines since 2010 in respondent's rating of impartiality (from 66% and 57% respectively). This could be related to some diminution of trust in the media following the past year's events, TV and radio took the brunt of the decline; other media were not affected as much as they were already likely to be seen as less impartial.

Radio (see Annex 1: Slides 57 to 62)

- Seventy-four per cent of respondents said they listened to the radio either every day or several times a week (47% of respondents listen every day).
- Among those who listen to the radio, 2% said they had personally heard something on the radio that they found offensive, 97% said they had not and 1% did not know.
- Radio listeners were asked to rate the extent to which they personally relied on BBC/commercial radio stations for coverage of certain local issues and events, with a score of 1 being 'completely rely on' and 5 'do not rely on at all'. Looking at the top two ratings, commercial radio listeners were more likely than BBC radio listeners to state they relied on the radio for coverage of local news (38% vs 31%), travel/weather (41% vs 34%), information about events/the community (32% vs 24%), and emergencies such as snow and floods (35% vs 39%).
- Almost three in five (59%) of respondents felt that present levels of advertising and programme sponsorship on commercial radio stations "don't bother me but I would not want any more". Just over a quarter (21%) felt "there is already more than I am really happy with" and 7% stated "a little more would not bother me".

Attitudes towards privacy (see Annex 1: Slides 63 to 65)

- When asked about their attitudes towards privacy on television, just under half of respondents (48%) agreed with the statement that "broadcasters should not be able to show programmes that scrutinise the lives of celebrities and politicians without their consent", with a third (34%) saying they should and 17% neither agreeing nor disagreeing.
- Nineteen per cent agreed with the statement: "TV broadcasters should be free to show programmes that scrutinise the lives of general members of the public without them giving consent"; while 63% disagreed, and 15% neither agreed nor disagreed.
- Newspapers were seen as the medium most intrusive into the lives of people in the public eye (48%) and the general public (49%), followed by TV (24% and 27% respectively) and magazines (21% and 11% respectively).

Regulation (see Annex 1: Slides 66 to 74)

- The majority of respondents (89%) stated that they thought TV programmes are regulated – an increase from 85% in 2010. Three in four (74%) respondents felt the current levels of TV regulation were ‘about right’.
- Four in ten (41%) of respondents stated they thought the internet was regulated. More than 2 in 5 (44%) felt that current levels of internet regulation were ‘too little’, (increasing to 51% when asking parents), 23% said ‘about right’ and 32% said they didn’t know whether it was about right or not. Since 2010 the proportion of respondents who said they ‘did not know’ has declined (from 38%).
- Almost three-quarters (73%) of respondents were aware that it is possible to watch/download programmes online. Awareness declined with age (82% of 16-34s vs 45% of 65+) and parents awareness was higher than awareness among those not responsible for children (81% vs 68%).
- Among those aware that it is possible to watch/download programmes online, 58% thought that the content is regulated and 10% were not aware. Awareness is higher among 16-34s (61% compared to 45% of over 65s) and among ABC1s (61% compared to 54% of C2DEs).

Take-up and use of technology, TV (see Annex 1: Slides 75 to 91)

- Among those who use video on demand (Virgin On Demand, Sky Anytime or BT Vision+) (29% of all respondents), the top three reasons for use were because they “missed the programme/file when on TV” (77%), “wanted to watch programme/film at a time that suits me” (43%) and “use it when there is nothing on ‘normal’ TV to watch” (41%).
- Among those who have a set-top DVR from their Pay TV provider (16%) the top three reasons for use were to “watch TV you’ve previously recorded” (75%), “watch live TV” (66%) and “catch up services” (42%).
- A third (34%) of internet users said they used the internet to watch TV programmes online or download from TV broadcasters’ websites, and a third (33%) said they watched TV clips online or downloaded from other websites.
- Forty-eight per cent of respondents who said they watched TV/films/video clips via the internet said they did so at least several times a week, rising to 54% of 16-34s.
- Among those who use online catch up services, the top three reasons for use were “missed the programme/file when on TV” (59%), “want to watch programme/film at a time that suits me” (34%) and, in joint third position “use it when there is nothing on ‘normal TV to watch’ and “just to pass some time/relax” (25%).
- TV remains the most used medium, with 97% of respondents saying they watched it at least several times a week (87% said ‘every day’). Just under three-quarters (74%) said they used the radio at least several times a week, 73% said they used the internet, 48% audio-visual media via the internet (i.e. TV programmes/films/video clips) and 39% non-live TV (i.e. time-shifted content on a TV set).
- Many respondents said they used other media while watching TV on a TV set. Almost two-thirds (65%) of respondents said they used their mobile while watching

the TV on a TV set (36% said 'every day'). Almost half (47%) said they used the internet at the same time, and 46% said they used a landline phone.