



# Public Service Broadcasting: Annual Report 2007

Research report

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# Executive Summary

- This report is the first in an annual series. It aims to provide an evidence base for monitoring the delivery of public service broadcasting (PSB). The designated PSB broadcasters are the BBC, ITV1, GMTV, Channel 4, Five, S4C and Teletext.
- It is important to stress from the outset that this is a factual account of broadcast hours, viewing figures and audience opinions of the channels, rather than a strategic review of the PSB landscape. Its purpose is to enable both Ofcom and its stakeholders to gain a deeper understanding of the current position of PSB delivery, and how this has changed over the last five years. These annual reports will be particularly valuable in the run up to digital switchover.
- It will also provide important evidence for other related Ofcom projects such as the Future of News; Children's Television; and the Channel 4 Financial Review.
- The report is an outcome of Ofcom's 2004 PSB Review, which stated that Ofcom would develop a new approach to assessing the effectiveness of public service broadcasters, taken together, in delivering PSB Purposes and Characteristics (para 6.29, *Ofcom PSB Review Phase 3: Competition for Quality*)
- The PSB Purposes and Characteristics, which were developed during the 2004 PSB Review, are as follows:

## PSB Purposes

*Informing our understanding of the world* - To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas

*Stimulating knowledge and learning* -To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning

*Reflecting UK cultural identity* - To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences

*Representing diversity and alternative viewpoints* - 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

## PSB Characteristics

*High quality* - well-funded and well-produced

*Original* – new UK content rather than repeats or acquisitions

*Innovative* – breaking new ideas or re-inventing exciting approaches, rather than copying old ones

*Challenging* – making viewers think

*Engaging* – remaining accessible and attractive to viewers

*Widely available* – if content is publicly funded, a large majority of citizens need to be given the chance to watch it

Source: *Ofcom PSB Review Phase 3: Competition for Quality*

- Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes set out in the 2003 Communications Act. Parliament asked Ofcom to monitor the effectiveness of public service broadcasters in delivering the range of PSB Purposes and Characteristics. The

first Review was in 2004. Subsequent PSB Reviews will be conducted at least every five years.

- This report, which will be provided annually, will help prepare for the next PSB Review, and also gives objective evidence as context for licensees' annual statements of programme policy and (SOPPs) and self-assessment reviews (SARs). The report does not report on broadcaster compliance with quotas. These are published in Ofcom's annual Communications Market Review.
- While the key purpose of this report is to show how PSB as a whole is being achieved in the UK, in order to carry this out it needs to consider the contribution of the individual PSB channels. However, it is important to state from the outset that the report is not an assessment of the individual performance of the public service broadcasters. The report contains no editorial commentary.
- The focus of this report is upon the designated PSB broadcasters. The extent to which public service content may be provided by other channels is not addressed. However, the next PSB Review will undoubtedly examine this issue, given the importance of digital channels and changes in media consumption. Recent changes in the media are discussed in this report in the overview of the UK television market.
- This is the first year of publication, and Ofcom welcomes suggestions from stakeholders about what other elements of reporting could be included in forthcoming years.
- The main analyses through which PSB is examined in this report are as follows:
  - Output hours: the hours and minutes per week or year transmitted by broadcasters, showing 2002–2006 trends. This data is submitted by broadcasters to Ofcom as part of their annual PSB returns. Figure 4 in the Introduction provides an overview of what types of programme are included in which genre category.
  - Viewing figures: who is watching the output; for how long; 2002–2006 trends from the Broadcasters' Audience Research Board (BARB). Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.
  - Audience impact: what regular viewers think of the output – 2006 data providing the first published findings from Ofcom's PSB Tracker survey, which asks viewers for their opinions of how well channels deliver PSB Purposes and Characteristics. This is contextualised with findings from the BBC-GfK Pulse survey, which asks about individual programmes.
  - It is important to note how the findings from the Ofcom Tracker are reported. Firstly, this report gives the opinions of regular viewers of a channel, rather than all viewers. Regular viewers are more likely to provide an informed view of the performance of a channel than those who may respond with potentially out-of-date or unfounded perceptions. For some of the smaller channels, this may mean that particular types of viewer only go to that channel for particular types of programme, and therefore may not be as knowledgeable about other programme types.

Secondly, respondents were asked to rate each channel on a scale of 1–10 on a variety of statements. Scores of between 7 and 10 are used as the main unit of reporting, correlating to a positive affirmation of a channel's delivery. Therefore, "60% rated the channel" refers to the fact that 60% of viewers gave the channel a score of between 7-10.

- For the purposes of consistency, output hours, viewing figures, and audience impact are provided for each channel in the report's charts and diagrams, regardless of whether or not the channel has a particular PSB remit in that area. However, the text focuses on those elements where individual channels have a particular remit, or where channels could be expected to make a PSB contribution. These contributions are set out in the following table, taken from the 2004 PSB Review:

#### **Contributions to PSB from main broadcasters/providers**

**The BBC** as the cornerstone of PSB, with special responsibility for investing in distinctive content and always striving to meet PSB Purposes and Characteristics.

**ITV1** focusing on news and high production value origination from around the UK. ITV1 having a special additional responsibility for the provision of regional news, current affairs and other regional programming.

**Channel 4** as having a specific remit for innovation, educative programming and distinctiveness.

**Five** being primarily market-led with a focus on UK original production.

**S4C** having a key role in Welsh language public service broadcasting.

**Teletext** having a remit for a range of high quality and diverse text material

*Source: Ofcom PSB Review Phase 3: Competition for Quality*

The main findings from the research are set out below.

### **Overall summary**

- PSB as a whole continues to be valued highly by viewers.
- The provision of programmes which help inform people's understanding of the world is the most important element of PSB amongst viewers, and is also the area perceived to be best delivered.
- The PSB channels contribute to the delivery of overall PSB objectives in different ways.
  - The BBC performs particularly strongly across many of the elements of PSB. BBC One's strengths are in delivering news and big national events, while BBC Two performs well for stimulating knowledge and learning.
  - ITV1 is appreciated for its quality drama and regional identity; its provision of peak-time first-run originated Drama and Soap is also significantly higher than other channels.
  - Channel 4 is rated most highly for engaging, high quality and challenging programmes; 16-24s rate Channel 4 more highly on virtually all PSB measures than the audience as a whole.
  - Five's output is less strongly appreciated by regular viewers in general terms, reflecting the relative size and salience of the channel. However, when looking at appreciation of individual programmes, it gets strong support.
- Children's PSB is valued particularly highly by parents, but there are clear issues with some elements of its delivery, particularly on ITV1.
- There are a number of areas where PSB is perceived to be delivering less well. Innovation is rated as important by nearly 6 out of 10 viewers, however in terms of delivery it scores lower than any other PSB Characteristic, a finding consistent with

Ofcom's 2004 PSB Review. The reflection of regions to the rest of the UK is also perceived to be being delivered less well (albeit of stated lower priority for people). Programmes that stimulate learning or that challenge people are similarly not perceived as particularly well delivered.

- Viewing of UK content has also decreased in some areas, most notably to comedy. Terrestrial viewing of Music programmes is down, although viewing of Arts programmes has increased.

### **The UK television landscape**

- Take-up of digital television continued to rise in 2006, driven mainly by the growth of Freeview. In September 2006 73% of households watched digital television on their main set, a 7.9 percentage point increase on the previous year.
- Net advertising revenue (NAR) fell by 8% in 2006. In contrast, subscription revenues rose, resulting in subscription revenues exceeding NAR by £1bn.
- The terrestrial broadcasters continued to develop internet, mobile and multichannel content services, expanding their distribution of public service content on a variety of digital platforms.

### **Purpose 1: Informing our understanding of the world**

*"To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas"*

- News remains the cornerstone of PSB provision in the eyes of viewers. It consistently outranks other elements of PSB. It is seen as particularly well delivered by regular viewers of the BBC, slightly less so by ITV1 and Channel 4 regular viewers. That said, viewers to specific Channel 4 news programmes appreciate them more than viewers of news programmes on other channels. Levels of trust in all the news providers is high.
- While the relative proportion of News in peak time has decreased slightly from 11% in the period 2002-2004, to 10% in 2005 and 2006, Current Affairs has increased slightly during the same period from 3% to 4% of overall peak-time output
- Average annual hours of viewing to news, across all individuals in the UK, dipped sharply in 2006 to 91 hours, from 98 hours in 2005. However, this is likely to be in part due to a decrease in the overall hours of output from 7,311 hours in 2005 to 6,879 hours in 2006. Hours of news output do shift considerably from year to year depending on the news agenda.



## Purpose 2: Stimulating knowledge and learning

*“To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning”*

- The provision of programmes which stimulate informal learning is considered important by around 6 in 10 viewers – a mid-ranking score compared to other Purposes and Characteristics. However, perceptions as to its delivery are lower, at 4 in 10 viewers. Perceived delivery of such programming does not vary much by channel, although regular viewers of BBC Two rate it highest (51%) compared to 41% of Channel 4’s regular viewers. Attitudes toward the delivery of interesting programmes about history, science or the arts are more sharply delineated, with 75% of BBC Two’s regular viewers rating it between 7-10 out of 10, compared to 48% of Channel 4’s and BBC Four’s, and 26% of Five’s.
- Factual output (including documentaries, consumer affairs, and factual entertainment among other genres) across all PSB channels increased substantially since 2002, rising from 7,797 hours in 2002 to 10,684 hours in 2006. However, in 2006 the increase was only marginal on 2005. There was a slight reduction in hours on BBC Two and Channel 4 compared to 2005. In contrast, hours of Factual output increased on ITV1 from 1,559 hours in 2005 to 1,864 hours in 2006. Output on Five also increased, from 751 hours in 2005 to 881 hours in 2006.
- Peak-time, first-run original Serious Factual output (including natural history, science and technology, and history programmes) across the PSB channels rose from 824 hours in 2002 to 915 hours in 2006. However, this was largely due to an increase in output on BBC Three and BBC Four, from 75 hours to 170 hours. Five’s output also increased significantly over the period, from 143 hours in 2002 to 203 hours in 2006. Peak-time first-run original Serious Factual output on Channel 4 declined in the period 2002-2006 by nearly one quarter, from 194 hours in 2002 to 150 in 2006. BBC One and Two’s output decreased marginally during this period. The 2006 total for the broadcasters taken together is lower than the total for 2005, which was 1,018.
- BBC Four provides a significant proportion of overall Arts and Classical Music output – out of the 1,789 hours broadcast across all the PSB channels in 2006, it contributed 1,125 hours. However, its peak-time hours decreased over the period, from 510 hours in 2002 to 409 in 2006. In peak time, Five’s output increased from 23 hours in 2002 to 35 hours in 2006. Channel 4 output was the same in 2006 as it was in 2002 - 32 hours. BBC One’s output halved from 18 hours to 9, while BBC Two’s increased from 94 to 130 hours. BBC Three’s hours reduced considerably in peak time, from 100 hours in 2002 to 25 in 2006.
- Viewing of peak-time first-run Serious Factual programmes has increased over time, driven by increased viewing of BBC Two and Channel 4’s output. However, viewing of other kinds of Factual programmes decreased in 2006, from 149 hours in 2005 to 125 hours in 2006.

### Purpose 3: Reflecting UK cultural identity

*“To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences”*

- A number of different programme genres and elements of PSB are combined in this Purpose, which taken together illustrate the extent to which UK identity is reflected and shared. Drama, soaps and comedy are key programme types which reflect cultural identity - as are regional programmes, news and non-news output. While UK drama and soaps in themselves aren't perceived as particularly important elements of PSB by viewers when compared with other genres, they are seen to be well delivered, particularly on ITV1.
- Around half of regular viewers of BBC One, BBC Two, ITV1 and Channel 4 feel that their programmes show people from different parts of the UK, with younger Channel 4 viewers rating this particularly highly (60%). Regional news programming is perceived as important and well delivered both on BBC and ITV.
- The portrayal of the regions to the rest of the UK is perceived as being less well delivered, although ITV1 and BBC One are rated by their viewers more highly than the other channels. However, this element of PSB is perceived as less important to viewers than most of the other Purposes and Characteristics.
- First-run Originated Drama output (excluding Soaps) accounted for 714 hours of peak-time terrestrial scheduling during 2006, an increase since 2002 of 10%. Peak-time Originated Soap output on BBC One has remained steady since 2002, while output on ITV has increased from 255 hours in 2002 to 294 hours in 2006.
- The Drama and Soap genres, including some non-UK material, form nearly 40% of viewing time on the main terrestrial channels taken together. Since 2002 UK comedy viewing decreased by one third, with 16-24s watching most of their comedy on Channel 4, while older audiences watch more on the BBC. Viewing to UK Soap decreased, from 82 hours in 2005 to 70 hours in 2006.
- BBC regional output in England increased from 3,653 hours in 2002 to 4,018 hours in 2006. During the same period, ITV1's regional output decreased significantly, due to its reduction in programmes other than News and Current Affairs, an outcome of the 2004 PSB Review. In the Nations, BBC and ITV1 non-network hours of output decreased slightly, except in Scotland where ITV1 non-network output hours decreased more steeply.
- Audience share of ITV1 and BBC1 evening regional news programmes varies considerably across the UK, with UTV being particularly strong in Northern Ireland.
- Many network programmes with specific regional or national locations tend to gain higher audience shares in those particular regions or Nations. In particular, *Rebus*, *Doc Martin*, *Taggart*, *Coronation Street* and *Shameless* do well in their areas of location.

## Purpose 4: Representing diversity and alternative viewpoints

*“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”*

- Channel 4, BBC Two and BBC One are all rated as representing diversity and alternative viewpoints by around half their regular viewers. Younger people are more likely to rate Channel 4 and BBC Two highly.

### PSB Characteristics

- High quality, engaging, and challenging programmes are all judged important by around two-thirds of respondents. Innovative content is seen as important by 57% of the population.

High quality – *“well-funded and well-produced”*

- Almost three quarters of regular viewers (73%) of BBC One and BBC Two rate those channels as showing programmes of high quality. Some 62% rate ITV1, 58% Channel 4 and 41% Five. Younger viewers (aged 16-34 years) of all channels tend to have a more positive view of the quality of the programmes than older viewers. There is a particular difference in views among Channel 4 viewers: 74% of its regular viewers aged 16-24 say it shows high quality programmes, compared to 55% of its viewers aged 35-54, and 47% of its viewers aged over 55.

Original – *“new original content rather than repeats or acquisitions”*

- Almost half of BBC One and BBC Two regular viewers say the channels show enough new programmes made in the UK (48% and 49% respectively). 44% of ITV1’s regular viewers think it shows enough new programmes, and 41% of Channel 4’s. Less than one quarter (23%) of Five’s regular viewers find the statement applicable to the channel, and 18% rate it poorly on the provision of original UK content. This is likely to be reflective of its lower programme budget compared with the other main PSB channels.
- There has been little change in the amounts of peak-time network originated content (5,615 hours in 2002 compared to 5,476 hours in 2006), reflecting the quotas on such content in peak time. Regional originations are closely related to overall regional output, and their decline since 2005 is largely due to ITV’s reduction in non-news regional output.

Innovative – *“breaking new ideas or re-inventing exciting approaches, rather than copying old ones”*

- While 57% of viewers said it was important that the PSB channels should provide innovative programming, only 32% of respondents said that innovation was being delivered across the PSBs – the second-lowest rating for delivery of PSB Purposes and Characteristics.
- Delivery of innovation by particular channels is rated more highly. Around half of regular viewers rate Channel 4 (51%) and BBC Two (50%) as providing programmes with new ideas and different approaches. BBC One was seen as innovative by 43%, ITV1 by 38%, and Five by 30%. BBC Three and BBC Four’s perceived levels of innovation were higher than that of ITV1 and Five (45% and 42% respectively).

- 70% of Channel 4's 16-24 viewers rate it between 7-10 out of 10 for providing programmes with new ideas and different approaches, compared to 60% of BBC Two's 16-24 audience. While younger regular viewers are more likely to value all the terrestrial channels than are older viewers, older people are particularly unlikely to value Channel 4 for showing new ideas and different approaches (32% of over-65s rate it).

#### Challenging – “*making viewers think*”

- BBC Two is seen by 61% of its regular viewers as showing challenging programmes, with BBC One and Channel 4 also being rated by over half their regular viewers (54%). Some 43% of ITV's viewers thought this statement applicable to the channel, and around one third (32%) of Five's viewers.

#### Engaging – “*remaining accessible and attractive to viewers*”

- In general terms, half of viewers feel that the PSB channels, when taken together, are providing them with programmes they want to watch (a further 40% did not have a strong opinion either way). When asked about specific channels, some 62% of BBC One and BBC Two regular viewers, 60% of Channel 4 regular viewers, 58% of ITV1 regular viewers, and 43% of Five's regular viewers feel that the respective channels shows programmes they want to watch. This latter result is likely to be related to the relative size and salience of the channel.
- Channel 4's younger regular viewers felt particularly positive about its programming – 83% of its 16-24 year old viewers said it showed programmes they wanted to watch, the highest rating across all channels and demographic groups. Its regular viewers aged over 65 were particularly likely to rate it poorly, as were those in socio-economic group DE.
- There is less agreement that the channels reflect viewers' own interests and concerns. Just under half of BBC Two's regular viewers feel that it reflects their interests, and 47% of BBC One's regular viewers feel that it does so. Just over 40% of ITV1's and Channel 4's regular viewers feel that the channel reflects their concerns and interests, although this figure rises to 59% among younger Channel 4 viewers.

### Children and PSB

- BBC One, BBC Two, CBBC and CBeebies were all rated highly by parents on delivering almost all the PSB Purposes and Characteristics in children's programming. Apart from the BBC channels (terrestrial and children's digital), parents rated Five highly as showing programmes that their child wanted to watch.
- Overall, the perceived discrepancies between the importance and delivery of elements of PSB are particularly marked for children's programming.
- The volume of children's PSB output – including CBBC and CBeebies - has declined marginally from 2002 (12,771 hours) to 2006 (12,340 hours). However, children's output on the five terrestrial PSB channels declined by 11% from 2002 to 2006. In 2006, of the five terrestrial PSB channels, BBC Two and Five provided the greatest number of hours per year of children's programming; 1,453 hours and 1,337 hours respectively.
- There has been an increase in the proportion of children's viewing to Children's genre multichannel output (including both commercial and BBC digital channels,) from 56% of total weekly hours viewed in 2002 to 82% in 2006. There was growth in the proportion of viewing of BBC digital channels from 9% in 2002 to 21% in 2006.

- In multichannel homes there has been a 36% decline in children's viewing of children's programmes on the five terrestrial PSB channels, from 47 hours per child per year in 2002 to 30 hours per year in 2006.
- Viewing to children's output on ITV1 and BBC One in multichannel homes dropped by half between 2002 and 2006 – ITV1's from 12 hours to 6 hours, and BBC One from 18 hours to 8 hours.

## **S4C**

- Regular viewers of S4C Welsh language programming identify the channel most strongly with PSB Purpose 1 relating to news provision, and to Purpose 3 relating to regional/national output. It is seen by 6 in 10 (61%) as portraying Wales well to the rest of the UK. However, overall, S4C is less likely than the PSB channels together to be seen as providing many of the elements of PSB.
- In 2006, Welsh language programming accounted for 4,512 hours of the S4C service. This figure is slightly higher than that of 2005, of 4,472 hours. Originated Welsh language output by genre for the years 2004-2006 shows the dominance of Factual programming, and also high levels of sports output.
- S4C Welsh-language programmes were watched for an average of twenty one hours per year, or twenty four minutes per week, in 2006, up slightly on 2005 figures. Share of peak-time viewing (which by definition is focused on Welsh language programming) in 2005 was 3.1%, up from 2.8% in 2004 – an 11% increase.

## **Teletext**

- Amongst those that use Teletext at least once a month, opinions of its delivery are positive: 95% agree that there is a wide range of information available; 88% agree that they can trust it to be accurate and impartial; and 75% agree that there is a range of good quality information about the local area.
- The average number of adults viewing Teletext on a weekly basis between July 2005 and June 2006 was 13.7 million, a decrease from just over 15 million in 2005. This continues a trend of decline in use.
- Both regional and national news pages are ranked highly in the types of information said to be accessed through Teletext; these are viewed by just over one third of Teletext viewers (36% and 34% respectively). Any type of news is accessed by almost half of all Teletext viewers (46%). The other most popular pages are weather and sports (claimed to be read by 57% and 46% of viewers).

## Introduction

This report provides an evidence base for monitoring the delivery of public service broadcasting (PSB). The designated PSB broadcasters are the BBC, ITV1, GMTV, Channel 4, Five, S4C and Teletext.

Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes set out in the 2003 Communications Act. Parliament asked Ofcom to monitor the effectiveness of public service broadcasters in delivering the range of PSB Purposes and Characteristics. The first Review was in 2004. Subsequent PSB Reviews will be conducted at least every five years.

The report is an outcome of Ofcom's 2004 PSB Review, which stated that Ofcom would develop a new approach to assessing the effectiveness of public service broadcasters, taken together, in delivering PSB Purposes and Characteristics (para 6.29, *Competition for Quality*).

This report, which will be provided annually, will help prepare for the next PSB Review, and also gives objective evidence as context for licensees' annual statements of programme policy and (SOPPs) and self-assessment reviews (SARs). The report does not report on broadcaster compliance with quotas. These are published in Ofcom's annual Communications Market Review.

This PSB report is framed according to the PSB Purposes and Characteristics set out in the PSB Review. These are outlined below. While the key purpose of this report is to show how PSB as a whole is being achieved in the UK, it must also look at the contributions of the individual PSB channels.

This PSB report is not an assessment of the individual performance of the public service broadcasters. The report contains no editorial commentary. Its purpose is to enable both Ofcom and its stakeholders to gain a deeper understanding of the current position of PSB delivery, and how this has changed over the last five years.

This is the first year of publication, and Ofcom welcomes suggestions from stakeholders about what other elements of reporting could be included in forthcoming years.

### Structure of the report

**Overview of the UK television market:** An overview of the UK television landscape, including key metrics relating to output and funding. This section also provides some contextual information about the position of the UK relative to other countries around the world.

**Overview of PSB:** This section examines the PSB sector as a whole in terms of its hours of output by genre over time, its viewing figures, and also viewer perceptions of the overall importance of PSB and its delivery in general terms.

**PSB Purposes:** These sections of the report take each PSB Purpose in turn, and provide evidence of output and viewing trends over time, before focusing on how viewers characterise delivery of the individual Purposes across each of the PSB channels.



**PSB Characteristics:** This section takes each PSB Characteristic in turn and provides evidence of delivery across the PSB channels.

**Children's PSB:** Output and viewing data about children's programmes is contextualised with parents' views on the extent to which children's programmes provide PSB elements.

**S4C:** The contribution of S4C in terms of Welsh language programming to delivery of PSB Purposes and Characteristics.

**Teletext:** The contribution of Teletext to delivery of PSB Purposes and Characteristics.

**Channel summaries:** A short summary of how each channel is perceived by its viewers.

## The PSB context

Ofcom is charged by the 2003 Communications Act with assessing the effectiveness of the designated public service broadcasters (BBC<sup>1</sup>, Channel 3<sup>2</sup>, Channel 4, Five, S4C and Teletext), taken together, in delivering the public services Purposes set out in the Act.

There are various ways that Ofcom monitors PSB, set out below.

## Purposes and Characteristics

Ofcom's PSB Review, conducted throughout 2004 and reporting in 2005, concluded that PSB should be defined in terms of Purposes and Characteristics, "designed to remain relevant over time, even as new technologies and media emerge to supplement, or eventually replace, more conventional broadcast channels". These Purposes and Characteristics are listed in Figure 1<sup>3</sup>.

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<sup>1</sup> The BBC PSB channels are BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News 24 and BBC Parliament. BBC News 24 and BBC Parliament are not included in this report, as the main focus is upon generalist channels, plus the specific area of Children's programming. In future years BBC News 24 is likely to be included.

<sup>2</sup> i.e. ITV1 and GMTV1.

<sup>3</sup> The BBC has also developed a separate set of PSB Purposes and Characteristics. See BBC Annual Report for more details.

## Figure 1: PSB Purposes and Characteristics

<p><b>PSB Purposes</b></p> <p><b>Informing our understanding of the world</b> - To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas</p> <p><b>Stimulating knowledge and learning</b> - To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning</p> <p><b>Reflecting UK cultural identity</b> - To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences</p> <p><b>Representing diversity and alternative viewpoints</b> - 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</p>
<p><b>PSB Characteristics</b></p> <p><b>High quality</b> - well-funded and well-produced</p> <p><b>Original</b> – new UK content rather than repeats or acquisitions</p> <p><b>Innovative</b> – breaking new ideas or re-inventing exciting approaches, rather than copying old ones</p> <p><b>Challenging</b> – making viewers think</p> <p><b>Engaging</b> – remaining accessible and attractive to viewers</p> <p><b>Widely available</b> – if content is publicly funded, a large majority of citizens need to be given the chance to watch it</p>

Although the PSB channels are expected together to fulfil the Purposes and Characteristics, within the PSB system it is also acknowledged that each PSB channel has a different remit (with access to different funding sources and different institutional approaches). These were summarised by Ofcom as<sup>4</sup>:

- The BBC as the cornerstone of PSB, with special responsibility for investing in distinctive content and always striving to meet PSB Purposes and Characteristics.
- ITV1 focusing on news and high production value origination from around the UK. ITV1 having a special additional responsibility for the provision of regional news, current affairs and other regional programming.
- Channel 4 as having a specific remit for innovation, educative programming and distinctiveness.
- Five being primarily market-led with a focus on UK original production.
- S4C having a key role in Welsh language public service broadcasting.
- Teletext having a remit for a range of high quality and diverse text material.

The PSB Purposes and Characteristics are deliberately looser than the formal quotas for annual hours of particular genres. Their development was in recognition of the fact that

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<sup>4</sup> Phase 3 – Competition for quality: Ofcom review of public service television broadcasting, February 2005.



some television programme genres are becoming less distinct, and can vary significantly in the degree to which they could be described as 'PSB'.

However, this is not to say that analysis of genres cannot provide useful contextual information. Figure 2 sets out the programme genres that are deemed most applicable to each of the PSB Purposes, and these are used as context in this report.

**Figure 2: PSB Purposes and their applicability to programme genres**

PSB Purpose	Most relevant programme genres
Purpose 1: Informing our understanding of the world	<ul style="list-style-type: none"> <li>• News</li> <li>• Current affairs</li> </ul>
Purpose 2: Stimulating knowledge and learning	<ul style="list-style-type: none"> <li>• Factual</li> <li>• Arts</li> <li>• Music</li> <li>• Education</li> </ul>
Purpose 3: Reflecting UK cultural identity	<ul style="list-style-type: none"> <li>• Regional programming</li> <li>• UK Comedy</li> <li>• UK Drama</li> <li>• UK Soap</li> <li>• Sport</li> </ul>
Purpose 4: Representing diversity and alternative viewpoints	<ul style="list-style-type: none"> <li>• Religion<sup>5</sup></li> </ul>

## Statements of Programme Policy (SOPP)

The annual process by which independent PSB broadcasters produce statements of programme policy, and reviews of the previous year's output, is a statutory requirement for broadcasters, introduced by the 2003 Communications Act. Broadcasters are required to complete their statements and reviews each year in accordance with Ofcom guidance, which is published in the form of a Guidance Note. The independent PSB broadcasters are ITV1 network; Channel 4; Five; GMTV<sup>6</sup>; Teletext; and the fifteen ITV Nations/Regions<sup>7</sup>. The BBC and S4C have different arrangements, but nonetheless produce their own statements and reviews.

The broadcasters' SOPPs for 2007 and reviews of 2006 are published simultaneously with this report.

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<sup>5</sup> In future reports, other types of programme will be included in this Purpose – for example social documentaries, and programmes with a multicultural element.

<sup>6</sup> GMTV holds a separate licence from ITV1 and has separate obligations and commitments.

<sup>7</sup> The English regional licences held in common ownership and the two SMG licences are able to submit consolidated statements and reviews. Individual statements and reviews are required from UTV, Channel Television and ITV Wales.

## Research methodologies

The main tools through which PSB is monitored in this report are as follows:

**Output hours:** the hours and minutes per week or year transmitted by broadcasters.

**Viewing figures:** who is watching the output, for how long.

**Audience impact:** what viewers think of the output.

For the purposes of consistency, output hours, viewing figures, and audience impact are reported on for all genres and Purposes/Characteristics throughout. However, the text makes it clear where individual channels have a particular remit, or where channels should not be expected to make a PSB contribution.

There are a number of factors to note in relation to these data sources.

### Output hours

The output data in this report is collected by Ofcom from the broadcasters each year, as part of their PSB returns. The period 2002-2006 is shown. It should be noted that these output figures form part of a new database<sup>8</sup>. It should also be noted that 2006 figures include some different programme classifications to previous years, and so totals for certain genres may be slightly different than earlier figures. These are noted in the narrative where relevant.

### Viewing figures

This data is provided by BARB (Broadcasters' Audience Research Board), a panel of 5,100 homes providing TV measurement for the industry.

The majority of the analysis focuses on total annual viewing hours for genres<sup>9</sup>. The proportion of viewing to programme genres is also included, as is average weekly reach and audience share figures. The analysis provides viewing trends since 2002.

Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

### Audience impact

This report provides the first published findings from Ofcom's PSB Tracker survey. The data were collected throughout 2006, daily across four months – January, April, July and October – which gives an opportunity to examine whether particular programming, or times of the year, have an impact on perceptions. Over 7,500 viewers were interviewed 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<sup>10</sup>. The statements that they were asked about correspond to the Purposes and Characteristics as set out in Figure 3. More detail on methodology can be found at Annex 1.

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<sup>8</sup> The database collects information at three genre levels. For this 2007 report, only the first level is reported.

<sup>9</sup> This measure describes the total annual hours of viewing by an average individual to a given programme genre.

<sup>10</sup> Viewers are asked to rate each channel (and the channels taken together) out of 10, and the top four scores (7-10) are used to calculate responses, correlating to a very/quite response.

**Figure 3: PSB Purposes and Characteristics and their alignment with PSB Tracker Statements**

PSB Purposes and Characteristics	PSB Tracker Statements
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	It shows news programmes and factual programmes that explain complicated issues clearly Its news programmes are trustworthy Its programmes help me understand what's going on in the world today
Purpose 2: To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning	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 3: 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	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 Its regional news programmes provide a wide range of good quality news about my area
Purpose 4: 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	Its programmes show different kinds of cultures and opinions within the UK
High quality – well funded and well produced	It shows well-made, high-quality programmes
Original – new UK content rather than repeats or acquisitions	It shows enough new programmes, made in the UK
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	It shows programmes that make me stop and think
Engaging – remaining accessible and attractive to viewers	It shows programmes I want to watch Its programmes reflect the interests and concerns of people like me

The report also includes data from the BBC-GfK Pulse survey, an online, nationally-representative panel of 15,000 viewers. Over 5,000 responses are collected each day. Panellists are presented with the previous day's schedules for all the terrestrial channels plus BBC Three, BBC Four, E4 and Sky One. Once they have selected the programmes they viewed they are asked a number of questions about them. Panellists only score programmes they have chosen to watch, and therefore they will generally be scoring programmes they enjoy. In this report, scores are presented at genre level, and by responses, not respondents. Please see Annex 1 for more detail on methodology.

## Programme genre definitions

The output hours and viewing figures use different datasets, which have slightly different programme classifications. The main differences are shown in Figure 4 below, which also provides illustrative programmes for the various genres as classified by the output hours.

**Figure 4: Comparison of selected programme genre classifications and illustrative programme titles**

Genre	Illustrative programmes	Output hours	BARB viewing figures
News		<ul style="list-style-type: none"> <li>Excludes regional news</li> <li>GMTV output is divided between News, Current Affairs, Factual, and Children's</li> </ul>	<ul style="list-style-type: none"> <li>Includes <i>Newsnight</i> on BBC Two</li> <li>GMTV output is divided between News and Other Factual (for features)</li> <li>Does not include regional news</li> </ul>
Current Affairs	<ul style="list-style-type: none"> <li><i>Panorama</i> (BBC One)</li> <li><i>Newsnight</i> (BBC Two)</li> <li><i>Tonight with Trevor McDonald</i> (ITV1)</li> <li><i>Dispatches</i> (Channel 4)</li> <li><i>The Wright Stuff</i> (Five)</li> </ul>	<ul style="list-style-type: none"> <li>Excludes consumer affairs (which is categorised under General Factual)</li> <li>Includes <i>The Wright Stuff</i> on Five</li> <li>Includes <i>Newsnight</i> on BBC Two</li> </ul>	<ul style="list-style-type: none"> <li>Includes political, economic, social, consumer affairs</li> <li>Does not include <i>The Wright Stuff</i> on Five, which is classified as Entertainment</li> </ul>
Other Factual	<ul style="list-style-type: none"> <li><i>Traffic Cops</i> (BBC One)</li> <li><i>Masterchef</i> (BBC Two)</li> <li><i>The Jeremy Kyle Show</i> (ITV1)</li> <li><i>Big Brother</i> (Channel 4)</li> <li><i>The Gadget Show</i> (Five)</li> </ul>	<ul style="list-style-type: none"> <li>Includes consumer affairs, factual entertainment, leisure and hobbies, talk shows and factual magazine shows</li> </ul>	<ul style="list-style-type: none"> <li>Includes human interest, factual entertainment, hobbies and leisure</li> </ul>
Serious Factual	<ul style="list-style-type: none"> <li><i>One Life</i> (BBC One)</li> <li><i>Coast</i> (BBC Two)</li> <li><i>Autopsy</i> (Channel 4)</li> <li><i>Extraordinary People</i> (Five)</li> </ul>	<ul style="list-style-type: none"> <li>Includes natural history, science and technology, history, nature and wildlife and other documentaries and special events</li> </ul>	<ul style="list-style-type: none"> <li>Includes natural history, science and medical, history, factual drama</li> </ul>
Education	<ul style="list-style-type: none"> <li>BBC Learning Zone</li> <li>Channel 4 Schools</li> </ul>	<ul style="list-style-type: none"> <li>Includes formal education and Schools programmes</li> </ul>	<ul style="list-style-type: none"> <li>Includes Schools programmes</li> </ul>
Entertainment	<ul style="list-style-type: none"> <li><i>My Family</i> (BBC One)</li> <li><i>Never Mind the Buzzcocks</i> (BBC Two)</li> <li><i>I'm a Celebrity</i> (ITV1)</li> <li><i>8 out of 10 Cats</i> (Channel 4)</li> <li><i>Suburban Shoot-out</i> (Five)</li> </ul>	<ul style="list-style-type: none"> <li>Includes comedy and sitcoms</li> <li>Includes contemporary music</li> </ul>	<ul style="list-style-type: none"> <li>Includes contemporary music</li> <li>Includes Comedy for overviews; although UK comedy is separated off for analysis of PSB Purpose 3</li> </ul>
Originated Drama	<ul style="list-style-type: none"> <li><i>Life on Mars</i> (BBC One)</li> <li><i>The Line of Beauty</i> (BBC Two)</li> <li><i>Prime Suspect</i> (ITV1)</li> <li><i>Shameless</i> (Channel 4)</li> </ul>	<ul style="list-style-type: none"> <li>Includes 'made for TV' films</li> <li>Includes factual drama</li> </ul>	

	<ul style="list-style-type: none"> <li>• <i>Perfect Day</i> (Five)</li> </ul>		
Originated Soap	<ul style="list-style-type: none"> <li>• <i>Coronation Street</i> (ITV1)</li> <li>• <i>EastEnders</i> (BBC One)</li> </ul>	<ul style="list-style-type: none"> <li>• Excludes <i>The Bill</i></li> </ul>	<ul style="list-style-type: none"> <li>• Includes <i>The Bill</i></li> </ul>
Films		<ul style="list-style-type: none"> <li>• Excludes 'made for TV' films</li> </ul>	<ul style="list-style-type: none"> <li>• Includes 'made for TV' films</li> </ul>

## Section 1

# Overview of the UK television market

## Key themes

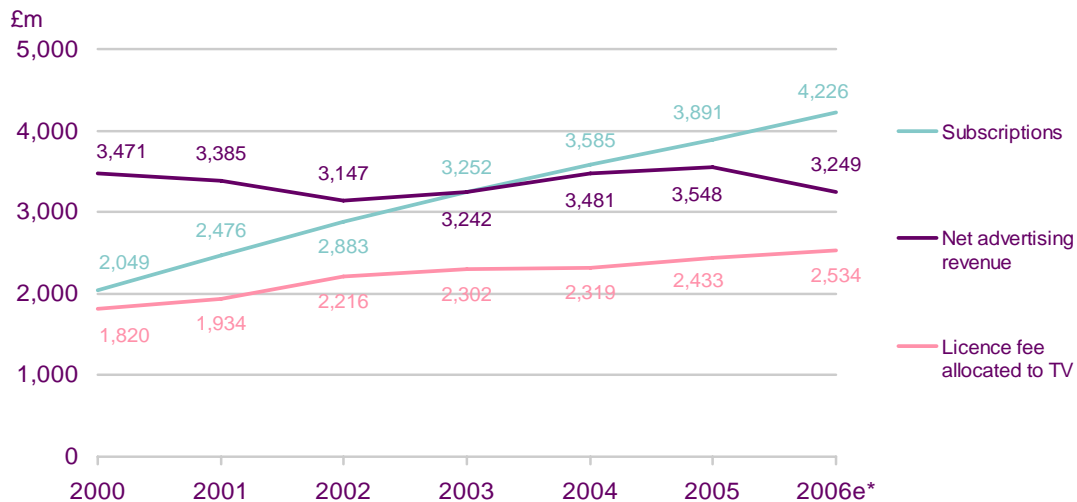
- 2006 was a transitional year for UK television. Take-up of digital television continued to rise, driven mainly by the growth of Freeview; in September 2006 73.3% of households watched digital television on their main set, a 7.9 percentage point increase on the previous year.
- Television subscription revenues increased in 2006 due to growth in subscriber numbers and above-inflation price rises. By contrast, net advertising revenue (NAR) fell by 8% overall despite a small increase in multichannel NAR. Of the commercial terrestrial broadcasters, ITV1's NAR fell most sharply, by 12%. Consequently, the difference between the revenue generated by subscription and NAR grew to £1bn in 2006.
- The internet as a distribution platform for audio-visual (AV) content grew in significance in 2006. The BBC and ITV unveiled plans to simulcast their television channels over the internet, and the four main terrestrial broadcasters (BBC, ITV, Channel 4, Five) launched or planned internet-based on-demand services. Sky rebranded its broadband download service as Sky Anytime, making sports, films and drama series available as PC downloads.
- The terrestrial broadcasters also announced plans for other value-added services. In November 2006 it was announced that a high definition (HD) broadcast pilot involving 450 Freeview homes had been a technical success and that viewers expected HD services over Freeview in the future. The terrestrial broadcasters also ventured further into TV services over mobile; Channel 4's mobile portal expanded to include clips from *Channel 4 News*, *Desperate Housewives* and *Lost*; the BBC made *Dr Who* available as mobile downloads in April 2006; and ITV1 began to simulcast over the 3 mobile network from August 2006. These developments were mirrored in the multichannel sector; Sky Anytime also offered news and sports headlines, movie trailers and interviews for downloading to mobile.
- By the end of 2006 the four terrestrial broadcasters had all expanded their channel portfolios. The last to do so was Five, which launched Five Life and Five US in October 2006. Channel 4 bolstered its portfolio by making Film4 free-to-view from July 2006, and launched a time-shifted version of Film4 in the slot vacated through the sale of its Quiz Call channel. Channel 4's overall share (parent and digital channels) increased by 1.6 percentage points in multichannel homes in 2006.

## 1.1 UK television industry revenues

Overall revenues from subscriptions, net advertising and the licence fee are estimated to be £10,009m in 2006, an increase of 1.4% on 2005. This excludes revenue from pay per view, retail and interactive services, for which 2006 data are not yet available (in 2005 they accounted for almost £750m).

Within this overall figure, provisional estimates point to a sustained increase in subscription revenue and a decrease in advertising revenue, as shown in Figure 1.1.

**Figure 1.1: TV industry revenue by source**



Source: Operator returns, agency figures and Ofcom estimates

\* Ofcom has not yet received confidential financial operator returns for the calendar year 2006, and these figures are based on other sources. They may change in subsequent publications.

### Why and how were 2006 revenue estimates derived?

Ofcom has not yet received financial returns from operators for the calendar year 2006. We have therefore relied instead on estimates for TV industry subscription revenue, net advertising revenue and the licence fee allocated to television output.

Subscription revenue consists of two components. Satellite subscription revenue is drawn directly from BSkyB's published quarterly results. Cable subscription revenue is an estimate based on Ofcom's view on the proportion of total revenue from the old ntl and Telewest franchise areas that is derived from television subscription services (as opposed to fixed line telephony, broadband access or mobile telephony).

Net advertising revenue (NAR) is drawn from agency estimates, sourced from MediaTel. NAR figures for the terrestrial channels from this source have historically tied in well to the figures we derive from our operator returns, so we believe them to be accurate. NAR estimates for digital-only channels are subject to a greater margin of error (in the region of 5%).

An estimate of the 2006 licence fee that is allocated to TV-based output is derived from historic BBC data on direct expenditure on TV-based output, along with Ofcom estimates of the proportion of overheads that can be allocated to TV-related services. The licence fee base is estimated using a weighted average household licence fee for 2006 along with the known number of licences in force in 2005/06.

The rise in subscription revenue can be explained by further growth in satellite and cable subscribers and above-inflation increases in television subscription package prices. The trends in advertising revenue and public funding are discussed below.

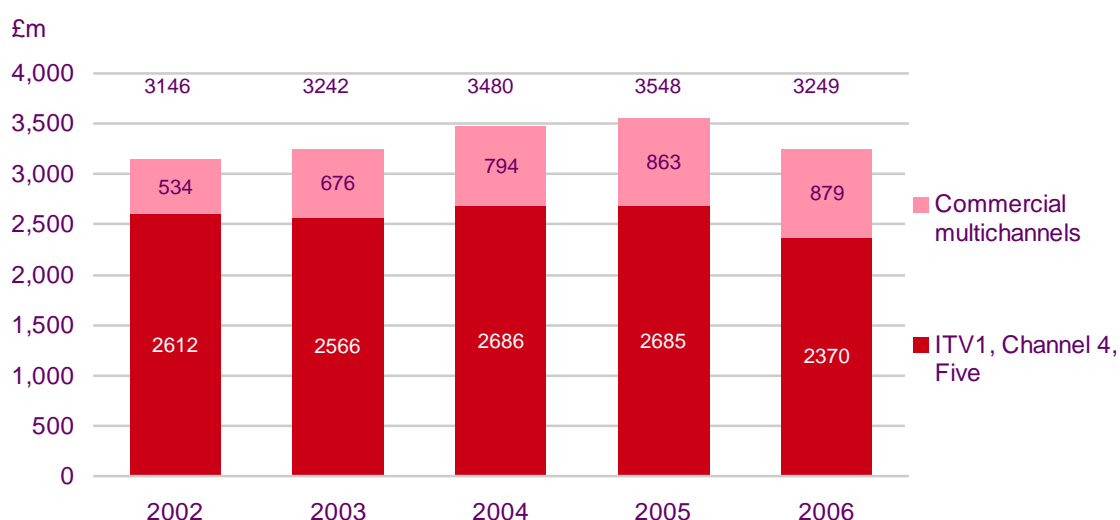
## The BBC licence fee

Public funds generated by the licence fee also increased in 2006 as a result of the final year of the Corporation's RPI+1.5% five year licence fee settlement. In January 2007 the licence fee settlement for the next five years was announced by the Department for Culture, Media and Sport (DCMS), under which, from April 2007, each television household will pay £135.50 for a licence, up 3% from the current £131.50. In 2008, this will rise by a further 3% and in each of the subsequent three years by 2%, reaching £151.50 in 2012.

## Net advertising revenues

Overall, NAR dropped by 8% in 2006, partly offset by a 2% rise in multichannel NAR. ITV1 revenues fell by 12%, compared to 6% for Channel 4 and 5% for Five<sup>11</sup>.

**Figure 1.2: Net advertising revenue by sector**



Source: Licensees, Ofcom analysis and Mediatel

Several factors account for the marked fall in television advertising revenues:

- The wider reduction in display advertising, which the Advertising Association forecast to have dropped by 3.2% in 2006;
- A drop in TV advertising expenditure as a proportion of total display advertising. According to the Advertising Association, TV's share of total display advertising in Q3 2006 was at its lowest since Q3 2003 at 32.1%; this was partly due to the growth of internet advertising, whose share of total display advertising grew from 2.9% in Q3 2005 to 4.1% in Q3 2006;
- The shift of advertising revenue out of ITV1, Channel 4 and Five to multichannels enabled advertisers to reach a bigger audience as the latter gained in viewing share.

<sup>11</sup> The agency figures for ITV are corroborated by a trading statement issued by the broadcaster in December 2006 stating that ITV1 NAR for 2006 was down by approximately 12.5%. Five's figure comes from its own returns to Ofcom.



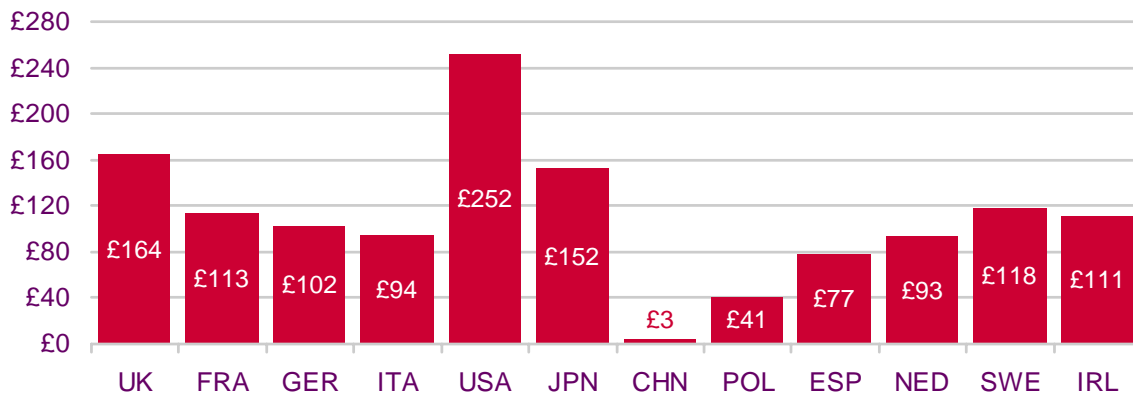
Commercial multichannel advertising constituted 27% of NAR in 2006, a three percentage point gain on the previous year.

### Television revenues: international comparisons

Ofcom's 2006 International Communications Market publication showed television industry revenue per head for 12 countries in 2005. This analysis (Figure 1.3 below) indicated that the UK TV industry was comparatively well-funded, both from commercial and public sources. It was second only to the US in television industry revenue per head with £164 received per head of population.

**Figure 1.3: Television industry revenues per capita**

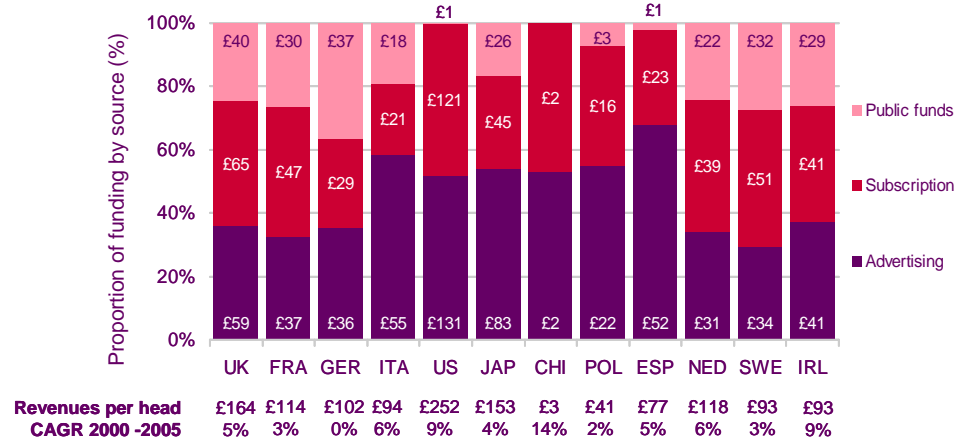
Revenues per head (£)



Source: World Television Markets 2005 (IDATE) and Ofcom analysis

In 2005 advertising constituted 36% of total TV industry revenue in the UK at £59 per head. The remaining amount was split between subscription revenues (40% / £65 per head) and public funds (24% / £40 per head). This breakdown of funds is broadly similar to France, Holland, Sweden and Ireland, but contrasts with the US, Italy and Japan, whose television industries are predominantly funded by advertising (see Figure 1.4 below).

**Figure 1.4: Sources of industry funding by country**

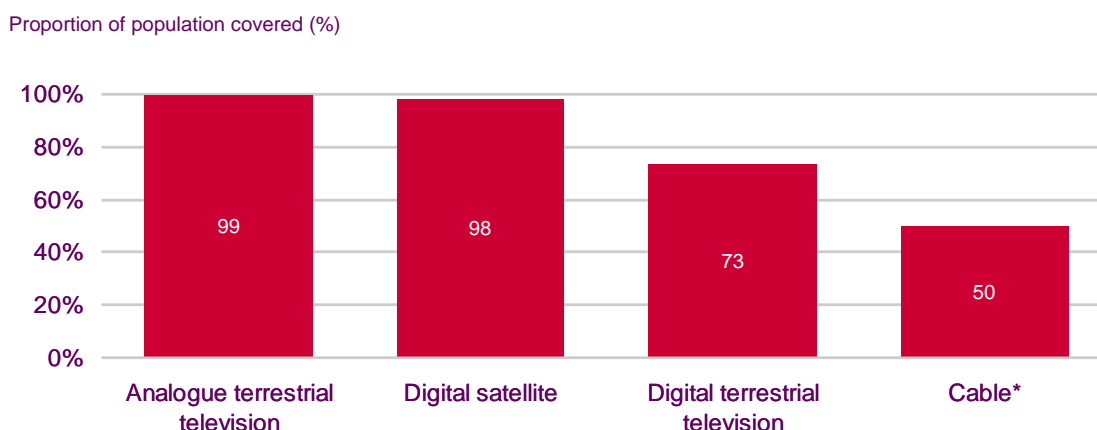


Source: World Television Markets 2005 (IDATE) and Ofcom analysis  
 Note: Figures inside the bars represent industry revenue per head

## 1.2 Platform availability

The availability of television platforms (Figure 1.5) as measured by the proportion of UK population covered has not changed significantly in the last year. Both analogue terrestrial television and digital satellite already offer over 95% availability; the proportion of the population who can receive all six television multiplexes via digital terrestrial television (DTT) is not likely to increase beyond 73% until digital switchover starts in 2008. The cable networks are in the process of upgrading their networks to digital; however, a small percentage of cable homes only currently receive analogue services.

**Figure 1.5: Availability of television platforms**



Source: Ofcom, 2006

\* A small amount of cable homes receive only analogue cable services

### New ways of delivering televisual content

Alongside traditional platforms, the dramatic increase in the take-up of broadband in 2006 prompted the terrestrial broadcasters to launch TV-over-internet services. The BBC announced its proposed launch of the 'iPlayer', a service delivered over the internet which will enable users to catch up with television up to seven days after transmission, watch TV streamed over the internet, and download audio material within any time limit. The services were approved in modified form (subject to consultation) by a Public Value Test (PVT), conducted by the BBC Trust, in early 2007.

In September 2006 the BBC also announced a memorandum of understanding with Microsoft, one of the goals of which was to support its online archive through search, navigation and content distribution. The BBC has stated that releasing its archive for consumption is a top priority, and the internet will be integral to achieving this.

Channel 4 began a simulcast service of its commissioned programmes in June 2006. ITV announced that it was planning to simulcast its TV networks over broadband from Q1 2007 as part of its 'broadband portal' which will launch in the same quarter. ITV.com will also offer programme previews and catch-up, as well as exclusive broadband content. In October 2005 ITV launched a local TV-over-broadband trial for the Brighton and Hastings region, and has announced plans to extend the service to the London and Central region in 2007.

An important step in advancing the plans of both ITV and the BBC to stream TV over the internet was the multicast trial which the broadcasters ran jointly from February to August 2006. This tested a bandwidth-efficient approach to distributing multiple AV streams to end users in co-operation with participating broadband service providers, with the aim of

ensuring that internet-based simulcasts do not prove to be unduly demanding on broadcasters' bandwidth.

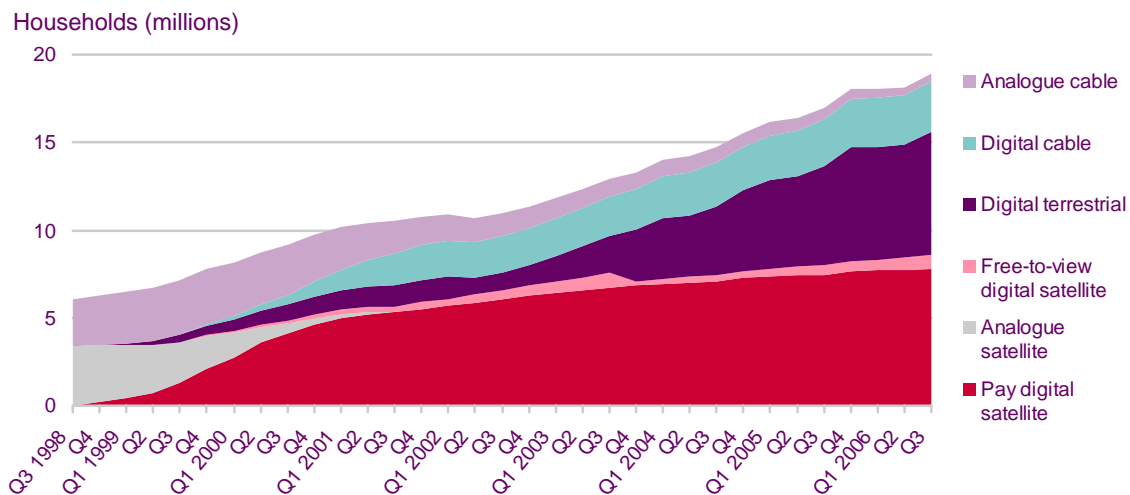
In October 2006 Channel 4 and Five both announced on-demand services. Channel 4 launched its on-demand service over cable via Virgin Media<sup>12</sup>, offering a seven day catch-up service. Its online on-demand service followed shortly afterwards, allowing downloads up to 28 days after transmission.

### 1.3 Digital television take-up

In Q3 2006, 73.3% of UK television households were able to receive digital television on their main set. Digital satellite remained the most popular DTV platform, with 8.5m subscribers in Q3 2006 (33.9% of all UK television homes). However, 7 million households watched DTT services, and growth in DTT services (Freeview) far exceeded that of digital satellite, up 23.9% in the last year compared to 6.9% growth in digital satellite. 6.4 million households received analogue broadcasts only on their main television set at the end of 2006.

The shift from analogue to digital also continued in the take-up of cable television. In Q3 2006 2.9m households watched digital cable services on their main set, and this represented 88% of all cable television households, an increase of eight percentage points on Q3 2005.

Figure 1.6: Digital TV take-up



Source: Ofcom

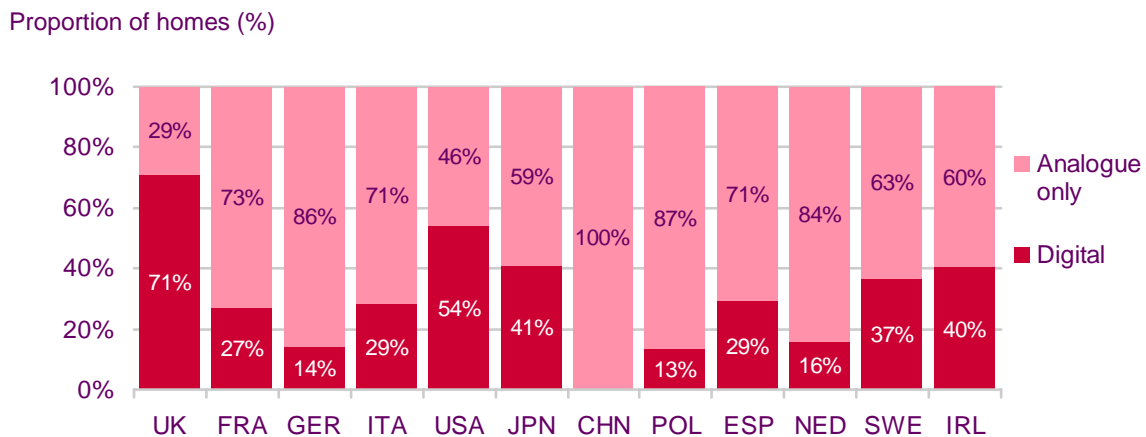
### Digital TV take-up: international comparisons

The UK currently leads the world in take-up of digital television services, as Figure 1.7, taken from Ofcom's 2006 International Communications Market report, shows. In 2005 the proportion of homes connected to a digital platform in the UK was 17 percentage points higher than in the US, the country with the next highest penetration of digital television<sup>13</sup>. This is explained by the growing popularity of Freeview in the UK.

<sup>12</sup> ntl: Telewest was rebranded as Virgin Media in February 2007.

<sup>13</sup> 71% penetration for the UK is a 2005 year-end figure – this had risen to 73.3% by Q3 2006.

**Figure 1.7: Proportion of homes connected to digital and analogue platforms**

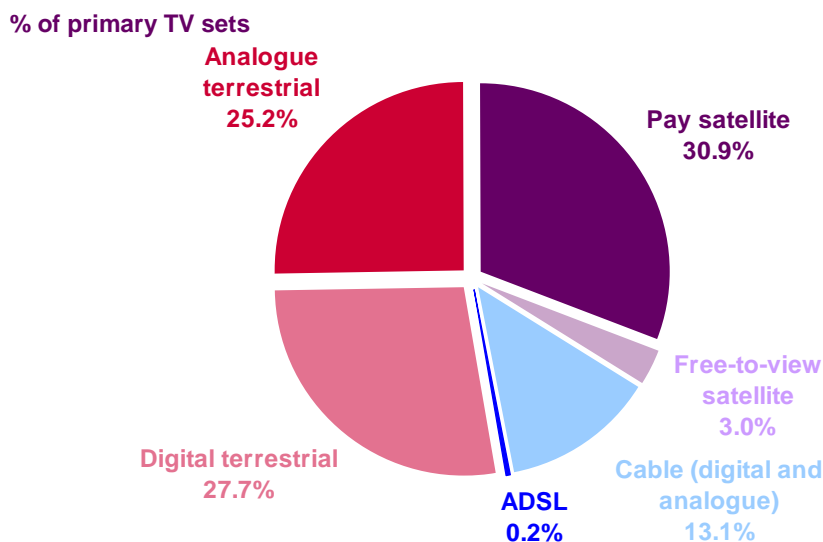


Source: World Television Markets 2005, IDATE

**The rate of conversion of secondary sets to digital increases**

In addition to the 73.3% of UK households receiving digital television on their primary set in Q3 2006, a further 1.6% subscribed to analogue cable services, bringing the number of homes receiving some form of multichannel television on their main set to 74.8%, as shown in Figure 1.8. This is 6.8 percentage points higher than the same period last year. An estimated 3.0% of UK households received digital television through free-to-view satellite services, either as a result of acquiring dedicated free satellite equipment or having churned from subscription services and now only watching the free channels.

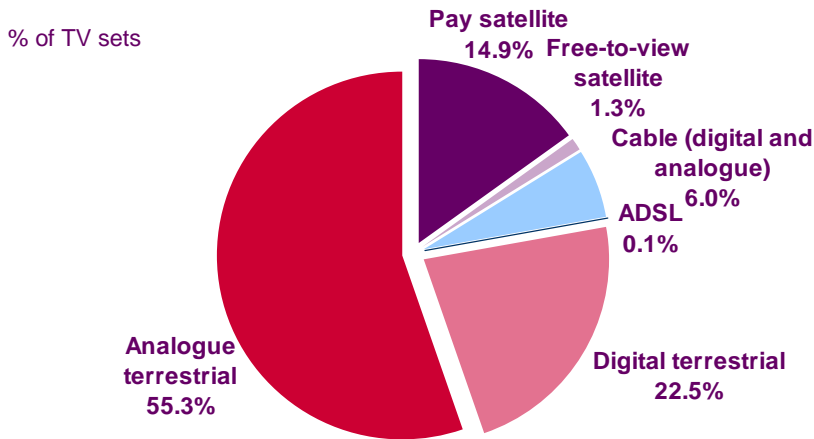
**Figure 1.8: Market share of platforms – primary set Q3 2006**



Source: Ofcom

Although 73.3% of primary sets received digital services, the proportion falls to 44.7% if all of the approximately 60 million television sets in the UK are included, as shown in Figure 1.9. However, the pace of secondary set conversion is increasing; in Q3 2006 almost 8 million were connected to a digital reception device, twice as many as in the same period last year. This has driven DTT's increased share of all TV sets – its share grew by 3.1 percentage points in Q3 2006 alone.

**Figure 1.9: Market share of TV sets – all sets Q3 2006**



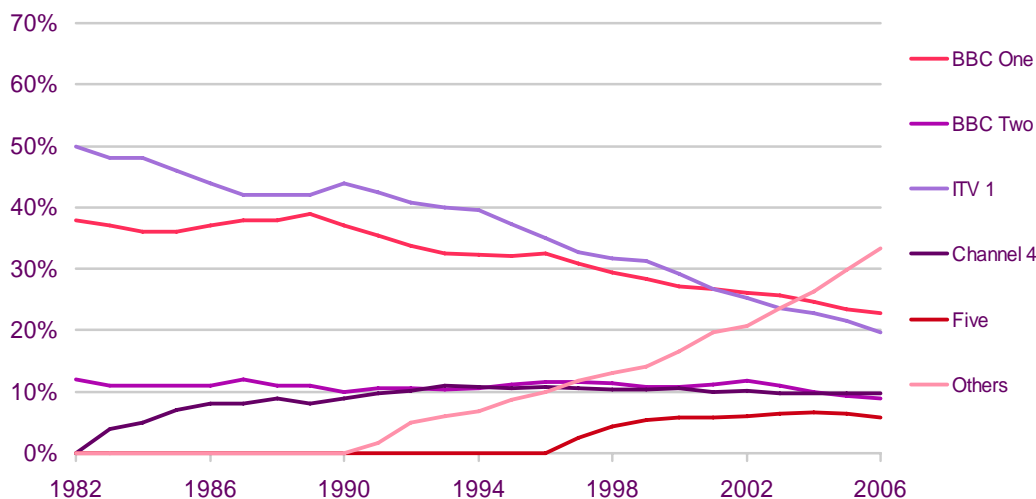
Source: Ofcom

## 1.4 Television viewing

### Viewing in all homes

Figure 1.10 charts the share of each of the terrestrial broadcasters, and the sum of all other multichannels, since 1982. The combined share of the five main channels in all homes dropped by 3.6 percentage points in 2006. ITV1 suffered the most, down 1.8 percentage points, with multichannel growing by around the same amount. BBC1's share stabilised, having in previous years been one of the channels most affected by the rise of multichannel television. Channel 4 was the only terrestrial broadcaster to maintain its share, losing just 0.2 percentage points since 2001. Conversely Five, whose share had been in the 6.3% to 6.5% range for four years, experienced a drop of 0.8 percentage points.

**Figure 1.10: Channel shares in all homes 1982-2006**



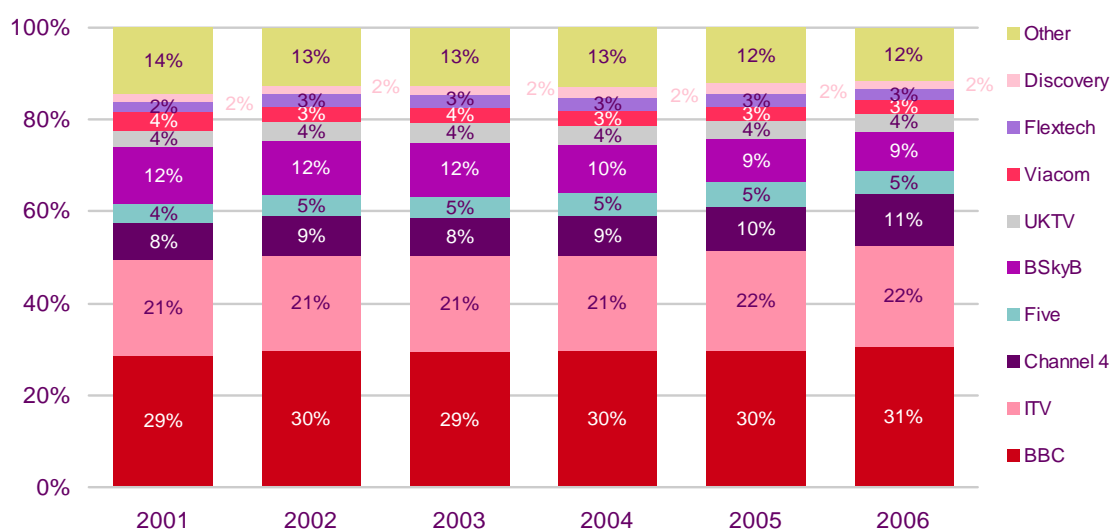
Source: BARB

## Viewing in multichannel homes

In multichannel homes the five main channels face significant competition, but ITV and Channel 4 have developed channel portfolios to compensate for reduced share on the parent channel. In 2006 Channel 4's portfolio of channels attracted a multichannel home share 2.6 percentage points higher than it did in 2004, as shown in Figure 1.11. Much of this growth can be explained by Film4 and E4 going free-to-view in July 2006 and May 2005 respectively. More 4 also launched as a free-to-view channel in October 2005.

Five was the last terrestrial broadcaster to launch new channels, with the launch of Five Life and Five US in October 2006. The BBC's portfolio, including BBC Three, BBC Four and BBC News 24, managed to add nearly one percentage point to its audience share in 2006.

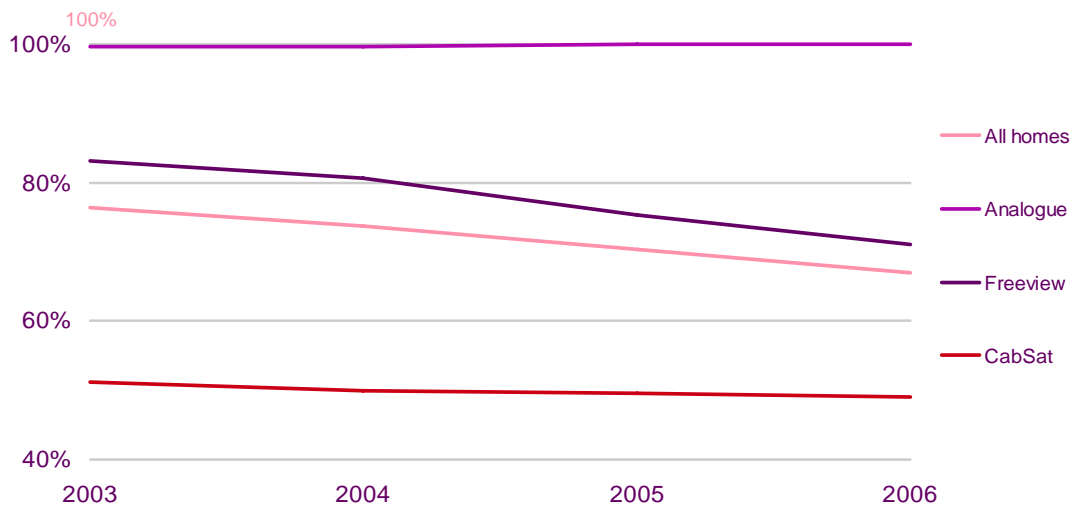
**Figure 1.11: Broadcaster shares in multichannel homes**



Source: BARB

In 2006 the combined share of the five main channels on Freeview dropped by 4.4 percentage points to 71%. The difference between their share on Freeview and cable and satellite has narrowed from 32 percentage points in 2003 to 22 percentage points in 2006. This reflects the growing number of channels on Freeview, the increasing audience share of digital channels, and the rising level of competition that digital switchover will bring to the five main channels.

**Figure 1.12: Main five terrestrial channels' share on different platforms**

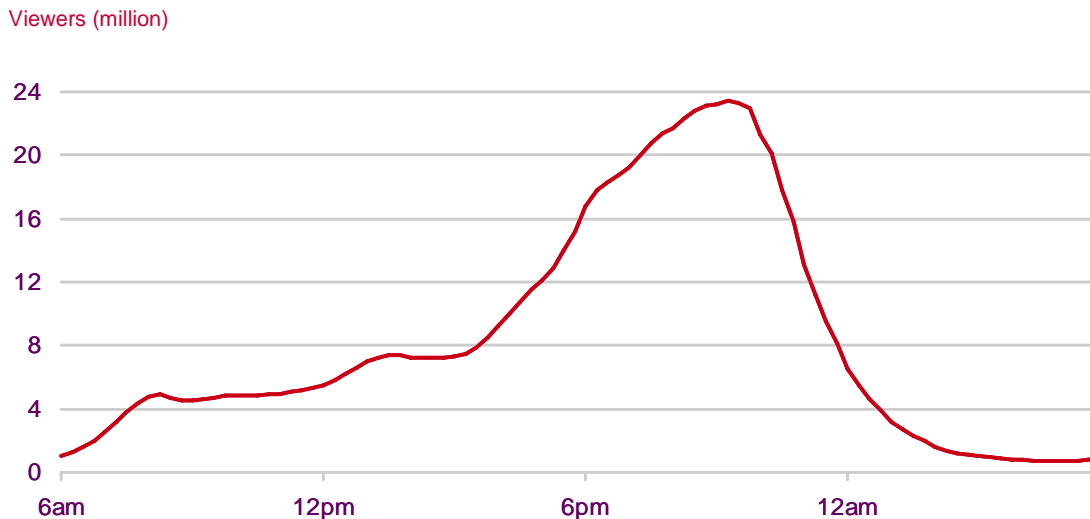


Source: BARB

### Viewing by daypart

An analysis of the average number of people watching television at any one time in 2006 shows three peaks in the course of the day; two smaller ones around breakfast and lunch time (more pronounced on weekdays than at weekends) and a much larger peak in the evening. The interval with the highest viewing audience was 21.15 – 21.30, during which time there were on average 23.4 million people watching television. This is in line with the peak viewing time in 2005, but the interval has shifted half an hour later from a 20.45 – 21.00 peak in 2005.

**Figure 1.13: Profile of TV viewing audience by daypart**



Source: BARB

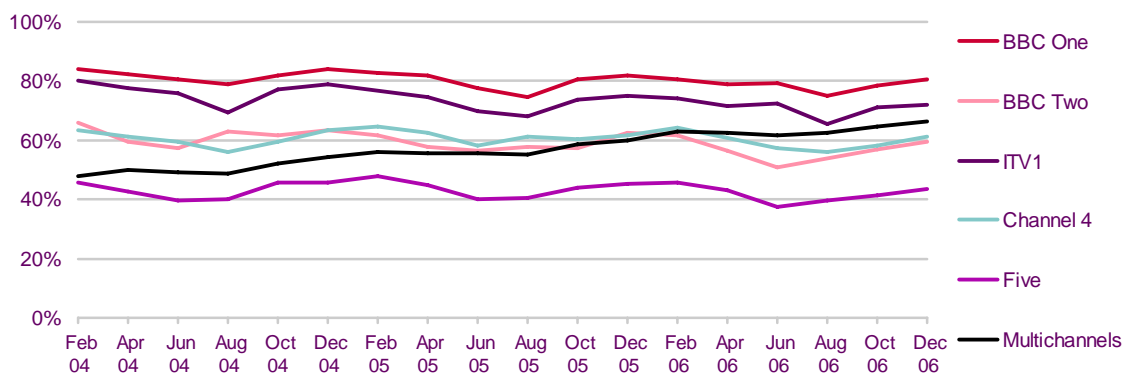
## Reach

Reach figures set out the number of people aged 4+ who watched at least 15 minutes of a genre or channel in an average week. The 15-minute reach of each of the five main channels fell in 2006, down on average 1.8 percentage points from 2005. Of the channels, BBC Two's reach decreased the most in 2006, dropping by an average of 2.4 percentage points per month on the previous year. BBC One's reach fell the least, dropping 1.2 percentage points against 2005.

Multichannel television continued to increase its reach in 2006; its 15-minute reach increased by 6.6 percentage points on 2005 to 63.5%. This reflects the increase in take-up of multichannel television, and the number of channels being offered.

**Figure 1.14: Weekly TV reach in all homes (15 minutes, all day)**

15 minute weekly reach

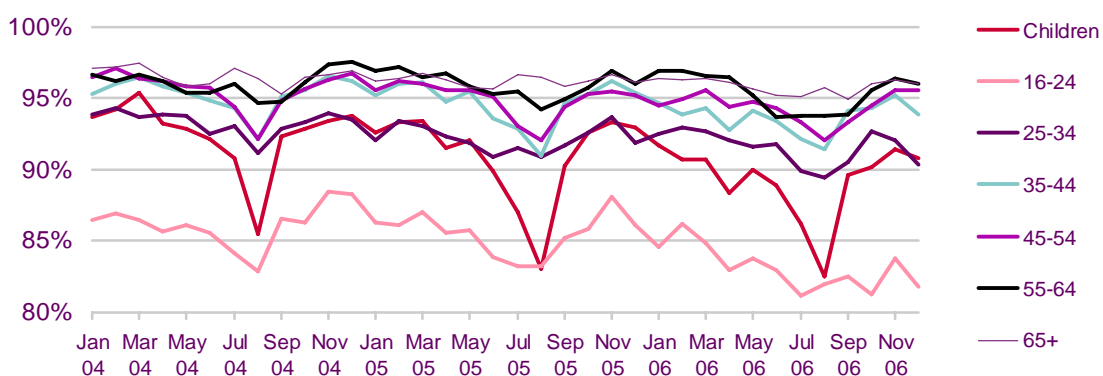


Source: BARB

During 2006, UK television reach dropped across all age groups, but particularly among 16-24 year olds, whose 15-minute reach was on average 2.4 percentage points lower per month in 2006 than in 2005.

**Figure 1.15: Weekly TV reach by age in all homes (15 mins, all day)**

15 minute weekly reach



Source: BARB



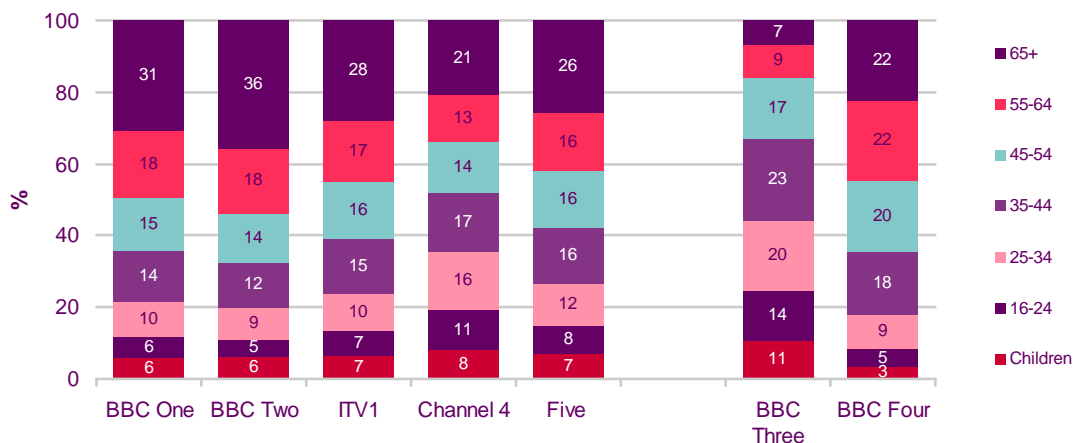
## 1.5 Viewing by age group

Figure 1.16 shows the difference in the age breakdown of viewers of the different channels in 2006.

Of the five terrestrial channels, BBC Two had the highest proportion of people aged over 65 in its audience (36%), and Channel 4 had the highest proportion of people aged under 35 (27%, excluding children). BBC One and ITV1 have very similar age profiles.

BBC Three and BBC Four appeal to very different age groups. BBC Three has the highest proportion of young people of all the PSB channels – 34% excluding children).

**Figure 1.16: Age profile of channel viewers**



Source: BARB 2006, Network  
Profile data calculated on a base of all individuals 4+

It is also important to be reminded of the differences between age groups in terms of their overall viewing of television, and how this might have changed over time. Figure 1.17 shows the average hours of viewing per day of each age group since 2002, across all television channels (not just terrestrial), with an average figure for all viewers at the top.

16-24s watch an average of 2.6 hours of (any type of) television per day, and people aged over 65 watch an average of 4.9 hours. Overall, the average time spent watching TV is 3.6 hours per day. As Figure 1.17 shows, there has been relatively little change in viewing habits since 2002 for most age groups. That said, children are viewing nearly one-tenth less, and 16-24s 4% less than they did in 2002. Those aged 45-54 are viewing slightly more.

**Figure 1.17: the average hours of daily viewing overall, over time (2002 – 2006 for all individuals, columns split by age)**

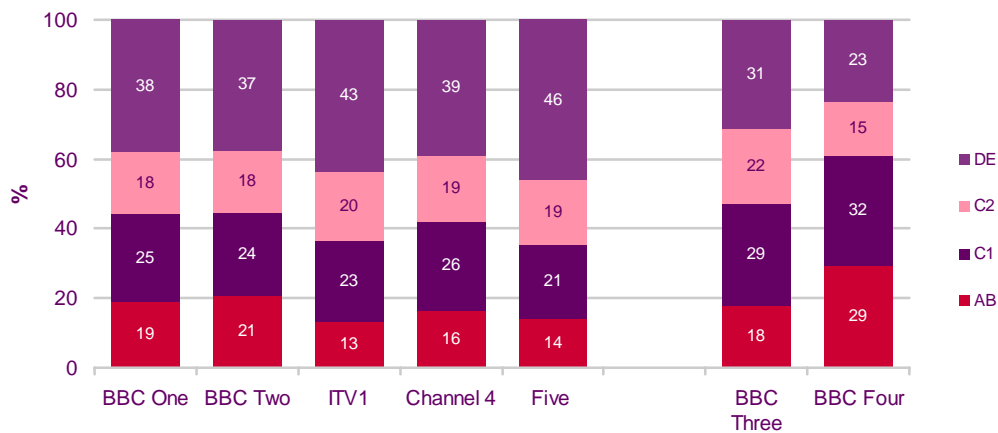


Source: BARB 2002-2006, Network  
Average hours of viewing per day, total TV

## 1.6 Viewing by socio-economic group

Turning to socio-economic groups, Figure 1.18 shows that in 2006, 44% of BBC One's audience was ABC1 compared to 36% of ITV1's. Five had the highest proportional share of DEs (46%) and 43% of ITV1's audience were DEs.

**Figure 1.18: Channel profile by socio-economic group**



Source: BARB 2006, Network  
Profile data calculated on a base of all individuals 4+

## Section 2

# Overview of Public Service Broadcasting

## 2.1 Summary findings

### Output hours

- The peak-time programme mix since 2002 has seen a rise in the proportion of Factual programmes, from 22% in 2002 to 27% in 2006. The proportion of Films reduced, from 12% to 7%.
- Peak-time output in 2006 was dominated by Factual, Drama and Light Entertainment, at 27%, 25% and 18% respectively of the overall peak-time output across the five terrestrial channels. News accounted for 10% and Current Affairs for 4% of output hours.
- In 2006 49% of ITV1's evening schedules was taken up by Drama, and 45% of BBC Two's by Factual. Just over one third (34%) of Channel 4's evening schedule comprised Factual programming.
- Across the 0600-2400 time period, there was more variety in the schedules than in peak time, with overall Factual programming filling 21% of the schedule, Children 15%, Entertainment 14% and Drama and Soap 16%.
- Output hours in this chapter relate to network programmes only. It is important to note that in addition, ITV1 and the BBC have each broadcast half an hour of regional news in peak time, per weekday. This has remained constant during the period.

### Viewing figures

- Overall average weekly reach of all TV genres declined between 2002 and 2006 from 90% to 88%, with most individual programme genres seeing some decline.
- In peak time, the proportion of viewing of Factual programmes has increased since 2002. Viewing of Drama has also increased, while viewing of Entertainment and Films has decreased.
- Proportions of viewing vary according to the channel. In 2006, Drama and Soaps comprised the bulk of viewing on ITV1 during peak time. Other Factual dominated peak-time viewing on Channel 4 (43.8%) compared to 36.3% on BBC Two. Serious Factual accounted for 16.2% of viewing on BBC Two, and 4.8% of viewing on Channel 4. One third of viewing on Five was of Drama, and one quarter of viewing on BBC One. Viewing on BBC was the most varied in terms of the number of genres watched.
- Proportions of viewing of genres on PSB channels in DTT and cable and satellite homes are broadly similar.

## **Audience impact**

- News is the programme genre that viewers say is most important to them personally and to society as a whole (56% and 62% respectively). 48% of people think that Education is of societal importance, and 40% think this of Current Affairs. Comedy and Sport are judged to be of societal importance by 28% of the population, similar to Serious Factual (27%) and Regional News (25%).
- Results from Ofcom's PSB Tracker show that people find news and information provision of primary importance. Some 57% think it important that channels show programmes with new ideas and different approaches, and 40% think it important that there are high-quality dramas or soaps, made in the UK.
- Around two-thirds of people think that programme quality, and thought-provoking programmes, are important, while just over half (53%) think this of new UK programming.
- News, big national events, and dramas are seen to be well-delivered across the PSBs. Programmes that portray a region well to the rest of the UK, and innovative programmes, are least well delivered, according to viewers.

## **2.2 Introduction**

This chapter provides an introduction to the scope and delivery of PSB across the terrestrial channels. The focus is on the main five terrestrial channels rather than inclusion of the BBC digital channels, in order that, for instance, children's output on the digital channels does not distort the proportions of output being described. Later chapters provide detail of output and viewing including the digital channels BBC Three and BBC Four. There is a separate chapter which examines Children's programming and includes CBBC and CBeebies. BBC News 24 and BBC Parliament are not included in this report, as the main focus is upon generalist channels, plus the specific area of Children's programming. In future years BBC News 24 is likely to be included within analysis of Purpose 1 relating to news provision.

It starts with a description of programme output – necessarily genre-based rather than grouped according to PSB Purpose or Characteristic. It then describes the extent of viewing of these genres. Finally, it provides an initial outline of how important, and how well-delivered, viewers find the various aspects of PSB, both in terms of programme genres and for PSB Purposes and Characteristics.

## **2.3 Output hours**

This section outlines the relative proportions of programme output on the PSB channels. It looks first at how proportions and amounts of output have changed over time, before moving on to examine how individual channels have changed their output.

It is important to note that the data in this chapter relates only to network programmes, with the exception of the breakdown of peak time plus daytime output. Regional output is considered separately under Purpose 3.

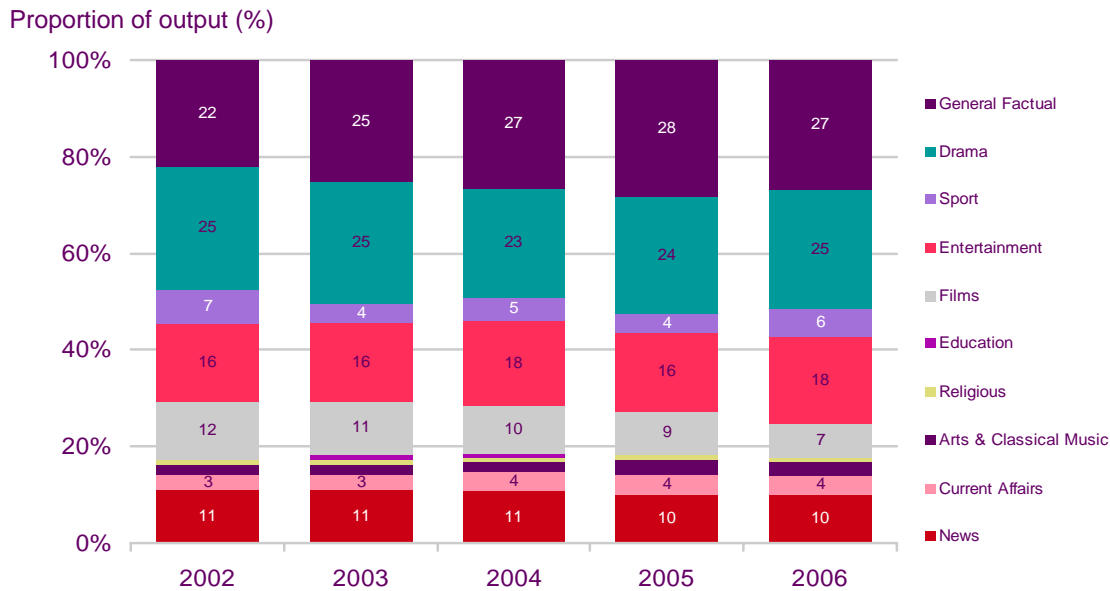
Figure 2.1 shows how the peak-time<sup>14</sup> programme mix has changed since 2002.

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<sup>14</sup> Peak time is defined as 1800 – 2230, including weekends.

The peak-time programme mix since 2002 has seen a rise in the proportion of Factual programmes, from 22% in 2002 to 27% in 2006. The proportion of Films reduced, from 12% to 7%, although this is likely in part to be due to a reclassification of made-for-TV films into the Drama genre.

**Figure 2.1: Peak-time output 2002-2006, terrestrial PSB channels**



Source: PSB broadcaster returns

The picture across the 24-hour period (Figure 2.2) confirms that Factual programming has increased significantly since 2002. Entertainment programming sharply increased in hours between 2005 and 2006, while Films reduced.

Children’s programming output has reduced since 2004 on the main terrestrial channels (while maintaining its levels of output on CBBC and CBeebies, as shown in Chapter 8). News and Current Affairs levels of output remained the same taken together, which suggests that differences between 2005 and 2006 are a result of classification changes.

**Figure 2.2 – 24-hour output 2002 – 2006, terrestrial PSB channels only**



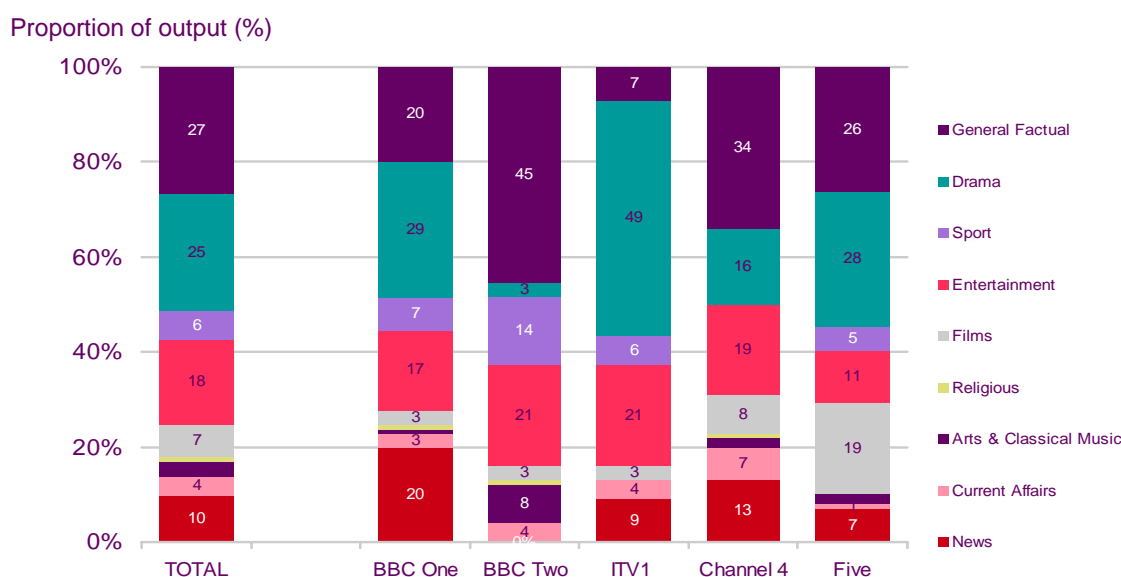
Source: PSB broadcaster returns

Turning to the proportion of genres appearing on each of the PSB channels, Figure 2.3 shows peak-time output and Figure 2.4 shows the period 0600-2400<sup>15</sup>.

Peak-time output in 2006 across the terrestrial PSBs was dominated by Factual, Drama and Entertainment, at 27%, 25% and 18% respectively of the overall peak-time output across the five terrestrial channels. News accounted for 10% and Current Affairs for 4% of output hours.

There were significant variations by channel however: nearly half of BBC Two's peak-time output was classified as Factual (45%), compared with 34% of Channel 4's and 7% of ITV1's. Drama accounted for 49% of ITV1's evening output, 28-29% of BBC One and Five's, 16% of Channel 4's, and 3% of BBC Two's. Films comprised 19% of Five's evening schedule.

**Figure 2.3: Proportion of peak-time genre output by channel, terrestrial PSB channels, 2006**



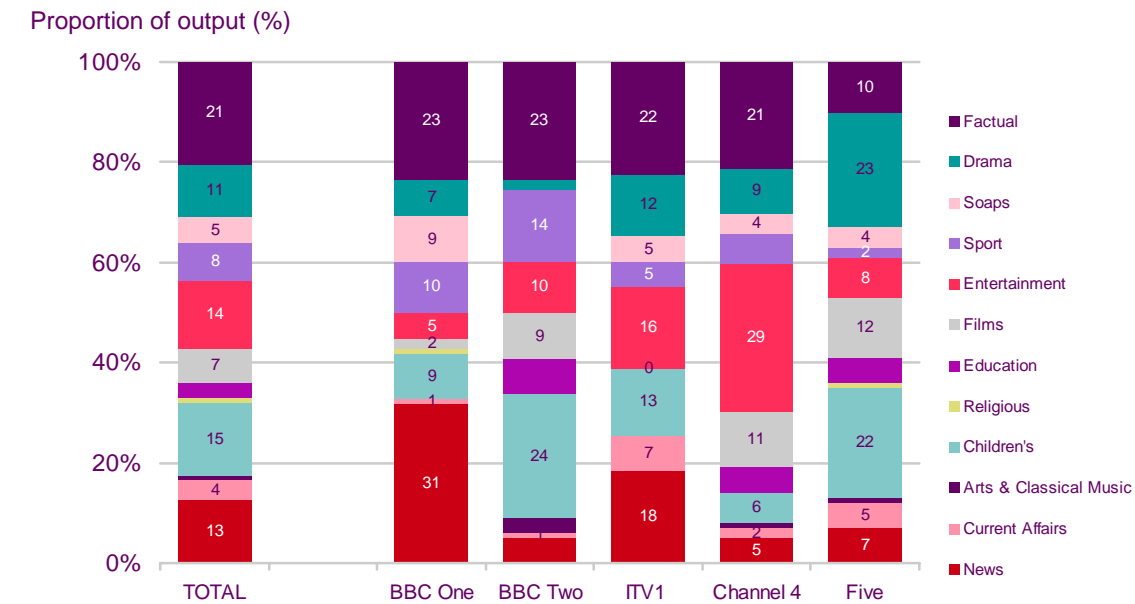
Source: PSB broadcaster returns

ITV1's proportion of peak-time news output was lower than Channel 4's (9% and 13% respectively) because one of its two evening news bulletins is at 10.30pm, outside the peak-time slot (the main one being in peak at 6.30pm). When the 0600-2400 schedule is examined for 2005-6 (see Figure 2.4 below), the proportion of its schedule showing news output is considerably higher (18%). This is also due to regional output being included in this overview of the 18-hour schedule.

Across this 18-hour schedule, Channel 4's proportion of Entertainment programming is high, at 29%.

Five's output between 0600 and 2400 contains a high proportion (22%) of children's programming. Its overnight broadcasts of sports programmes are not reflected in this chart – across a 24-hour schedule, the proportion of sports shown rises considerably.

<sup>15</sup> The period 0600-2400 was chosen in order to avoid any over-representation of a genre due to a high concentration of overnight output – for example News on BBC One, and Sport on Five.

**Figure 2.4: Proportion of genre output by channel 0600-2400, 2006**

Source: PSB broadcaster returns  
Note: includes regional output

As Figures 2.3 and 2.4 illustrate, the total mix of genres across the terrestrial PSBs is relatively varied across the period 0600-2400, although less so during peak time.

## 2.4 Viewing figures

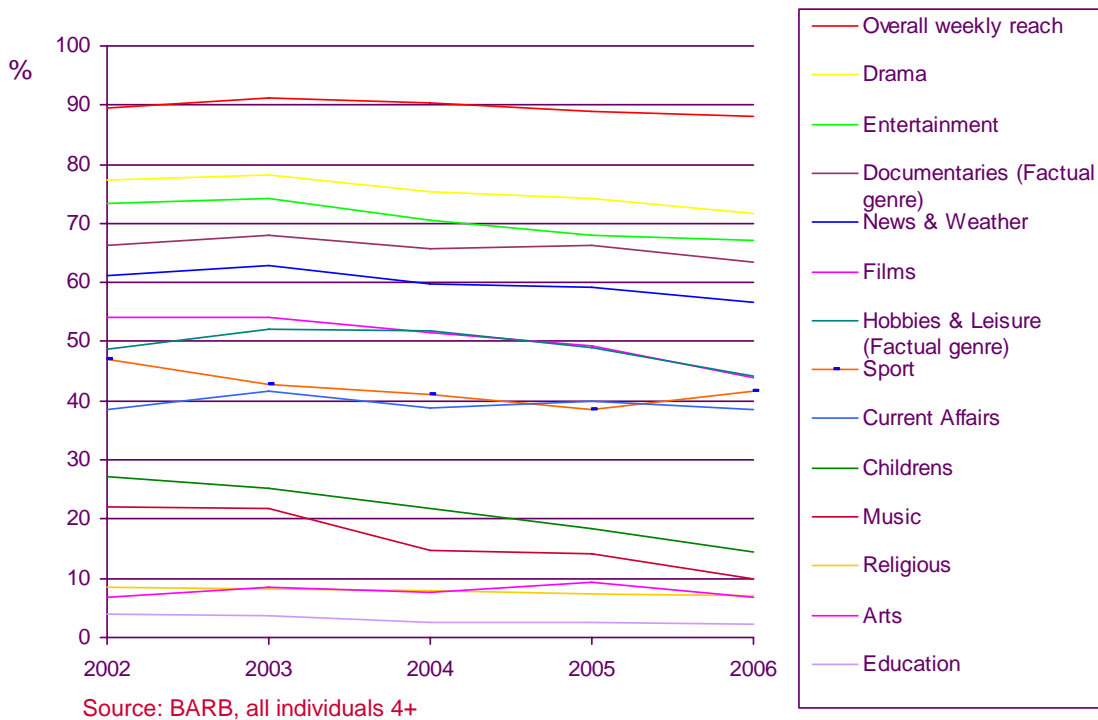
The section above describes what PSB broadcasters show on their channels, both aggregated and by channel. This next section describes the extent to which that output is watched, and by whom.

First, it sets out how the proportion of viewing of different genres across all the terrestrial PSB channels has changed over time. It then examines viewing habits as they relate to particular channels. Finally, it examines particular sub-groups of viewer.

In terms of weekly reach (15 minutes consecutive), overall reach has gone down from 90% in 2002 to 88% in 2006 (Figure 2.5)<sup>16</sup>. Most genres have seen some decline over time, with Children's particularly marked – from 28% in 2002 to 14% in 2006.

<sup>16</sup> Reach figures set out the number of individuals aged 4+ who watched at least 15 minutes of a genre or channel in an average week.

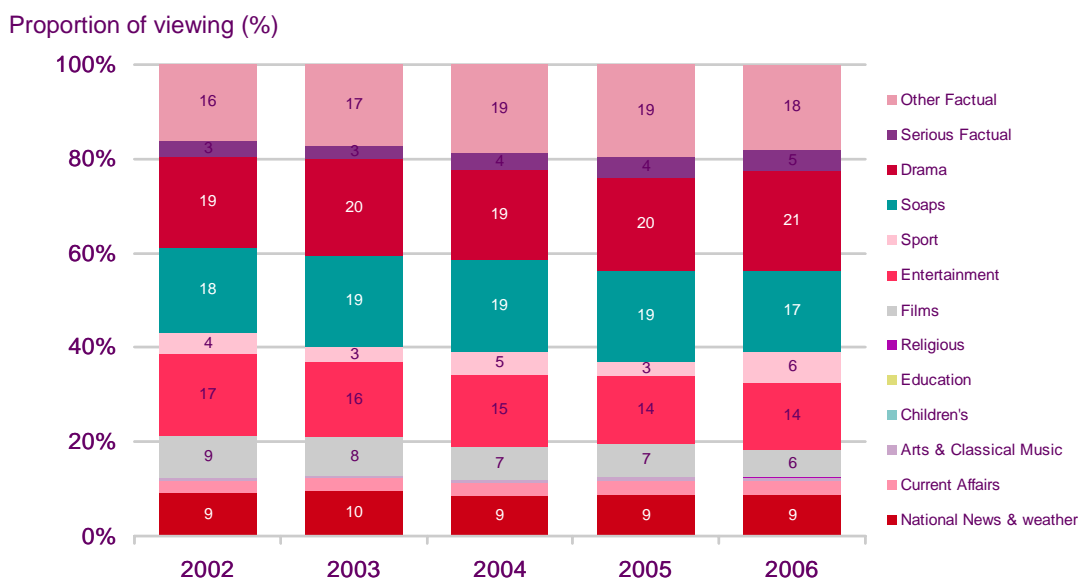
**Figure 2.5: Average Weekly Reach of PSB channels by genre 2002 – 2006, %**



**Proportion of viewing to programme genres**

As Figure 2.6 shows, the proportion of peak-time viewing of Entertainment programmes decreased since 2002, from 17% to 14% in 2006. The proportion of viewing of Soaps in 2006 was back at similar levels to 2002. Viewing of Drama increased from 19% to 21%, as did viewing of both Serious and Other Factual. Viewing of Sport increased by one third, but viewing of Films reduced from 9% in 2001 to 6% in 2006. The proportion of viewing of News remained the same.

**Figure 2.6: Proportion of viewing of different genres across all the terrestrial channels together, 2002-6 – peak time – all individuals**



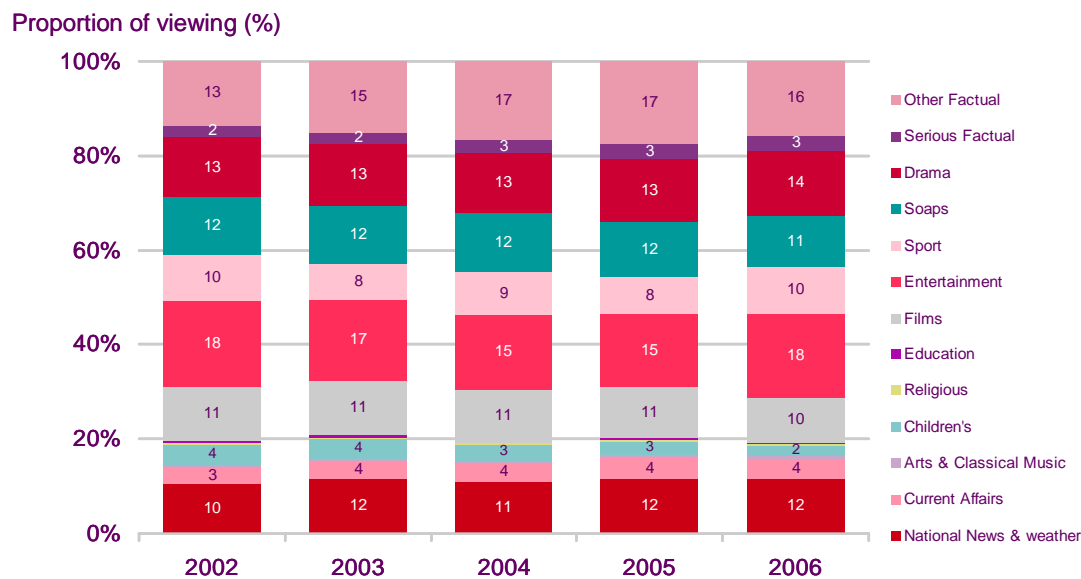
Source: BARB 2002-2006, Network, terrestrial channels only, all individuals, peak-time (1800-2230)



Figure 2.7 shows the proportion of viewing across the entire day. Viewing of Drama, Current Affairs, Serious and Other Factual increased from 2002 (although viewing of Other Factual was lower in 2006 than in 2005). Viewing of News remained at similar proportions to 2002. Viewing of Children's decreased from 4% to 2% over the period.

The amount of viewing of different genres on the terrestrial channels in 2006 was dominated by the Drama category, which includes soaps, with 25% of total viewing. The Entertainment category, which includes comedy, contemporary music, games shows, and 'event' series such as *Strictly Come Dancing* or *The X-Factor*, had 18% of viewing. Other Factual (16%), News (12%), Sport and Films (each at 10%), were next.

**Figure 2.7: Proportion of viewing of different genres across all main terrestrial channels, 2002-2006, 24 hours**

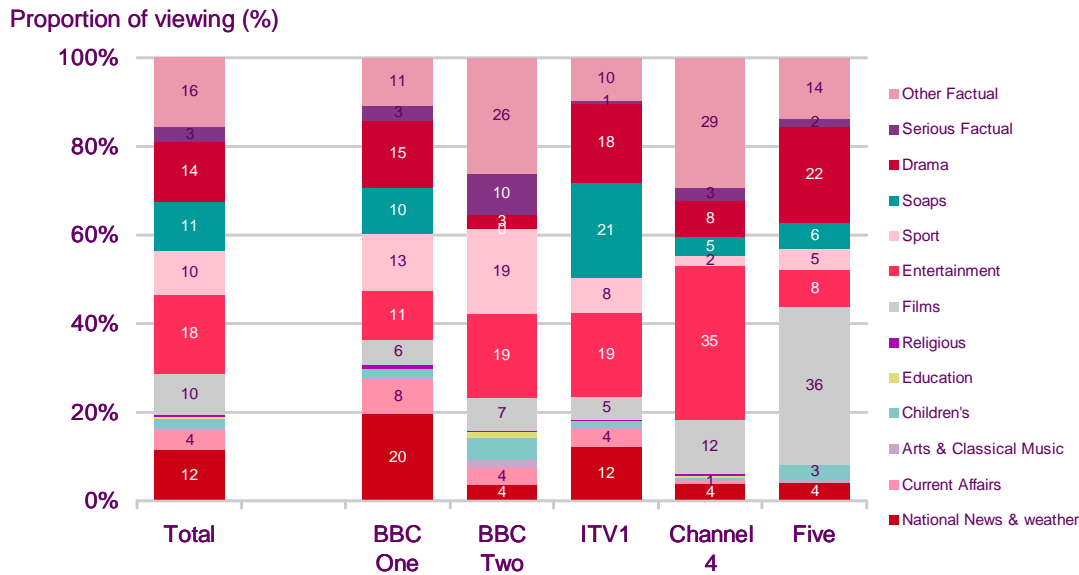


Turning to viewing across individual channels, Figure 2.8 sets out the proportion of viewing of each of the terrestrial channels in 2006.

Individuals across the UK spent just over one quarter of their total viewing of BBC One watching drama and soaps in 2006. They spent 20% of their total viewing of BBC One watching news programmes.

39% of viewing of ITV1 was of drama programmes including soaps, and 36% of viewing on Five went to watching films. 35% of viewing time on Channel 4 went to Entertainment and contemporary music programming, and 29% to Other Factual.

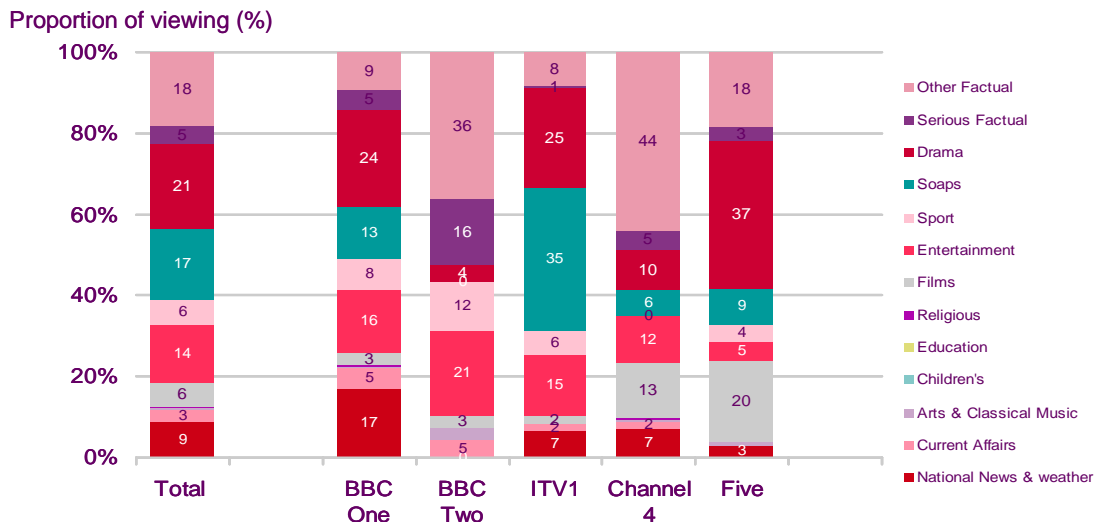
**Figure 2.8: Proportion of network viewing by channel, 24 hours, 2006**



Source: BARB 2006, network, terrestrial channels only, all individuals, all time (0600-3000)

Figure 2.9 shows the proportion of network viewing by channel during peak time in 2006. Drama and soaps comprised the bulk of viewing on ITV1. Other Factual dominated peak-time viewing on Channel 4 (44%) compared to 36% on BBC Two. Serious Factual accounted for 16% of viewing on BBC Two, and 5% of viewing on Channel 4. Over one third of viewing on Five was of Drama excluding Soaps, and one quarter of viewing on BBC One. Viewing on BBC One was the most varied between genres.

**Figure 2.9: Proportion of network viewing by channel, peak-time, 2006**



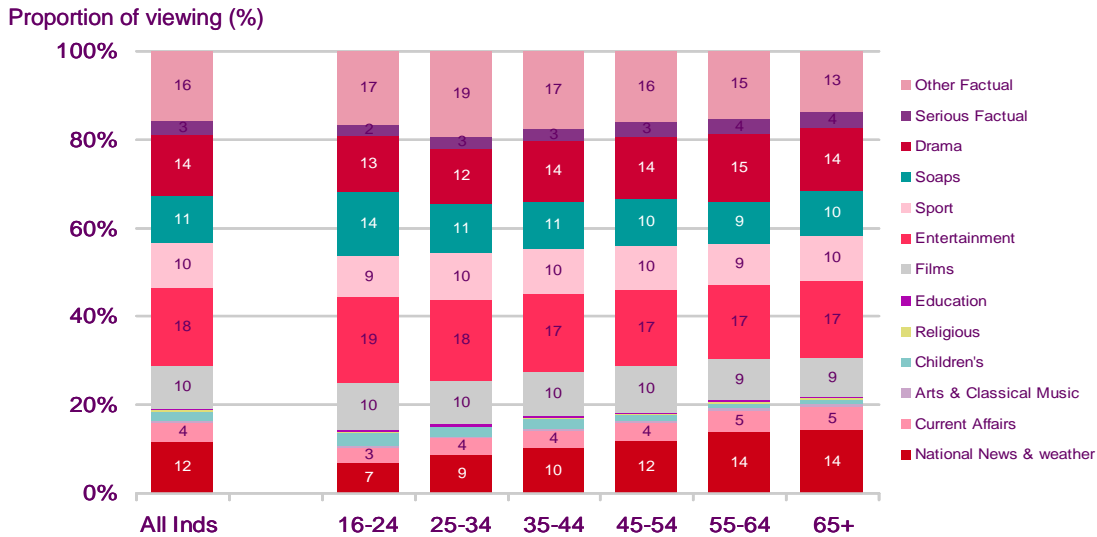
Source: BARB 2006, Network, terrestrial channels only, all individuals, Peak-time (1800-2230)

The profile of viewing of different genres is fairly similar across different age groups. Figure 2.10 shows the proportional, or relative, amounts of viewing to different genres – as Chapter 1 set out, overall amounts of viewing are significantly higher for older people, and significantly lower for younger people.

The relative amount of news viewing increases with age (see Chapter 3 for more details), and the relative amount of viewing of soaps decreases with age. Again, this does not mean that the overall amounts of soap viewing are greater amongst the young; rather, that of their limited viewing, *proportionally* more goes on watching soaps than older age groups.

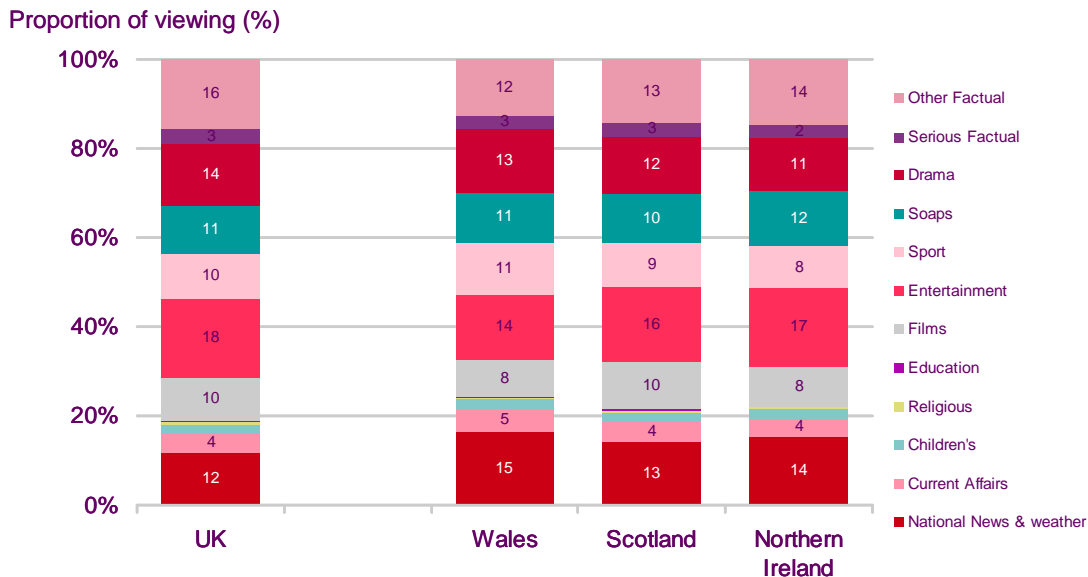
16-24s proportionally spend 19% of their viewing time on terrestrial television watching Entertainment. 25-34s spend 19% of their time watching Other Factual programming.

**Figure 2.10: Split in total network viewing by age group (% of viewing), 2006**



It is also interesting to examine the extent to which viewing habits differ across the Nations<sup>17</sup> of the UK. Figure 2.11 sets out the relative proportions of viewing.

**Figure 2.11: Proportion of total network viewing, by Nation, 2006**

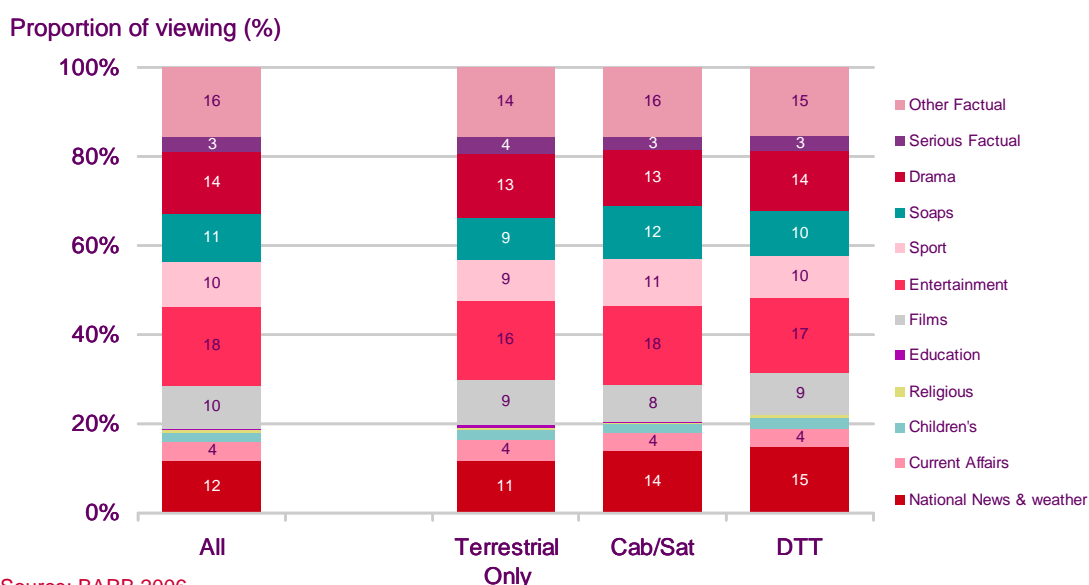


<sup>17</sup> England is not included here as due to its size of population there is very little difference with the overall UK breakdown.

There were few differences between the Nations of the UK according to the 2006 breakdown. People in Wales watched slightly more Sport, News and Drama, and those in Northern Ireland watched slightly more Entertainment, Other Factual and Soaps.

Figure 2.12 illustrates the proportion of viewing of genres on terrestrial PSB by terrestrial-only viewers and those in multichannel homes. While differences are slight, proportionally more viewing is of Soap, Sports and Entertainment in cable and satellite, compared to DTT homes. People in DTT and cable and satellite homes now watch considerably more News than those in terrestrial-only homes. The proportion of viewing of News is very similar between DTT and cable and satellite homes (15% and to 14% respectively).

**Figure 2.12: Proportion of viewing of genres, terrestrial and multichannel, 24 hours, 2006**

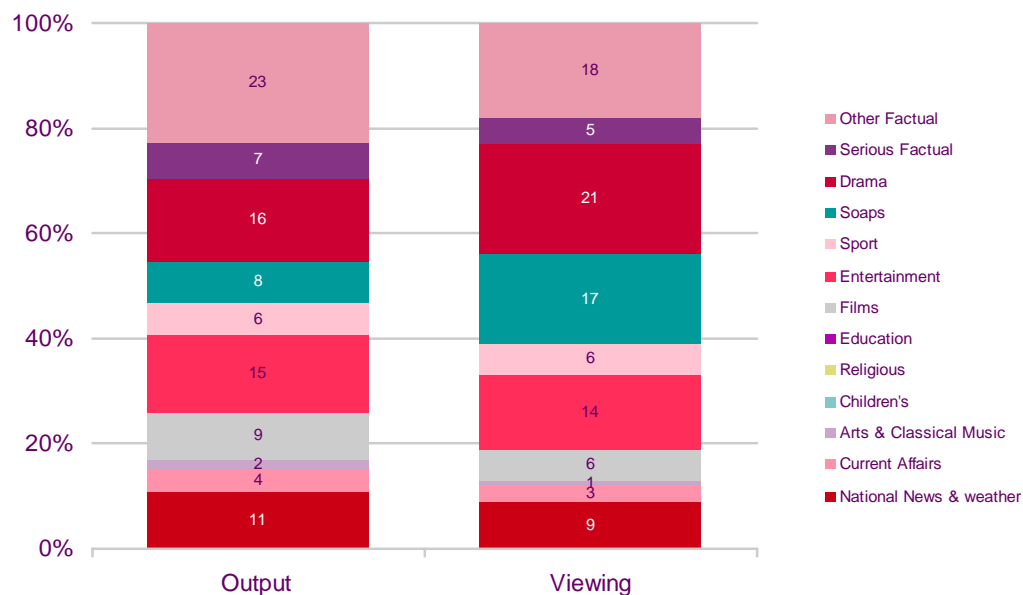


## 2.5 Proportions of peak-time output and viewing: the “popularity index”

Figure 2.13 compares the peak-time proportions of output hours and viewing that apply to the different genres<sup>18</sup>. If the goal of making schedules as attractive as possible to viewers was possible to achieve absolutely, it might be expected that the proportions of output would match the proportions of viewing: that the 11% of News and weather shown onscreen during peak time would be watched for 11% of total viewing time.

As Figure 2.13 shows, in broad terms (within a couple of percentage points), across most genres, this holds true. However, there are some exceptions, most notably in relation to Drama and Soaps, underlining the narrative pull of drama. Other Factual also “loses” viewing comparative to its output.

**Figure 2.13: Proportions of peak time output and viewing, 2006**



Source: BARB 2006

## 2.6 Audience impact

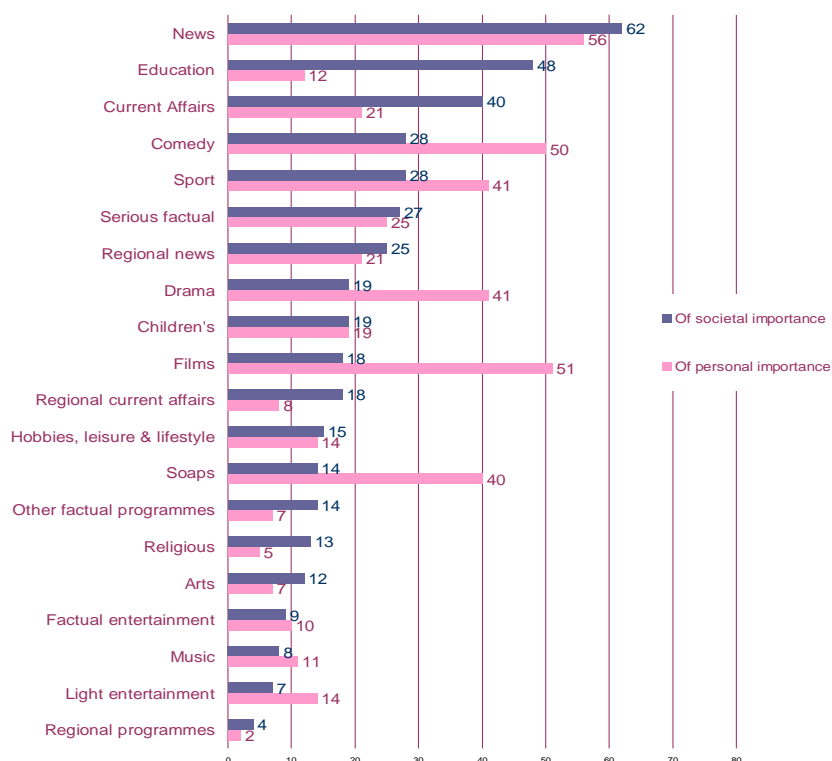
### The societal and personal importance of programme genres

The section above examined the extent to which audiences are watching different types of programme genre. This section sets out how important viewers think such genres are.

Ofcom research in 2006 asked viewers to choose five genres that were of personal importance to them, and five genres that they felt were important for the good of society as a whole. Results are shown in Figure 2.14.

<sup>18</sup> For this piece of analysis, output hours from BARB have been used, in order to make a clearer comparison with the viewing figures. The Introduction sets out the main differences in genre classifications between the broadcasters' output returns to Ofcom and the BARB system.

**Figure 2.14: Viewer opinions on the personal and societal importance of genres**



Source: July 2006, TNS omnibus, n=2000

*Question wording: From the following list, please choose the FIVE types of programmes whose presence on the main TV channels you consider to be PERSONALLY valuable to you and your household/you consider to be most important for the GOOD of society as a whole*

News is held to be the most important TV genre both in personal and societal terms (56% and 62% respectively). Serious Factual, Regional News, Children's, Hobbies, Leisure and Lifestyle, and Factual Entertainment are all perceived to be of approximately equal social and personal importance. For other genres, however, there is divergence between what is seen to be of value personally and for society as a whole.

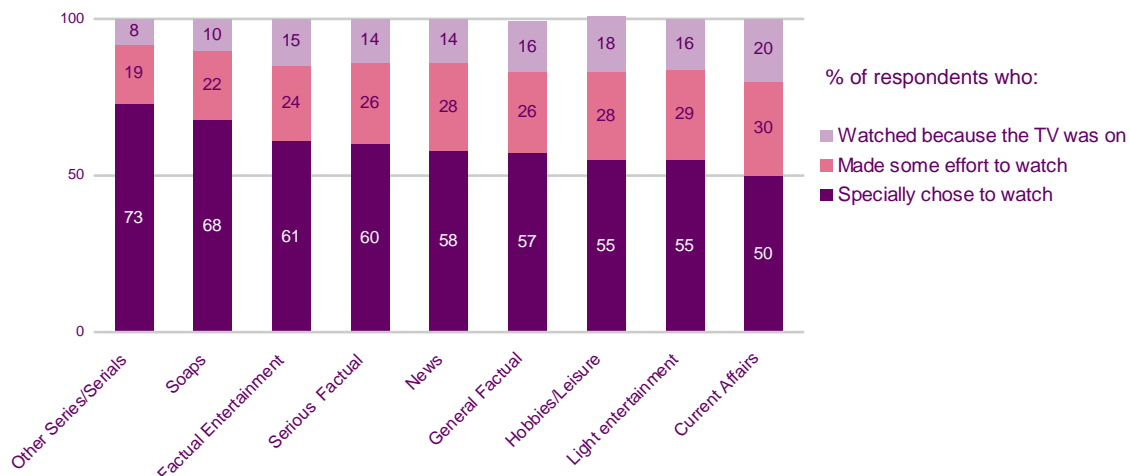
In terms of genres linked to societal good, Education and Current Affairs follow News. Next are Comedy, Sport, Serious Factual and Regional News<sup>19</sup>.

Of most personal importance are Comedy, Films, Sport, Drama and Soaps. These tally with what viewers actually watch, according to BARB figures, with the exception of Documentaries and the Hobbies/Leisure categories. This is perhaps because viewers either don't as readily admit to watching these Factual genres, or are not completely aware that

<sup>19</sup> When compared to our 2004 data, there are some differences. These may be explained by differences in methodology: the 2004 survey was a paper completion survey filled out by a panel; the 2006 survey was an in-home survey conducted by an interviewer. Whereas in 2004 the sports and soap genres were ranked highly in terms of their societal importance (second and fourth), in 2006 they were placed lower, at fifth and thirteenth respectively. The rise in the perception that Education and Current Affairs are important genres for societal good may possibly be linked to a greater desire for knowledge and understanding arising from the current geo-political climate.

they are watching them. As Figure 2.15 illustrates, narratives seem to encourage “active” viewing, with various types of factual programming being less actively sought out<sup>20</sup>.

**Figure 2.15: Comparison of “active” viewing by genre**



Source: BBC/Ipsos 2004

So far, analysis has focused on programme genres. However, as noted earlier, genres cannot provide a full picture of PSB provision, as a particular programme genre can contain within it a number of very different styles and levels of quality.

Ofcom’s PSB Purposes and Characteristics are a key mechanism to assess the provision of public service broadcasting across the main channels. They arose in part out of the 2004 PSB Review, which asked viewers to rate the importance of a number of different statements relating to PSB provision. Figure 2.16 sets out the top ten elements of most importance to respondents in 2004.

<sup>20</sup> This data (from 2004) shows responses from a panel of 4,000 viewers, who were asked to note beside each programme they watched whether it was one they had “specially chose to watch” or were watching more passively. These responses were then aggregated into genres.

**Figure 2.16: Importance of 2004 PSB statements**



Source: December 2003, Ofcom/Ipsos, n=4000

As Figure 2.16 illustrates, the most important element for viewers in 2004 was the need to keep people informed through news and other types of programme. What was also of particular importance for viewers was the protection of children from unsuitable content, and also range and balance throughout the schedules, and throughout the day. Programme quality and entertainment were also highly rated.

Ofcom's Purposes and Characteristics were translated into everyday language for the PSB Tracker, which asks respondents to give their opinions on 17 PSB statements<sup>21</sup>.

The chapters which follow provide detailed analysis of the ways in which these PSB Purposes and Characteristics are being fulfilled by the PSB channels. This chapter provides an initial summary, looking at the overall importance ascribed to these elements of PSB by audiences, and their views on overall delivery.

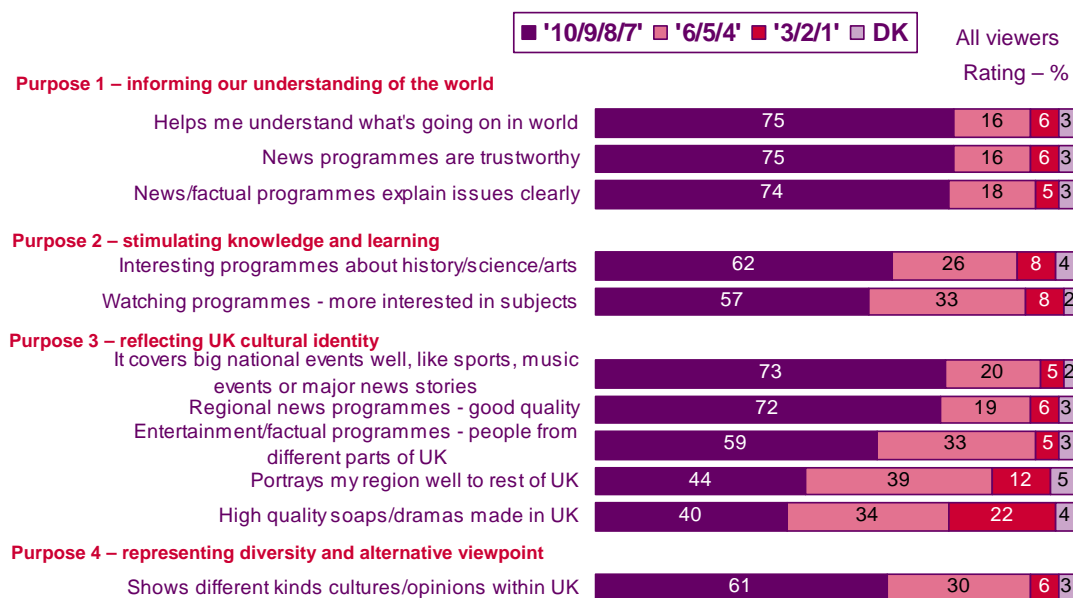
<sup>21</sup> Viewers were asked to rate each channel on the statements using a 10 point scale, where 10 applies completely and 1 does not apply at all to the channel. Within this report a rating of 7, 8, 9 or 10 has been taken as a positive response indicating that a viewer sees the channel/channels as delivering against this Purpose/Characteristic.



## The importance of PSB Purposes and Characteristics

This section reports on the perceived importance of the range of PSB Purposes and Characteristics. Figure 2.17 shows how important people find each of the statements relative to each other<sup>22</sup>.

**Figure 2.17: The importance of PSB Purposes**



Q: I'm going to read out a number of statements, on four different aspects of TV and I'd like you to tell me how important you think it is that these TV channels do each of them

Base = All respondents (1213)

©Ofcom Source: PSB Tracker - Omnibus – GfK NOP Media - Jan / Feb 2006

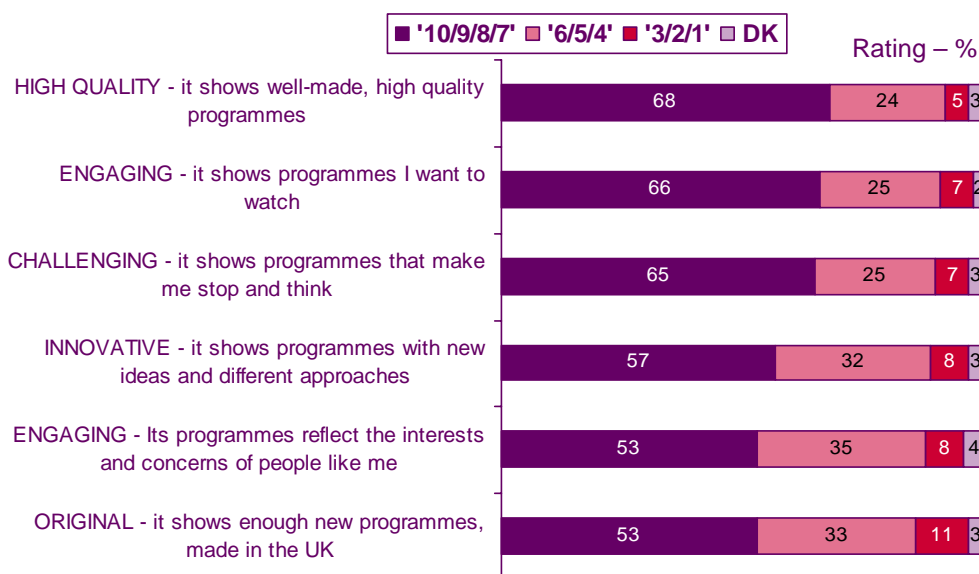
Confirming audience views about genres, news and information are the elements of television that are perceived to be of most importance to people. Around three-quarters of people in the UK rated the trustworthiness of news, the possibility of programmes to help them understand what was going on in the world, and explaining things clearly, as the most important elements of TV channels' provision.

Turning to the Characteristics of PSB, new programmes (i.e. not repeats) are seen as important by just over half the population (Figure 2.18). Two-thirds think that programme quality and thought-provoking programmes are important. Innovation is seen as important by 57% of respondents.

<sup>22</sup> This dataset was in addition to the PSB Tracker, and therefore does not comprise the same respondents. Detailed comparisons between the perceived importance of PSB and its delivery cannot therefore be undertaken.

**Figure 2.18: The importance of PSB Characteristics**

All viewers



Q: I'm going to read out a number of statements, on four different aspects of TV and I'd like you to tell me how important you think it is that these TV channels do each of them

Base = All respondents (1213)

©Ofcom Source: PSB Tracker - Omnibus – GfK NOP Media - Jan / Feb 2006

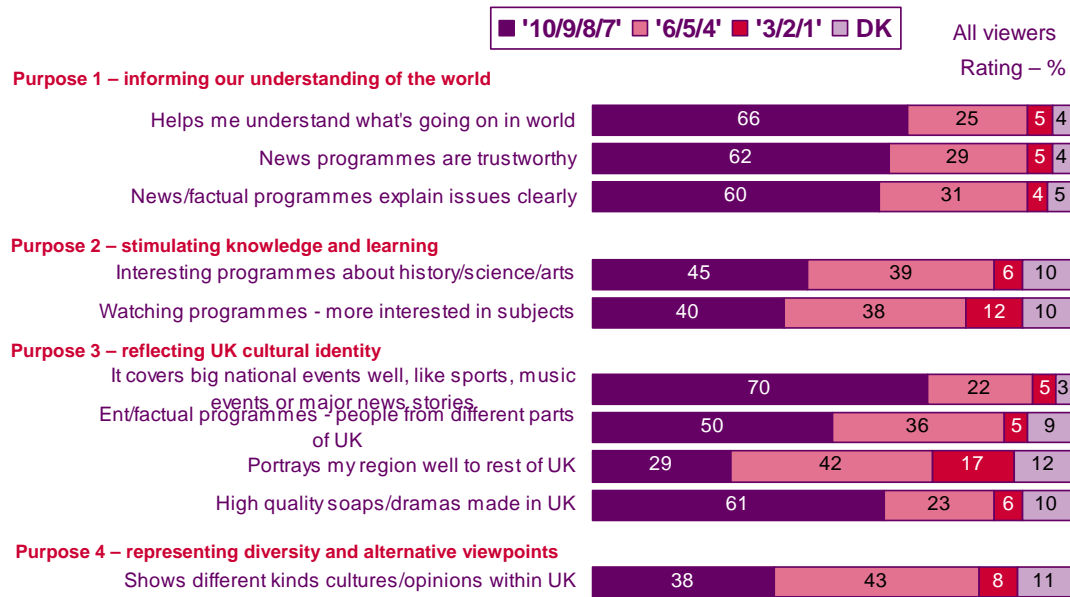
### The overall delivery of PSB Purposes and Characteristics

Figures 2.19 and 2.20 set out what viewers think of the overall delivery, by all the PSB channels taken together, of the various PSB statements. Perceptions about the delivery of PSB are in most cases notably lower than levels of importance<sup>23</sup>, particularly in relation to Purpose 2, Purpose 4, and the Characteristics relating to challenging content, innovation, and original UK content.

News, big national events, and dramas are seen to be well-delivered across the PSBs. Programmes that portray a region well to the rest of the UK, and innovative programmes, are least well delivered according to viewers, although the former is not an element of PSB that is perceived to be of major importance.

<sup>23</sup>This was similar to findings from the 2004 PSB Report. One explanation for this could be that levels of satisfaction relate to actually-existing provision, whereas levels of importance are theoretical and therefore more likely to be higher. That said, levels of importance in the 2004 survey were significantly higher than in 2006. While differences in methodology and question wording will have had an impact, perceptions of the importance of these statements will be important to track over time.

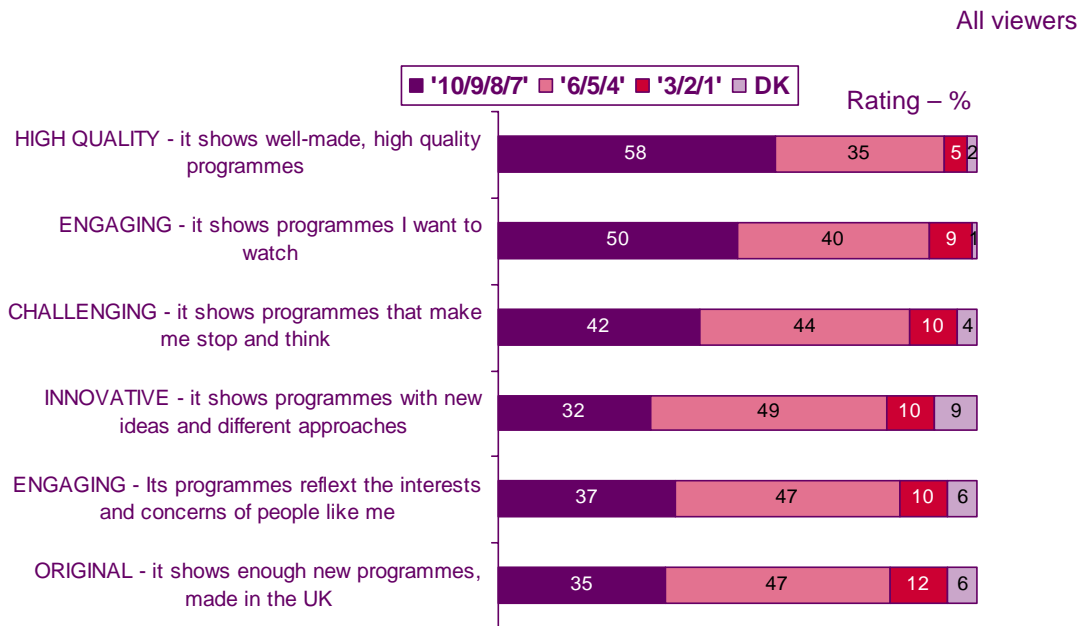
**Figure 2.19: The delivery of PSB Purposes**



Q: Thinking about all channels combined, that is BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three and BBC Four – even if you don't personally watch all of them, what is your general view across these main channels for .....

Base = All respondents (937) Oct 06

**Figure 2.20: The delivery of PSB Characteristics**



Q: Thinking about all channels combined, that is BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three and BBC Four – even if you don't personally watch all of them, what is your general view across these main channels for .....

Base = All respondents (937) Oct 06

This chapter has provided an overview of the key analytic elements of PSB – hours broadcast, viewing figures, and audience impact. The following chapters examine each of the PSB Purposes and Characteristics in some depth, to provide a rich analysis of the current position of public service broadcasting in the UK.

## Section 3

# PSB Purpose 1: informing our understanding of the world

## 3.1 Summary findings

### Importance of Purpose 1 to viewers

- News and information are the elements of television that are perceived to be of most importance to people. Around three-quarters of people in the UK rated the trustworthiness of news, the possibility of programmes to help them understand what was going on in the world, and explaining things clearly, as the most important elements of channel provision.

### Output hours

- The relative proportion of News in peak time has decreased slightly from 11% in the period 2002-2004, to 10% in 2005 and 2006. However, Current Affairs has increased slightly during the same period from 3% to 4% of overall output.
- In 2006, News accounted for 13% of all output during 0600-2400, and Current Affairs for 4%.

### Viewing figures

- Viewing of news programmes in particular is obviously affected by news events, and so in 2001, as a consequence of the September 11<sup>th</sup> attacks, an average of 103 hours of main terrestrial channel news was watched per person. This dropped in 2002 to 94 hours, and then with the wars in Iraq and Afghanistan, it rose again to 108 hours. In 2004 and 2005, news viewing was around 98 hours per year, per individual. There was a significant drop in 2006, to 91 hours per year, although this is likely to be largely due in a reduction in output hours from 2005. However, proportionally with other programme genres, viewing of News has increased slightly over the period, from 10% to 12%.
- Proportionally, news on BBC One is viewed for more hours per year than news on ITV1 (53 hours and 26 hours respectively in 2006). Hours spent viewing Channel 4 news have remained constant since 2002, but there was a decline in 2006 for BBC Two. Viewing of ITV1's news output was also down slightly on 2005 levels.
- Viewing by 16-24s of network terrestrial news has decreased over time, from 41 hours in 2002, to 33 hours in 2006. Their viewing of ITV1 has driven much of this decline, down from an average of 15 hours per year in 2002 to 11 hours per year in 2006.
- Viewers aged 65+ spend nearly six times as much time watching terrestrial network news as do 16-24s (195 hours and 33 hours respectively)

### Audience impact

- Over half of viewers feel that the PSB channels as a whole provide programmes which help them understand what's going on in the world, which are trustworthy, and which explain complicated issues clearly – the highest-ranked elements of PSB apart from the coverage of key national events.
- Around three-quarters of regular viewers of BBC One and BBC Two said that programmes on these channels helped them understand what was going on in the world. This decreased to almost two-thirds of regular viewers of ITV1 (63%) and 57% of viewers to Channel 4.
- Regular viewers to the channels ascribed relatively high levels of trust to the news programmes of each broadcaster. Levels of active distrust were small, although sizeable proportions of regular viewers of Five, BBC Three and BBC Four said they don't know.
- Views about which channels explain complicated issues showed that the BBC terrestrial channels are rated more highly than other channels.
- In terms of particular channels, BBC One and BBC Two are seen as best delivering these elements amongst regular viewers. Viewers in Northern Ireland tend to rate ITV1 more highly than in other Nations, and males are more likely to rate Channel 4 highly. Those in the DE socio-economic group are less likely to rate BBC One, BBC Two, and Channel 4 highly.
- From the Pulse survey, among respondents who chose to watch News programming, responses across all channels showed high levels of agreement that broadcasting was of high quality, trustworthy and impartial, and also that the viewer learnt something.

## 3.2 Introduction

This chapter examines the first PSB Purpose, as defined in Ofcom's PSB Review 2004:

To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas

This chapter focuses on news and current affairs programming as the key ways to deliver this PSB Purpose (please note that regional output is examined separately in Chapter 5)<sup>24</sup>. BBC News 24 and BBC Parliament are not examined in this report, although they do contribute to the BBC's overall delivery of PSB content in this area.

News programming is a genre which all main terrestrial broadcasters have a statutory duty to provide, and as such this Purpose is directly applicable to all of them.

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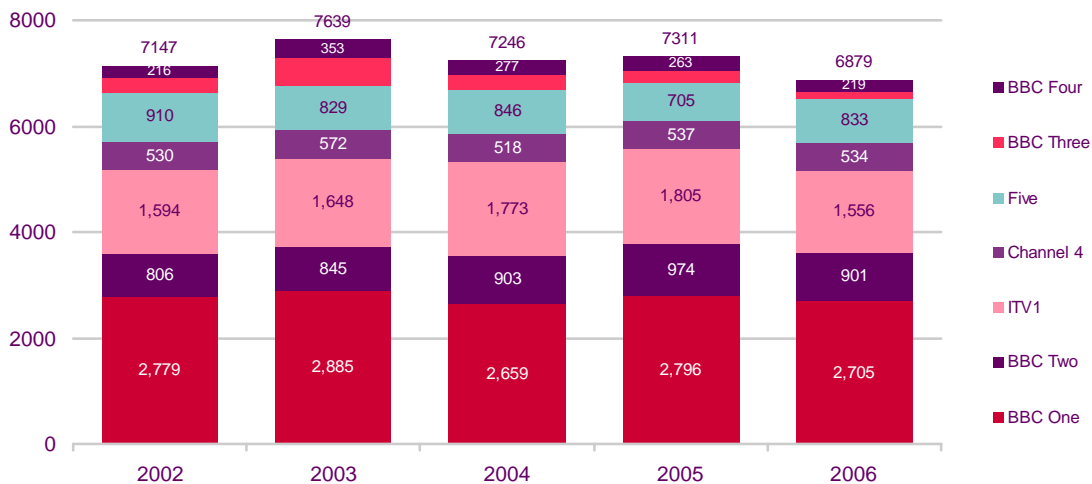
<sup>24</sup> Other genres, for example Serious Factual, could have been included here, but for the purposes of clarity of reporting they are included in the following PSB Purpose relating to informal learning. The emphasis in this chapter is upon the two genres which encapsulate *current* events and ideas.

### 3.3 Output

The relative proportion of terrestrial news in peak time has decreased slightly from 11% during 2002-2004, to 10% in 2005 and 2006, with current affairs going from 3% to 4% during this period (see Figure 2.1 above). In 2006, News accounted for 13% of all output during the 0600-2400 timeslot, and Current Affairs for 4%.

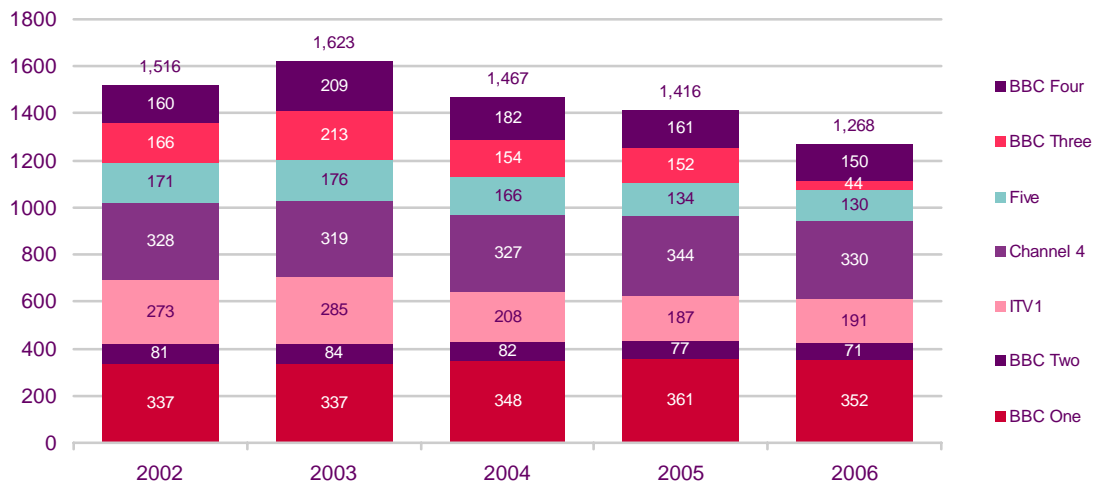
Figure 3.1 sets out the annual hours of output of news and current affairs programmes by channel. It should be noted that hours of national news output will vary from year to year depending on the news agenda and the need for extended bulletins. It is also the case that variations in BBC One and Two output figures are in part due to the extent of simulcast of BBC News 24 programming overnight. There was a drop in ITV's output between 2005 and 2006, from 1,805 hours to 1,556 hours. Five's output rose from 705 hours in 2005 to 833 hours in 2006.

**Figure 3.1: Annual volume of news and current affairs output, all day, 2002-2006**



Source: PSB broadcaster returns

Figure 3.2 shows the number of hours per year of News and Current Affairs output in peak time. Hours of output on ITV1 (including GMTV) have reduced, but this is largely due to the scheduling changes brought about by the moving of *News at Ten* out of its peak time slot and into near peak. BBC Three's news output diminished sharply in 2006 as a result of no longer showing a 30-minute bulletin at 7pm.

**Figure 3.2: Volume of hours of news and current affairs output, peak time, 2002-2006**

Source: PSB broadcaster returns

### 3.4 Viewing figures

This section reports on overall hours and proportions of viewing of the News and Current Affairs genres.

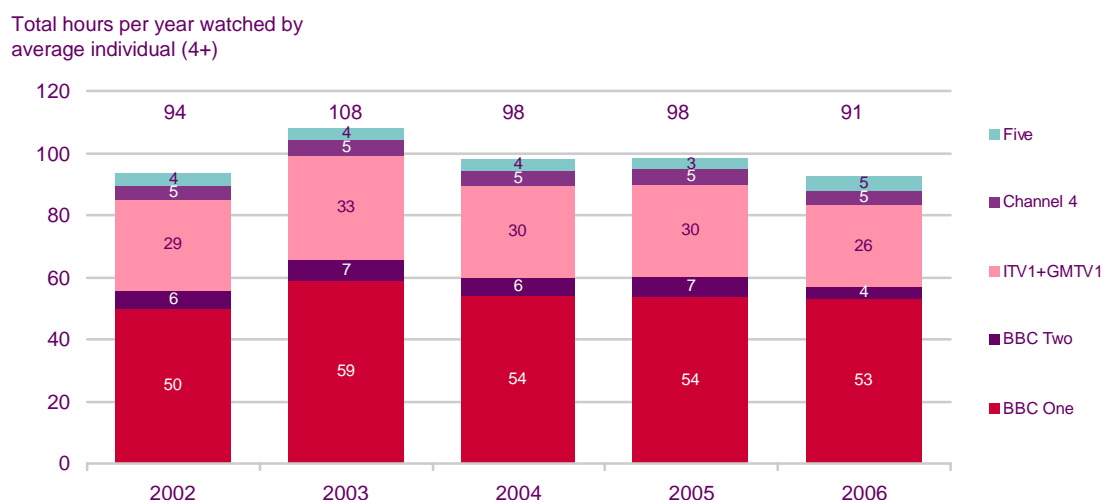
#### News and current affairs viewing hours

Viewing of news programmes in particular is obviously affected by news events, and so in 2001, as a consequence of the September 11<sup>th</sup> attacks, people watched an average of 103 hours of news. This dropped in 2002 to 94 hours, and then with the wars in Iraq and Afghanistan, it rose again to 108 hours. In 2004 and 2005, news viewing was around 98 hours per year, per individual. In 2006, this dropped to 91 hours per year. This drop can in large part be explained by the fact that the amount of news and current affairs output was also lower (6,879 hours in 2006 compared to 7,311 hours in 2005).

Figure 3.3 also shows the hours viewed per channel. Proportionally, news on BBC One is viewed for more hours per year than news on ITV1 (53 hours and 26 hours respectively in 2006). Hours spent viewing Channel 4 news have remained constant since 2002, but there was a marked decline in 2006 for BBC Two, from 7 hours in 2005 to 4 hours in 2006. ITV1's news output was watched for an average 26 hours per year in 2006 compared to 30 hours in 2005<sup>25</sup>.

<sup>25</sup> ITV1's output includes GMTV. The reduction is likely to be related to the decrease in hours of output on ITV1.

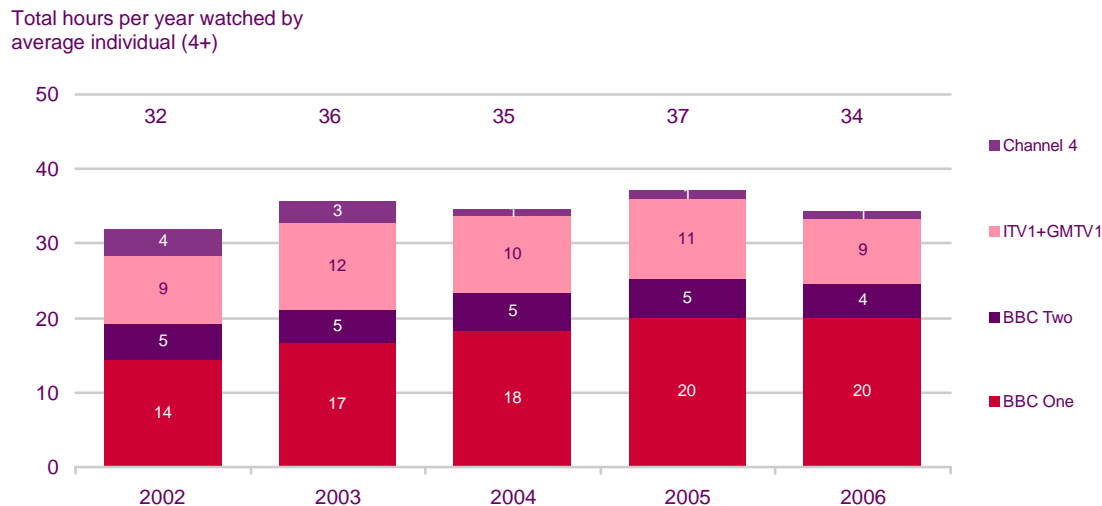
**Figure 3.3: Yearly hours of network news viewing, 2002 – 2006**



Source: BARB, 2002-2006

Viewing of Current Affairs programming also fluctuates over time, as Figure 3.4 illustrates. While viewing of Current Affairs on BBC One has risen during the period, viewing on Channel 4 has decreased significantly. This is largely due to the classification of its breakfast programming as Current Affairs, which ceased in 2004. As stated previously, Five's *The Wright Stuff* is classified on the BARB system as Entertainment and therefore does not appear here.

**Figure 3.4: Viewing of Current Affairs programming by channel 2002 – 2006**



Source: BARB, 2002-2006

### News viewing by age and by platform

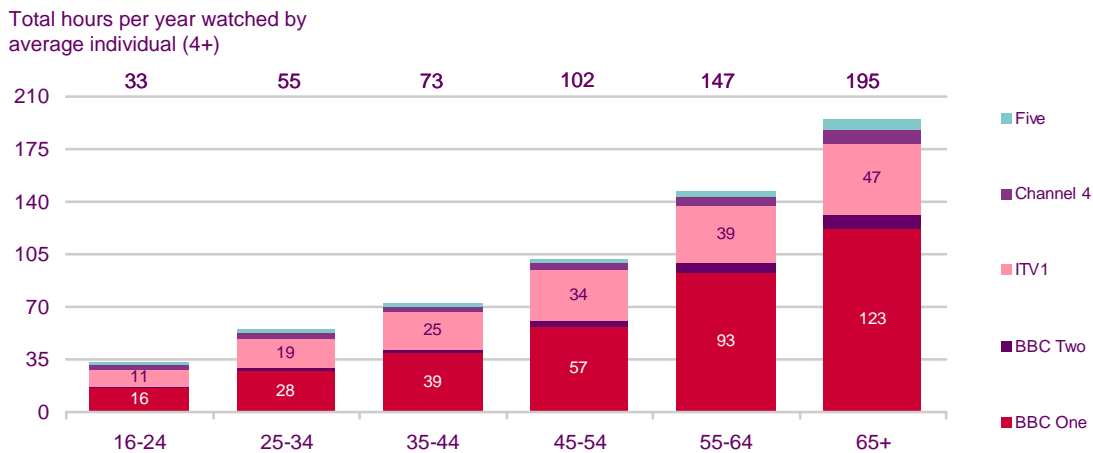
Viewing of the News genre varies greatly according to the age of the viewer, as Figure 3.5 illustrates. Viewers aged 16-24 watched an average of 33 hours, or 38 minutes per week, of terrestrial news programmes in 2006. This is in contrast to those aged over 65, who watched an average of 195 hours per year, or 3 hours 45 minutes per week.

This differential is of course largely explained by the relative amounts of overall television viewed by these two age-groups – 16-24s watch an average of 2.6 hours per day, compared to 4.9 hours per day viewed by those aged 65 or over. That said, the overall proportional



difference is still significant – those aged 65+ spend nearly six times as much time watching terrestrial network news as do 16-24s.

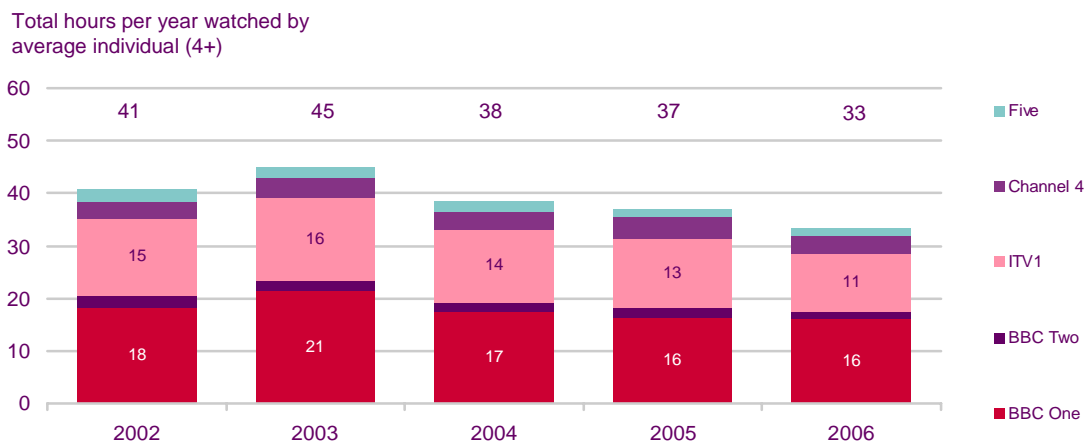
**Figure 3.5: Total viewing of network national news programmes, by channel, by age**



Source: BARB, 2002-2006

Figure 3.6 shows that viewing by 16-24s of network terrestrial news has decreased over time, from 41 hours in 2002 to 33 hours in 2006. Since 2004, viewing of ITV1 has decreased from an average of 14 hours per year to 11 hours per year.

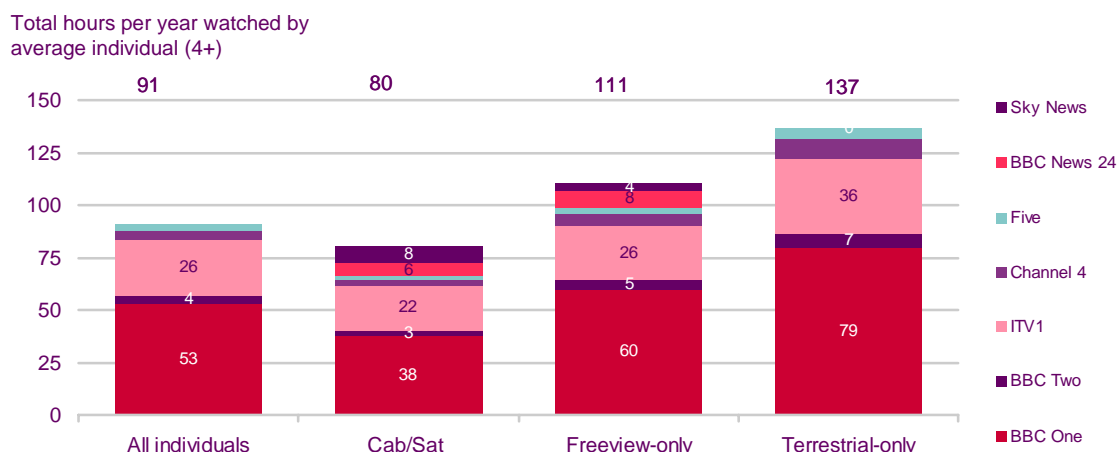
**Figure 3.6: Total viewing of network national news, by channel, 16-24s, 2002-6**



Source: BARB 2006

News viewing on the PSB channels also varies according to the type of access to multichannel available. As Figure 3.7 shows, while an average of 91 hours was watched by all individuals in 2006, this decreased to 80 hours for those with cable or satellite, and rises to 111 hours for those with Freeview, and further to 137 hours for those in terrestrial-only homes. The figures for cable and satellite, and for Freeview, include viewing of Sky News and of BBC News 24.

**Figure 3.7: Split in total viewing hours of national and UK 24-hour news, all PSB channels, by platform, 2006**



Source: BARB 2006

### 3.5 Audience impact

This section focuses on what viewers think about the delivery of this PSB Purpose relating to news and current affairs.

The PSB Tracker asked three statements which, taken together, provide an indication of what audiences think of PSB broadcasters' delivery of Purpose 1:

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

Its news programmes are trustworthy

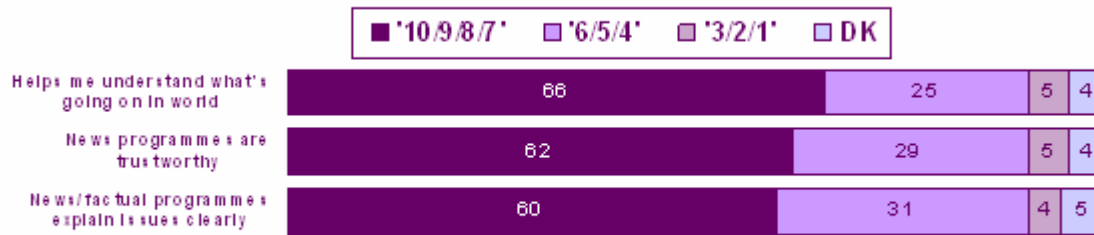
It shows news programmes and factual programmes that explain complicated issues clearly

#### *Perceived importance of PSB statements*

As set out in Chapter 2, Figure 2.17, these statements relating to news are seen as particularly important for the PSBs to provide, although those in socio-economic category DE, and those in Northern Ireland, are less likely than the rest of the UK to find them of most importance.

#### *Perceived delivery of PSB statements*

When asked about the delivery of all the PSBs taken together, viewers rate these elements of PSB relating to Purpose 1 more highly than other Purposes and Characteristics, with more than 6 in 10 rating them between 7-10 out of 10 overall (Figure 3.8).

**Figure 3.8: Viewer perceptions of delivery of Purpose 1 across all PSBs**

*Extent to which the characteristic applies to the channels together, where 10 means 'applies completely' and 1 means 'does not apply at all'*

Source: GfK NOP omnibus data, base for 'all PSB channels' = all UK adults, 937, Oct 06

### Programmes that are helpful in understanding the world today

Figure 3.9 below shows how regular viewers of each of the PSB channels rated their experience of gaining understanding of the world today through watching its programmes.

Around three-quarters of regular viewers of BBC One and BBC Two said that programmes on these channels helped them understand what was going on in the world. This decreases to almost two-thirds of regular viewers of ITV1 (63%) and 57% of viewers of Channel 4. Five's regular viewers are not necessarily watching the channel for its news provision, and so the channel has lower ratings for this attribute (35%) and higher proportions saying they don't know (19%). Channel 4's regular viewers are more likely than the BBC's or ITV1's to say they don't know (9%), again indicating that regular Channel 4 viewers aren't necessarily watching the channel for its news provision.

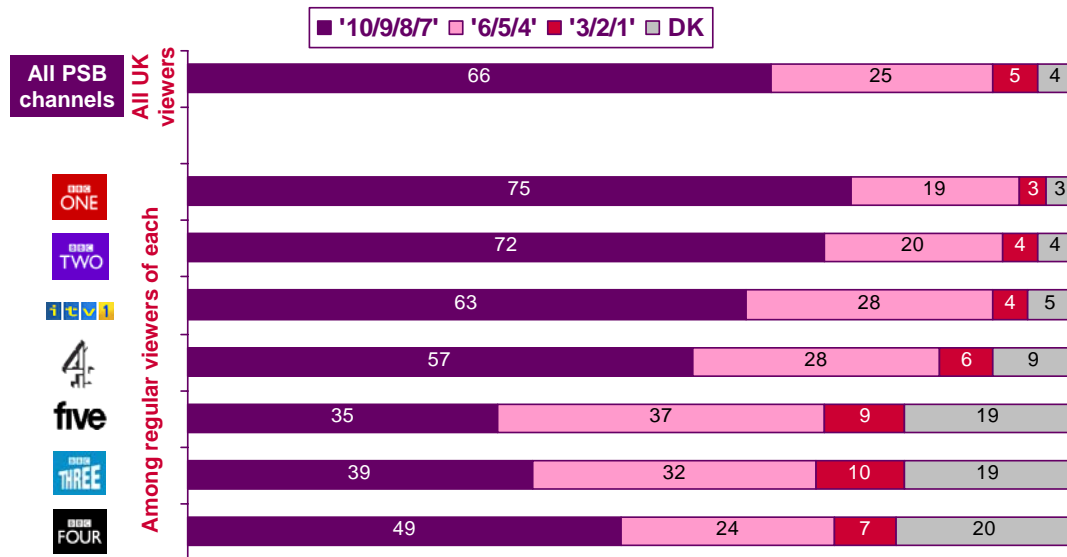
People in Wales and Northern Ireland are more likely than those in England say that ITV programmes help them understand what's going on in the world today (68% and 71% respectively compared to 63%).

People aged 16-35, males and those in the AB socio-economic class are more likely to give Channel 4 a higher rating on this measure. And those in the DE socio-economic class are more likely than the average to give Five a higher rating, but less likely to do so for BBC One, BBC Two or Channel 4.

### Figure 3.9: Opinions of Purpose 1 – informing our understanding of the world

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

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



Base for 'all PSB channels': all UK adults, 937, Oct 06  
 Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC One = 5220, BBC Two = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC Three = 481, BBC Four = 247  
 Source: PSB Tracker - GfK NOP Media, 2006

### News programmes and trust

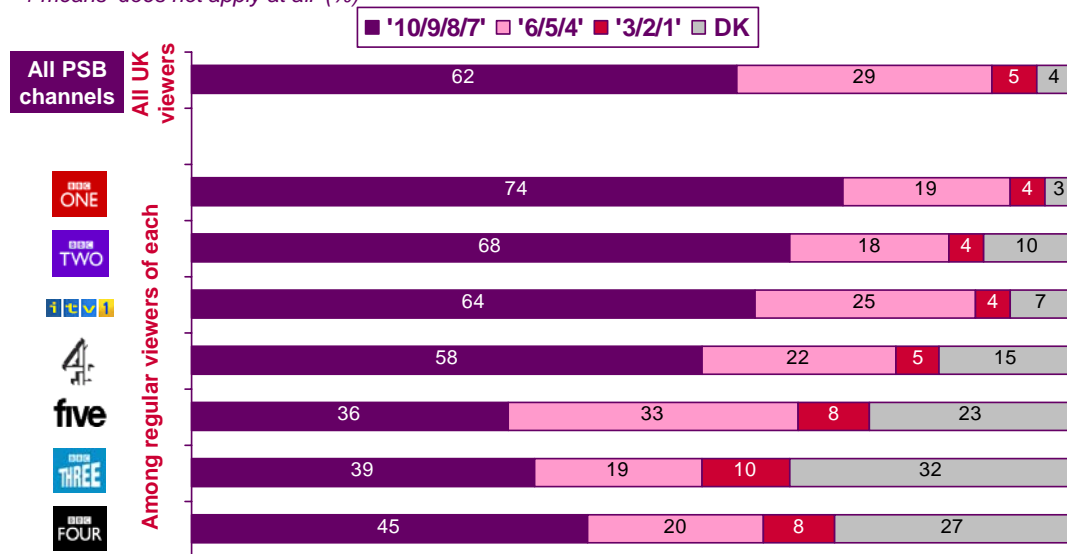
Regular viewers ascribe relatively high levels of trust to the news programmes of each broadcaster (Figure 3.10). Levels of active distrust are small, although sizeable proportions of regular viewers to Five, BBC Three and BBC Four say they don't know.

The main distinctions in demographic response are between regular viewers in different socio-economic groups. ABs are more likely to rate the trustworthiness of the BBC and Channel 4 than DEs. 63% of men say Channel 4's news programmes are trustworthy compared to 53% of women.

**Figure 3.10: Opinions of Purpose 1 – trust**

“Its news programmes are trustworthy”

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



Base for 'all PSB channels': all UK adults, 937, Oct 06

Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)

BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247

Source: PSB Tracker - GfK NOP Media, 2006

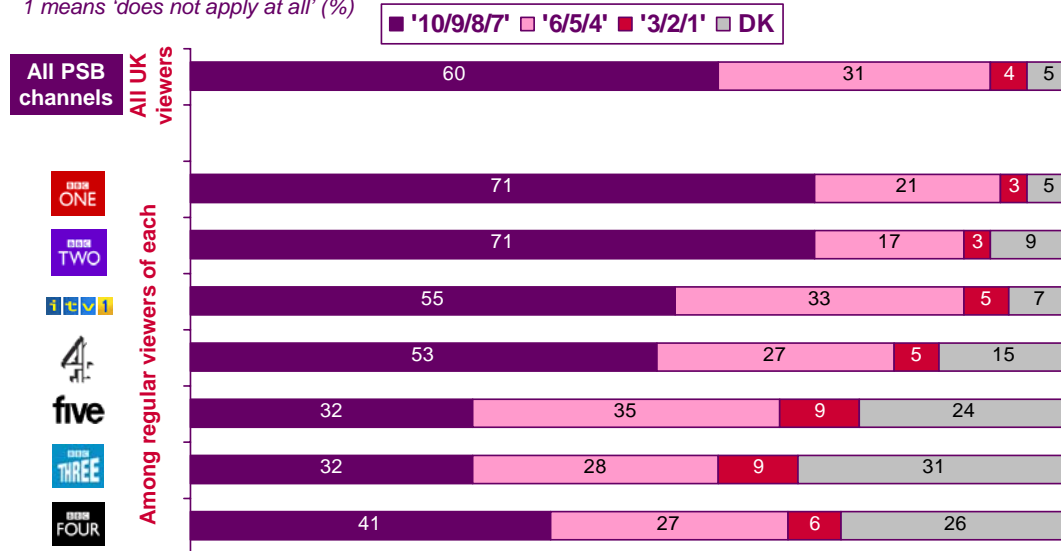
### Programmes which explain complicated issues clearly

The third area relating to this PSB Purpose is the extent to which people feel the channels show news and factual programmes which explain complicated issues clearly. Responses are shown in Figure 3.11 below.

There is a more marked distinction between the BBC terrestrial channels and the other channels, with more similarity between ITV1 and Channel 4. Again, men are more likely to rate Channel 4 highly than women. People in socio-economic category AB and C1C2 are more likely to rate BBC One, BBC Two, and Channel 4 more highly than those in the DE category, and people in Northern Ireland are more likely to give ITV1 a higher rating than those in England. People from minority ethnic groups are less likely than white respondents to rate BBC One and BBC Two highly, but more likely to rate Channel 4 highly.

**Figure 3.11: Opinions of Purpose 1 – explaining complicated issues clearly**

“It shows news programmes and factual programmes that explain complicated issues clearly”  
 Extent to which the purpose/characteristics applies to the channel(s), where 10 means ‘applies completely’ and 1 means ‘does not apply at all’ (%)



Base for 'all PSB channels': all UK adults, 937, Oct 06  
 Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker - GfK NOP Media, 2006

In the BBC-GfK Pulse survey, respondents were asked about a number of statements that relate to PSB Purpose 1, having already watched a programme in the News genre:

- How trustworthy did you think this programme was?
- How impartial did you think this programme was?
- This was a high quality programme.
- Did you feel you learnt anything from watching this programme?

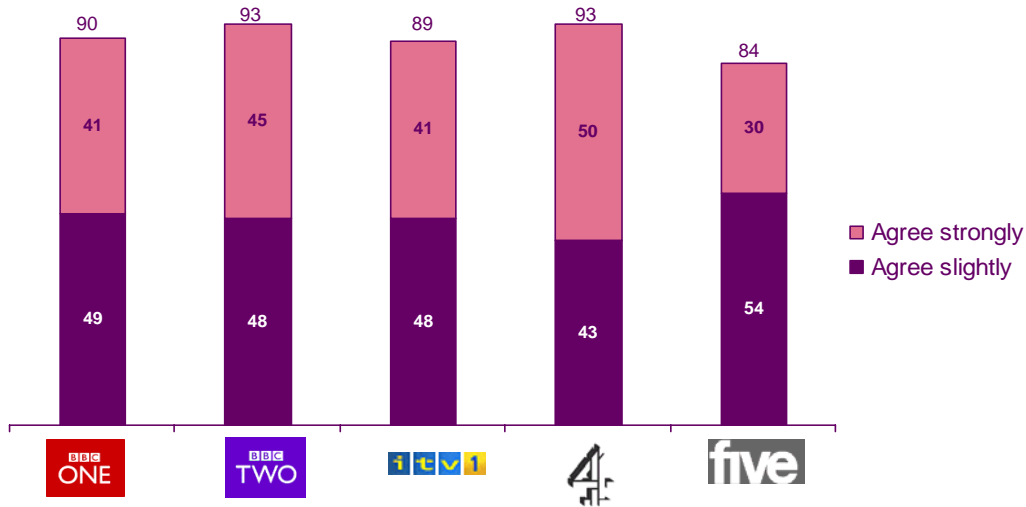
Across all channels, the proportion of responses in agreement with these statements was very high, showing strong support for News programming. It should be noted that respondents to the Pulse survey rated programmes they had chosen to watch, and therefore high agreement with these statements is to be expected. Channel 4 consistently showed the largest proportion of positive responses and Five the least for this genre.

When asked about the quality of the News programmes watched, most responses were in strong or slight agreement that it was a high quality programme. For most channels, around nine out of ten responses showed agreement that the News programme viewed had been of high quality (89 to 94%); this was slightly lower for Five at 84%.

**Figure 3.12: Pulse opinions of Purpose 1 - quality**

News: "This was a high quality programme"

% saying "Agree strongly/slightly"



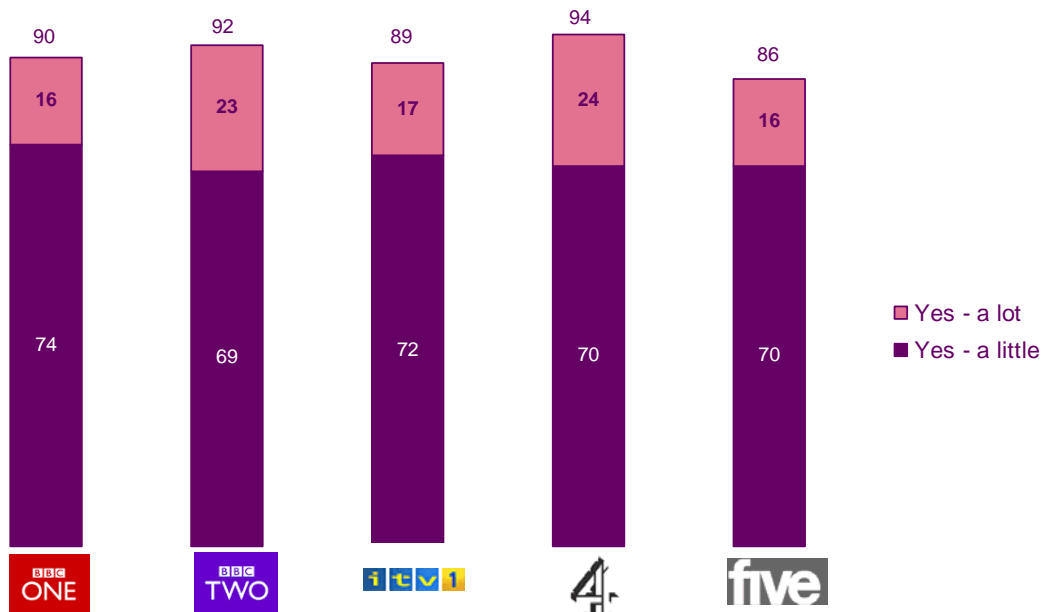
Base for all responses to programmes watched in News genre as defined by BDS  
 Response figures: BBC One 386597, BBC Two 15110, ITV1 140044, Channel 4 16538, Five 7480  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

The majority of responses to the question "did you feel you learnt anything new" were positive. For each channel over 86% of responses were in agreement that they had learnt a little or a lot from watching the programme.

**Figure 3.13: Pulse opinions of Purpose 1 - learning**

News: "Did you feel you learnt anything from watching this programme?"

% saying "Learnt a little/a lot"

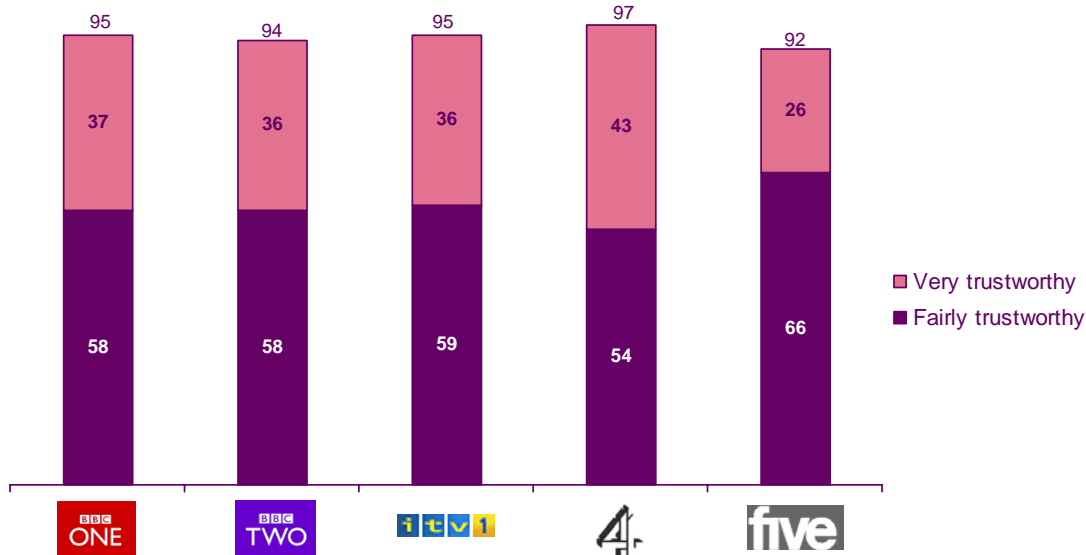


Base for all responses to programmes watched in News genre as defined by BDS  
 Response figures: BBC One 386597, BBC Two 15110, ITV1 140044, Channel 4 16538, Five 7480  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

There were high levels of agreement, at 90% and above, regarding the trustworthiness of news programmes for each channel. Responses to programmes shown on Channel 4 showed the highest levels of perceived trust from the Pulse survey.

**Figure 3.14: Pulse opinions on Purpose 1 - trust**

News: "How trustworthy did you think this programme was?"  
 % saying "It was very/fairly trustworthy"

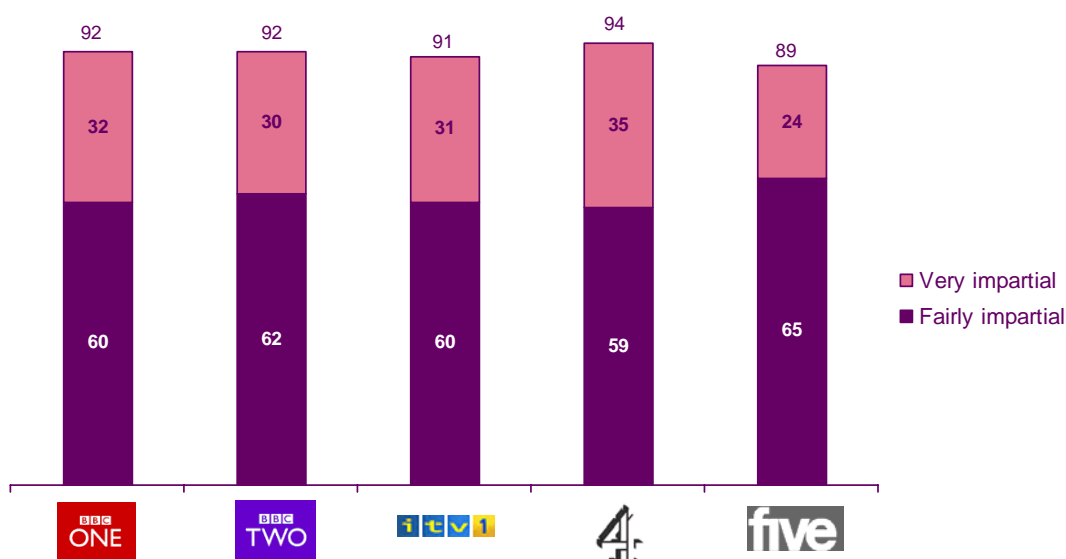


Base for all responses to programmes watched in News genre as defined by BDS  
 Response figures: BBC One 386597, BBC Two 15110, ITV1 140044, Channel 4 16538, Five 7480  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

The Pulse survey panel was also asked whether they thought the News programmes they had watched were impartial. Levels of perceived impartiality were high, with around nine in ten responses to programmes on each channel being either very or fairly impartial.

**Figure 3.15: Pulse opinions on Purpose 1 – impartiality**

News: "How impartial did you think this programme was?"  
 % saying "It was very/fairly impartial"



Base for all responses to programmes watched in News genre as defined by BDS  
 Response figures: BBC One 386597, BBC Two 15110, ITV1 140044, Channel 4 16538, Five 7480  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006



## Section 4

# PSB Purpose 2: stimulating knowledge and learning

## 4.1 Summary findings

### Importance of Purpose 2 for viewers

- The UK population tends to see this Purpose as important for PSB channels with around three-fifths saying that showing interesting programmes about history, science or the arts is important and a similar proportion saying they believe it is important that they become more interested in particular subjects as a result of watching programmes.

### Output hours

- In 2006, Factual programmes comprised the largest proportion of output in the peak-time schedules of the PSB channels, at 27%.
- Factual output on the five terrestrial channels has increased substantially since 2002, although in 2006 the increase was only marginal on 2005. There was a slight reduction in hours on BBC Two and Channel 4 compared to 2005. In contrast, hours of Factual output increased on ITV1 from 1,559 hours in 2005 to 1,864 hours in 2006. Output on Five also increased, from 751 hours in 2005 to 881 hours in 2006.
- Peak-time first-run original Serious Factual output across the PSB channels rose from 824 hours in 2002 to 915 hours in 2006. However, this was largely due to an increase in output on BBC Three and BBC Four, from 75 hours to 170 hours. Five's output also increased significantly over the period, from 143 hours in 2002 to 203 hours in 2006. The 2006 total for the broadcasters taken together is lower than the total for 2005, which was 1,018.
- Peak-time first-run Serious Factual output on Channel 4 declined in the period 2002-2006 by nearly one quarter, from 194 hours in 2002 to 150 in 2006. BBC One and Two's output decreased marginally during this period.
- BBC Four provides a significant proportion of overall Arts and Classical Music output – out of the 1789 hours broadcast across all the PSB channels in 2006, it contributed 1125 hours. However, its peak-time hours decreased over the period, from 510 hours in 2002 to 409 in 2006.
- In peak time, Five's output increased from 23 hours in 2002 to 35 hours in 2006. Channel 4 output was the same in 2006 as it was in 2002 - 32 hours. BBC One's output halved from 18 hours to 9, while BBC Two's increased from 94 to 130 hours. BBC Three's hours reduced considerably in peak time, from 100 hours in 2002 to 25 in 2006.
- Programmes in the Education genre are predominantly shown out of peak time, with BBC Two the single largest broadcaster by far.
- Over the period 2002 – 2006, hours of Education programming on BBC Two reduced from 2,009 hours in 2002 to 1,571 hours in 2006, due to BBC Schools programming moving to CBBC from 2002, and the cessation of Open University overnight

programming in 2004. Hours on Channel 4 and Five increased over the period, with Five's nearly doubling from 152 hours in 2002 to 288 hours in 2006.

### **Viewing figures**

- Average hours of viewing of Other Factual programming (based on all individuals aged 4+) reduced considerably in 2006 to 125 hours from 149 hours in 2005, with reduced viewing across the channels. More hours of viewing went to Channel 4 than to other channels.
- In contrast, viewing of Serious Factual rose, from 20 hours in 2002 to 26 hours in 2006. In particular, viewing on BBC Two rose, from 6 hours per year in 2002 to 11 hours per year in 2006. The majority of viewing hours went to BBC One and BBC Two.
- Levels of viewing of Arts, Music and Education programming were much lower. Arts programming was watched for an average of 3.4 hours in 2006, down from a high of 4.7 hours in 2005. There were further reductions in hours of Music viewing in 2006, from 9.7 hours in 2005 to 5.7 hours in 2006. The majority of viewing was of Channel 4 and BBC Two.
- Education programming was watched for an average of 2.1 hours in 2006, down from 3.2 hours in 2002. Viewing on BBC Two has decreased from 2.7 hours in 2002 to 1.5 hours in 2006.

### **Audience impact**

- Three-quarters of regular viewers of BBC Two see it as delivering interesting programmes about history, science and the arts. BBC One, Channel 4 and BBC Four are also more likely than the other channels to be associated with programmes of this type by their regular viewers.
- BBC Two viewers are more likely to feel they have become more interested in subjects as a result of watching its programmes (51%) than regular viewers of the other channels. Among regular viewers of each channel, younger people are more likely than older people to say they have become more interested.
- From the Pulse survey, viewer responses to programmes in the Other Factual and Serious Factual genres show high levels of agreement that having watched a programme, they learnt something. The highest proportions of agreement were seen for the BBC channels (ranging from 83 to 89%), and lowest for ITV1 (ranging from 73 to 76%).

## 4.2 Introduction

This section looks in detail at PSB Purpose 2, which focuses on informal learning across a range of programming.

To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning

This PSB Purpose specifically mentions encouraging interest and learning through the genres of arts and science. Broadcasters may also consider that other types of programmes play a part in the delivery of this Purpose. However, given that other genres *may* or *may not* be playing a part in achieving this Purpose, throughout this section the most relevant genres are taken to be Factual (broken down into Serious Factual and Other Factual), Arts, Music and Education.

PSB broadcasters do not have any specific quotas to achieve in relation to this Purpose, although the BBC has stated that it is keen to encourage such informal learning across its programmes. In addition, Channel 4 has a remit requirement to contribute to educational and educative programming.

The two statements from the PSB Tracker that relate to this PSB Purpose are:

It shows interesting programmes about history, science or the arts

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

The statements from the BBC-GfK Pulse survey that are relevant to this PSB Purpose are:

Did you feel you learnt anything from watching this programme?

Has this programme inspired you to find out more about the subject(s) covered in the programme?

## 4.3 Output hours

### Factual

In 2006, the Factual genre<sup>26</sup> comprised the largest proportion of output in the peak-time schedules of the PSB channels, at 27%.

Figure 4.1 shows the hours of overall Factual output shown by the different PSB channels since 2002. Output was distributed fairly evenly over each of the PSB channels.

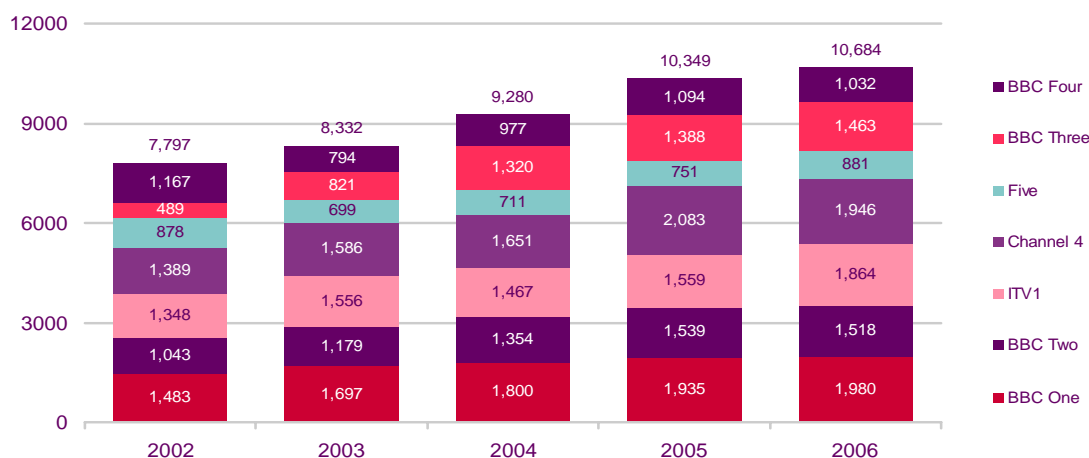
Factual output on the five terrestrial channels has increased substantially since 2002, although in 2006 the increase was only marginal on 2005. There was a slight reduction in hours on BBC Two and Channel 4 compared to 2005. In contrast, hours of Factual output increased on ITV1 from 1,559 hours in 2005 to 1,864 hours in 2006. Output on Five also increased, from 751 hours in 2005 to 881 hours in 2006.

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<sup>26</sup> The Factual programme genre encompasses a wide variety of different types of programme, ranging from *The Jeremy Kyle Show* to *Planet Earth* (see Figure 4 for more illustrative programmes). As set out in the Introduction, its sub-genres include consumer affairs, factual entertainment, leisure and hobbies, natural history and history, science and technology.

**Figure 4.1: Factual output 2002 – 2006, all day**

Hours per year



Source: PSB returns

The Factual genre can be further analysed by examination of the Serious Factual<sup>27</sup> sub-genre (see Figure 4.2).

Peak-time originated Serious Factual output across the PSB channels rose from 824 hours in 2002 to 915 hours in 2006. However, this was largely due to an increase in output on BBC Three and BBC Four, from 75 hours to 170 hours. Five's output also increased significantly over the period, from 143 hours in 2002 to 203 hours in 2006. The 2006 total for the broadcasters taken together is lower than the total for 2005, which was 1,018.

Peak-time Serious Factual output on Channel 4 declined in the period 2002-2006 by nearly one quarter, from 194 hours in 2002 to 150 in 2006. BBC One and Two's output decreased marginally during this period.

**Figure 4.2: First run, peak time originated Serious Factual output 2002 – 2006**

Hours per year



Source: Broadcaster returns and CID

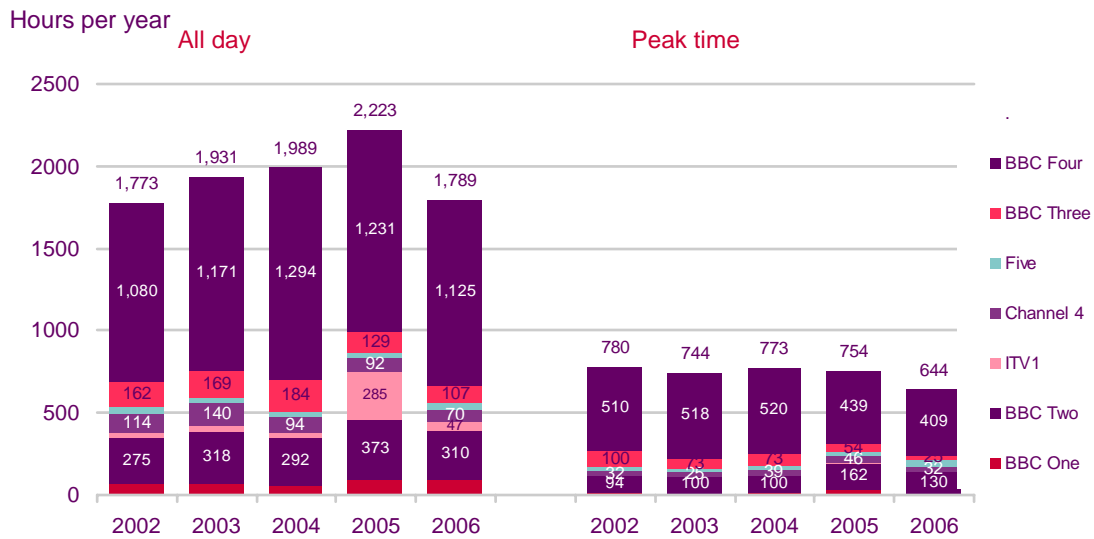
<sup>27</sup> The Serious Factual sub-genre includes the sub-genres of nature and wildlife; science and technology; and history. It describes first-run, originated programmes only.

## Arts and classical music

Arts and classical music output hours are shown in Figure 4.3. BBC Four provides a significant proportion of overall output – out of the 1,789 hours broadcast across all the PSB channels in 2006, it contributed 1,125 hours. However, its peak-time hours decreased over the period, from 510 hours in 2002 to 409 in 2006.

In peak time, Five's output increased from 23 hours in 2002 to 35 hours in 2006. Channel 4 output was the same in 2006 as it was in 2002 - 32 hours. BBC One's output halved from 18 hours to 9, while BBC Two's increased from 94 to 130 hours. BBC Three's hours reduced considerably in peak time, from 100 hours in 2002 to 25 in 2006.

**Figure 4.3: Arts & classical music output hours, 2002-2006**



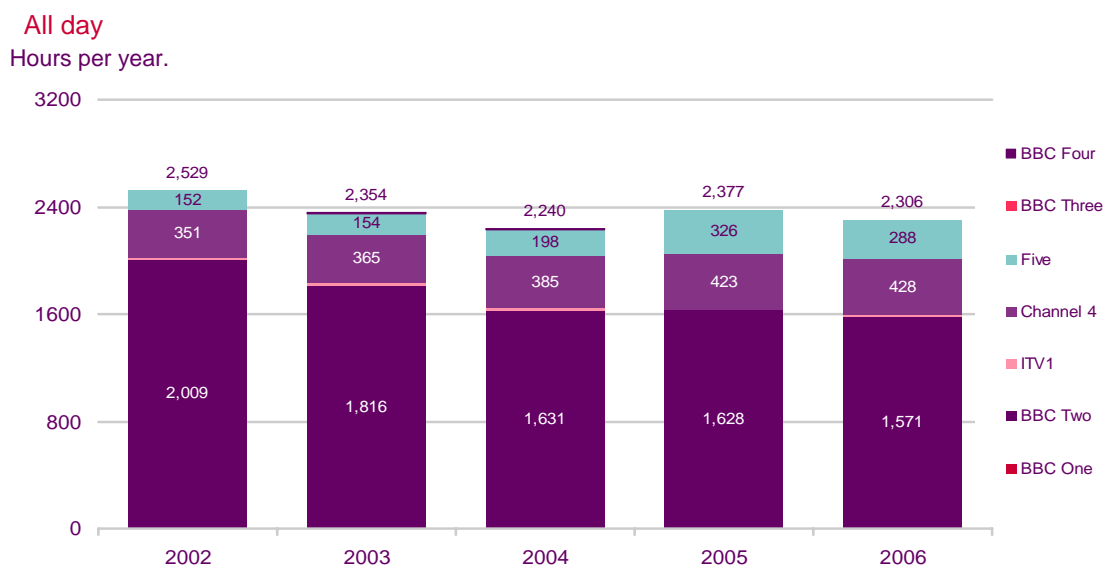
Source: PSB returns

## Education

Programmes in the Education genre are predominantly shown out of peak time, with BBC Two the single largest broadcaster by far (see Figure 4.4).

Over the period 2002 – 2006, hours of Education programming on BBC Two reduced from 2,009 hours in 2002 to 1,571 hours in 2006, due in some measure to BBC Schools programming moving to CBBC from 2002, and the cessation of Open University overnight programming in 2004. Hours on Channel 4 and Five increased over the period, with Five's nearly doubling from 152 hours in 2002 to 288 hours in 2006.

**Figure 4.4: Education output hours, 2002-2006**



Source: PSB returns

#### 4.4 Viewing figures

This section provides hours viewed per average individual (4+) for each of the Factual, Arts and Education genres. Factual programming has been subdivided into Serious and Other Factual programming. The BARB categories used for Serious Factual are those of natural history, science and medical, history, and factual drama. Other Factual comprises human interest, factual entertainment, and the hobbies and leisure category.

Figure 4.5 shows that viewing of Other Factual programming reduced considerably in 2006 to 125 hours from the 2005 figure of 149 hours, with reduced viewing across the channels. More hours of viewing went to Channel 4 than to other channels.

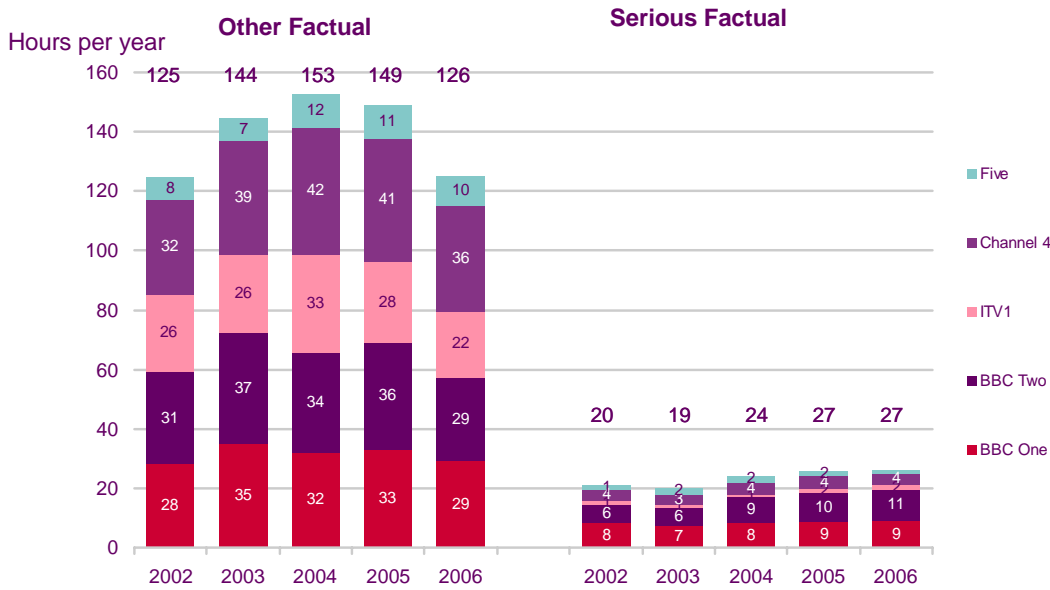
In contrast, viewing of Serious Factual rose, from 20 hours in 2002 to 26 hours in 2006. In particular, viewing on BBC Two rose, from 6 hours per year in 2002 to 11 hours per year in 2006. The majority of viewing hours went to BBC One and BBC Two.

Viewing of Serious Factual programmes increases with age – 16-24s watched an average of 12 hours in 2006, compared to 21 hours for those aged 35-44 and 53 hours for the over-65s.

Viewing of Serious Factual is greater in analogue homes than in cable and satellite homes. While an average of 26 hours per year is watched across all homes, this decreases to 17 hours per year for those in cable and satellite homes. Those with Freeview watch an average of 28 hours, and those in analogue-only homes watch 45 hours per year.

Turning to the Other Factual genre, while there is again a significant increase in hours viewed by older people, the differential is proportionally less than for Serious Factual – 16-24s watch 81 hours per year, 35-44s watch 127 hours per year, and those aged over 65 watch 187 hours per year. Channel 4 is watched proportionally more by 16-34s, and BBC Two by those aged over 55.

**Figure 4.5: Viewing hours per year, Other and Serious Factual, 2002-2006**



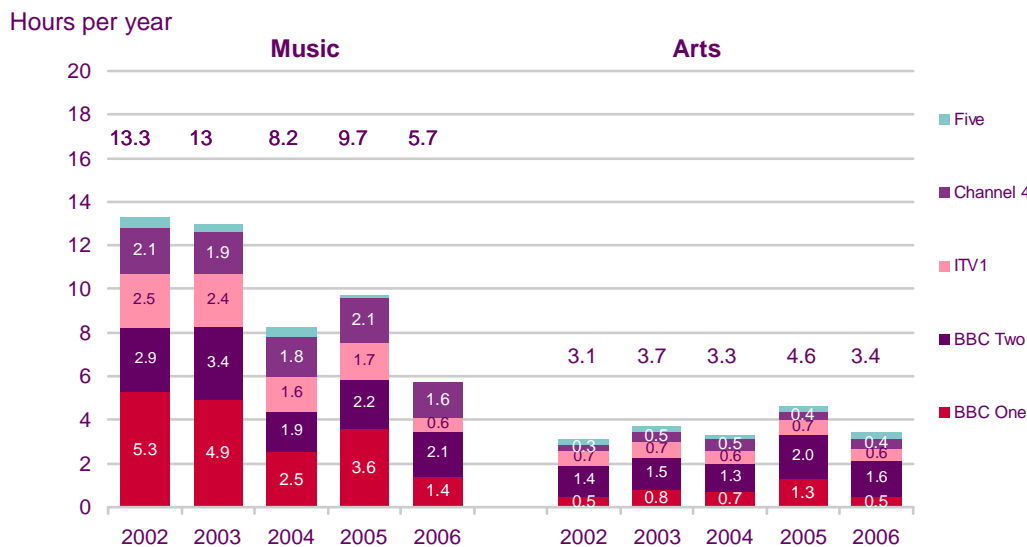
Source: BARB 2002-2006

### Arts and Music viewing hours

Arts programming was watched for an average of 3.4 hours in 2006, down from a high of 4.6 hours in 2005. The majority of viewing went to BBC One and BBC Two.

There was a further reduction in hours viewed of Music programming in 2006, from 9.7 hours in 2005 to 5.7 hours in 2006. The majority of viewing was on Channel 4 and BBC Two.

**Figure 4.6: Hours of music and arts programming viewing, 2002-2006**



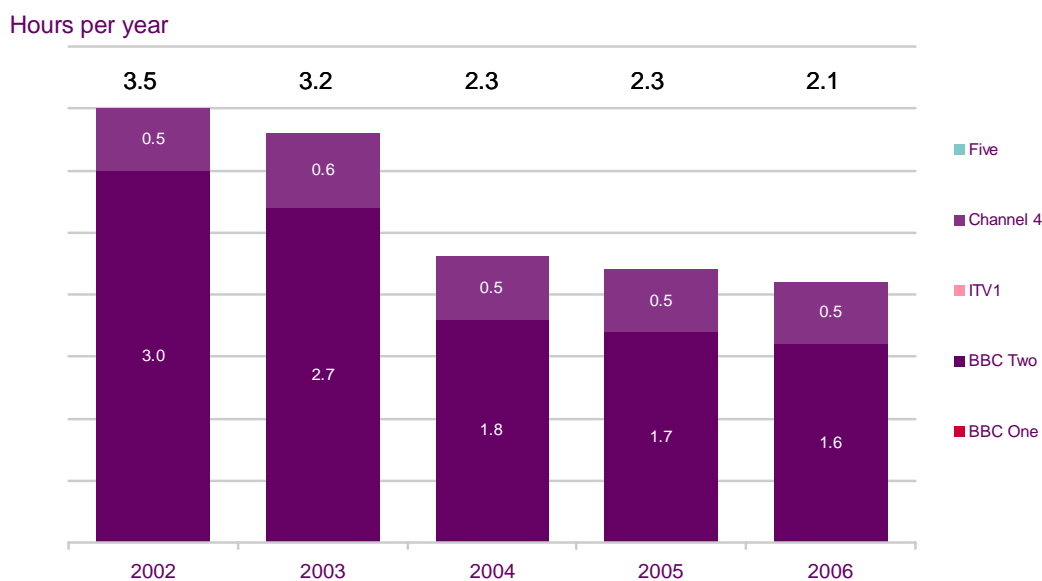
Source: BARB 2002-2006

### Education viewing hours

Education programming was watched for an average of 2.1 hours in 2006, down from 3.5 hours in 2002. Viewing on BBC Two, the main provider of educational programming,

decreased from 2.7 hours in 2002 to 1.5 hours in 2006. The decrease in viewing is greater than the decrease in hours of output over the period.

**Figure 4.7: Hours of education programming viewing, 2002-2006**



Source: BARB 2002-2006



## 4.5 Audience impact

There are two statements from the PSB Tracker that provide information about how well viewers feel that the channels provide elements of Purpose 2:

It shows interesting programmes about history, science or the arts

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

### Perceived importance of PSB statements

As set out in Chapter 2, 62% of the UK population feel that showing interesting programmes about history, science or the arts is important for the PSB channels (rating this as 7–10 out of 10) and a similar proportion (57%) say they believe it is important that they become more interested in particular subjects as a result of watching their programmes.

### Perceived delivery of PSB statements

In terms of the perceived delivery of these elements of PSB by the broadcasters taken together, Figure 4.8 illustrates that just under half of viewers feel that as a whole, broadcasters show interesting programmes about history, science or the arts, and two-fifths feel that they have become more interested in subjects as a result of watching programmes on these channels. Women, and people in the socio-economic group DE, are more likely to say that across all channels they have become more interested in particular subjects.

**Figure 4.8: Perceived delivery of Purpose 2 statements**



*Extent to which the characteristic applies to the channels together, where 10 means 'applies completely' and 1 means 'does not apply at all'*  
 Source: GfK NOP Omnibus data: Base for 'all PSB channels': All UK adults, 937, Oct 06

The extent to which these results change according to broadcaster is shown below.

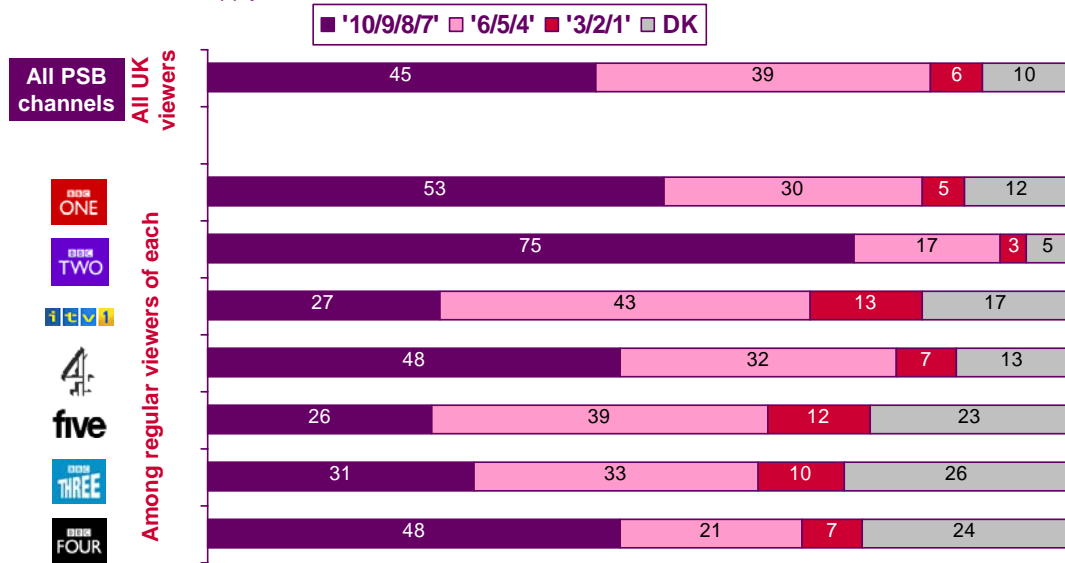
Figure 4.9 shows that overall, regular viewers of BBC Two tend to see this channel as delivering this kind of programming, with three-quarters rating it highly. BBC One, Channel 4 and BBC Four are also more likely than the other channels to be associated with interesting factual programmes of this type by their regular viewers.

There are few major differences by age, gender, socio-economic group or geographic region.

**Figure 4.9: Opinions on Purpose 2 – interesting programmes**

"It shows interesting programmes about history, science or the arts"

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



Base for 'all PSB channels': all UK adults, 937, Oct 06  
 Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker - GfK NOP Media, 2006

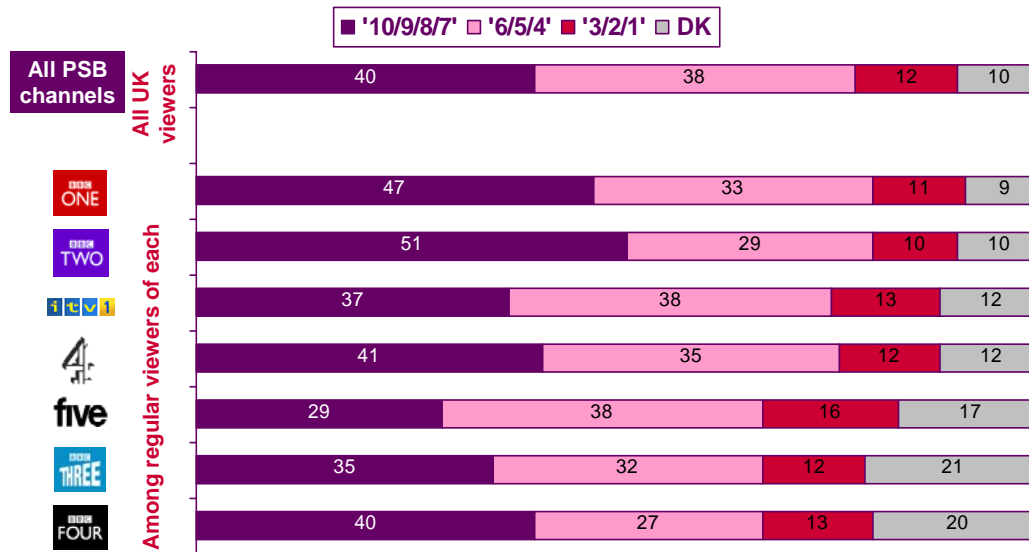
Figure 4.10 shows regular viewer responses to whether they have become more interested in subjects as a result of watching programmes. The BBC terrestrial channels are more highly rated by their regular viewers than the other channels, with just over half (51%) rating BBC Two highly (7-10 out of 10).

Among regular viewers of each channel, younger people are more likely than older people to say they have become more interested. This is particularly the case for the 16-24 age group on BBC One, ITV and Channel 4. The 25-34 age group is more likely to rate BBC Two highly. The DE socio-economic group is more likely to rate ITV1 highly than the AB group, while the reverse is true for BBC Two and Channel 4. People from minority ethnic groups are more likely to rate Five highly than white regular viewers on this statement.

### Figure 4.10: Opinions on Purpose 2 – stimulating learning

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

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



Base for 'all PSB channels': all UK adults, 937, Oct 06

Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247

Source: PSB Tracker - GfK NOP Media, 2006

In the Pulse survey, respondents were asked the following two questions about programmes they had watched in the Other Factual and Serious Factual genres<sup>28</sup>. Only the first question was asked of Arts and Music programmes:

Did you feel you learnt anything from watching this programme?

Has this programme inspired you to find out more about the subject(s) covered in the programme?

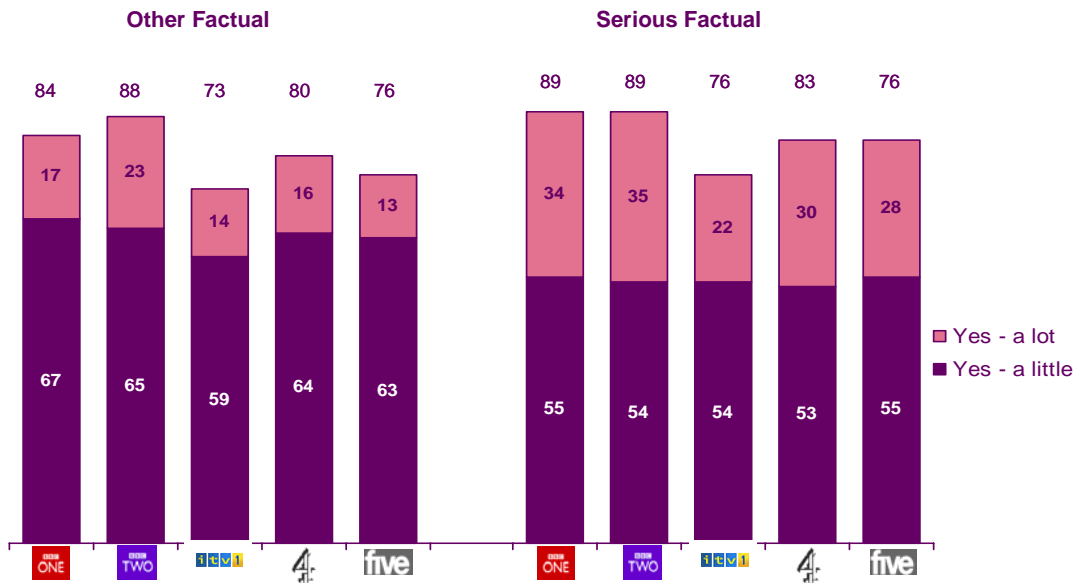
For Other Factual and Serious Factual programmes there were high levels of agreement that respondents had learnt something as a result of watching the programme, with around three-quarters of responses saying they had learnt a lot or a little. This was particularly high for BBC Two programmes in both genres, and for BBC One Serious Factual programmes. ITV1 programming in both genres had the lowest level of responses agreeing with this statement.

<sup>28</sup> In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Data Services' (BDS) classifications. This differs from both BARB and broadcaster returns' genre classifications. Genres are not, therefore, directly comparable. The BDS Serious Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications.

**Figure 4.11: Pulse opinions on Purpose 2 – learning**

Other Factual and Serious Factual: "Did you feel you learnt anything from watching this programme?"

% saying 'learnt a little/a lot'



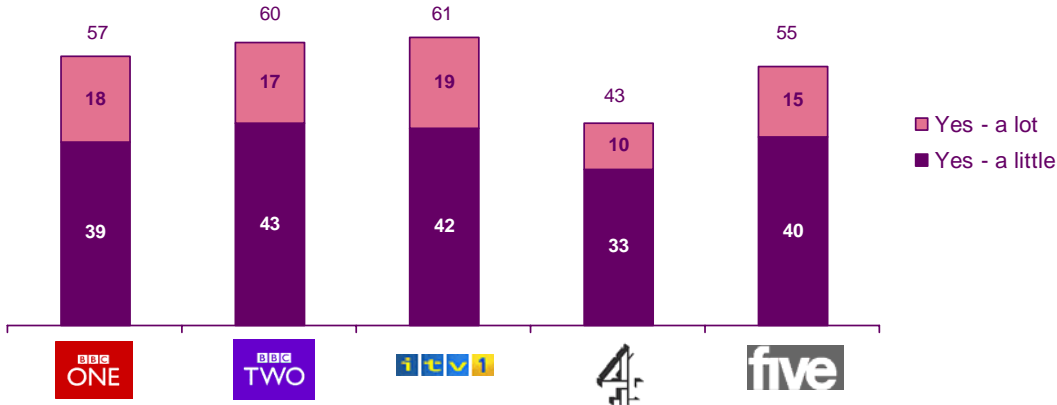
Base for all responses to programmes watched in Other Factual genre as defined by BDS; Serious Factual genre as defined by BDS and Ofcom  
 Responses: Other Factual - BBC One 127228, BBC Two 109992, ITV1 9688, Channel 4 41630, Five 12603  
 Responses: Serious Factual - BBC One 120754, BBC Two 112960, ITV1 42606, Channel 4 55784, Five 36726  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

For programmes in the Music and Arts genre, there were fewer responses for viewers learning something as a result of watching the programme. While around three in five responses were in agreement that something had been learnt from watching a Music or Arts programme on BBC One, BBC Two or ITV1, only around two in five said the same for Channel 4's programmes<sup>29</sup>.

<sup>29</sup> This may be part be due to a number of the Channel 4 programmes being music video programming, less likely to be seen as educative than other types of Arts programmes.

**Figure 4.12: Pulse opinions on Purpose 2 – learning**

Music and Arts: “Did you feel you learnt anything from watching this programme?”  
 % saying “Learnt a little/a lot”



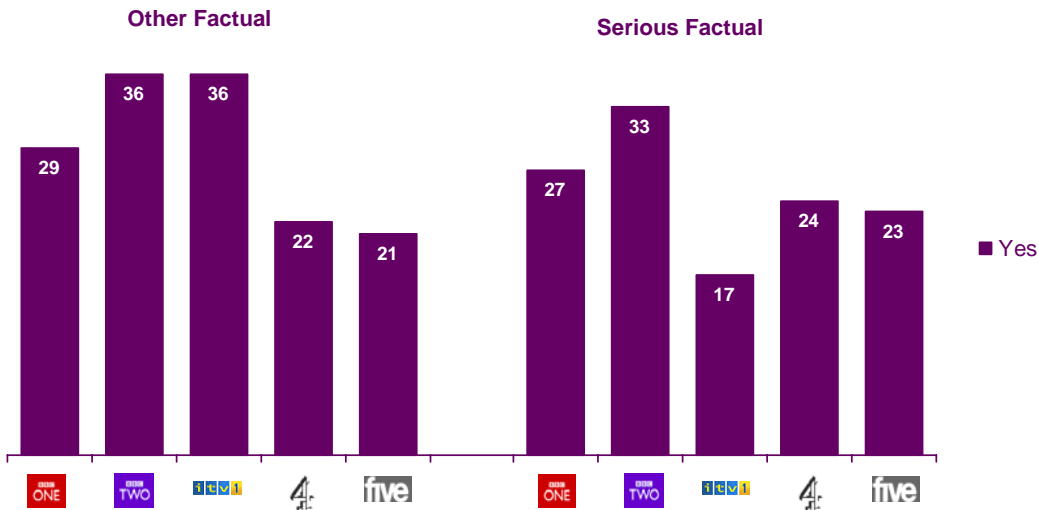
Base for all responses to programmes watched in Music and Arts genre as defined by BDS  
 Response figures: BBC One 4880, BBC Two 11733, ITV1 5208, Channel 4 11733, Five 4880  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

Respondents were also asked whether they thought the programmes they had watched had inspired them to find out more about the programme subject. For Other Factual programmes over one-third of responses were in agreement with the statement for BBC Two and ITV1 (36% for both), but less than one-third for BBC One (29%). For Channel 4 and Five responses were around 20%.

A similar picture was seen for Serious Factual programming, although for ITV1 only 17% of responses felt that it had inspired them to find out more.

**Figure 4.13: Pulse opinions on Purpose 2 – inspired to find out more**

Other Factual and Serious Factual: “Has this programme inspired you to find out more about the subject(s) covered in the programme?”  
 % saying “Yes”



Base for all responses to programmes watched in Other Factual genre as defined by BDS; Serious Factual genre as defined by BDS and Ofcom  
 Responses: Other Factual - BBC One 127228, BBC Two 109992, ITV1 9688, Channel 4 41630, Five 12603  
 Responses: Serious Factual - BBC One 120754, BBC Two 112960, ITV1 42606, Channel 4 55784, Five 36726  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

## Section 5

# PSB Purpose 3: reflecting UK cultural identity

## 5.1 Summary findings

### Importance of Purpose 3 to viewers

- Some elements of Purpose 3 are important to viewers – the coverage of big national events and the provision of regional news programmes are important to nearly three-quarters of the population. Other elements are perceived as less important – the provision of high quality UK soaps and dramas, and the portrayal of Nations and regions to the rest of the UK, are of importance to less than half.

### UK cultural identity

#### Output hours

- The Drama programme genre (including non-originated programming) accounted for 25% of the peak-time terrestrial PSB schedule in 2006. This figure included Soap.
- First-run Originated Drama output (excluding Soaps) accounted for 714 hours of peak-time terrestrial scheduling during 2006, an increase since 2002 of 10%. Peak-time Originated Soap output on BBC One has remained steady since 2002, while output on ITV has increased from 255 hours in 2002 to 294 hours in 2006.

#### Viewing figures

- In 2006 UK Drama accounted for 72 hours of viewing for the average individual across the year. This was evenly split between BBC One and ITV1, with very little viewing taking place on other channels.
- Viewing of UK Soaps went down since 2002, from an average 81 hours per year to 70 hours in 2006. The reduction is mainly due to less viewing to ITV1. 16-24s watch an average of 51 hours per year, compared to 112 hours for over-65s.
- People from minority ethnic groups are far less likely than the white population to watch UK Drama and UK Soaps – for example, UK Drama is watched for an average 83 hours per year by white viewers, and 44 hours per year by those from minority ethnic groups.
- Viewing of UK Comedy went down from 15 hours in 2002 to 9 hours in 2006. The majority of this was of BBC One (3 hours), followed by BBC Two (2 hours). Average viewing of Channel 4 UK comedy remained at 1 hour per year since 2002.
- Across the Comedy genre as a whole (including non-UK comedy) 16-24s watch most on Channel 4, while older audiences watch more on the BBC.

### **Audience impact**

- The coverage of big national events is seen by regular viewers to be carried out most effectively by BBC One (79%). Two-thirds of regular viewers of ITV1 (67%) see it as covering big national events well. Older people are more likely to rate BBC One and ITV1 highly on this statement, and younger people are more likely to rate Channel 4 highly.
- Regular viewers of BBC One were slightly more likely to rate it highly on portraying people from different parts of the UK. However, young regular viewers of Channel 4 rated it particularly highly – 60% of 16-24s felt it showed people from around the UK.
- ITV1 is rated higher than any other channel by regular viewers for showing high quality soaps or dramas made in the UK (69% rating it 7-10 out of 10). Just over six in ten (62%) regular BBC One viewers rated the channel highly on this statement.
- From the Pulse survey, more respondents nominated Channel 4 comedy (85%) for being original and different.

### **Nations and regions provision**

#### **Output hours**

- BBC regional output in England increased from 3,653 hours in 2002 to 4,018 hours in 2006. During the same period, ITV1's output decreased significantly, due to its reduction in programmes other than News and Current Affairs, an outcome of the 2004 PSB Review. In the Nations, BBC and ITV1 output decreased slightly, except in Scotland where ITV1 output hours decreased more steeply.

#### **Viewing figures**

- Audience share of ITV1 and BBC1 evening regional news programmes varies considerably across the UK, with UTV being particularly strong in Northern Ireland. ITV audience share is low in London. BBC share is lowest in the Border region and in North East England. Comparing 2002 and 2006 figures, there was a slight decline in share on both channels in terms of overall viewing share, from 21% to 20% for ITV1 and from 30% to 28% on BBC1. The pattern of decline was mixed however, with some regions maintaining share and others showing a significant decrease.
- Audience and share of ITV1's regional Thursday 7.30pm slot are robust, albeit decreasing slightly over time.
- Many network programmes with specific regional or national locations tend to gain higher audience shares in those particular regions or Nations. In particular, *Rebus*, *Doc Martin*, *Taggart*, *Coronation Street* and *Shameless* do well in their areas of location.

### **Audience impact**

- ITV1 and BBC One score more highly than the other channels on viewer perceptions of how well they portray the region to the rest of the UK, with 40% and 38% respectively of their regular viewers agreeing with this statement.
- Responses from regular viewers of the BBC and ITV are very similar in relation to whether they provide good quality regional news, at 64% and 62% respectively.

## 5.2 Introduction

This chapter reports on PSB Purpose 3:

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

This PSB Purpose is not aligned closely to any single programme genre, but rather focuses on the fostering of cultural identity at both regional and national levels, which can take place within a number of different genres.

One of the key elements in this Purpose is that of the shared experience. This encompasses both the reflection of a particular position or viewpoint more widely across the UK, and also nation-wide events and issues being widely watched. In other words, it is both about the particular getting a wider airing, but also about mainstream content being widely shared and enjoyed.

PSB Purpose 3 is particularly relevant to ITV1 in terms of its regional output.

### Regional output

Regional output comprises both bespoke programmes produced for individual Nations or English regions and the production of programmes in or from the Nations and regions for consumption across the UK.

### Programme genres

While many different types of programme within most programme genres could arguably be said to foster cultural identity, there are three genres which are particularly likely to illustrate and engender it: originated Comedy, Drama and Soap. In addition, Sports programming can provide an indication of the extent to which audiences are being served with TV content which can generate and strengthen feelings of national belonging.

This chapter provides output hours data on originated Drama, originated Soap and Sports programming. Viewing figures are calculated on UK Comedy, UK Drama, UK Soap and Sport. The difference between “originated” and “UK” is small, with co-productions with other European or global organisations being included in “originated” but not in “UK”.

It also provides output hours and BARB viewing figures for a number of different areas of regional production, including an illustration of how particular programme series from specific regions of the UK are viewed in different geographic areas of the UK.

### Audience research

There are a number of PSB Tracker statements which, taken together, serve to illustrate this PSB Purpose. They are:

It portrays my region well to the rest of the UK

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

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

In addition, there are a series of statements from the BBC-GfK Pulse survey which illustrate this Purpose:

Comedy [including imports as well as UK originations]

This programme felt original and different from most other TV programmes I've seen

It's the kind of programme I would talk to other people about

Drama [including imports as well as UK originations]

This was a high quality programme

All these elements are reported on in the sections below.

This chapter is divided into two sections: the first examines the UK cultural identity, and the second regional provision.

### 5.3 UK cultural identity

The key genres that can be seen as contributing to the development of a UK-wide shared experience are those of Drama, Soap, Comedy and Sport. Viewing to UK Comedy is included below, although output hours are not possible to include in the report.

#### Output hours

##### Originated Drama and Originated Soap output hours

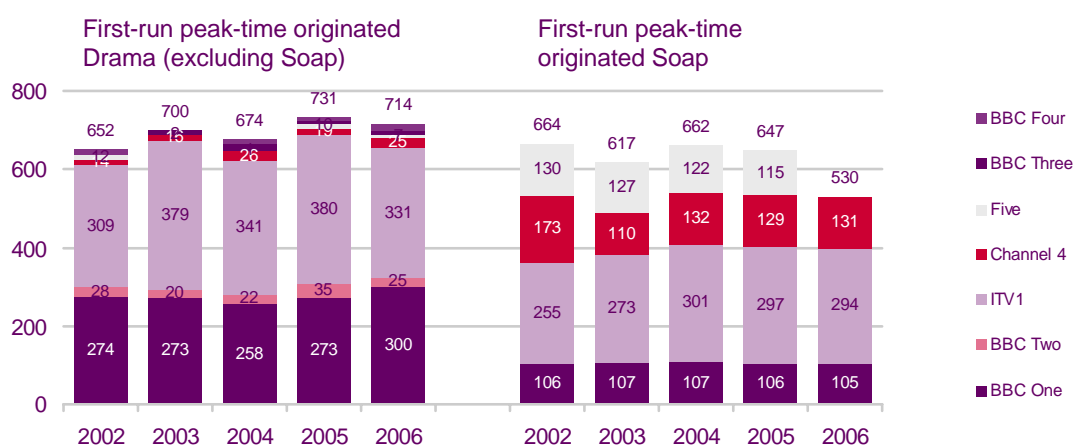
The overall Drama programme genre (including non-UK programming) accounted for 25% of the peak-time terrestrial PSB schedule in 2006. This figure included Soap.

First-run Originated Drama output (excluding Soaps) accounted for 714 hours of peak-time terrestrial scheduling during 2006. Hours on BBC One increased to 300 hours in 2006 from 273 hours in 2005, while hours on ITV1 decreased from 380 hours to 331 hours during the same period. Channel 4 showed 25 hours of first-run peak time originated programming in 2006, up from 19 hours the previous year.

Peak-time Originated Soap output on BBC One has remained steady since 2002, while output on ITV has increased from 255 hours in 2002 to 294 hours in 2006. Channel 4's hours relate to *Hollyoaks*, and Five's to *Family Affairs*, which finished at the end of 2005.

**Figure 5.1: Peak-time first-run originated Drama and Soap output hours, 2002-2006**

Hours of output per year, PSB channels



Source: PSB broadcaster returns

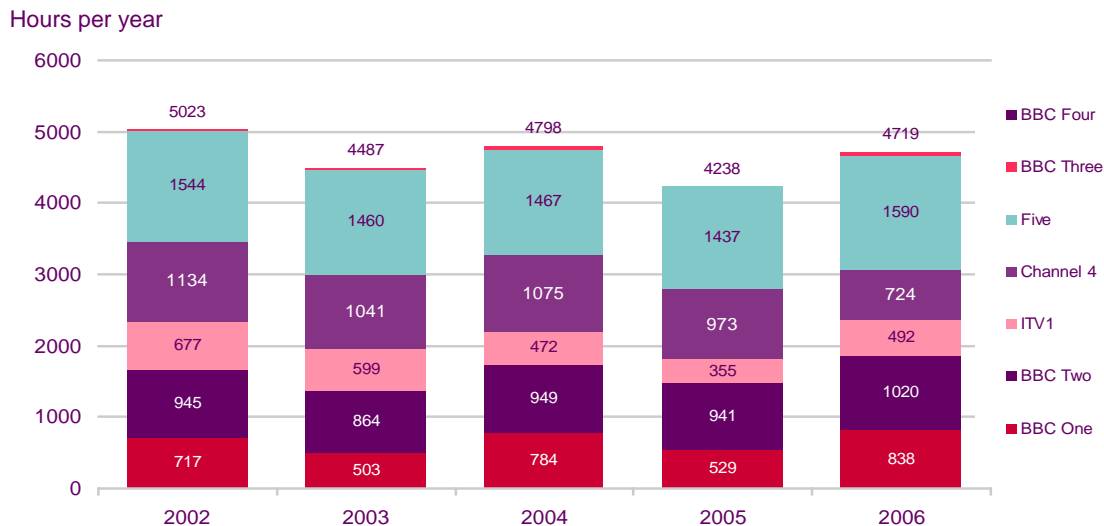
#### Sport output hours

Sport comprised 6% of peak-time output on the terrestrial PSB channels taken together in 2006.

Sports output by channel varied considerably by time of day. Across the full day schedule, Five broadcast most sport – 1590 hours in 2006 compared to 1020 for BBC Two, 838 hours for BBC One and 724 for Channel 4. This was largely due to its scheduling of sport during the night.

However, during peak time, BBC Two broadcast most sport by a considerable degree – in 2006 it showed 226 hours compared to 99 hours on BBC One and 91 hours on ITV1. Peak-time output hours fluctuate year on year, depending on major sporting fixtures – peak-time sports output comprised 559 hours of the schedules in 2006 compared to 344 hours in 2005.

**Figure 5.2: Sport output hours, 2002 – 2006**



Source: PSB returns

## Viewing figures

This section examines viewing figures for each of the main genres that together contribute to this PSB Purpose.

### UK Drama and UK Soap viewing hours

As Figure 5.3 shows, total annual hours of viewing of UK Drama (including repeats) peaked in 2003 at an average of 83 hours per year for an average viewer. In 2006 it was 72 hours. Viewing was evenly split between BBC One and ITV1, with very little viewing taking place on other channels.

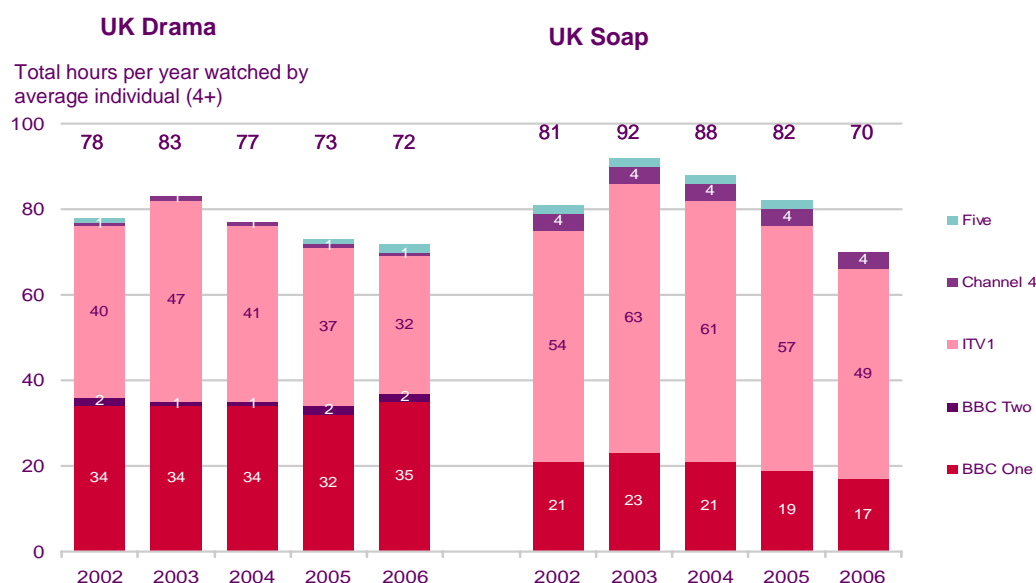
Viewing of UK Soap has gone down since 2002, from an average 81 hours per year to 70 hours in 2005. Proportionally, more viewing has gone from BBC One.

As with many other programme genres, young people watch much less UK Drama than older age-groups. 16-24s watch 32 hours per year, compared to 133 hours for 55-64s. However, as might be expected, the difference in viewing of UK Soaps is not as stark - 16-24s watch an average of 51 hours per year, compared to 112 hours for over 65s.

In the overall Drama genre (including non-UK drama programmes), proportionally more younger people watch drama on Channel 4 than older people. Older people are more likely to watch ITV1 drama than younger people. Both age groups watch similar proportions of drama on BBC One.

People from minority ethnic groups are far less likely than the white population to watch UK Drama and UK Soap – for example, UK Dramas are watched for an average 83 hours per year by white viewers, and 44 hours per year by those from minority ethnic groups.

**Figure 5.3: Total viewing hours to UK Drama and UK Soap, 2002-2006**



Source: BARB 2006

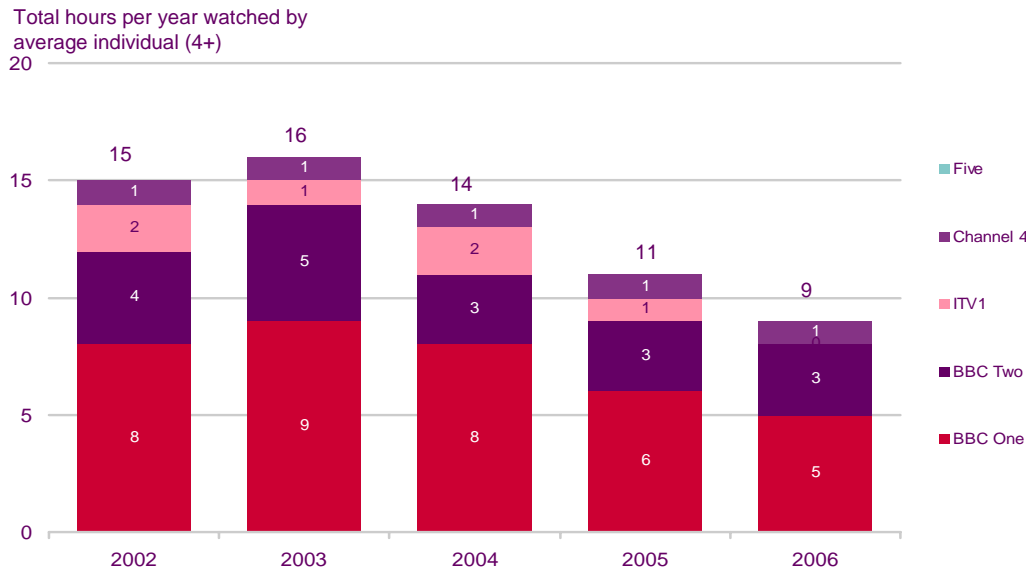
### UK comedy viewing hours

Average yearly hours of viewing of UK Comedy have reduced from 15 hours in 2002 to 9 hours in 2006 (Figure 5.4). The majority of 2006 viewing was of BBC One (3 hours), followed by BBC Two (2 hours). Average viewing of Channel 4 UK comedy has been constant at one hour per year since 2002. There was no recorded UK comedy viewing on Five<sup>30</sup>.

Across the Comedy genre as a whole (including non-UK comedy) 16-24s watch most on Channel 4, while older audiences watch more on BBC. There is little viewing either on ITV1 or Five, although Five is slightly more popular among 16-24s and ITV1 among the older age groups. Channel 4 is also more popular among people from minority ethnic groups.

<sup>30</sup> Programmes categorised as Comedy for Five’s output hours were categorised differently for BARB, and allocated instead to Drama.

**Figure 5.4: Total viewing hours of UK Comedy, 2002-2006**

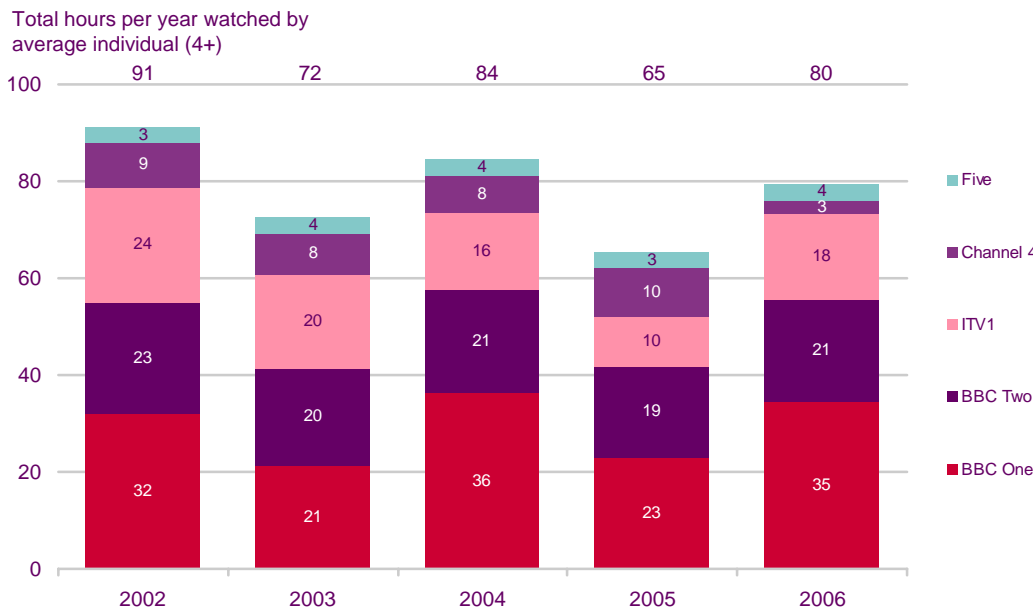


Source: BARB 2005

**Sport viewing hours**

Amounts of yearly viewing vary according to the particular sporting events taking place. Figure 5.5 shows the proportion of hours spent viewing sports on the main PSB terrestrial channels. BBC One and BBC Two were watched for the greatest proportion of hours (35 and 21 hours respectively), and Sport on ITV1 was watched for an average of 18 hours per year.

**Figure 5.5: Total viewing hours to sports programmes, 2002-2006**



Source: BARB 2002-2006

## Audience impact – UK cultural identity

There are a number of statements from the PSB Tracker that together provide an indication of the extent to which viewers feel that this element of PSB Purpose 3 is being carried out by the broadcasters:

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

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

### Perceived importance of PSB statements

As Chapter 2 showed, nearly three-quarters of viewers (73%) said that it was important that the PSB channels together covered big national events. 59% said it was important to show people from different parts of the UK, and 40% said that it was important for channels to show high quality UK soaps and dramas.

### Perceived delivery of PSB statements

Satisfaction with the delivery of these elements across all broadcasters was relatively high, as Figure 5.6 shows.

**Figure 5.6: Perceived delivery of Purpose 3 statements**



*Extent to which the characteristic applies to the channels together, where 10 means 'applies completely' and 1 means 'does not apply at all'*

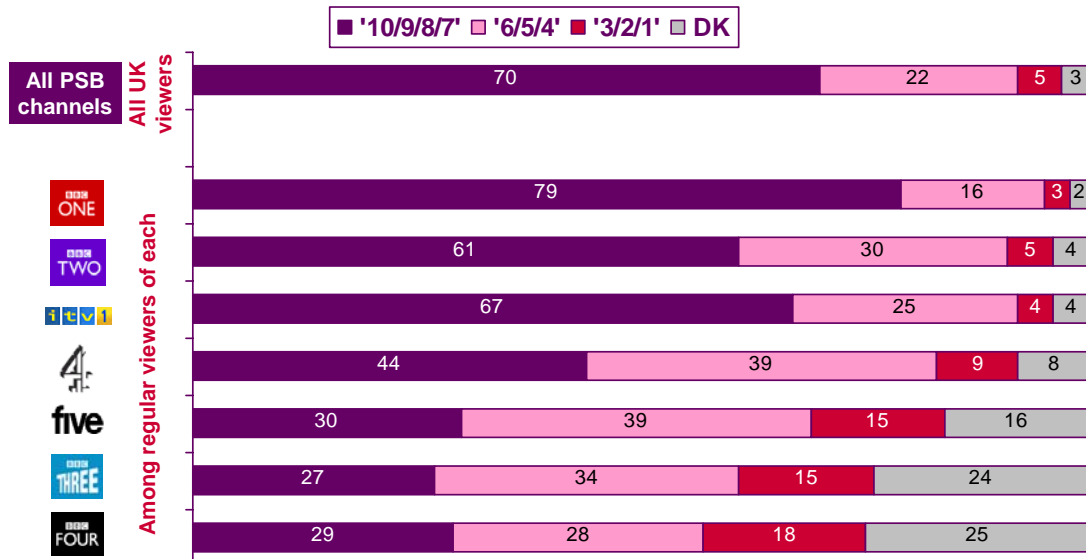
Source: GfK NOP Omnibus data: Base for 'all PSB channels': All UK adults, 937, Oct 06

The coverage of big national events is seen by regular viewers to be carried out most effectively by BBC One (79%). Two-thirds of regular viewers of ITV1 (67%) see it as covering big national events well. Older people are more likely to rate BBC One and ITV1 highly on this statement, and younger people are more likely to rate Channel 4 highly.

### Figure 5.7: Opinions on Purpose 3 – it covers big national events well

“It covers big national events well, like sports, music events or major news stories”

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



Base for 'all PSB channels': all UK adults, 937, Oct 06

Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)

BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247

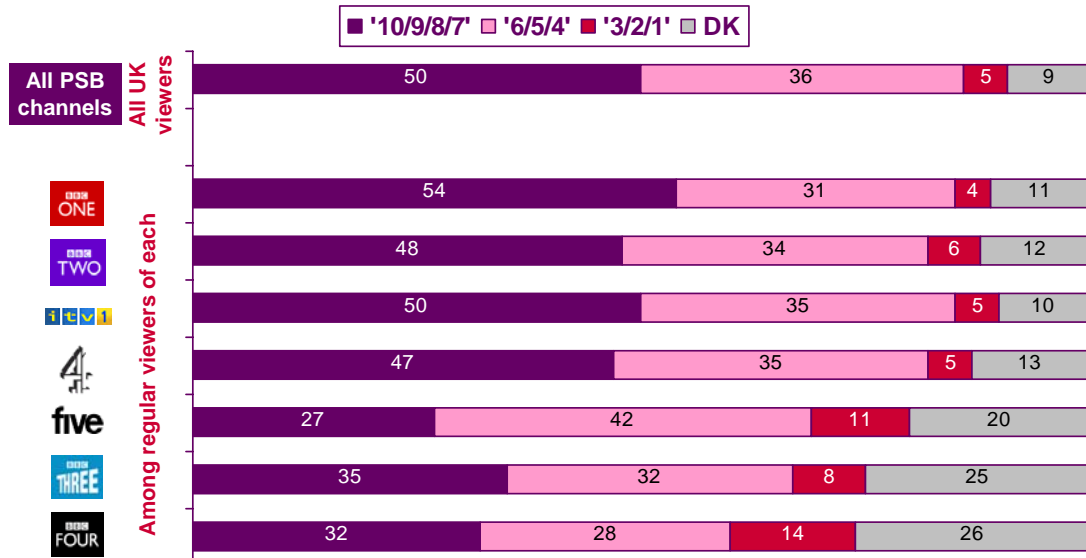
Source: PSB Tracker - GfK NOP Media, 2006

Regular viewers of BBC One were slightly more likely to rate it highly on portraying people from different parts of the UK. However, young regular viewers of Channel 4 rated it particularly highly – 60% of 16-24s felt it showed people from around the UK.

### Figure 5.8: Opinions on Purpose 3 – reflecting UK cultural identity

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

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



Base for 'all PSB channels': all UK adults, 937, Oct 06

Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)

BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247

Source: PSB Tracker - GfK NOP Media, 2006

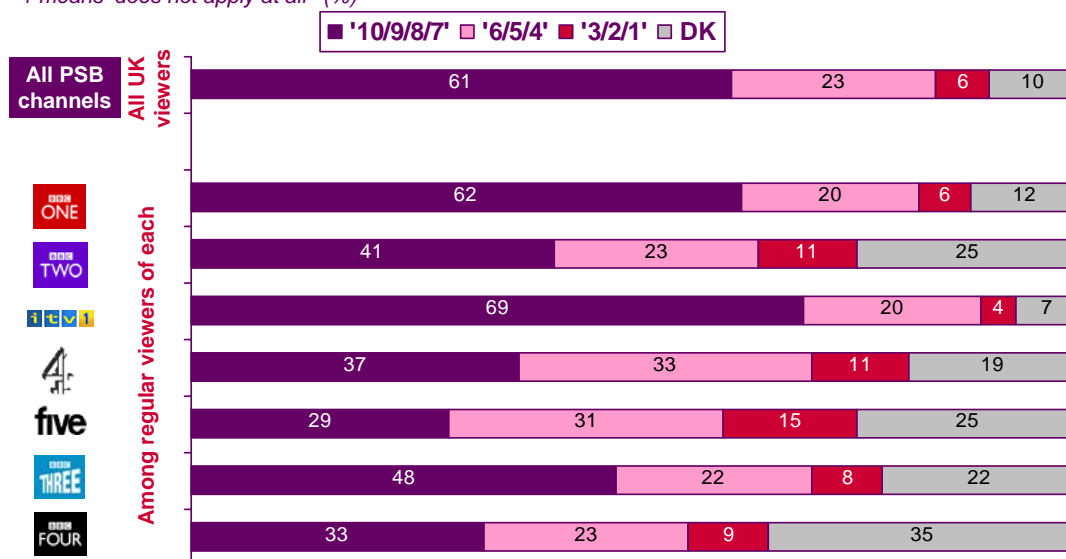
ITV1 is rated higher than any other channel by regular viewers for showing high quality soaps or dramas made in the UK (69% rating it 7-10 out of 10). Just over six in ten (62%) regular BBC One viewers rated the channel highly on this statement. BBC Three is rated more highly than BBC Two, Channel 4 or Five. Viewers from minority ethnic groups are less likely to rate ITV1 highly than white viewers – 53% compared to 70%.

Regular viewers in younger age groups are much more likely to agree with this statement for BBC One, ITV1, Channel 4 and Five than those in older age groups.

**Figure 5.9: Opinions on Purpose 3 – it shows high quality soaps or dramas made in the UK**

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

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



Base for 'all PSB channels': all UK adults, 937, Oct 06

Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)

BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247

Source: PSB Tracker - GfK NOP Media, 2006

The BBC Pulse survey asked respondents who had watched Comedy programmes (including comedies from other countries, not just the UK) if they agreed with the following statements. Those watching Drama were asked the second question only:

This programme felt original and different to most other TV programmes I've seen

It is the kind of programme I would talk to other people about

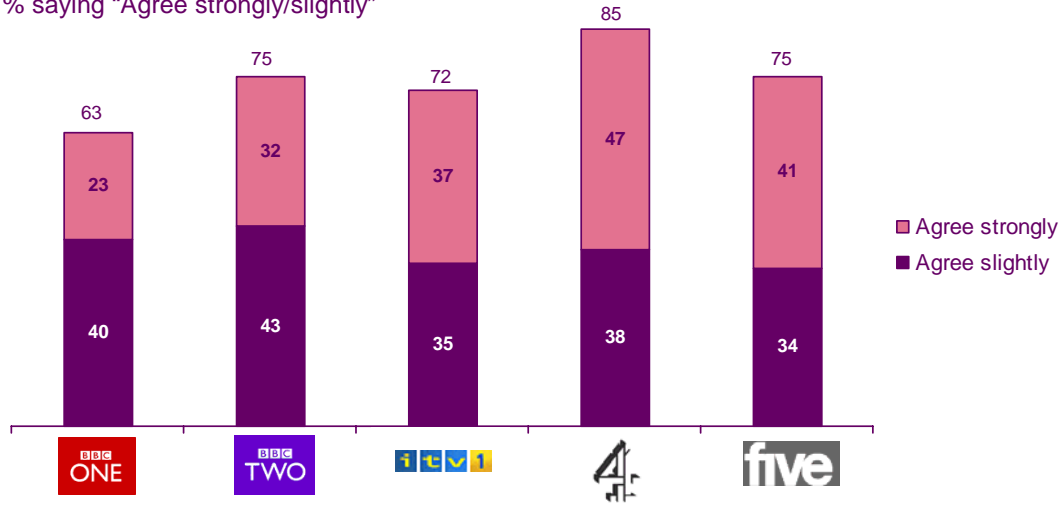
In terms of finding Comedy programmes 'original and different', there was significant variation in responses from the Pulse survey. 85% of responses about Channel 4 comedies said that having watched a programme on Channel 4 they found it original/different. This was true for 75% of responses to programmes from BBC Two and Five, 72% for ITV1 and 63% for BBC One.



**Figure 5.10: Pulse opinions on Comedy: original**

Comedy: "This programme felt original and different from most other TV programmes I've seen"

% saying "Agree strongly/slightly"



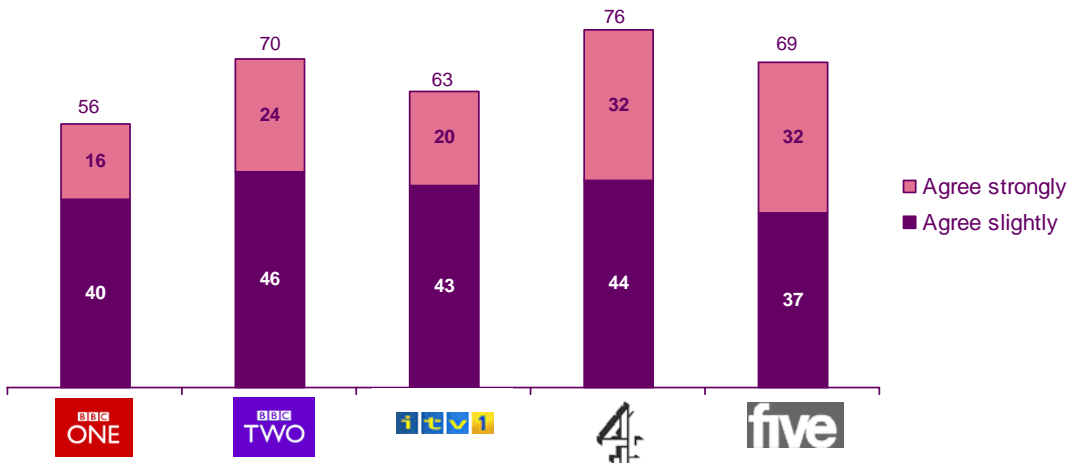
Base for all responses to programmes watched in Comedy genre as defined by BDS  
 Responses: BBC One 23524, BBC Two 31104, ITV1 4046, Channel 4 34515, Five 1005  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

Pulse respondents were also asked whether the Comedy programmes they had watched would be the kind of programme they would talk to other people about. Again, the largest proportion of responses in agreement for any broadcaster was for Channel 4 (76%). BBC Two and Five had around 70% in agreement with the statement, and ITV1 and BBC One had smaller proportions (63% and 56% respectively).

**Figure 5.11: Pulse opinions on Comedy: would talk to others about**

Comedy: "It is the kind of programme I would talk to other people about"

% saying "Agree strongly/slightly"

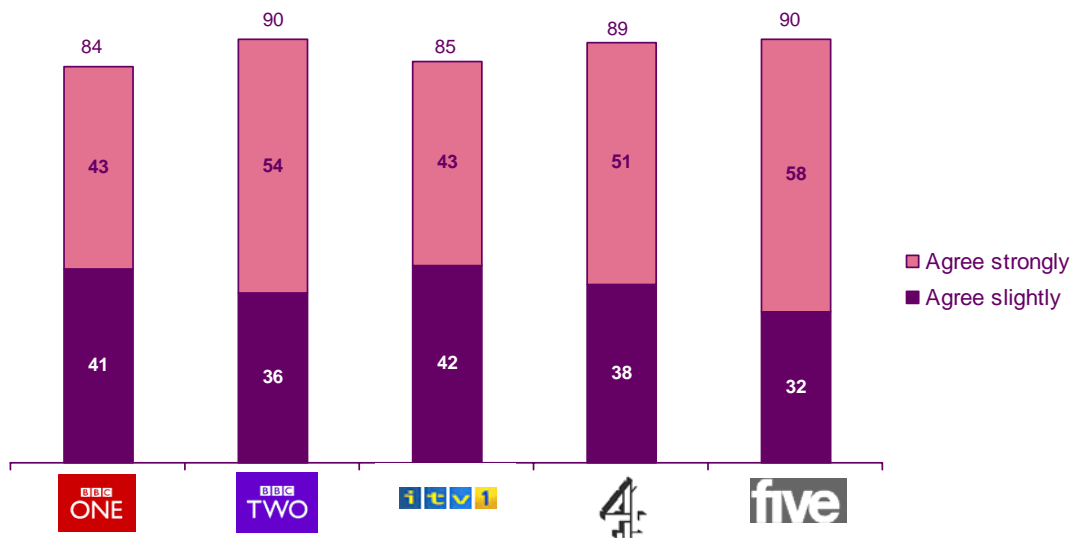


Base for all responses to programmes watched in Comedy genre as defined by BDS  
 Responses: BBC One 23524, BBC Two 31104, ITV1 4046, Channel 4 34515, Five 1005  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

Pulse respondents were asked whether the Drama programmes they had watched would be the kind of programme they would talk to other people about. Between 84-90% of responses agreed that this would be the case, with responses relating to BBC Two, Five and Channel 4 programmes slightly higher than for other channels.

**Figure 5.12: Pulse opinions on Drama: would talk to others about**

Drama: "It is the kind of programme I would talk to other people about"  
 % saying "Agree strongly/slightly"



Base for all responses to programmes watched in Drama genre as defined by BDS  
 Responses: BBC One 559826, BBC Two 17066, ITV1 666013, Channel 4 97324, Five 171839  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

## 5.4 Nations and regions provision

### Output hours – news programming

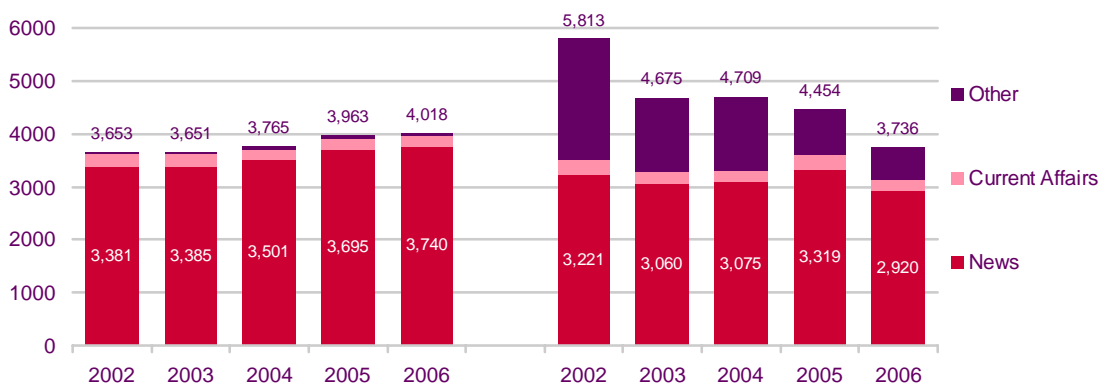
BBC regional output in England increased from 3,653 hours in 2002 to 4,018 hours in 2006. During the same period, ITV1's output<sup>31</sup> decreased significantly, due to its reduction in programmes other than News and Current Affairs, following changes to its licence conditions.

**Figure 5.13: Regional output in England, 2002-2006**

BBC regional output in England

ITV regional output in England

Hours per year



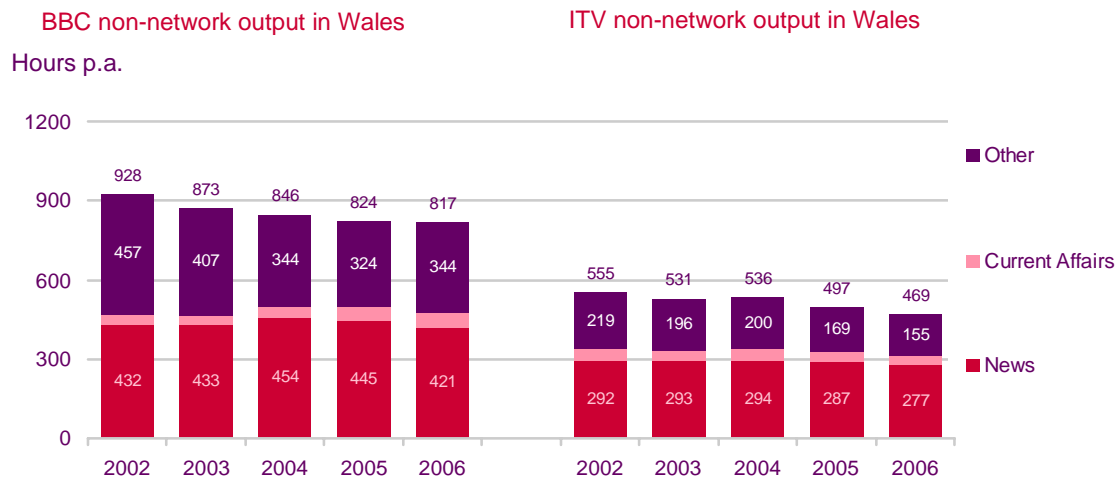
Source: Broadcaster returns and CID

Note: No sub-regional opt-outs are included in these data; figures exclude repeats

<sup>31</sup> ITV1 output figures exclude GMTV's regional opt-out programming.

In Wales, the BBC's overall non-network output total was 817 hours in 2006, and ITV1's was 469 hours. Both broadcasters saw a decline in hours of output since 2002, mainly in programming outside news and current affairs.

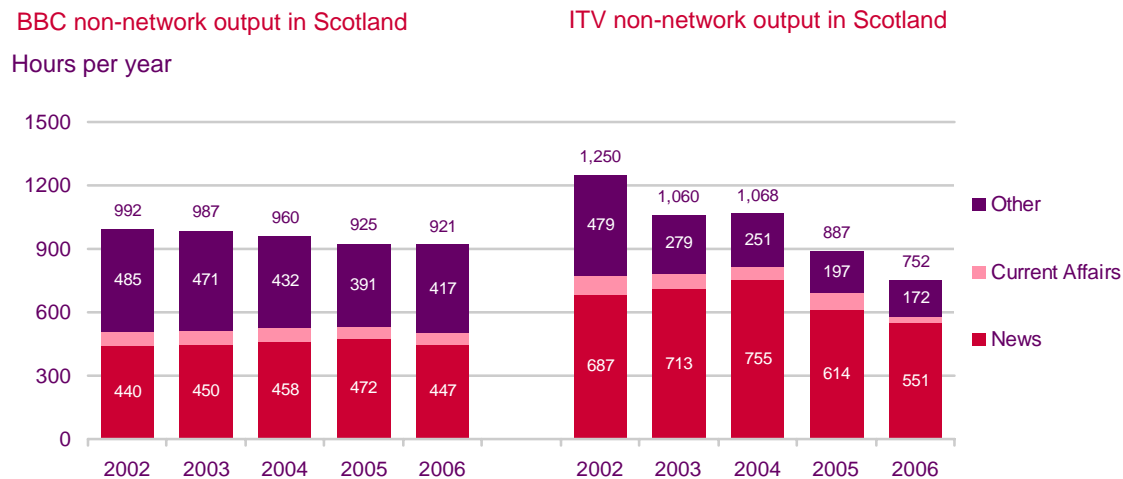
**Figure 5.14: Non-network output in Wales, 2002-2006**



Source: Broadcaster returns and CID  
Note: figures exclude repeats

In Scotland, BBC hours of non-network output again declined over the period, from 992 hours in 2002 to 921 hours in 2006. ITV1 hours of non-network output decreased more sharply over the same period, following the 2004 PSB Review and reclassification of some programming.

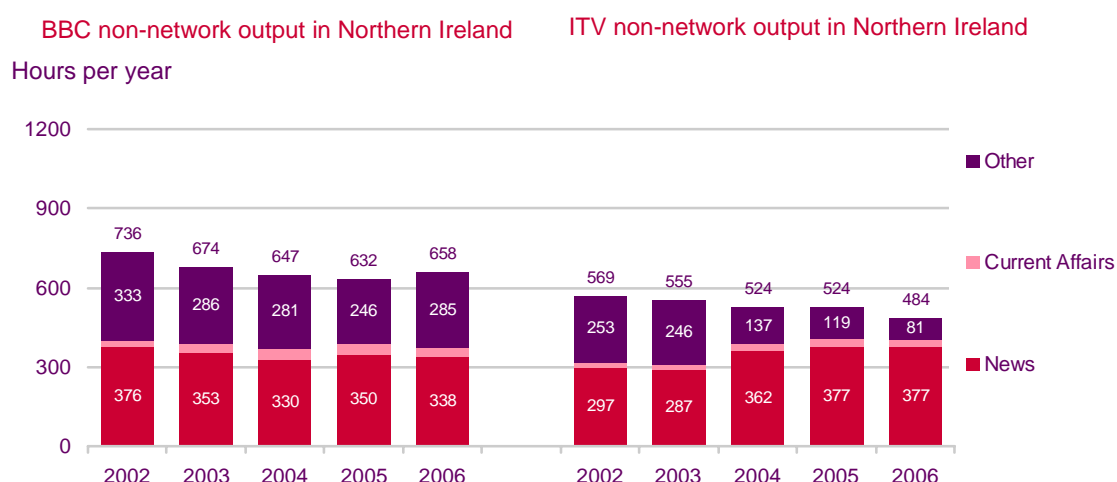
**Figure 5.15: Non-network output in Scotland, 2002-2006**



Source: Broadcaster returns and CID  
Note: figures exclude repeats

Finally, in Northern Ireland, hours of non-network output on the BBC decreased over time, from 736 hours in 2002 to 658 hours in 2006. However, 2006 hours had increased from 2005. Hours on News on UTV (the ITV licensee in Northern Ireland) were higher in 2006 (377 hours) than in 2002 (297 hours), but hours of Other programming were lower, at 81 hours in 2006 compared to 253 hours in 2002.

**Figure 5.16: Non-network output in Northern Ireland, 2002-2006**



Source: Broadcaster returns and CID  
 Note: figures exclude repeats

## 5.5 Viewing figures

This section provides information on the share of viewing gained by the evening regional news programmes across the Nations and regions of the UK, and compares this with the situation in 2002. It also shows the average number of viewers on ITV1 for the Thursday evening slot which, since 2002, has tended to show regional programmes.

Figure 5.17 shows the average number of viewers to the Thursday 7.30 – 8pm slot on ITV1, which has tended to be occupied by Nations or regions non-news programming since 2002. From time to time, network programmes are shown in this time slot, and these were excluded from the analysis.

Figure 5.17 shows that audiences and share for this timeslot increased in the period 2003-5, although in 2006 there was a decline in both audience and share.

**Figure 5.17: ITV1 Nations and regions programmes, Thursday 7.30 - 8pm slot, 2003-2006**

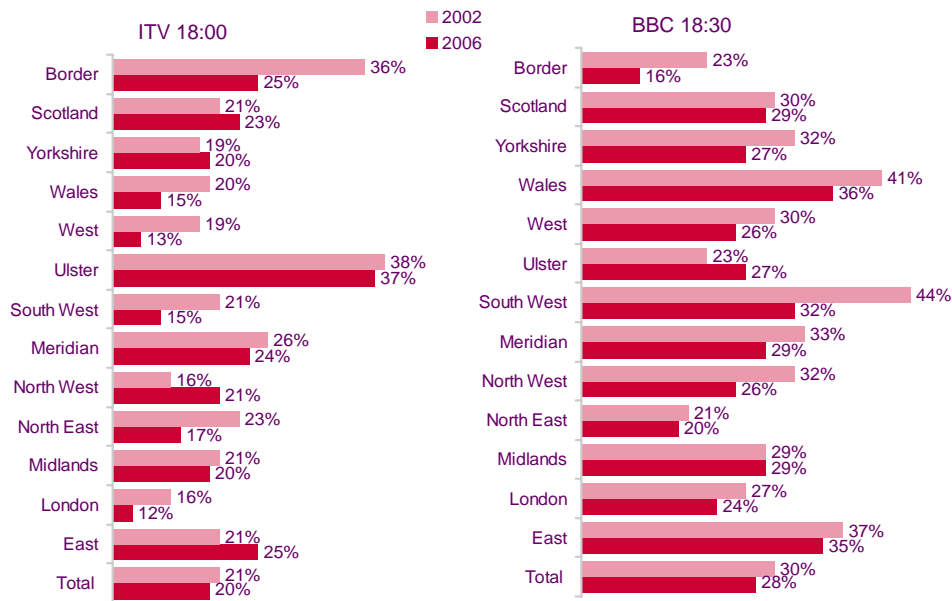
	2003	2004	2005	2006
Audience (millions)	3.69	4.01	4.14	3.86
Audience share (%)	16.7	18.6	20.0	18.8

Source: BARB. Excludes network programmes broadcast in this timeslot during the period.

Figure 5.18 shows the viewing share of ITV1 and BBC1 evening regional news programmes in 2002 and 2006. Share of audience varies considerably across the UK, with UTV being particularly strong in Northern Ireland. ITV audience share is low in London. BBC share is lowest in the Border region and in North East England.

There was a slight decline in share on both channels in terms of overall viewing share, from 21% to 20% for ITV1 and from 30% to 28% on BBC1. The pattern of decline is mixed however, with some regions maintaining share and others showing a significant decrease.

Figure 5.18: ITV1 and BBC1 regional news viewing share 2002-2006



Source: BARB

Note: ITV regions are used for this analysis, and so BBC1 share does not correlate exactly with distinct BBC regional news programmes

Figure 5.19 shows how programmes that are made in particular parts of the UK and reflect that identity tend to gain higher audiences in that part of the UK than elsewhere. Audience share figures are for 2006. The strongest “region effect” is in fact a national one – for *Rebus* in Scotland, with a 45% difference between the network and the National share. The next biggest regional effects are for *Doc Martin*, at 39%, and *Taggart*, at 37%. *Shameless* and *Coronation Street* were also watched by proportionally more viewers in their region of production than across the network (30%).

Figure 5.19: Selected TV drama audience shares across UK and in region of production, 2006

Title	Channel	Network audience share (%)	Region/Nation of production	Production Region/Nation audience share (%)	Differential (%)
Bel's Boys	ITV1	3.4	Northern Ireland	3.8	12
Casualty	BBC One	30.8	West	26.9	-13
Coronation St	ITV1	44.7	North West	58.1	30
Doc Martin	ITV1	25.9	South West	36	39
Doctors	BBC One	30.3	Midlands	29.7	-2
Eastenders	BBC One	31.6	London	34	8
Emmerdale	ITV1	37.4	Yorkshire	43.9	17
Heartbeat	ITV1	23.9	Yorkshire	26.2	10
Hollyoaks	Channel 4	9.6	North West	9.8	2
Rebus	ITV1	27.4	Scotland	39.7	45
Shameless	Channel 4	13.9	North West	18	30

Taggart	ITV1	19.9	Scotland	27.2	37
Torchwood	BBC Two	7.1	Wales	6.9	-3

Source: BARB 2006

## Audience impact

The PSB Tracker statements that relate to regional representation are the following:.

It portrays my region well to the rest of the UK

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

### *Perceived importance of PSB statements*

Viewers find the first statement of less importance than nearly all the others when asked about its resonance for the PSB channels as a whole – 44% felt it important that the PSB channels portrayed their region well to the rest of the UK. However, regional news is seen as much more important – 72% of respondents felt it important that regional news programmes provide good quality news.

### *Perceived delivery of PSB statements*

In terms of delivery of these elements of PSB, 29% of viewers value the channels as a whole as portraying their region well to the rest of the UK (rating them 7-10 out of 10), although almost one in five (17%) do not rate them well (1-3 out of 10). This is the lowest level of satisfaction out of all the PSB statements.

Turning to particular channels, ITV1 and BBC One score more highly than the other channels, with 40% and 38% respectively of their regular viewers agreeing with the statement. Regular viewers of BBC Two are more likely than regular viewers of Channel 4 to agree with the statement. BBC Three is rated higher than BBC Four by its regular viewers.

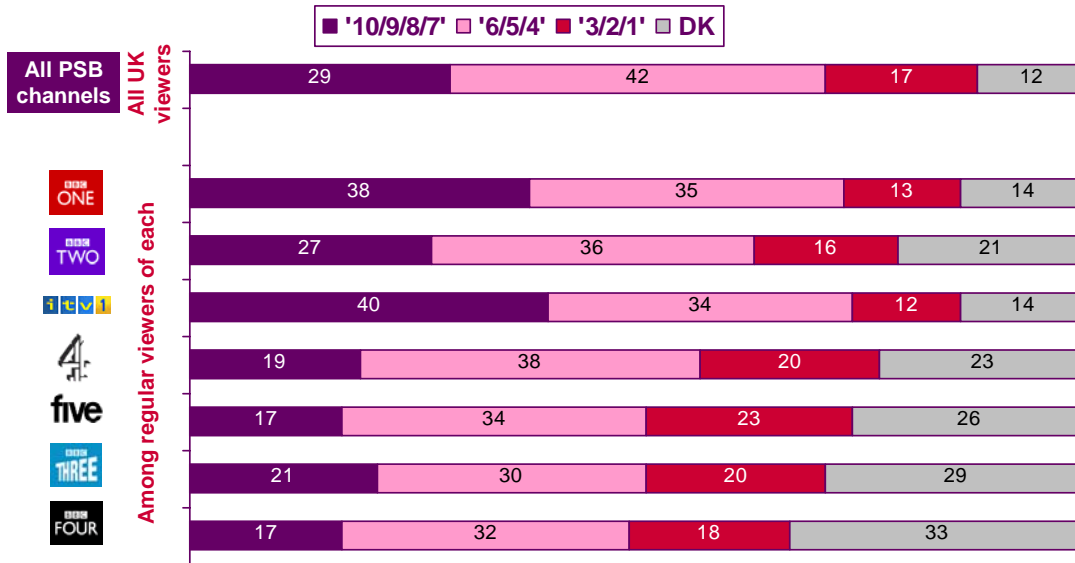
Older people aged over 65 are more likely than other age groups to rate the channels highly on this element of PSB – 44% of this age group rate BBC One, and 46% rate ITV1.

Those in socio-economic group AB are less likely to rate the channels on this element of PSB, and those in group DE are more likely.

**Figure 5.20: Opinions on Purpose 3 – portrayal of region to rest of UK**

“It portrays my region well to the rest of the UK”

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



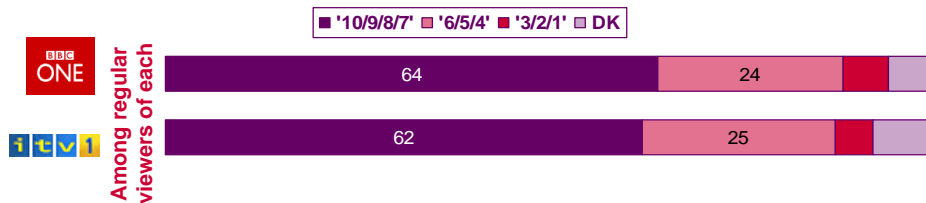
Base for 'all PSB channels': all UK adults, 937, Oct 06  
 Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker - GfK NOP Media, 2006

Only the BBC and ITV show regional news programmes, and therefore Figure 5.21 shows result for these channels only. Responses from regular viewers of these channels are very similar at 64% and 62% respectively.

**Figure 5.21: Opinions on Purpose 3 – regional news programmes**

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

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



Base for 'all PSB channels': all UK adults, 937, Oct 06  
 Base for individual viewers: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker - GfK NOP Media, 2006

## Section 6

# PSB Purpose 4: representing diversity and alternative viewpoints

## 6.1 Summary findings

### Importance of Purpose 4 to viewers

- Just over three-fifths (61%) of the UK population saw this Purpose as important (rating this as 7-10 out of 10) with few (6%) rating it as unimportant (1-3 out of 10). In terms of the perceived delivery of all of the PSB channels against this Purpose, fewer rate the channels together as performing well (38%).

### Output hours

- Religious programming was broadcast for 311 hours in 2006, down from 415 hours in 2002. The decrease was driven by a reduction in ITV1's religious programming output although the output of Five, BBC Two and BBC Four also decreased between 2002 and 2006. BBC One's output increased from 96 hours in 2002 to 112 hours in 2006. Channel 4's output also increased, from 53 hours to 61, during the same period.
- Looking at the provision of religious programming in peak time, 70 hours were broadcast during peak time in 2006. There was a rise in output on BBC One in 2006 compared to the previous year, matched by a decrease in BBC Two's output.

### Viewing figures

- Viewers watched Religious programmes in 2006 for an average 3.2 hours per year, compared to 3.8 hours in 2001. The majority of this viewing was on BBC One. Viewing of ITV1 and Channel 4 has reduced over the period.

### Audience impact

- 38% of UK TV viewers say that the PSB channels together perform well in terms of having programmes that 'show different kinds of cultures and opinions within the UK'. Just over 1 in 10 (11%) rate the channels poorly on this.
- Just under half of regular viewers of Channel 4 (48%) BBC Two (47%) and BBC One (46%) see the channels as showing different cultures and opinions.
- Younger age groups, for example 16-24 year-olds, are more likely to rate Channel 4 and BBC Two highly (61% and 62% respectively). They are also more likely to rate BBC One and Five higher than older age-groups. Older people are less likely than younger age groups to rate the channels on this element of PSB, and this is particularly the case for Channel 4's regular older viewers.



## 6.2 Introduction

This chapter reports on PSB Purpose 4:

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

This PSB Purpose is in some measure aligned to the Religious programming genre, in as much as programmes in this genre describe a range of different cultures and viewpoints. Beyond this genre, there are a range of other discrete programmes that may fit this PSB Purpose, for example particular types of social documentary, or programmes that reflect multicultural themes or represent diversity.

In future years it is expected that such discrete programmes can be examined in this chapter through the use of a new database which logs such elements; for this 2007 report, the output hours and viewing figures in this chapter relate to the Religious genre only.

The PSB Tracker statement relating to this Purpose is

Its programmes show different kinds of cultures and opinions within the UK

Respondents are likely to have thought about a range of programme types when giving their views on how PSB channels deliver this element of PSB.

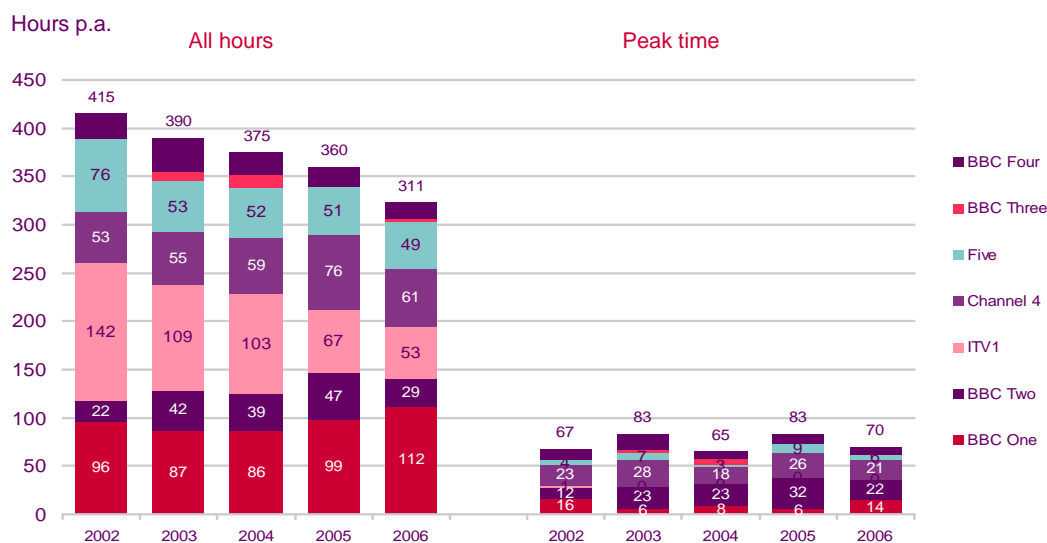
This Purpose is particularly linked to Channel 4's remit, as well as that of the BBC.

## 6.3 Output

Religious programming output was broadcast for 311 hours in 2006, down from 415 hours in 2002 (Figure 6.1). The decrease was driven by a reduction in ITV1's religious programming although the output of Five, BBC Two and BBC Four also decreased from 2002 to 2006. BBC One's output increased from 96 hours in 2002 to 112 hours in 2006. Channel 4's output also increased, from 53 hours to 61, during the same period.

Looking at the provision of religious programming in peak time, 70 hours were broadcast during peak time in 2006. There was a rise in output on BBC One in 2006 compared to the previous year, matched by a decrease in BBC Two's output.

**Figure 6.1: Religious programming output hours, 2002 – 2006**

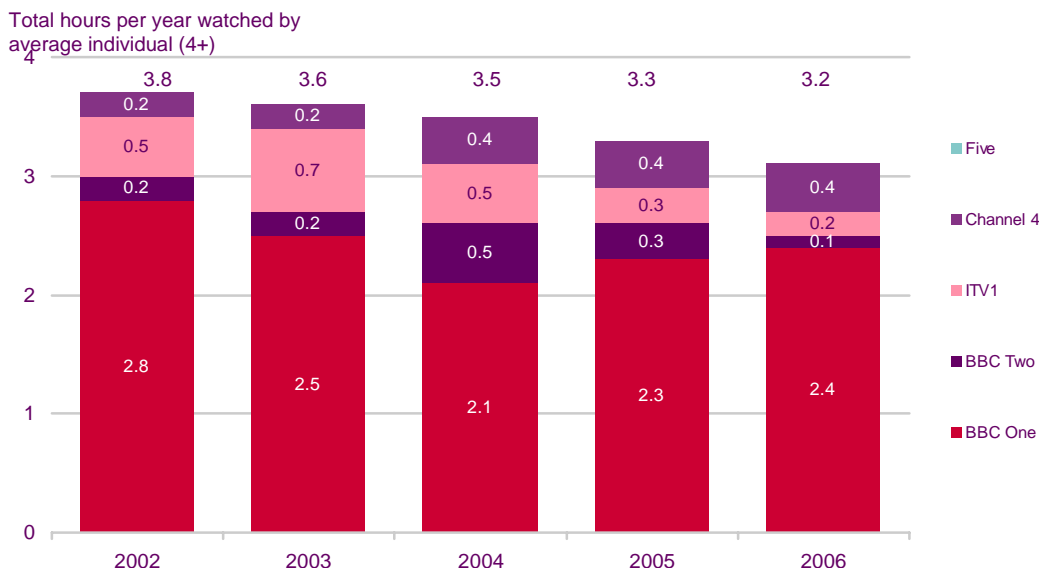


Source: PSB broadcaster returns

### 6.4 Viewing figures

Figure 6.2 shows a gradual decline in viewing of Religious programmes since 2002. Viewers watched Religious programmes in 2006 for an average of 3.2 hours per year. The majority of this viewing was of BBC One.

**Figure 6.2: Religious programmes annual viewing hours, 2002 - 2006**



Source: BARB 2002-2006

Older people are more likely to watch these programmes; those aged 55-64 watched an average of 4.9 hours a year, and those aged 65 and over watched an average of 8.5 hours per year. Those aged 16-24, on the other hand, watched an average of 1.1 hours.

## 6.5 Audience impact

The perceived performance of the PSB channels on this Purpose was measured by viewers rating the extent to which the statement *'its programmes show different kinds of cultures and opinions within the UK'* applies to the channels (Figure 6.3).

### Perceived importance of PSB statement

Some 61% of viewers rate the portrayal of different kinds of cultures and opinions an important element of PSB.

### Perceived delivery of PSB statement

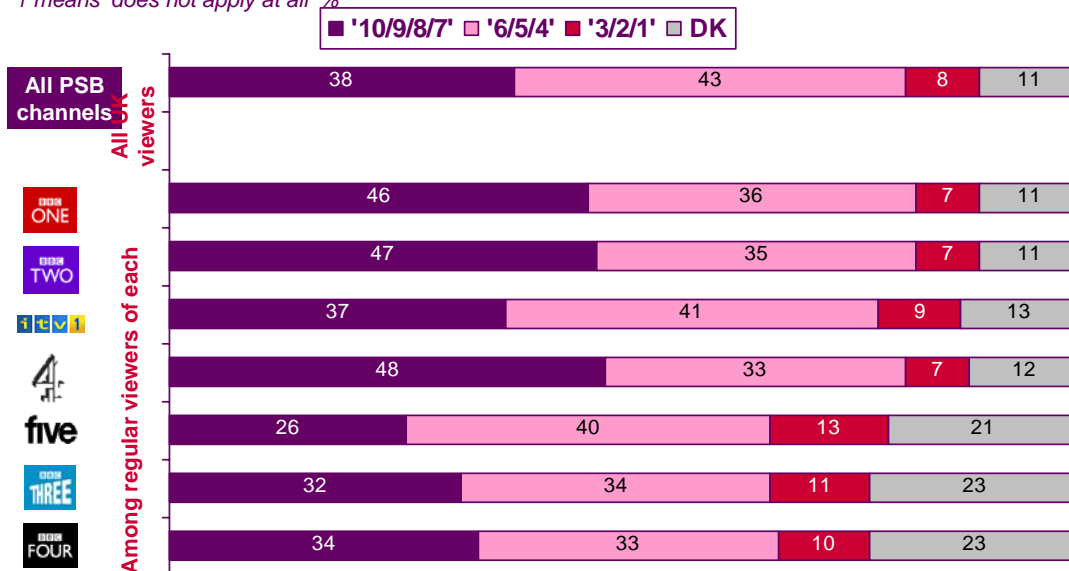
Delivery of this PSB Purpose is perceived to be significantly lower than its importance. 38% of UK TV viewers say that the PSB channels together perform well in terms of having programmes that *'show different kinds of cultures and opinions within the UK'*. Just over one in 10 (11%) rate the channels poorly on this.

Just under half of regular viewers of Channel 4 (48%) BBC Two (47%) and BBC One (46%) see the channels as showing different cultures and opinions.

Younger age groups, for example 16-24 year-olds, are more likely to rate Channel 4 and BBC Two highly (61% and 62% respectively). They are also more likely to rate BBC One and Five higher than older age groups.

**Figure 6.3: Opinions on Purpose 4 – representing diversity and alternative viewpoints**

"Its programmes show different kinds of cultures and opinions within the UK"  
Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' %



Base for 'all PSB channels': all UK adults, 937, Oct 06

Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)

BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, five = 1424, BBC3 = 481, BBC4 = 247

Source: PSB Tracker – GfK NOP Media, 2006

## Section 7

# Public Service Broadcasting: Characteristics

## 7.1 Summary findings

### The importance of PSB Characteristics

- High quality, engaging, and challenging programmes are all judged important by around two-thirds of respondents. Innovative content is seen as important by 57% of respondents.

### High quality

- Almost three-quarters of regular viewers (73%) of BBC One and BBC Two value those channels as showing programmes of high quality (giving them a score of 7-10 out of 10). 62% of ITV1's viewers rate it highly on this measure, and 41% of Five's (with a further 42% giving Five a score of 4-6 out of 10).
- Younger viewers (aged 16-34 years) of all channels tend to have a more positive view of the quality of the programmes than older viewers. There is a particular difference in views of Channel 4: 74% of its regular viewers aged 16-24 say it shows high quality programmes compared to 55% of its viewers aged 35-54, and 47% of its viewers aged over 55.
- Across all responses to programmes watched by Pulse respondents, each channel was rated highly in terms of delivering quality broadcasting (between 82 and 88% of responses).

### Original

- There has been little change in the amounts of peak-time network originated content (5615 hours in 2002 compared to 5476 hours in 2006), reflecting the quotas on such content in peak time. Regional originations are closely related to overall regional output, and their decline since 2005 is largely due to ITV's reduction in non-news regional output.
- Almost half of BBC One and BBC Two regular viewers say the channels show enough new programmes made in the UK (48% and 49% respectively). Less than one quarter (23%) of Five's regular viewers find the statement applicable to the channel, and 18% rate it poorly on the provision of original UK content. This is likely to be reflective of its lower programme budget compared with the other main PSB channels.

### Innovative

- Viewers felt that PSB channels taken together performed less well in this area than for any other PSB Characteristic, with 32% saying that they showed innovative programming. Channel 4 and BBC Two are seen by their regular viewers as most positive in the area of innovation (51% and 50% respectively rating the channels at 7-10 out of 10 on this statement). For Channel 4, 70% of its 16-24 viewers rate it as innovative, compared to 60% of BBC Two's 16-24 regular viewers. Across all the

terrestrial channels, younger regular viewers are more likely than older viewers to see channels as innovative.

- BBC Three and Four are seen as delivering new ideas and different approaches by their regular viewers, more so than ITV1's or Five's.
- In the Pulse survey, the majority of responses were in agreement that programmes were 'original and different'. Channel 4 and BBC Two were rated particularly highly (both at 78%), with ITV1 having the smallest proportion of responses agreeing (65%).

### **Challenging**

- BBC Two is seen by more of its regular viewers as showing challenging programmes (61%), with BBC One and Channel 4 also being valued on this measure by over half their regular viewers (54%). Around one third (32%) of Five's viewers thought the channel showed challenging programmes.

### **Engaging**

- The programmes gaining the largest average audience figures in 2006 were dominated by football World Cup matches on BBC One and ITV1 – seven out of the fifteen top audiences on BBC One were for World Cup matches.
- Across the PSBs, the most-watched programmes included a range of genres including drama, sports, documentaries, entertainment, films, music, hobbies/leisure and news/weather.
- Some 62% of BBC One and BBC Two regular viewers gave these channels a rating of 7-10 out of 10 for showing programmes they wanted to watch; 60% of Channel 4 regular viewers, and 58% of ITV1 regular viewers. 43% of Five's regular viewers gave it this score, with a further 42% rating it 4-6 out of 10.
- Channel 4's younger regular viewers felt particularly strongly about this statement – 83% of its 16-24 regular viewers said it showed programmes they wanted to watch, the highest rating across all channels and demographic groups.
- Just under half of BBC Two's regular viewers felt that it reflected their interests, and 47% of BBC One's regular viewers felt it did so. Just over two-fifths of ITV1's and Channel 4's regular viewers felt the channel reflected their concerns and interests, although there was stronger agreement among younger viewers for Channel 4 – 59% of its 16-24 viewers said its programmes reflected their interests.
- In the Pulse survey, for each channel, more than four out of five responses for all programmes in the Entertainment genre viewed showed strong or slight agreement that the programme was entertaining.

## 7.2 Introduction

This chapter reports on five of the PSB Characteristics:

- High quality – well funded and well produced
- Original – new UK content, rather than repeats or acquisitions
- Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones
- Challenging – making viewers think
- Engaging – remaining accessible and attractive to viewers

Examination of the PSB Purposes entailed using contextual information in the form of output hours and audience figures relating to particular programme genres. However, due to the less tangible nature of the PSB Characteristics, the main focus in this section is upon viewer opinions gathered through the PSB Tracker and the BBC-GfK Pulse dataset.

The two exception to this are the ‘Engaging’ Characteristic, which includes viewing figures of the programmes gaining the largest average audiences, and the ‘Original’ Characteristic, which includes output hours showing the amounts of originated content broadcast.

Some of the PSB Characteristics apply particularly to certain channels. Innovation is a key element of Channel 4’s remit, and ITV1 and Five have a particular goal of quality UK production.

### PSB Tracker

The PSB Tracker used the following statements to explore respondents’ views of the PSB Characteristics:

It shows well-made, high quality programmes

It shows enough new programmes made in the UK

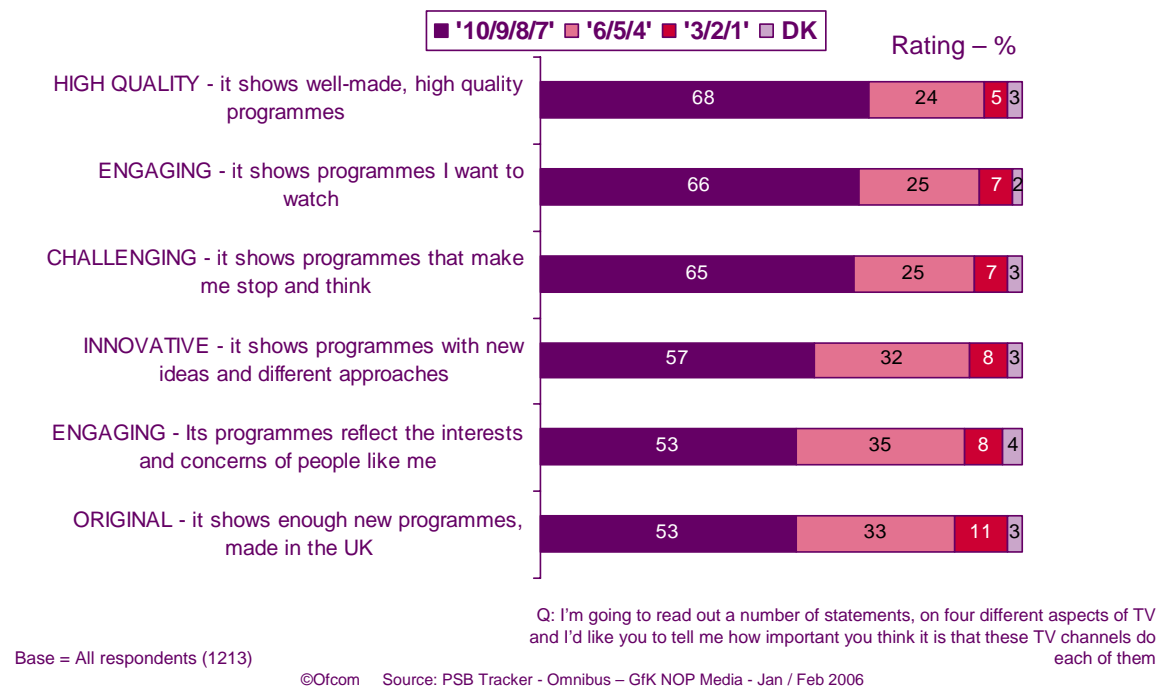
It shows programmes with new ideas and different approaches

It shows programmes that make me stop and think

It shows programmes I want to watch

Its programmes reflect the interests and concerns of people like me

Chapter 2 provided an overview of audience views on the perceived importance of the PSB Purposes and Characteristics. The perceived importance of the six statements relating to PSB Characteristics is shown again here in Figure 7.1. High quality, engaging, and challenging programmes are all judged important by around two-thirds of respondents. Innovative content is seen as important by 57% of the population.

**Figure 7.1: The importance of PSB Characteristics to viewers**

### 7.3 High quality

#### Audience impact

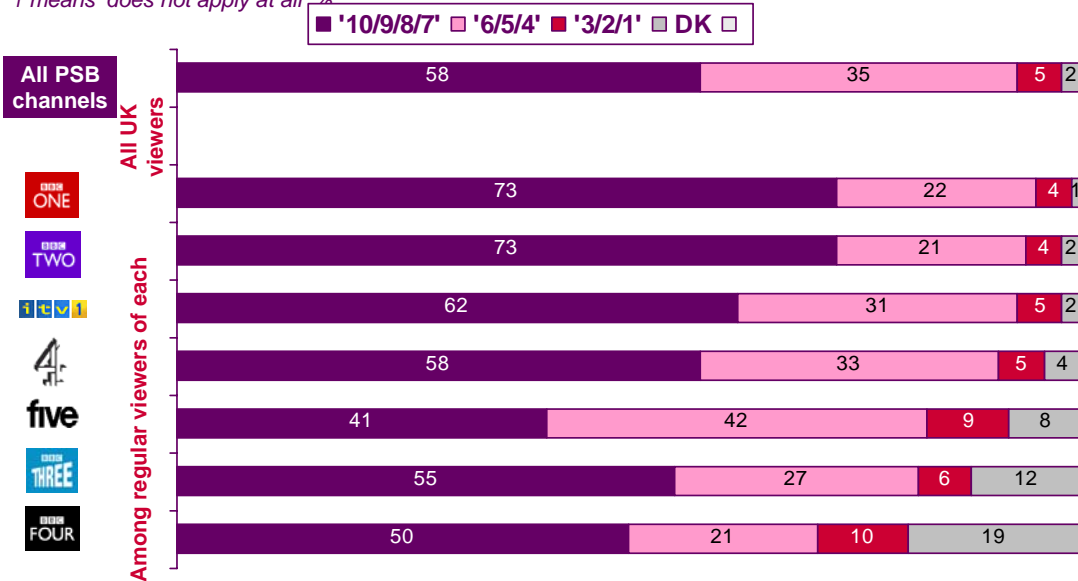
The PSB Tracker asked regular viewers of each channel to what extent the statement '*it shows well-made high-quality programmes*' applied to each channel separately and to what extent '*they show well-made, high-quality programmes*' applied to the PSB channels considered together. Responses are shown in Figure 7.2.

Some 58% of viewers rate highly the PSB channels together for showing well-made, high-quality programmes (rating 7-10 out of 10) – the highest overall rating for statements relating to PSB Characteristics. Looking at channels individually, almost three-quarters of regular viewers (73%) of BBC One and BBC Two rate those channels highly. Similarly high figures of 50% and over are seen for all other channels, except for Five where 41% of its regular viewers rate it as showing well-made, high-quality programmes, with a further 42% rating it 4-6 out of 10.

Certain groups of viewers rate particular channels more highly than other groups. Younger viewers (aged 16-34 years) of all channels tend to have a more positive view of the quality of the programmes than older viewers. There is a particular difference in views of Channel 4: 74% of its regular viewers aged 16-24 say it shows high-quality programmes compared to 55% of its viewers aged 35-54, and 47% of its viewers aged over 55.

### Figure 7.2: PSB Tracker: viewer opinions of high quality

“Show(s) well-made, high quality programmes”  
 Extent to which the purpose/characteristics applies to the channel(s), where 10 means ‘applies completely’ and 1 means ‘does not apply at all’ %



Base for 'all PSB channels': all UK adults, 937, Oct 06  
 Base for individual channels: self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker – GfK NOP Media, 2006

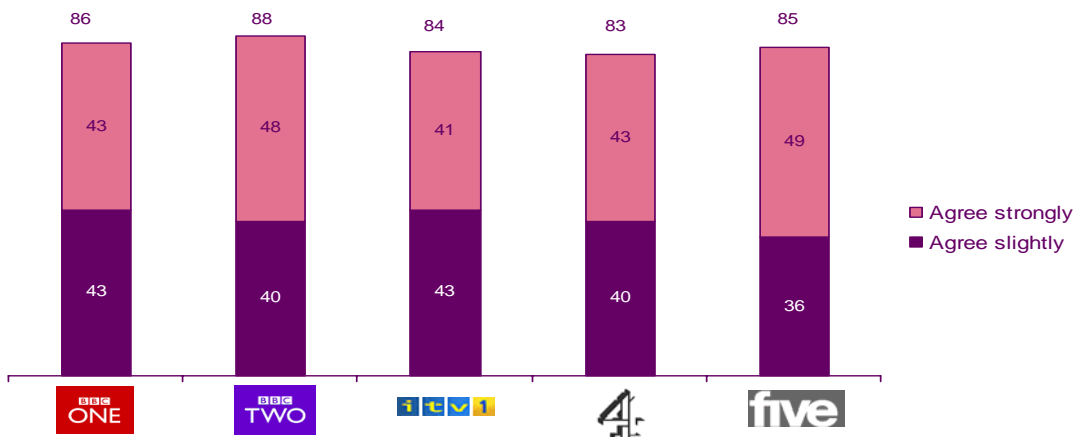
Respondents to the Pulse survey were asked the following question about all programmes they had watched:

This was a high quality programme

Across all responses to programmes watched by respondents to the Pulse survey, each channel was rated highly in terms of delivering quality broadcasting. With between 83% and 88% of responses agreeing that the programme was high quality, there was little difference between channels.

### Figure 7.3: Pulse opinions: Programme quality

All genres: “This was a high quality programme”  
 % saying “Agree strongly/ slightly”



Base for all responses to programmes watched by Pulse respondents  
 Responses: BBC One 1692586, BBC Two 548246, ITV1 1291876, Channel 4 681975, Five 329753  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

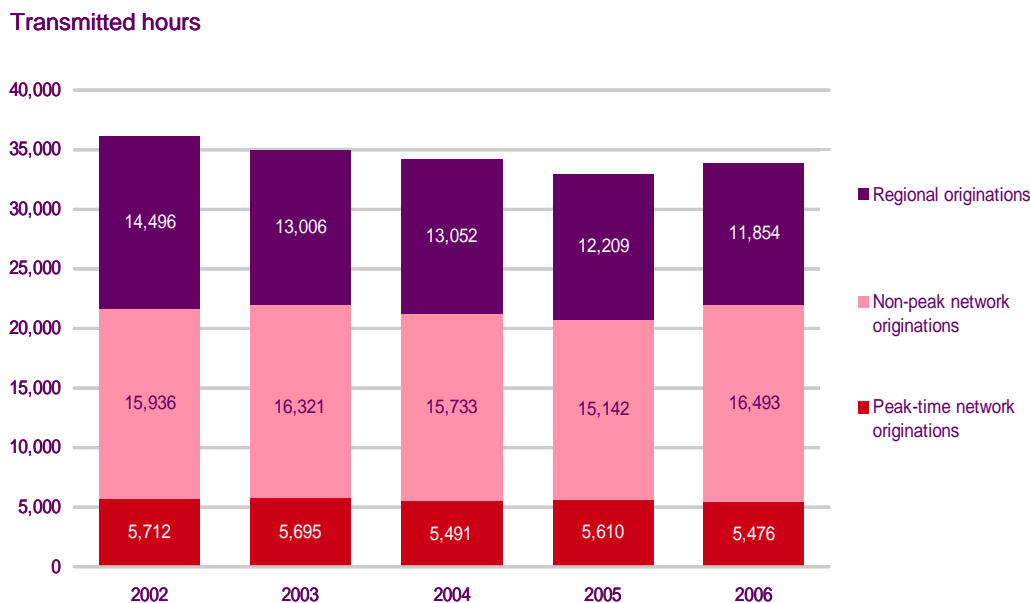


## 7.4 Original

### Output hours

Figure 7.4 shows the amounts of different kinds of originated output on the five main PSB channels from 2002 – 2006. There has been little change in the amounts of peak-time network originated content (5,615 hours in 2002 compared to 5,476 hours in 2006), reflecting the quotas on such content in peak time. Non-peak network originated content is higher than it was in 2005, due largely to ITV's overnight programming from ITV Play. Regional originations are closely related to overall regional output, and their decline since 2005 is largely due to ITV's reduction in non-news regional output, as described in Chapter 6 above.

**Figure 7.4: Output hours of originated programmes on terrestrial PSB channels, 2002-2006**



Source: Broadcaster returns and CID

### Audience impact

Figure 7.5 shows the extent to which regular viewers of the PSB channels feel that the channels show 'enough new programmes, made in the UK'. Just over one third of viewers (35%) give all PSB channels together a rating of 7-10 out of 10 for this element of PSB, while nearly half (47%) give them a rating of 4-6 out of 10.

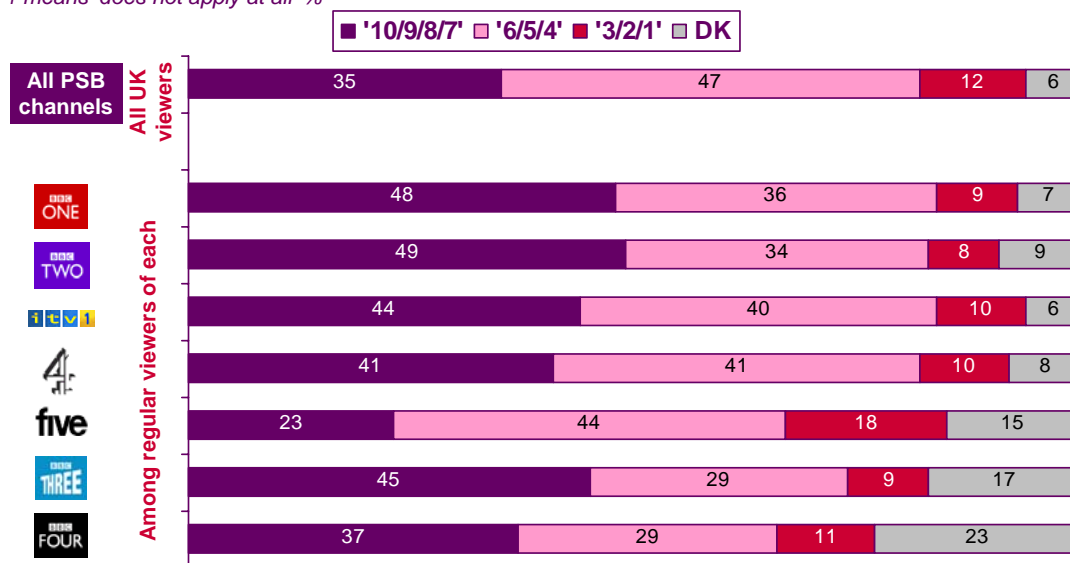
Regular viewers of each channel, except Five, rate that channel more positively than the rating all viewers give to the PSB channels taken together. Almost half of BBC One and BBC Two viewers rate the channels highly on this aspect of PSB (48% and 49% respectively). Less than one quarter (23%) of Five's regular viewers rate the channel highly, although a further 44% give it a rating of 4-6 out of 10. This is likely to be reflective of its lower programme budget compared with the other main PSB channels.

Younger regular viewers of the channels (aged 16-34) are more likely than other viewers to think the channels, separately and individually, show enough new programmes originating in the UK.

### Figure 7.5: Original – audience views

“It shows enough new programmes, made in the UK”

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



Base for 'all PSB channels': All UK adults, 937, Oct 06  
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker - GfK NOP Media, 2006

## 7.5 Innovative

### Audience impact

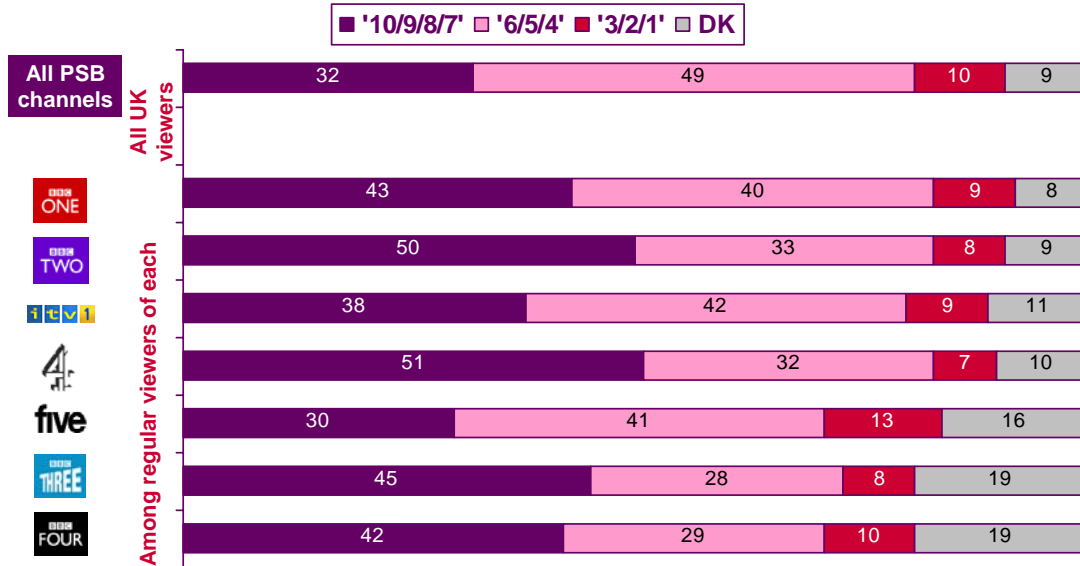
Figure 7.6 below shows regular viewers’ opinions about the extent to which channels show ‘programmes with new ideas and different approaches’.

Around one third of viewers (32%) agreed that the PSB channels together show enough new programmes with new ideas and different approaches. Channel 4 and BBC Two are seen by their regular viewers as most positive (51% and 50% respectively rating the channels as 7-10 out of 10 on this statement). For Channel 4, 70% of its 16-24 viewers rate it in this way, compared to 60% of BBC Two’s 16-24 audience. Across all the terrestrial channels, younger regular viewers are more likely to rate the channel highly than older viewers.

BBC Three and Four are seen as delivering new ideas and different approaches by their regular viewers, more so than ITV1 or Five.

### Figure 7.6: Innovation – audience views

“It shows programmes with new ideas and different approaches”  
 Extent to which the purpose/characteristics applies to the channel(s), where 10 means ‘applies completely’ and 1 means ‘does not apply at all’ %



Base for 'all PSB channels': All UK adults, 937, Oct 06  
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker – GfK NOP Media, 2006

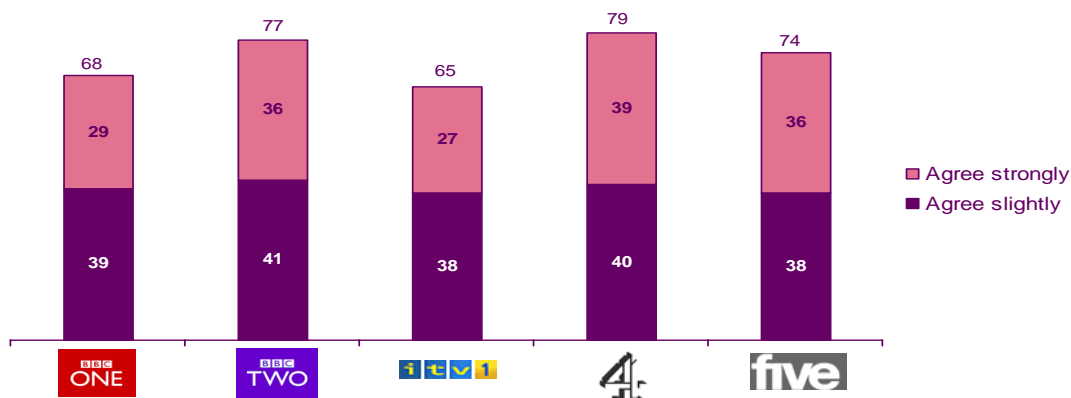
In the Pulse survey, having watched a programme, respondents were asked whether they agreed or disagreed with the following statement relating to innovation:

This programme felt original and different from most other TV programmes I've seen

The majority of responses agreed that the programme watched was 'original and different'. There was some variation between broadcasters, with Channel 4 and BBC Two programmes being rated particularly highly (79% and 77% respectively), and BBC1 and ITV1 programmes less so (68% and 65% respectively). 74% of responses about Five's programmes rated them as original and different.

### Figure 7.7: Innovation: Pulse audience opinions

All genres: “This programme felt original and different from most other TV programmes I've seen”  
 % saying “Agree strongly/slightly”



Base for all responses to programmes watched by Pulse respondents  
 Responses: BBC One 1692586, BBC Two 548246, ITV1 1291876, Channel 4 681975, Five 329753  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

As described earlier, responses relating to Channel 4's comedy programmes were particularly high, with 85% of responses agreeing that Channel 4's comedy programmes 'felt original and different from most other TV programmes I've seen', compared to 75% of BBC Two's and Five's, 72% of ITV1's and 63% of BBC1's.

## 7.6 Challenging

### Audience impact

Figure 7.8 shows regular viewers' opinions about the extent to which channels show 'programmes that make me stop and think'. Just over two-fifths of UK viewers rated the main PSB channels as delivering programmes that made them stop and think.

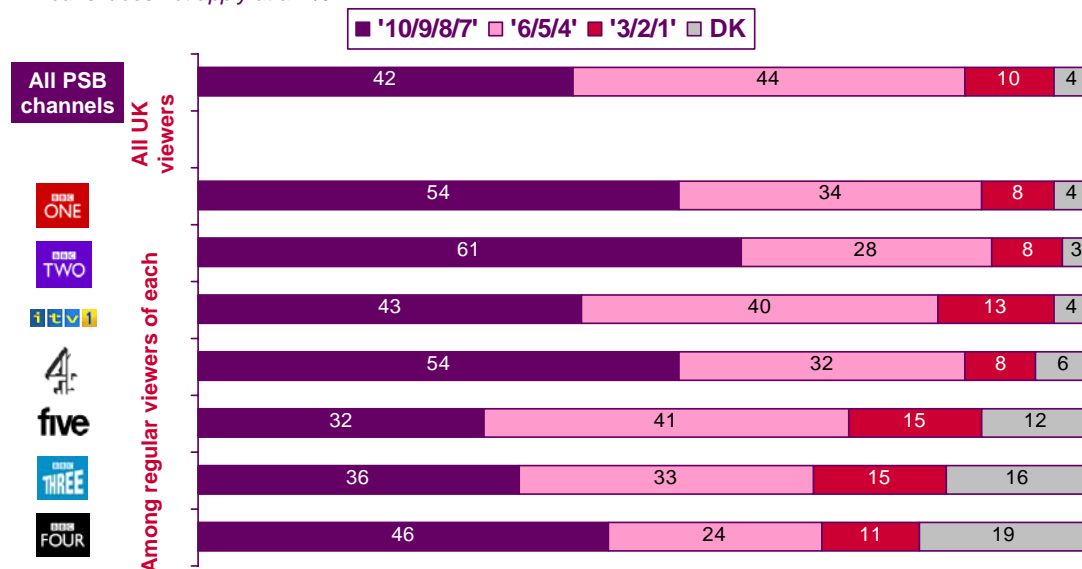
BBC Two was seen by more of its regular viewers as showing challenging programmes (61% rating it 7-10 out of 10), with BBC One and Channel 4 also being rated in this way by over half of their regular viewers (54%). Around one third (32%) of Five's viewers thought its programmes made them stop and think – although as seen below, when responding about particular programmes on Five, its viewers give it a much higher score.

Younger regular viewers of all channels were more likely to see their content as challenging. Older people were less likely to rate the channels as showing challenging content, and this was particularly the case with Channel 4. Regular viewers in the AB socio-economic group found BBC Two and Channel 4 challenging, but ITV1 and Five less so.

**Figure 7.8: Challenging – audience views**

"It shows programmes that make me stop and think"

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



Base for 'all PSB channels': All UK adults, 937, Oct 06

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)

BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247

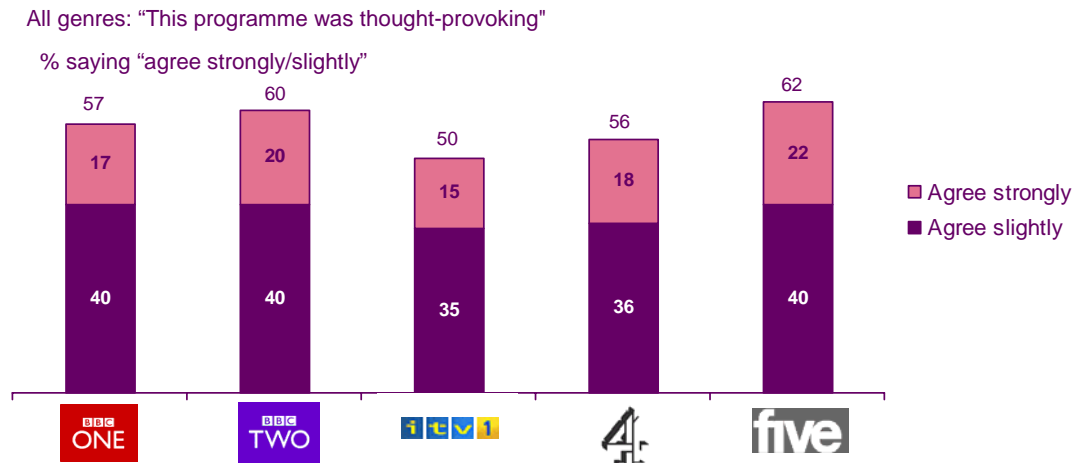
Source: PSB Tracker – GfK NOP Media, 2006

In relation to challenging content, Pulse respondents were asked whether they agreed with the statement 'This programme was thought-provoking'.

Across the five main channels, more than half the responses to all programmes watched agreed that the programme had been thought-provoking. This was most common among

responses to programmes on Five and BBC Two, with 62% and 60% of responses in agreement. The channel with the lowest number of positive responses for ‘thought-provoking’ was ITV1, at 49%.

**Figure 7.9: Challenging: Pulse audience opinions**



Base for all responses to programmes watched by Pulse respondents  
Responses: BBC One 1692586, BBC Two 548246, ITV1 1291876, Channel 4 681975, Five 329753  
Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

## 7.7 Engaging

“Engaging” in this context means the provision of programming that is accessible and attractive to viewers.

### Viewing figures

The top 15 programmes viewed on each channel during 2006 are listed in Figure 7.10, to provide an illustration of the types of ‘engaging’ content that PSB broadcasters provide.

The programmes gaining the largest average audience figures in 2006 were dominated by football World Cup matches on BBC One and ITV1 – seven out of the fifteen top audiences on BBC One were for World Cup matches<sup>32</sup>.

Across the PSBs, the most-watched programmes included a range of genres including drama, sports, documentaries, entertainment, films, music, hobbies/leisure and news/weather.

Away from sport, BBC One’s biggest audiences were for the Christmas Day episode of *The Vicar of Dibley*, and an early January episode of *EastEnders*. The 13<sup>th</sup> March *Coronation Street* episode was the highest non-sports programme for ITV1, followed by *Dancing on Ice*.

The largest audiences on Channel 4 in 2006 were for *Big Brother*, followed by *Eight Out Of Ten Cats*, *Lost*, and a *Bodyshock: Half Ton Man* documentary. *The Apprentice* final gained the largest audience for BBC Two, followed by *Who Do You Think You Are* and *Top Gear*.

<sup>32</sup> For series and serials, only the highest-rating programme was counted.

Five's largest audiences were for films and for its US drama import CSI.

**Figure 7.10: Top 15 programmes by audience size, by channel for 2006**

BBC One							
Title	Date	Day	Start time	End time	Duration	Genre	000s
WORLD CUP 2006: ENG V ECU	25/06/2006	Sunday	16:00:09	17:50:24	1:50:15	Sport	16290
WORLD CUP 2006: ENG V POR	01/07/2006	Saturday	16:00:46	18:43:46	2:43:00	Sport	16205
WORLD CUP 2006: ITA V FRA	09/07/2006	Sunday	19:00:08	21:41:21	2:41:13	Sport	13915
WORLD CUP 2006: POST-MATCH	01/07/2006	Saturday	18:43:46	19:00:02	0:16:16	Sport	13784
THE VICAR OF DIBLEY	25/12/2006	Monday	21:34:38	22:27:39	0:53:01	Entertainment	12392
EASTENDERS	02/01/2006	Monday	20:01:55	20:31:53	0:29:58	Drama:Soaps	12326
STRICTLY COME DANCING	23/12/2006	Saturday	21:31:35	22:13:21	0:41:46	Entertainment	12113
WORLD CUP 2006: ENG V PAR	10/06/2006	Saturday	14:00:03	15:51:44	1:51:41	Sport	11997
WORLD CUP 2006: POR V FRA	05/07/2006	Wednesday	20:00:11	21:53:07	1:52:56	Sport	10262
WORLD CUP 2006: BRA V CRO	13/06/2006	Tuesday	20:00:12	21:51:41	1:51:29	Sport	9645
FILM: PIRATES OF THE CARIBBEAN: THE CURS	39077	Tuesday	0.814618	0.904213	0.089595	Films:Cinema	9483
PLANET EARTH	05/03/2006	Sunday	21:01:04	22:00:02	0:58:58	Documentaries	9410
DOCTOR WHO	25/12/2006	Monday	19:00:06	20:00:21	1:00:15	Drama:Series/Serials	9345
MATCH OF THE DAY LIVE	30/05/2006	Tuesday	19:58:30	22:09:04	2:10:34	Sport	9287
LITTLE BRITAIN ABROAD	25/12/2006	Monday	22:29:01	22:58:30	0:29:29	Entertainment	8874

BBC Two							
Title	Date	Day	Start time	End time	Duration	Genre	000s
THE APPRENTICE: THE FINAL	10/05/2006	Wednesday	21:02:39	22:31:40	1:29:01	Documentaries	5948
WHO DO YOU THINK YOU ARE?	01/02/2006	Wednesday	21:00:58	22:00:19	0:59:21	Hobbies/Leisure	5945
TOP GEAR	30/07/2006	Sunday	20:01:02	21:00:29	0:59:27	Hobbies/Leisure	5267
THE APPRENTICE	03/05/2006	Wednesday	21:01:47	21:59:54	0:58:07	Documentaries	4979
THE CATHERINE TATE SHOW	09/11/2006	Thursday	21:01:26	21:29:57	0:28:31	Entertainment	4917
SPRINGWATCH WITH BILL ODDIE	29/05/2006	Monday	20:01:30	21:00:30	0:59:00	Documentaries	4232
COAST	16/11/2006	Thursday	20:01:24	21:00:20	0:58:56	Documentaries	4180
MATCH OF THE DAY LIVE	23/03/2006	Thursday	20:00:08	22:01:56	2:01:48	Sport	4171
AUTUMNWATCH WITH BILL ODDIE	05/10/2006	Thursday	20:02:03	21:01:01	0:58:58	Documentaries	4046
WINTER OLYMPICS	20/02/2006	Monday	20:02:45	22:31:41	2:28:56	Sport	4041
IT STARTED WITH SWAP SHOP	28/12/2006	Thursday	21:01:29	23:10:41	2:09:12	Documentaries	3994
TOP OF THE POPS: THE FINAL COUNTDOWN	30/07/2006	Sunday	18:59:37	19:59:33	0:59:56	Music	3977
THE WEAKEST LINK	29/12/2006	Friday	17:41:21	18:29:56	0:48:35	Entertainment	3920
THE LOST WORLD OF FRIESE-GREENE	18/04/2006	Tuesday	21:02:11	22:01:11	0:59:00	Documentaries	3902
DRAGONS' DEN	21/09/2006	Thursday	20:01:48	21:00:10	0:58:22	Documentaries	3901

ITV1							
Title	Date	Day	Start time	End time	Duration	Genre	000s
WORLD CUP 06: ENG V SWE	20/06/2006	Tuesday	19:50:38	21:51:07	2:00:29	Sport	18464
WORLD CUP 06: ENG V TRI	15/06/2006	Thursday	16:50:55	18:53:25	2:02:30	Sport	13671
CORONATION STREET	13/03/2006	Monday	19:34:40	20:01:13	0:26:33	Drama:Soaps	12598
DANCING ON ICE - THE SKATE OFF	04/03/2006	Saturday	21:11:35	21:57:25	0:45:50	Entertainment	11680
WORLD CUP 06: POST-MATCH	20/06/2006	Tuesday	21:55:21	22:10:35	0:15:14	Sport	11452
DANCING ON ICE	04/03/2006	Saturday	18:49:15	20:04:05	1:14:50	Entertainment	11344
LEWIS	29/01/2006	Sunday	21:05:15	22:59:33	1:54:18	Drama:Series/Serials	11306
WILD AT HEART	29/01/2006	Sunday	20:01:00	20:59:24	0:58:24	Drama:Series/Serials	10810
THE X FACTOR RESULTS	16/12/2006	Saturday	21:29:55	22:30:45	1:00:50	Entertainment	10778
THE X FACTOR	16/12/2006	Saturday	18:59:15	20:27:30	1:28:15	Entertainment	10518
A TOUCH OF FROST	05/11/2006	Sunday	21:04:59	22:59:33	1:54:34	Drama:Series/Serials	10073
I'M A CELEBRITY - GET ME OUT OF HERE!	01/12/2006	Friday	21:01:00	22:27:05	1:26:05	Documentaries	10046
EMMERDALE	13/03/2006	Monday	19:03:00	19:29:25	0:26:25	Drama:Soaps	9857
GHOSTBOAT	09/04/2006	Sunday	21:02:45	22:28:44	1:25:59	Drama:Series/Serials	9747
HEARTBEAT	22/01/2006	Sunday	20:00:40	20:59:03	0:58:23	Drama:Series/Serials	9658

Channel 4							
Title	Date	Day	Start time	End time	Duration	Genre	000s
BIG BROTHER	18/08/2006	Friday	21:59:35	23:02:52	1:03:17	Documentaries	8198
CELEBRITY BIG BROTHER	27/01/2006	Friday	22:02:20	23:01:10	0:58:50	Documentaries	7310
8 OUT OF 10 CATS	18/08/2006	Friday	21:29:32	21:57:13	0:27:41	Entertainment	5282
LOST	11/01/2006	Wednesday	22:05:53	22:59:21	0:53:28	Drama:Series/Serials	5246
BODYSHOCK: HALF TON MAN	06/02/2006	Monday	20:59:35	22:00:37	1:01:02	Documentaries	5145
RAMSAY'S KITCHEN NIGHTMARES	05/12/2006	Tuesday	21:00:54	22:01:15	1:00:21	Documentaries	4895
DEAL OR NO DEAL	11/03/2006	Saturday	18:59:45	19:59:01	0:59:16	Entertainment	4662
GORDON RAMSEY'S F WORD	28/06/2006	Wednesday	21:00:40	22:01:13	1:00:33	Hobbies/Leisure	4521
DESPERATE HOUSEWIVES	18/01/2006	Wednesday	22:04:43	22:58:07	0:53:24	Drama:Series/Serials	4520
GRAND DESIGNS	19/04/2006	Wednesday	21:01:58	22:01:30	0:59:32	Hobbies/Leisure	4351
RELOCATION, RELOCATION	08/02/2006	Wednesday	20:02:40	21:00:15	0:57:35	Hobbies/Leisure	4287
EXTRAORDINARY BREASTFEEDING	01/02/2006	Wednesday	21:03:52	21:58:37	0:54:45	Documentaries	4067
INVASION	08/01/2006	Sunday	20:30:12	21:24:59	0:54:47	Drama:Series/Serials	3993
FILM: MY BIG FAT GREEK WEDDING (2002)	11/02/2006	Saturday	21:12:33	22:53:28	1:40:55	Films:Cinema	3770
BRAT CAMP	08/02/2006	Wednesday	21:04:17	21:59:55	0:55:38	Documentaries	3700

**Five**

Title	Date	Day	Start time	End time	Duration	Genre	000s
CSI: CRIME SCENE INVESTIGATION	31/01/2006	Tuesday	21:02:25	21:56:42	0:54:17	Drama:Series/Serials	4487
FILM: MEN IN BLACK II (2002)	10/12/2006	Sunday	20:21:42	21:00:42	0:39:00	Films:Cinema	4329
FIVE NEWS UPDATE	10/12/2006	Sunday	20:18:36	20:21:37	0:03:01	News/Weather	3962
CSI - NEW YORK	29/08/2006	Tuesday	22:01:00	22:54:18	0:53:18	Drama:Series/Serials	3812
FILM: HOME ALONE 2: LOST IN NEW YORK	17/12/2006	Sunday	17:16:07	19:20:59	2:04:52	Films:Cinema	3616
CSI MIAMI	10/10/2006	Tuesday	21:03:27	21:57:19	0:53:52	Drama:Series/Serials	3418
HOUSE	06/04/2006	Thursday	21:02:07	21:59:04	0:56:57	Drama:Series/Serials	2977
FILM: ARMAGEDDON	01/01/2006	Sunday	20:56:29	22:43:39	1:47:10	Films:Cinema	2897
THE SEVEN YEAR OLD SURGEON...	20/03/2006	Monday	20:59:29	21:57:58	0:58:29	Documentaries	2896
BAD BOYS 2	10/12/2006	Sunday	21:05:44	21:47:39	0:41:55	Films:Cinema	2829
FILM: OLIVER (1968)	10/12/2006	Sunday	16:46:41	19:23:23	2:36:42	Films:Cinema	2825
SHALLOW HAL	10/09/2006	Sunday	20:57:16	22:09:44	1:12:28	Films:Cinema	2818
FIVE NEWS AT 9	31/01/2006	Tuesday	20:58:04	21:01:05	0:03:01	News/Weather	2792
FILM: DIRTY DANCING	15/10/2006	Sunday	18:55:30	19:54:52	0:59:22	Films:Cinema	2692
FILM: DADDY DAY CARE (2003)	19/03/2006	Sunday	18:14:51	19:54:28	1:39:37	Films:Cinema	2650

**BBC Three**

Inds in MC homes

Title	Date	Day	Start time	End time	Duration	Genre	000s
TORCHWOOD	22/10/2006	Sunday	21:00:00	21:50:38	0:50:38	Drama:Series/Serials	2519
WORLD CUP 2006: POST-MATCH	22/06/2006	Thursday	21:49:30	21:59:30	0:10:00	Sport	1336
SPOOKS	16/10/2006	Monday	22:26:52	23:25:27	0:58:35	Drama:Series/Serials	1224
EASTENDERS	21/09/2006	Thursday	21:59:08	22:28:48	0:29:40	Drama:Soaps	1131
60 SECONDS	22/10/2006	Sunday	22:39:45	22:40:46	0:01:01	News/Weather	1098
DOCTOR WHO CONFIDENTIAL	08/07/2006	Saturday	19:46:34	20:15:05	0:28:31	Documentaries	1012
WORLD CUP 2006: CRO V AUS	22/06/2006	Thursday	20:00:04	21:49:30	1:49:26	Sport	873
THE 34 STONE TEENAGER	28/08/2006	Monday	21:00:53	21:56:52	0:55:59	Documentaries	822
THE APPRENTICE - YOU'RE FIRED!	12/04/2006	Wednesday	22:01:39	22:29:31	0:27:52	Documentaries	806
FILM: UNDER SIEGE 2	23/09/2006	Saturday	22:07:14	22:53:07	0:45:53	Films:Cinema	794
TWO PINTS OF LAGER AND A PKT OF CRISP	26/03/2006	Sunday	22:04:02	22:32:04	0:28:02	Entertainment	759
MATCH OF THE DAY LIVE	05/09/2006	Tuesday	19:00:45	21:44:54	2:44:09	Sport	758
DOCTOR WHO	02/07/2006	Sunday	19:01:47	19:45:07	0:43:20	Drama:Series/Serials	756
FILM: CAST AWAY	29/10/2006	Sunday	19:46:36	21:58:01	2:11:25	Films:Cinema	719
FILM: THE ROCK	10/06/2006	Saturday	22:06:39	23:17:59	1:11:20	Films:Cinema	712

**BBC Four**

Title	Date	Day	Start time	End time	Duration	Genre	000s
KENNETH WILLIAMS: FANTABULOSA!	13/03/2006	Monday	21:00:40	22:19:41	1:19:01	Drama:Single Plays	860
QI	10/11/2006	Friday	22:31:53	23:01:03	0:29:10	Entertainment	676
A FOR ANDROMEDA	27/03/2006	Monday	21:00:31	22:25:49	1:25:18	Drama:Single Plays	580
THE CHATTERLEY AFFAIR	20/03/2006	Monday	20:59:32	22:29:11	1:29:39	Drama:Single Plays	546
FEAR OF FANNY	23/10/2006	Monday	21:00:05	22:18:59	1:18:54	Drama:Single Plays	530
FILM: A BRIDGE TOO FAR	30/04/2006	Sunday	20:35:26	23:23:54	2:48:28	Films:Cinema	490
THE DEAD SEA SCROLLS	05/12/2006	Tuesday	21:01:27	22:30:25	1:28:58	Religious	474
PAUL MERTON'S SILENT CLOWNS	25/05/2006	Thursday	21:00:21	21:59:19	0:58:58	Arts	468
THE SECRET LIFE OF MRS BEETON	16/10/2006	Monday	21:00:35	22:26:28	1:25:53	Documentaries	460
FAMILY TIES	01/02/2006	Wednesday	22:02:14	22:31:09	0:28:55	Documentaries	439
TEN THINGS YOU DIDN'T KNOW ABOUT	10/07/2006	Monday	21:02:46	22:01:19	0:58:33	Documentaries	426
LEAD BALLOON	04/10/2006	Wednesday	22:31:22	23:00:35	0:29:13	Entertainment	415
UP POMPEII	06/08/2006	Sunday	21:52:26	22:26:08	0:33:42	Entertainment	413
PLANET EARTH	12/11/2006	Sunday	19:00:10	19:59:08	0:58:58	Documentaries	396
JOYCE GRENFELL - COMEDY WITH BREEDING	10/09/2006	Sunday	20:00:25	20:59:36	0:59:11	Documentaries	389

**Audience impact**

The PSB Tracker asked regular viewers for their opinions on two statements relating to this PSB Characteristic.

'It shows programmes I want to watch'

'Its programmes reflect the interests and concerns of people like me'

Figure 7.11 shows that overall, half of all viewers felt that the PSB channels taken together were providing them with programmes they wanted to watch, rating them 7-10 out of 10. A further 40% of viewers rated them 4-6 out of 10.

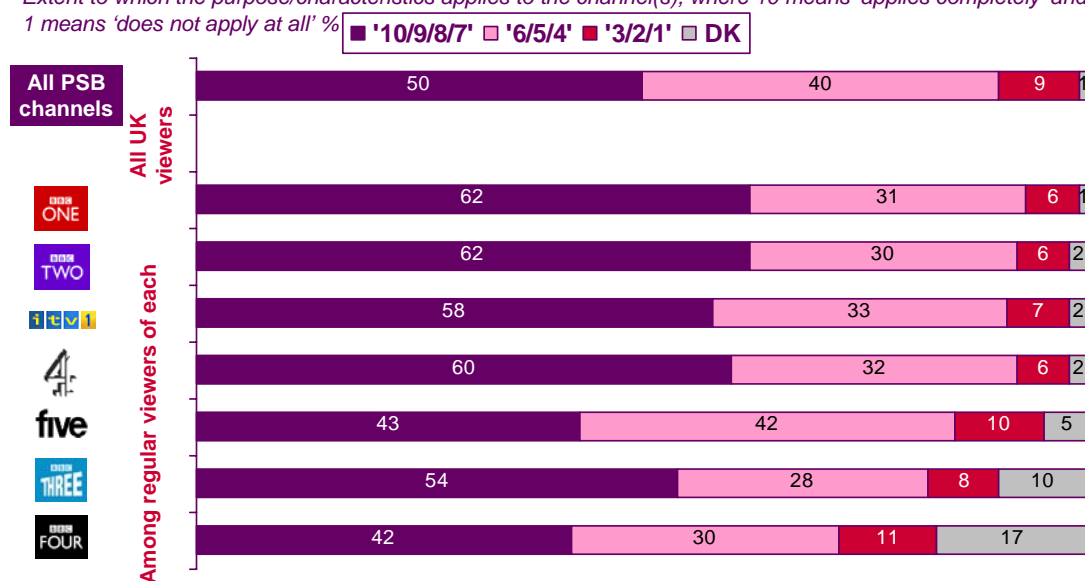
Some 62% of BBC One and BBC Two regular viewers gave them a rating of 7-10 out of 10; 60% of Channel 4 regular viewers, and 58% of ITV1 regular viewers. 43% of Five's regular viewers felt it showed programmes they wanted to watch - the highest score for Five, from its regular viewers, across all PSB Purposes and Characteristics. A further 42% of Five's regular viewers gave it a rating of 4-6 out of 10.

Channel 4's younger regular viewers felt particularly strongly about this statement – 83% of its 16-24 regular viewers rated it between 7-10 out of 10 in terms of showing programmes they wanted to watch, the highest rating across all channels and demographic groups for this statement. Its regular viewers aged over 65 were particularly likely to rate it poorly, as were those in socio-economic group DE.

**Figure 7.11: Engaging: audience opinions**

"It shows programmes I want to watch"

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



Base for 'all PSB channels': All UK adults, 937, Oct 06

Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)

BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247

Source: PSB Tracker – GfK NOP Media, 2006

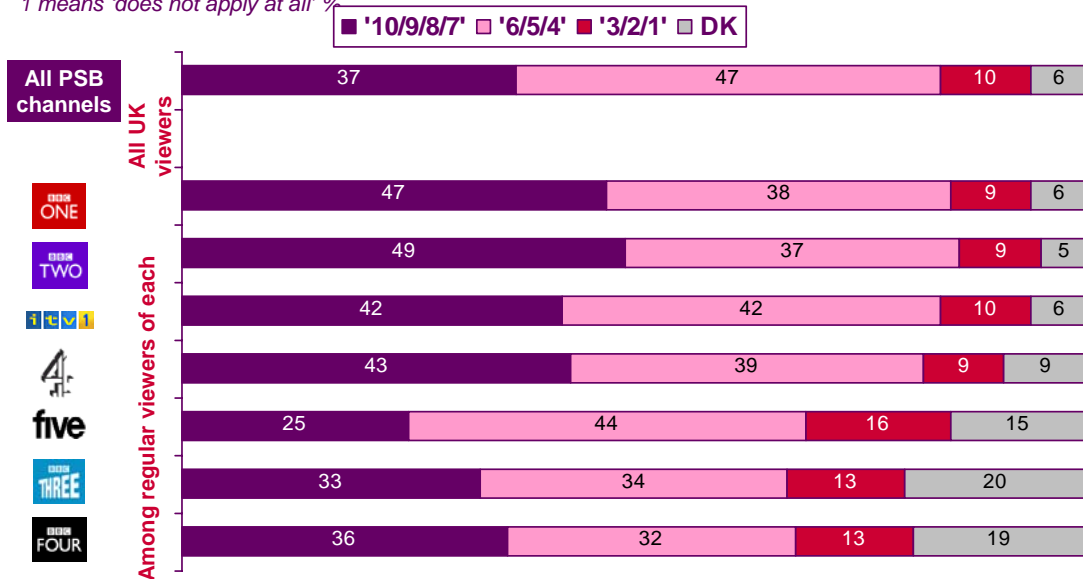
Turning to whether viewers felt that the channels reflected their own interests and concerns, Figure 7.12 shows that taken overall, fewer than two in five (37%) felt that the PSB channels reflected their interests. Just under half of BBC Two's regular viewers felt that it reflected their interests, and 47% of BBC One's regular viewers felt that it did so. Just over two-fifths of ITV1's and Channel 4's regular viewers felt that the channel reflected their concerns and interests, although there was stronger agreement among younger viewers of Channel 4 – 59% of its 16-24 viewers said its programmes reflected their interests.

For all the terrestrial channels, younger viewers showed stronger support for this statement. For BBC One, BBC Two and Channel 4, more people in the AB socio-economic group rated this statement highly; the reverse was found for ITV1 and Five with more people in the DE group rating it highly.



**Figure 7.12: Engaging: audience opinions**

"Its programmes reflect the interests and concerns of people like me"  
 Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' %



Base for 'all PSB channels': All UK adults, 937, Oct 06  
 Base for individual channels: Self-reported regular viewers of each channel (amalgamated data: Jan 06, April 06, July 06, Oct 06)  
 BBC1 = 5220, BBC2 = 2420, ITV1 = 4027, Channel 4 = 2746, Five = 1424, BBC3 = 481, BBC4 = 247  
 Source: PSB Tracker - GfK NOP Media, 2006

Having viewed programmes in the Entertainment genre, Pulse respondents were asked the following question:

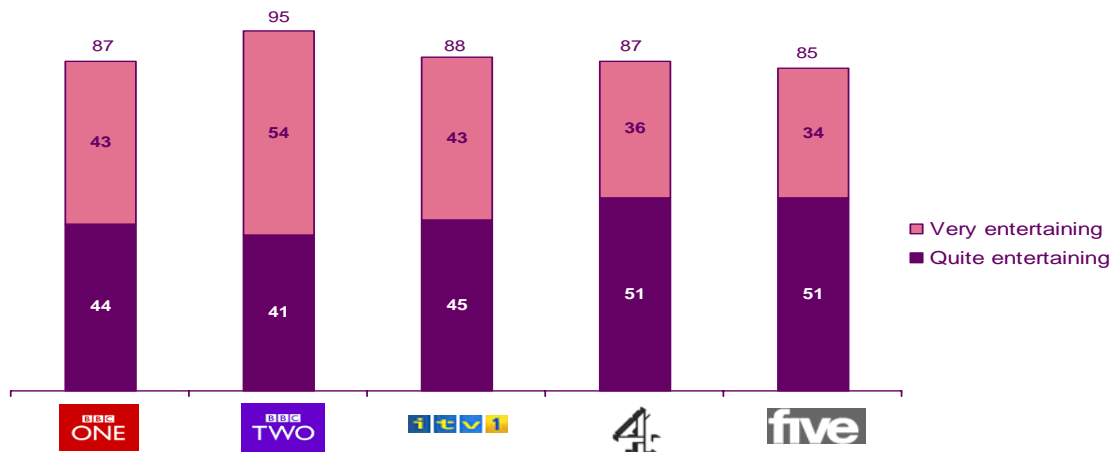
How entertaining did you think this programme was?

For each channel, more than four out of five responses for all Entertainment programmes viewed showed strong or slight agreement that the broadcast was entertaining. There was little variation between channels, but BBC Two had the largest proportion of responses in agreement at 95%.

**Figure 7.13: Engaging: Pulse audience opinions**

Entertainment: "How entertaining did you think this programme was?"

% saying "Very/quite entertaining"



Base for all responses to programmes watched in Entertainment genre as defined by BDS  
 Responses: BBC One 116461, BBC Two 39312, ITV1 225647, Channel 4 71211, Five 18883  
 Source: BBC Pulse survey, fieldwork by GfK NOP, Jan-Dec 2006

## Section 8

# Children's PSB

## 8.1 Summary findings

### Output hours

- Overall, the volume of children's PSB output – including CBBC and CBeebies - has declined marginally from 2002 (12,771 hours) to 2006 (12,340 hours). However, children's output on the five terrestrial PSB channels declined by 11% from 2002 to 2006.
- Between 2002 and 2006 there was a decrease in the hours per year of children's output on BBC One (from 847 hours to 514 hours, or 39%), ITV1 (from 999 hours to 733 hours, or 27%) and Channel 4 (529 hours to 350 hours, or 34%). While output decreased on BBC One, it increased on BBC Two, which now also carries material from the BBC digital channels.
- In 2006, of the five terrestrial PSB channels, BBC Two and Five provided the greatest number of hours per year of children's programming; 1453 hours and 1337 hours respectively.

### Viewing figures

- There has been an increase in the proportion of children's viewing to Children's genre multichannel output (including both commercial and BBC digital channels,) from 56% of total weekly hours viewed in 2002 to 82% in 2006. There was growth in the proportion of viewing of BBC digital channels from 9% in 2002 to 21% in 2006.
- In multichannel homes there has been a steep decline in children's viewing of children's programmes on the five terrestrial PSB channels, from 47 hours per child per year in 2002 to 30 hours per year in 2006.
- Viewing to children's output on ITV1 and BBC One in multichannel homes dropped by half between 2002 and 2006 – ITV1's from 12 hours to 6 hours, and BBC One from 18 hours to 8 hours.

### Parents' views

- Children's PSB is seen as important by parents. BBC One, BBC Two, CBBC and CBeebies were all rated highly by parents on delivering almost all the PSB Purposes and Characteristics in children's programming. Apart from the BBC channels (terrestrial and children's digital), parents rated Five highly as showing programmes that their child wanted to watch.
- Overall, the perceived discrepancies between the importance and delivery of elements of PSB are particularly sharp for children's programming, and the differentials are greater than for adults' PSB.

## 8.2 Introduction

Children's programming on the main terrestrial channels is made up of a range of genres, including drama, factual programmes, entertainment, animation and pre-school programming. Each of the channels maintains a different mix, with the 2002-6 data showing BBC and ITV1 together accounting for a significant proportion of all original, UK-produced programming in the key children's genres of drama and factual programming.

Five has also been a significant PSB provider of children's programmes, serving younger children in particular via its *Milkshake* strand. Channel 4's obligations are in schools' rather than general children's programmes. A relatively low volume of mainly pre-school children's output has appeared on the channel in recent years.

The most significant shift in the children's television landscape over the last ten years has been the introduction of specialist digital channels. The main PSB children's broadcasters have also diversified into multichannel programming for children. The BBC provides CBBC and CBeebies; ITV provides CITV, and Five has a branded block of children's programmes on its digital channel Five Life. CITV is not a designated public service broadcaster and therefore is not included in this analysis. Figure 8.1 shows children's viewing share to these channels, in multichannel homes.

**Figure 8.1: Share of Children's channels, multichannel homes**

Channel	Share (%)
Disney Channel (total)	3.8
CBeebies	3.8
CBBC	2.9
Nickelodeon (total)	2.7
Boomerang (total)	1.7
CITV	1.6
Cartoon Network (total)	1.3
Jetix (total)	0.8

Source: BARB, Q4 2006, children 4-15 in multichannel homes

This chapter looks at children's PSB programming in terms of output hours, viewing figures and parents' opinions for BBC One, BBC Two, ITV1, Channel 4, Five, CBeebies and CBBC<sup>33</sup>.

<sup>33</sup> Ofcom commissioned a separate survey to look at parents' views of children's broadcasting – the Children's PSB Tracker. Please see Annex 1 for more details.

## Output hours

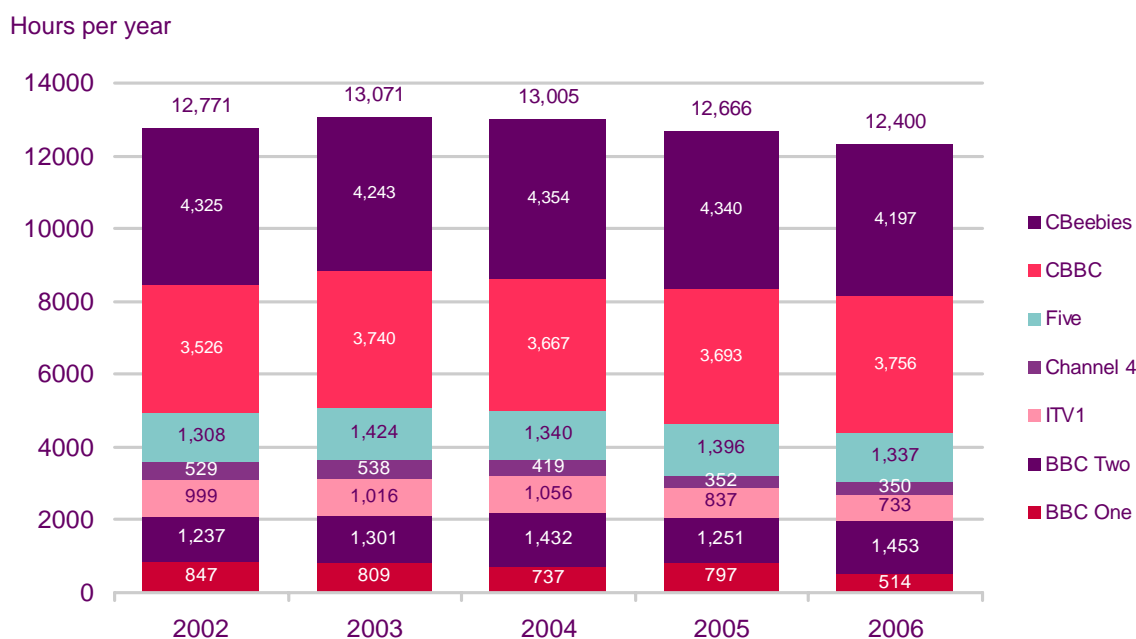
Overall, the volume of children's PSB output – including CBBC and CBeebies - has declined marginally from 2002 (12,771 hours) to 2006 (12,340 hours) as shown in Figure 8.2. The slightly lower total output hours in 2002 are partly due to the BBC launching CBBC and CBeebies in February of that year; full year data is therefore not possible for these channels. Both channels are dedicated to children's programming; CBeebies broadcasts from 0600 to 1900 and CBBC from 0700 to 1900.

Children's output on the five terrestrial PSB channels declined by 11% from 2002 to 2006. There was a decrease in the hours per year of children's output on BBC One (from 847 hours to 514 hours, or 39%), ITV1<sup>34</sup> (from 999 hours to 733 hours, or 27%) and Channel 4 (529 hours to 350 hours, or 34%). While output decreased on BBC One, it increased on BBC Two.

In 2006, of the five terrestrial PSB channels, BBC Two and Five provided the greatest number of hours per year of children's programming; 1,453 hours and 1,337 hours respectively.

It should be noted that children's programming, especially that for younger children, has a high percentage of repeats, and so changes in the total volume of hours are not necessarily reflective of new, original commissions<sup>35</sup>.

**Figure 8.2: Children's PSB output 2002 - 2006**



Source: PSB broadcaster returns

<sup>34</sup> ITV1 figures include GMTV.

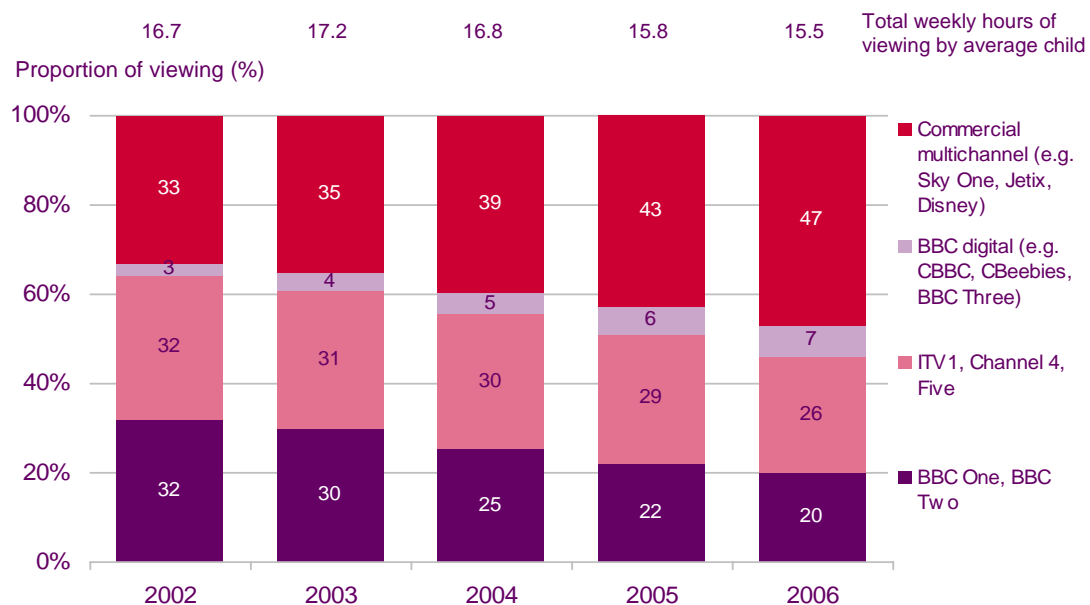
<sup>35</sup> Repetition of children's programming provides some educational benefits. It is also less of an issue than for adults' programming, as every few years the cohort watching changes.

### 8.3 Viewing figures

Multichannel television has had a significant effect on children's viewing habits. From 2002 to 2006, the proportion of viewing by children (individuals aged 4-15 as defined by BARB) of non-terrestrial channels has steadily increased; for commercial multichannels this increased from 33% in 2002 to 47% in 2006. This has been accompanied by a decline in the proportion of viewing hours for the five PSB terrestrial channels, from 64% of viewing in 2002 to 46% in 2006. These figures relate to all types of programme viewed by children; not solely their viewing of children's output.

Overall, taking both multichannel and terrestrial channel viewing together, there was a slight decrease in the weekly viewing hours by children from 2002 to 2006, from 16.7 total hours per week to 15.5 hours.

**Figure 8.3: Children's total weekly viewing by channel type 2002 - 2006**



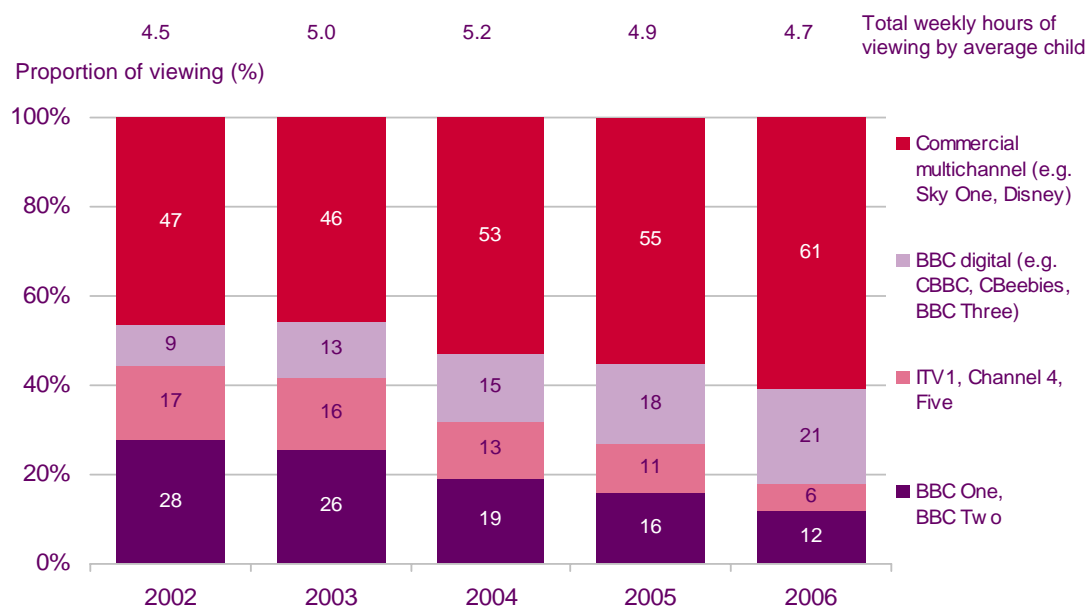
Source: BARB 2002-2006, all children 4-15

Looking at viewing solely to children's programming, Figure 8.4 shows that similar shifts in proportions of viewing to multichannel TV can be seen. There was a steep decrease in the proportion of viewing of children's programmes on the five terrestrial channels from 45% in 2002 to 18% in 2006, and an increase in multichannel viewing from 56% in 2002 to 82% in 2006. Within this the BBC digital channels grew from a 9% proportion of viewing in 2002 to 21% in 2006.

Viewing of children's programming across all channels has remained stable over this period at 4.5 hours per week in 2002 and 4.7 hours per week in 2006.

It is of note that while 46% of total children's viewing in 2006 was of terrestrial channels (see Figure 8.3 above), only 18% of viewing of children's programmes was to the same channels.

**Figure 8.4: Children’s weekly viewing of Children’s genre by channel type 2002 - 2006**



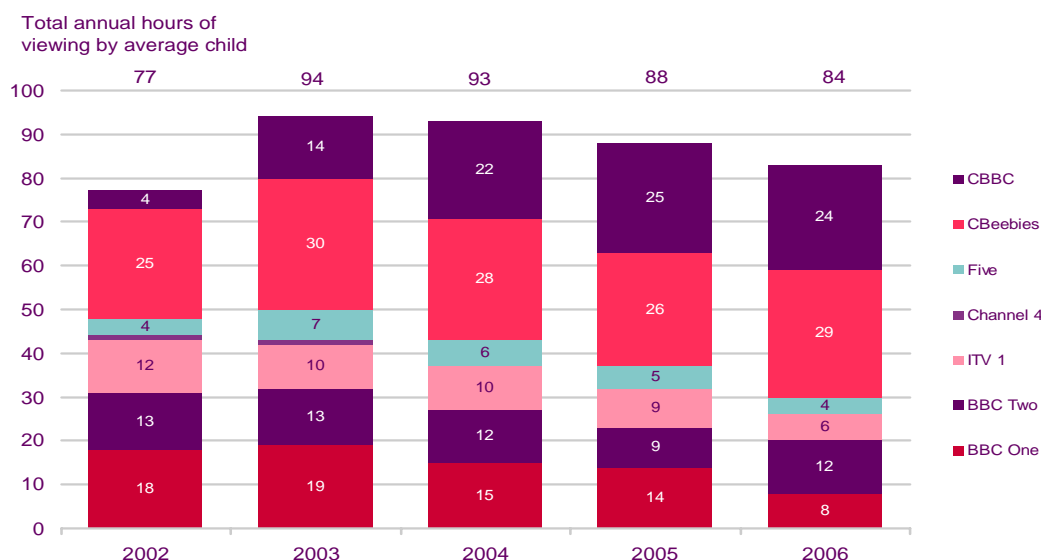
Source: BARB 2002-2006, all children 4-15

Since 2002, yearly viewing by 4-15 year olds in multichannel households of the Children’s genre on the five PSB terrestrial channels has declined substantially from 47 hours per child to 30 hours (Figure 8.5).

This reduction in terrestrial viewing hours of the Children’s genre is seen most significantly for BBC One and ITV1, which in 2006 were around half of what they were in 2002.

The digital PSB channels CBBC and CBeebies saw increases in viewing of the Children’s genre from 44 hours per child in 2003 (their first full year of broadcasting) to 53 hours in 2006. In total, annual viewing hours by children of all children’s programming on PSB channels reduced from 94 hours in 2003 to 84 hours in 2006.

**Figure 8.5: Total annual children’s viewing hours of Children’s genre on PSB channels in multichannel households**



Source: BARB 2002-2006, all children 4-15 in multichannel homes, Children’s genre only

Figure 8.6 shows the proportion of children's viewing of genres across the entire day on terrestrial channels. There has been a decrease in the proportion of viewing of the Children's genre, from 19% in 2002 to 12% in 2006. This may reflect children transferring their viewing of the Children's genre from terrestrial channels to multichannel channels, as shown in Figure 8.4. The only other genre where proportion of viewing share changed is Other Factual, which in 2002 was at 10% and in 2006 had increased to 14%; this is in line with a similar increase for all viewers, as shown in Chapter 2.

In 2006, the largest proportion of children's viewing of terrestrial channels was for Entertainment programmes at 20%. Other Factual and Soaps had the next largest shares at 14% each.

**Figure 8.6: Children's viewing of genres across terrestrial channels, 2002-2006**

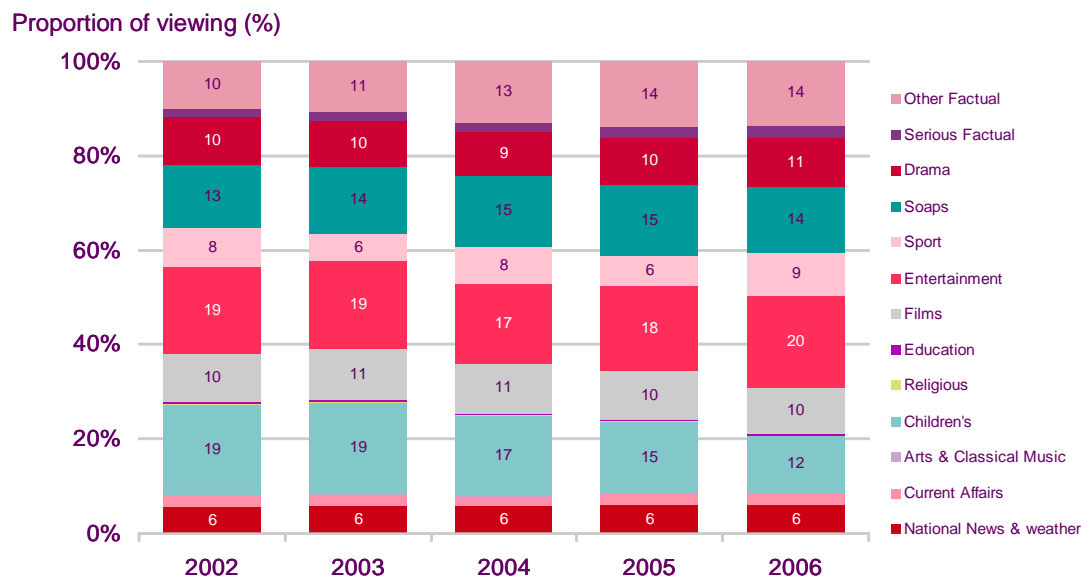
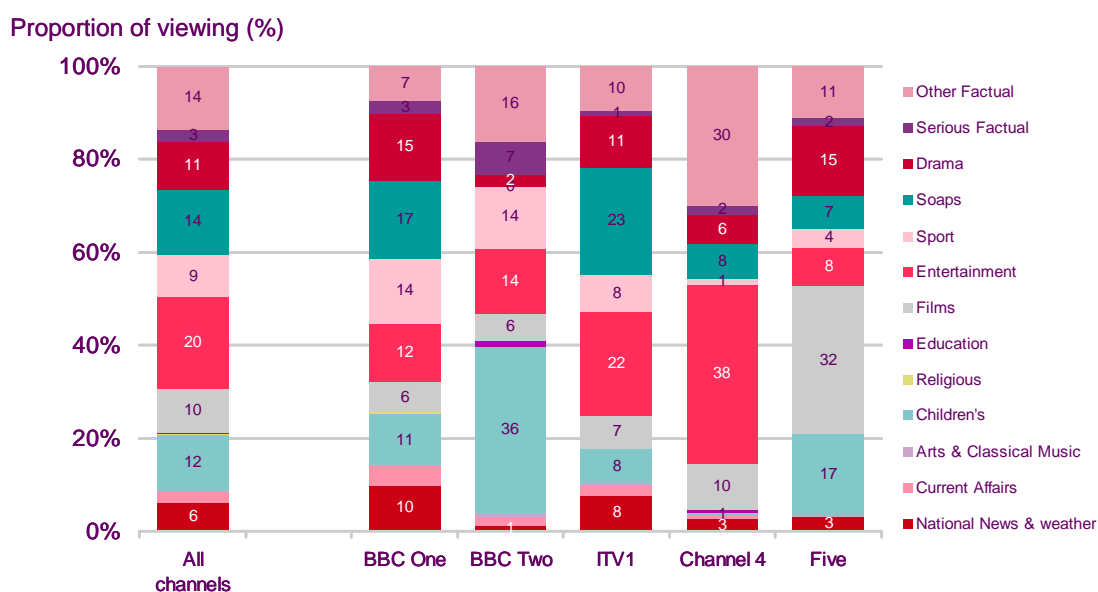


Figure 8.7 breaks down children's viewing of genres in 2006, by terrestrial channels. Compared to the same Figure for all individuals aged 4+ (see Chapter 2), as would be expected, a larger proportion of viewing by children is of the Children's genre for all channels. For all individuals, proportion of total viewing to the Children's genre is 2% for BBC One, 5% for BBC Two, 2% for ITV1, less than 1% for Channel 4 and 3% for Five. When this is compared to children's viewing, BBC Two has the largest relative increase, to 36% of total viewing of the Children's genre, and ITV1 the least, at 8%.

Among children, the genre with the largest proportion of viewing on BBC One was Soaps; for adults, this was News. For BBC Two over one third of viewing by children was of the Children's genre, making it the only channel where this genre was the most popular. This reflects the fact that BBC Two carries the largest amount of children's output (see Figure 8.2).

**Figure 8.7: Children’s viewing to genres across terrestrial channels, 2006**



Source: BARB 2006, Network, terrestrial channels only, all children 4-15, All time (0600-3000)

## 8.4 Parents’ views

Alongside the PSB Tracker which examines regular viewers’ opinions of the PSB broadcasters’ Purposes and Characteristics, a separate survey was carried out to examine parents’ opinions of Children’s programming. The PSB Purposes and Characteristics were translated into a number of statements relevant to children’s programming for parents to rate each channel on, as illustrated in Figure 8.8.

Parents of children aged 2-15 years old were asked how important they thought these Purposes and Characteristics were and to rate the PSB channels their child regularly watched against these statements. Parents were asked to think separately about all programmes their child watched, and those aimed at children<sup>36</sup>. They were asked to evaluate the five terrestrial channels, and the two PSB digital channels – CBBC and CBeebies<sup>37</sup>.

<sup>36</sup> For further detail on the survey methodology, see Annex 1. Channel 4 children’s output is small, comprising mainly a single series, *The Hoobs*, for pre-school children. Therefore, responses are likely to be lower than for the other channels.

<sup>37</sup> It should be noted that all Children’s programmes on BBC One and BBC Two are branded either CBBC or CBeebies. Some of this output is first shown on BBC One or BBC Two and then migrates to the digital channels; some of it is first shown on the digital channels and then migrates to the terrestrials. Therefore parents may find it difficult to distinguish the CBBC and CBeebies brands between the digital channels and the terrestrials.



**Figure 8.8: PSB Purposes and Characteristics and PSB Children's Statements**

<b>PSB Purposes</b>	<b>PSB Children's Statements</b>
Informing our understanding of the world - To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas	Its programmes increase my child's understanding of news, current issues and what's going on in the world
Stimulating knowledge and learning - To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning	Its programmes help my child to learn and develop
Reflecting UK cultural identity - To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences	It shows enough programmes made in the UK
Representing diversity and alternative viewpoints - 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	Its programmes help my child to be aware of different types of people and alternative viewpoints
<b>PSB Characteristics</b>	<b>PSB Children's Statements</b>
High quality – well-funded and well-produced	It shows well-made, high-quality programmes
Original – new UK content rather than repeats or acquisitions	It shows enough programmes made in the UK
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	Its programmes help my child to think for themselves
Engaging – remaining accessible and attractive to viewers	It shows programmes my child wants to watch
Widely available – if content is publicly funded, a large majority of citizens need to be given the chance to watch it	

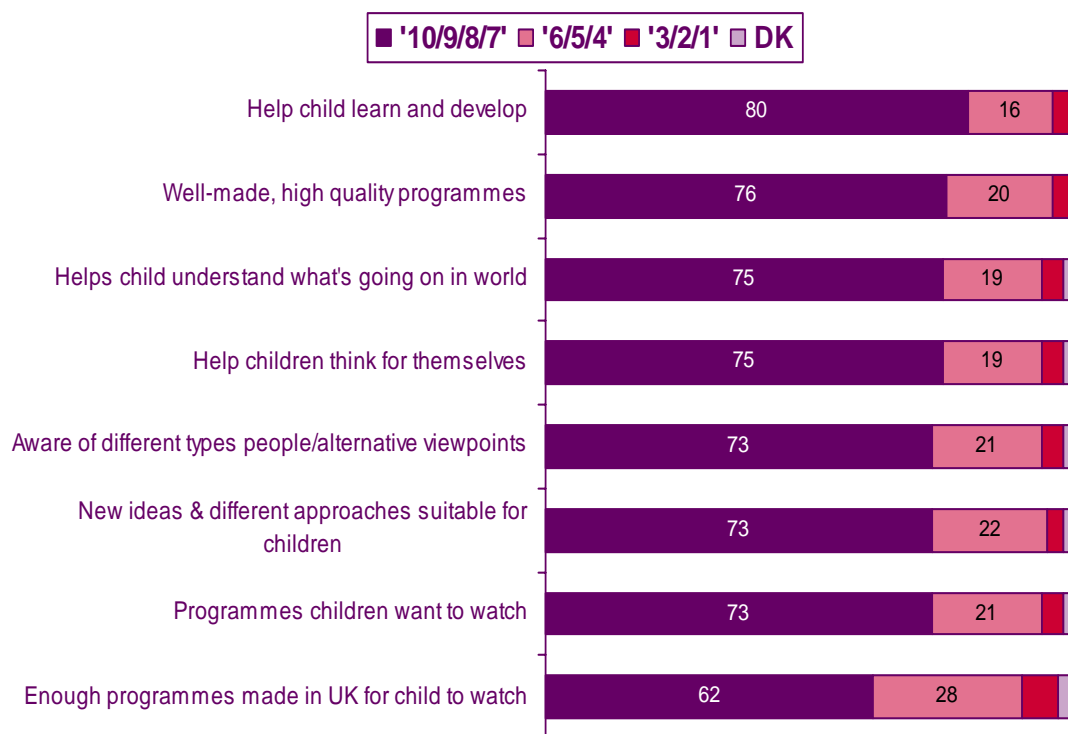
*The importance of PSB statements*

Figure 8.9 shows the relative importance parents ascribed to the different PSB statements. The educational responsibilities of PSB programming had high value to parents, with four in five (80%) saying they agreed that it was important for the PSB channels to 'help my child learn and develop.' All the other Purposes and Characteristics also received strong support, with around three-quarters of parents saying it was important that the PSB channels delivered each one. Providing 'enough programmes made in the UK for my child to watch' received slightly less support, with just under two-thirds (62%) of parents thinking this was important.

There were some differences in the perceived importance of some statements when looking at the age of the child. For example, while 66% of parents of 2-5 year olds thought that it was important that PSB programming helped their child understand what was going on in the world, 85% of parents of 13-15 year olds thought it was important.

**Figure 8.9: Importance of PSB statements to parents**

Importance of statements



Q2: I'm going to read out a number of statements, I'd like you to tell me how important you think it is for children and young people in general that these TV channels do each of them

Base = All respondents (803), parents of children aged 2-15 years old

Source: Children's PSB Tracker – GfK NOP Media, January 2007

## Purpose 1: Its programmes increase my child’s understanding of news, current issues and what’s going on in the world

Of the PSB channels overall, around two in five parents (39%) thought that they delivered children’s programmes that increased their child’s understanding of news, current issues and what was going on in the world. This is significantly lower than the importance attached to this element of PSB (75%).

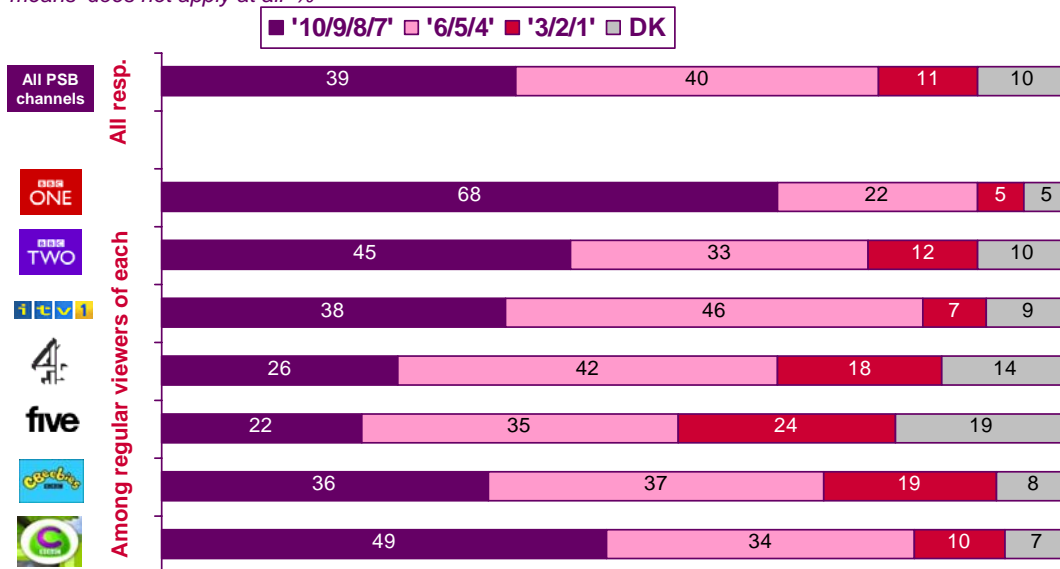
Some 68% of parents whose children regularly watched BBC One felt that this was provided. Approaching half agreed that CBBC and BBC Two delivered this (49% and 45% respectively). This finding is perhaps unsurprising as the BBC (CBBC and BBC One) is the only children’s PSB broadcaster to include regular news programmes for children.

Among the younger age groups, for the BBC digital channels, this statement had more resonance for parents with children aged 6-9, than for parents with children aged 2-5 (48% compared to 33% respectively for CBeebies, and 62% compared to 26% for CBBC).

**Figure 8.10: Opinions on Purpose 1 – increasing child’s understanding of world**

“Its programmes increase my child’s understanding of news, current issues and what’s going on in the world”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels  
 Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*, ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217  
 Source: Children's PSB Tracker – GfK NOP Media, January 2007  
 \* Small base size – data should be viewed as indicative only

## Purpose 2: Its programmes help my child to learn and develop

The vast majority of parents thought that ‘helping my child to learn and develop’ was important (80%). However, as Figure 8.10 shows, perceptions about its delivery are substantially lower - 43% of parents felt that the PSB channels overall achieved this in their children’s programming.

Parents whose children were regular viewers of CBeebies and CBBC were more likely to value these channels on this statement (72% and 69% respectively). The other two BBC channels were also rated higher (BBC One at 59%, BBC Two at 52%) than the other PSB channels (ITV1 at 38%, Channel 4 at 21% and Five at 32%).

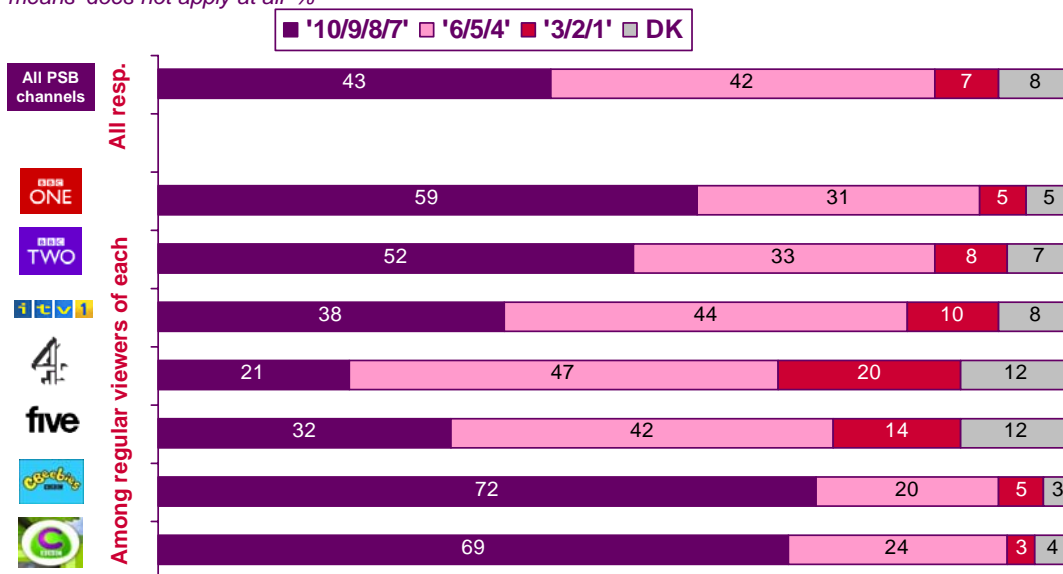
Parents with children aged 2-9 were more likely than parents with children aged 10-15 to think that the PSB channels overall delivered on this statement (49% compared to 38% respectively).

Of parents whose children were regular viewers of ITV1, those with children aged 6-9 years old were more likely than those with older children to think the channel helped their child to learn and develop (52% with 6-9 year olds compared to 31% with 10-12 year olds and 34% with 13-15 year olds).

**Figure 8.11: Opinions on Purpose 2 – helps child learn and develop**

“Its programmes help my child to learn and develop”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels

Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*, ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217

Source: Children's PSB Tracker – GfK NOP Media, January 2007

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

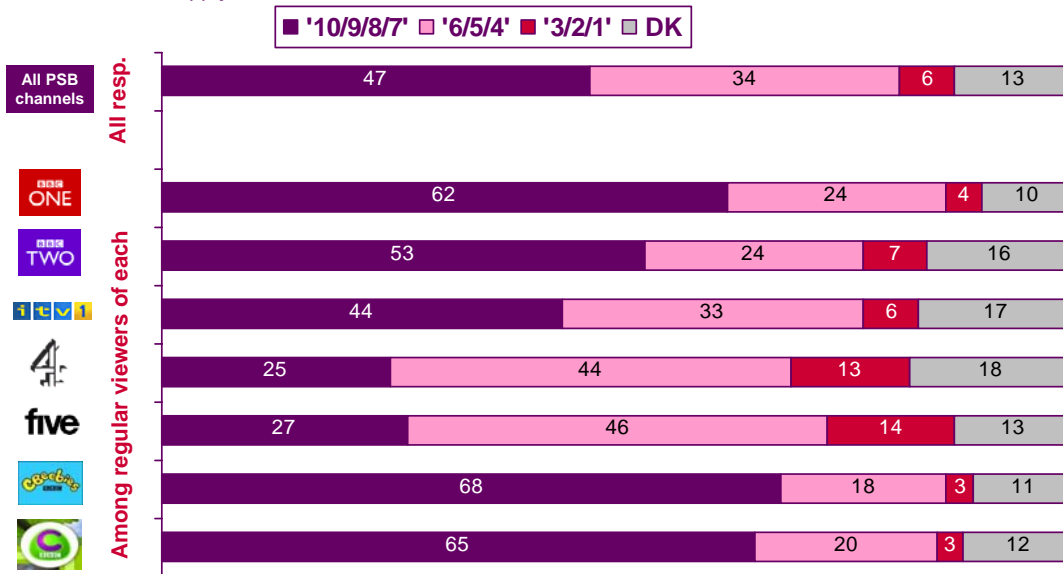
### Purpose 3: It shows enough programmes made in the UK

Some 62% of parents thought that it was important that the PSB channels showed enough programmes made in the UK, whereas 47% felt that the channels taken together were delivering this. Again, the BBC channels were thought to do this more than all PSB channels together in their children’s programming (CBeebies at 68%, CBBC at 65%, BBC One at 62% and BBC Two at 53%). Around one quarter of parents whose children regularly watched Channel 4 or Five valued them on this statement (25% and 27% respectively), with almost half rating them at mid-level (scoring 4-6 out of 10).

**Figure 8.12: Opinions on Purpose 3 – enough UK programmes**

“It shows enough programmes made in the UK”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels  
 Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*, ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217  
 Source: Children's PSB Tracker – GfK NOP Media, January 2007  
 \* Small base size – data should be viewed as indicative only

### Purpose 4: Its programmes help my child to be aware of different types of people and alternative viewpoints

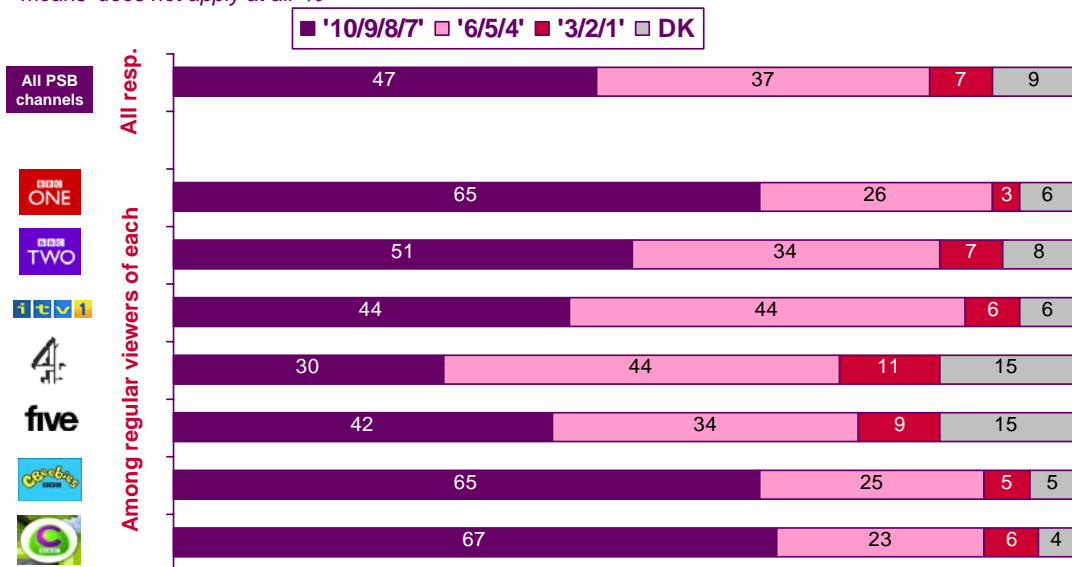
Overall, 73% of parents felt this to be an important element of PSB children’s programming. 47% felt that the PSB channels delivered this.

Parents of regular viewers to CBBC, BBC One and CBeebies rated the channels highly on this statement relating to the development of alternative viewpoints (67%, 65% and 65% respectively).

**Figure 8.13: Opinions on Purpose 4 - representing diversity and alternative viewpoints**

“Its programmes help my child to be aware of different types of people and alternative viewpoints”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels  
 Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*, ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217  
 Source: Children's PSB Tracker – GfK NOP Media, January 2007

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

## PSB Characteristic 1: It shows well-made, high-quality programmes

The provision of high-quality programmes was seen as important by 76% of parents.

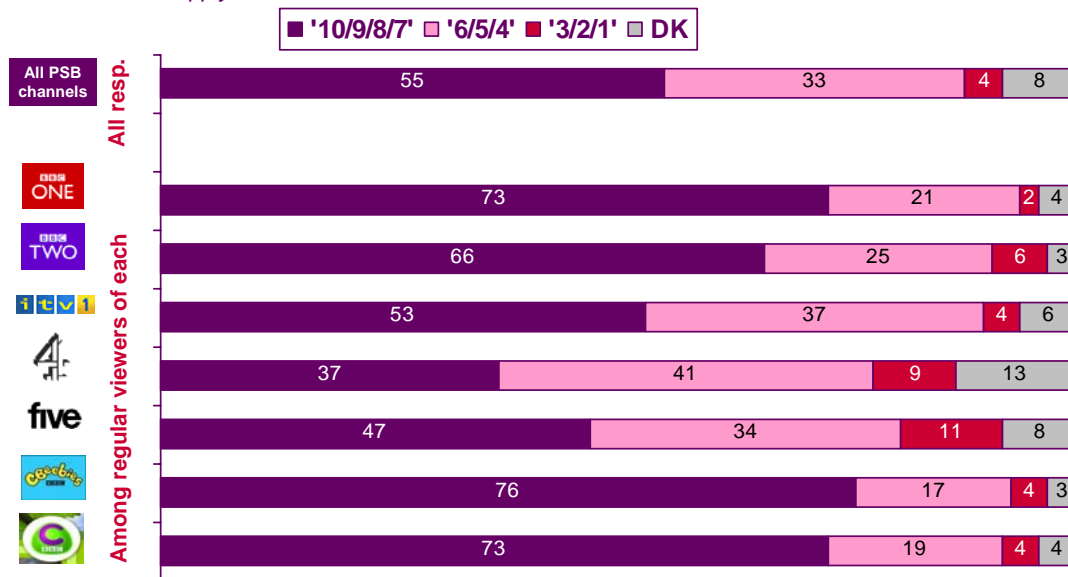
More than half of parents of UK children agreed that the PSB channels overall showed well-made, high-quality programmes. Again, this was seen as considerably higher for the BBC channels (CBeebies at 76%; BBC One and CBBC at 73%; BBC Two at 66%).

For all PSB channels, parents with children aged 6-9 were more likely than those with children aged 10-12 or 13-15 to say that the channel delivered on this Characteristic (64% compared to 48% and 50% respectively).

**Figure 8.14: Opinions on Characteristic 1 – high quality**

“It shows well-made, high quality programmes”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels  
 Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*,  
 ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217  
 Source: Children's PSB Tracker – GfK NOP Media, January 2007  
 \* Small base size – data should be viewed as indicative only

## PSB Characteristic 2: It shows programmes with new ideas and different approaches suitable for children

This element of PSB was seen as important by 73% of parents. Overall delivery was rated lower, at 45%.

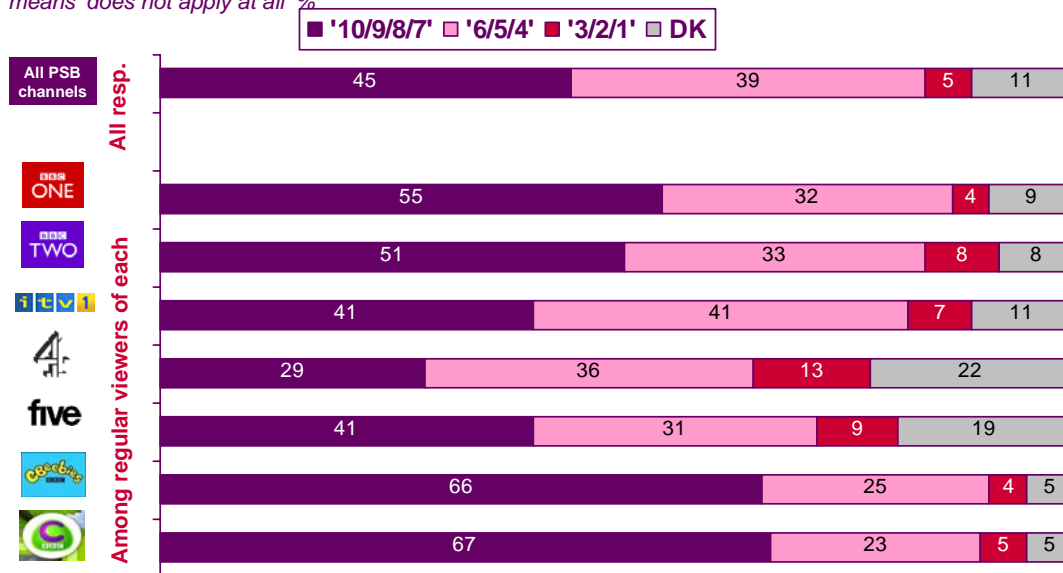
Figure 8.14 shows that innovation in PSB Children’s programming was seen as being led by the two digital BBC channels, with around two-thirds of parents agreeing that these channels showed programmes with new ideas and different approaches (CBBC at 67% and CBeebies at 66%). BBC One and BBC Two were seen to perform better than the PSB channels overall (55% and 51% respectively compared to 45% overall).

Parents with children aged 2-9 were more likely than those with children aged 10-15 to agree that the PSB channels overall delivered programmes with new ideas and different approaches (51% compared to 40%).

**Figure 8.15: Opinions on Characteristic 2 - original**

“It shows programmes with new ideas and different approaches suitable for children”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels  
 Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*, ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217  
 Source: Children's PSB Tracker – GfK NOP Media, January 2007  
 \* Small base size – data should be viewed as indicative only



### PSB Characteristic 3: Its programmes help my child to think for themselves

Some 75% of parents saw this as an important PSB element, compared to 41% who felt it was delivered by the PSBs overall.

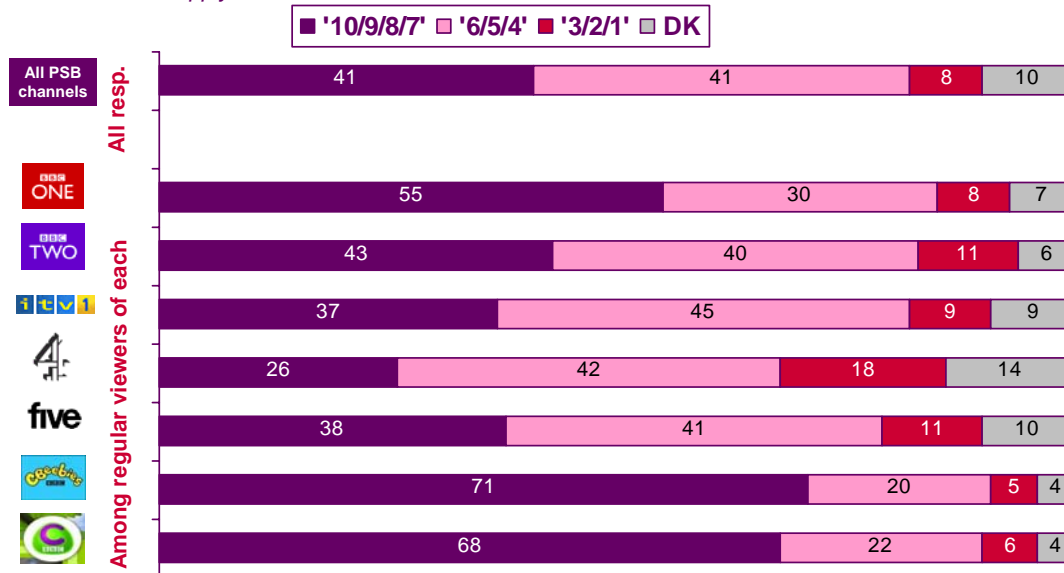
As with most other Characteristics, parents of children who watch CBeebies and CBBC regularly rated these channels highly as showing programmes that help their child think for themselves (71% and 68% respectively). This was also true among more than half of parents of children who watched BBC One regularly (55%), but less so for all other channels<sup>38</sup>.

Among parents whose children watch BBC One regularly, those with children aged 13-15 were less likely than those with children aged 6-9 or 10-12 to think that the channel delivered on this Characteristic (46% compared to 61% and 63% comparatively).

**Figure 8.16: Opinions on Characteristic 3 – challenging for children**

“Its programmes help my child to think for themselves”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels  
 Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*,  
 ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217

Source: Children's PSB Tracker – GfK NOP Media, January 2007

\* Small base size - data should be viewed as indicative only

<sup>38</sup> Although less than one quarter of parents whose children regularly watched Channel 4 agreed that its programmes helped their child to think for themselves, this is likely to be due to the fact that its Children's programming is made up of a small amount of pre-school programming.

## PSB Characteristic 4: It shows programmes my child wants to watch

73% of parents said it was important that the PSB channels together showed programmes that their children wanted to watch. Some 49% said that this was what the channels, taken together, provided.

Of the non-BBC channels, Five scored highest among parents whose children were regular viewers of the channel for showing children’s programmes that their child wanted to watch (57%). One in two parents agreed that ITV1 showed programmes their child wanted to watch.

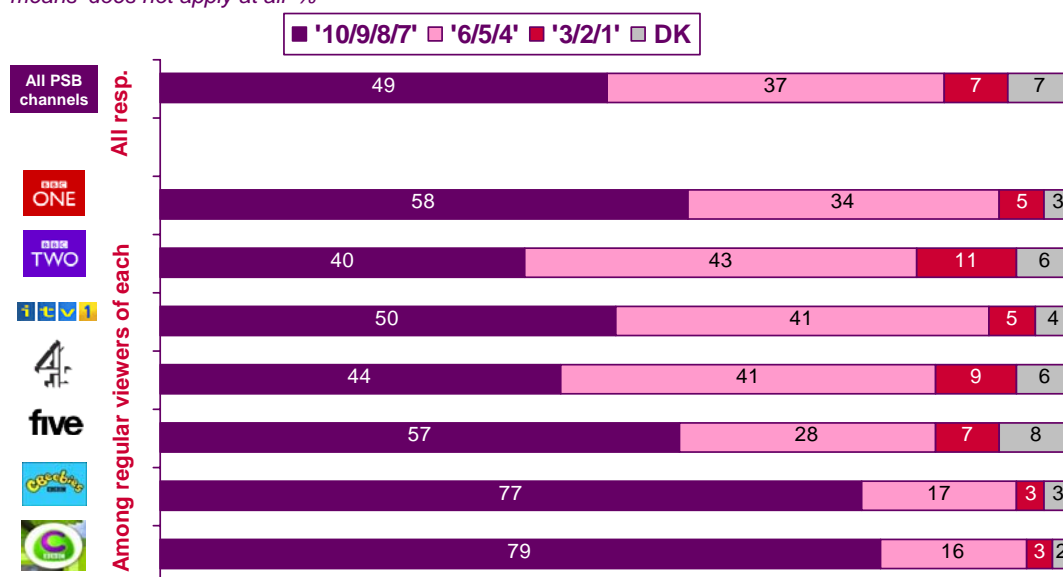
Fewer parents agreed that BBC Two and Channel 4 provided programmes their child wanted to watch in its children’s programming<sup>39</sup> (40% and 44% respectively).

Parents of younger children were more likely than those of older children to agree that the PSB channels together delivered programmes their child wanted to watch (2-5 year olds: 54%; 6-9 year olds: 55%; 10-12 year olds: 46%; 13-15 year olds: 41%).

**Figure 8.17: Opinions on Characteristic 4 – engaging for children**

“It shows programmes my child wants to watch”

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



Q4: I'm now going to ask you to rate specific TV channels on these different aspects of children's programmes. Please think about programmes that are made specifically for children and young people. For e.g. on at teatime or in the morning on the main TV channels  
 Base for 'all PSB channels': All respondents = 803; Parental reported child regular viewers of each channel BBC1 = 309, BBC2 = 83\*, ITV1 = 268, Channel 4 = 106, Five = 74\*, CBeebies = 253, CBBC = 217  
 Source: Children's PSB Tracker – GfK NOP Media, January 2007  
 \* Small base size - data should be viewed as indicative only

<sup>39</sup> This is to be expected of Channel 4, given that its output of children’s programming is low. However, for all terrestrial channels, BBC Two has the largest amount of children’s output. Some part of this low score may be attributable to the fact that it shares many of its programmes with CBeebies and CBBC, and parents think of its programmes as belonging to the digital channels.

## Section 9

# S4C

### 9.1 Summary findings

#### Output hours

- In 2006, Welsh language programming accounted for 4,512 hours of the S4C service. This figure is slightly higher than that of 2005, of 4,472 hours.
- Originated Welsh language output by genre for the years 2004-2006 shows the dominance of Factual programming, and also high levels of sports output. Since 2004, originated Factual output has decreased, while Children's has increased.

#### Viewing figures

- S4C Welsh-language programmes were watched for an average of twenty one hours per year, or twenty four minutes per week, in 2006, up slightly on 2005 figures. Share of peak-time viewing (which by definition is focused on Welsh language programming) in 2005 was 3.1%, up from 2.8% in 2004 – an 11% increase.

#### Audience impact

- Regular viewers of S4C Welsh language programming identify the channel most strongly with PSB Purpose 1 relating to news provision, and to Purpose 3 relating to regional/national output: it is seen by 6 in 10 (61%) as portraying Wales well to the rest of the UK.
- Over half believe S4C's news programmes are trustworthy (59%); 58% say that the news and factual programmes explain issues clearly; and 55% say that they help them to understand what is going on in the world.
- Regular viewers of Welsh language programming also tend to see S4C as providing high quality (55%) and engaging programmes (48% say it shows programmes they want to watch and 44% say it reflects the interests and concerns of people like them)
- S4C is less likely than the PSB channels together to be seen as providing many of the elements of PSB

## 9.2 Introduction

The Welsh Authority has the statutory responsibility to provide the S4C (analogue) and S4C Digidol (digital) services for viewers in Wales<sup>40</sup>. Along with around 32 hours per week of Welsh language programmes at peak times, S4C analogue broadcasts re-scheduled and live Channel 4 programmes at other times, while S4C Digidol broadcasts around 80 hours per week of Welsh language programmes<sup>41</sup>.

S4C is a 'publisher broadcaster' and the majority of its programmes are sourced from independent producers. In addition, the BBC supplies a minimum of 10 hours per week of programmes free of charge to the Authority, which are funded out of the BBC's licence revenue, along with additional programmes commissioned by S4C. ITV Wales is also a major supplier of programmes to S4C.

Details of S4C's statutory requirements as outlined in the Communications Act are as follows:

On Analogue:	On Digital:
Provision of a broad range of high quality and diverse programming	Provision of a broad range of high quality and diverse programming
A service in which a substantial proportion of the programmes consist of programmes in Welsh	A service in which a substantial proportion of the programmes consist of programmes in Welsh
The programmes broadcast between 6.30pm and 10pm every day consist mainly of programmes in Welsh	
The programmes that are not in Welsh are normally programmes which are being, have been or are about to be broadcast on Channel 4	

The Act also specifies in relation to S4C that its services must include news and current affairs programming.

In order to provide relevant information about audience views relating to S4C programming in Welsh, the PSB Tracker was boosted in Wales from January 2006. Opinions are based on regular viewers of Welsh language programming on either the analogue or the digital channel, rather than regular viewers of S4C as a whole. The PSB Tracker results in this chapter are based on the Welsh boost rather than the UK-wide research.

<sup>40</sup> S4C Digidol is also available across the UK on digital satellite.

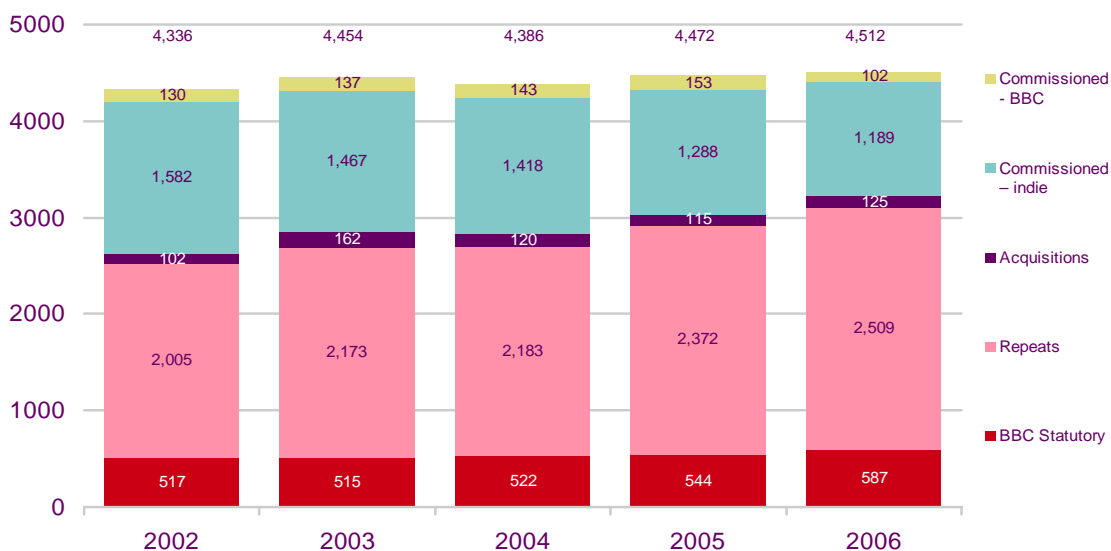
<sup>41</sup> All Welsh language output shown on analogue is also shown simultaneously on S4C Digital. The rest of the schedule comprises new programming, extended coverage of certain cultural and sporting events, alternative viewing opportunities and archive material.

### 9.3 Output hours

In 2006, Welsh language programming accounted for 4,512 hours of the S4C service<sup>42</sup>. This figure is slightly higher than that of 2005, of 4,472 hours. Figure 9.1 illustrates the amounts of commissioned, acquisition and repeated Welsh-language programming that was shown, along with the number of BBC statutory hours provided. It shows that over time, repeats have increased, and commissions decreased.

**Figure 9.1: Type of Welsh language output on S4C, 2002-2006**

Hours of output per year



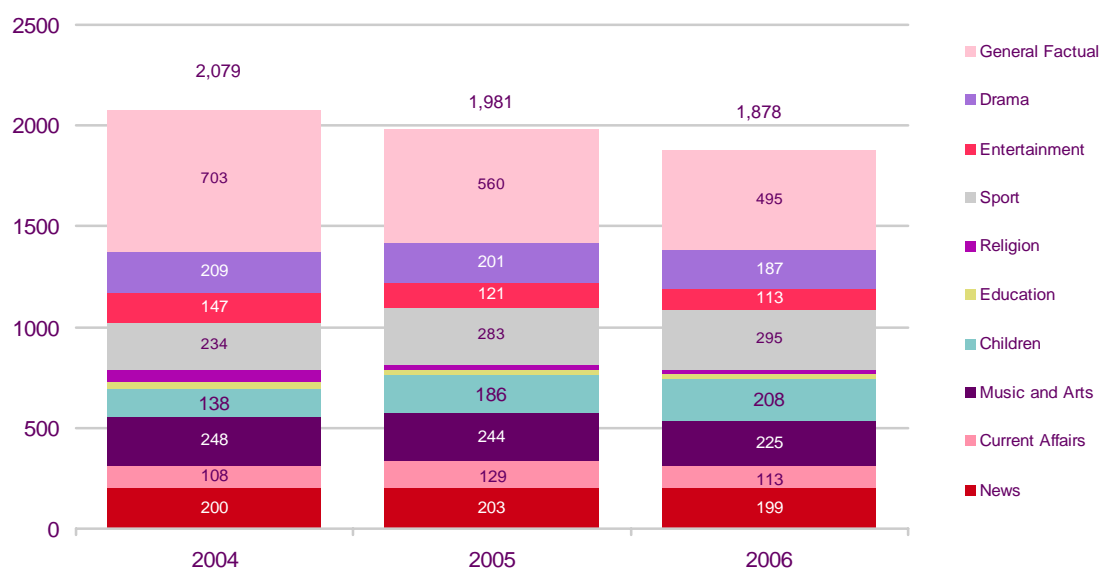
Source: S4C Statement of Accounts 2000-2005

Notes: The BBC statutory hours are not broken down into acquisitions, commissions or repeats

Originated output by genre for the years 2004-2006 is shown in Figure 9.2 (i.e. excluding repeats and acquisitions). It shows the dominance of Factual programming, and also high levels of sports output. Since 2004, originated Factual output has decreased, while Children's has increased.

<sup>42</sup> S4C Analogue shows the same Welsh-language programmes as S4C Digital. The figure corresponds to the approximately 80 hours per week broadcast on S4C Digital, of which around 32 hours per week is broadcast by S4C Analogue.

**Figure 9.2: Annual hours of originated Welsh language output on S4C, 2004-2006**



Source: S4C Statement of Account 2004 and 2005. Draft Statement of Account 2006.

Note: includes BBC statutory hours. BBC statutory hours are not broken down into acquisitions, commissions or repeats, therefore a nominal number of the hours in this chart may consist of repeated material.

## 9.4 Viewing figures

The viewing data is taken from the BARB measurement system, which examines S4C Welsh output as a whole, combining both analogue and digital, in order to provide an overall picture of the amount of Welsh programming viewed<sup>43</sup>.

S4C Welsh language programmes were watched for an average of 21 hours per year, or 24 minutes per week in 2006. This was slightly higher than the 2005 figure of 20 hours.

The weekly reach in 2005 of Welsh language programming on S4C was 23%, and S4C's share of all viewers (i.e. not just to Welsh language programming) was 3.7%<sup>44</sup>. Share of peak-time viewing (which by definition is focused on Welsh language programming) in 2005 was 3.1%, up from 2.8% in 2004 – an 11% increase.

<sup>43</sup> Source: S4C analysis of BARB.

<sup>44</sup> From November 1 2005 to January 22 2006 there was an incorrect application of a new S4C station code in the BARB viewing measurement system. This resulted in S4C's data being under-reported by an estimated 6% in peak hours and 3% across all hours for this period. These percentages should not be attributed to individual programmes as they are estimates over time and should not be assigned to specific programmes.

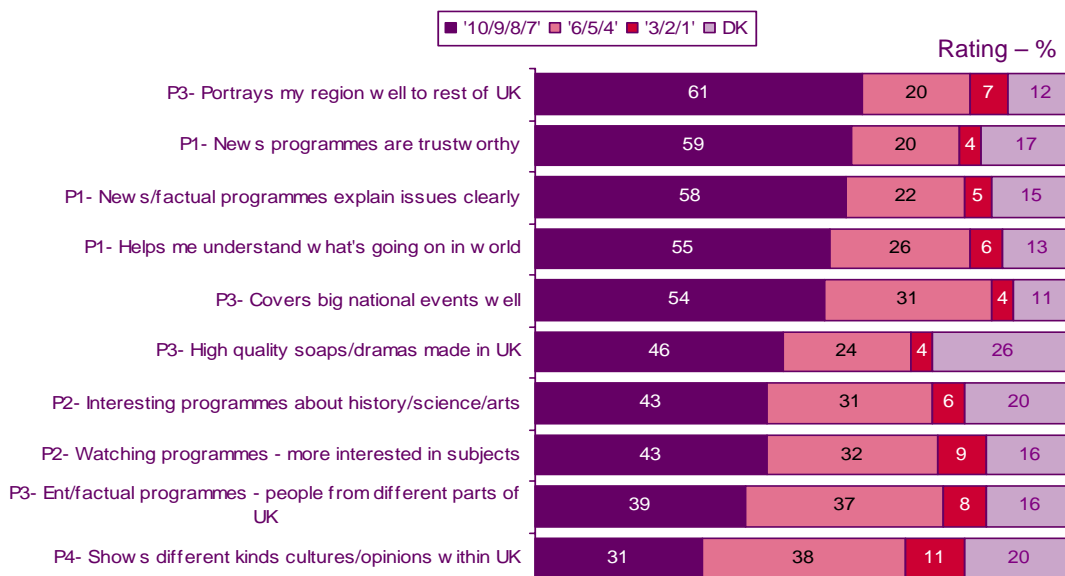
## 9.5 Audience impact

Figure 9.3 shows the extent to which regular viewers of Welsh programming on S4C value its delivery of PSB elements relating to PSB Purposes. Figure 9.4 shows the extent to which viewers of S4C Welsh programming feel that these apply to all of the PSB channels considered together.

This data shows that for regular viewers of S4C Welsh language programming, the strongest PSB associations with the channel are connected to Purpose 1 and Purpose 3. The channel is seen by 6 in 10 (61%) of their regular viewers as portraying their nation well to the rest of the UK<sup>45</sup> and over half believe the news programmes are trustworthy (59%), that the news and factual programmes explain issues clearly (58%) and also help them to understand what is going on in the world (55%).

**Figure 9.3: Welsh language viewer opinions of delivery of PSB Purposes on S4C**

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



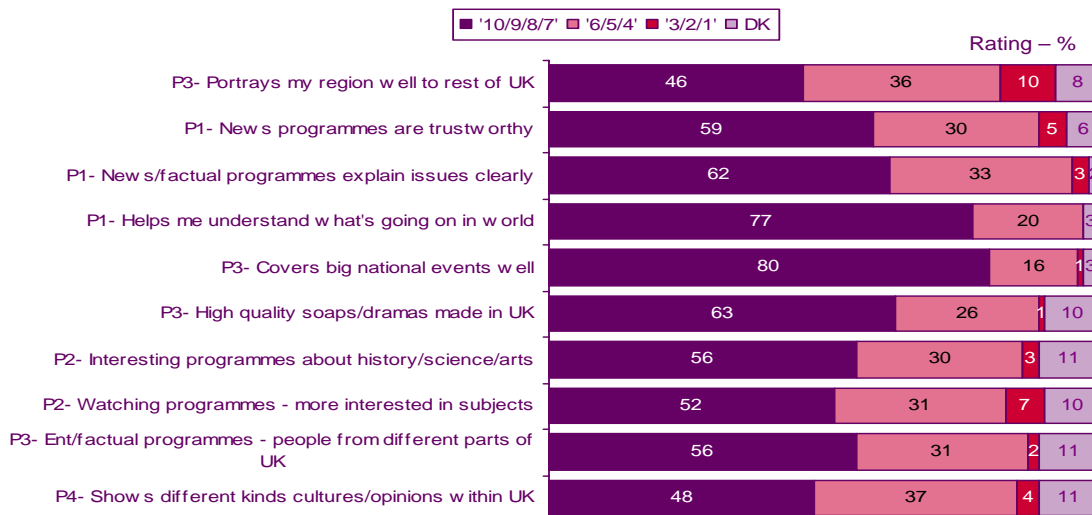
Base = Viewers of Welsh language programming on S4C - self-reported regular viewers of S4C (210)  
(amalgamated data: February 06, April 06, July 06, October 06)

In comparison Figure 9.4 shows that for viewers of S4C Welsh language programming, the strengths of the PSB channels taken together are seen as covering big national events well (80%) and having high quality soaps and dramas (63%) as well as elements relating to Purpose 1; 69% believed the news programmes were trustworthy, 62% said that the news and factual programmes explained issues clearly and 77% said that they helped them to understand what was going on in the world.

<sup>45</sup> 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.

**Figure 9.4: Welsh language viewer opinions of delivery of PSB Purposes across all PSBs<sup>46</sup>**

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



Base = Viewers of Welsh language programming on S4C (89), October 06

Figure 9.5 illustrates how regular viewers of Welsh programming on S4C see the PSB Characteristics as applying to S4C, and Figure 9.6 shows how viewers of S4C Welsh programming believe that these apply to all of the PSB channels together.

It is of note that all the PSB Characteristics are perceived to be better delivered on the PSB channels taken together rather than S4C specifically, except for the delivery of original UK content.

Regular viewers of Welsh-language programmes on S4C tended to see the channel as providing high quality (55%) and engaging programmes (48% said it showed programmes they wanted to watch and 44% said it reflected the interests and concerns of people like them), although a similar or larger proportion also associated these things with all of the PSB channels together (Figure 9.6).

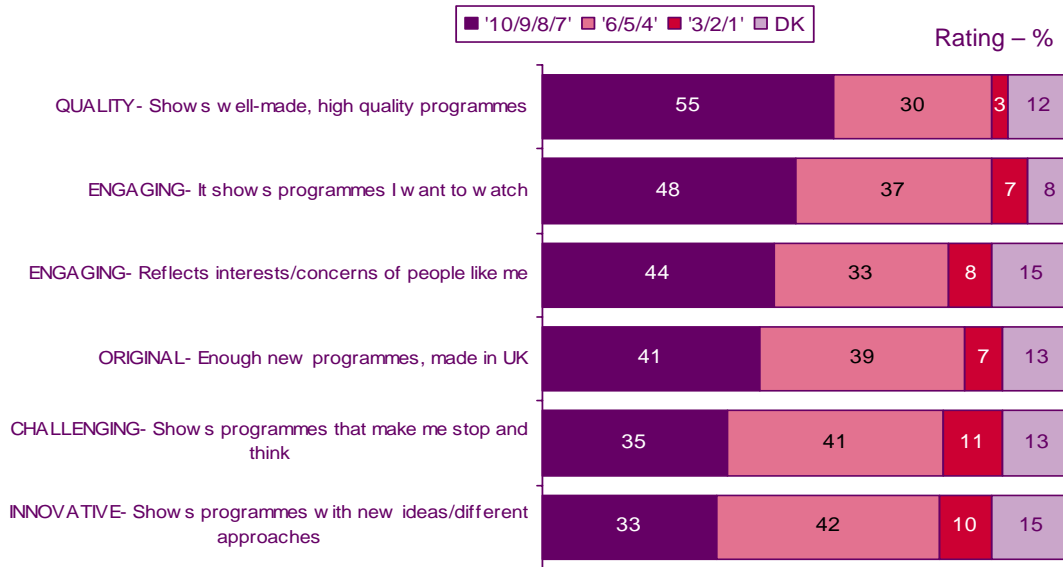
S4C is less likely than the PSB channels together to be seen as providing challenging programming (35% compared to 55%) and innovative content (33% compared to 48%).

<sup>46</sup> The base size for results relating to views about all PSB channels taken together is 89, therefore results are indicative only.



**Figure 9.5: Welsh-language viewer opinions of delivery of PSB Characteristics on S4C**

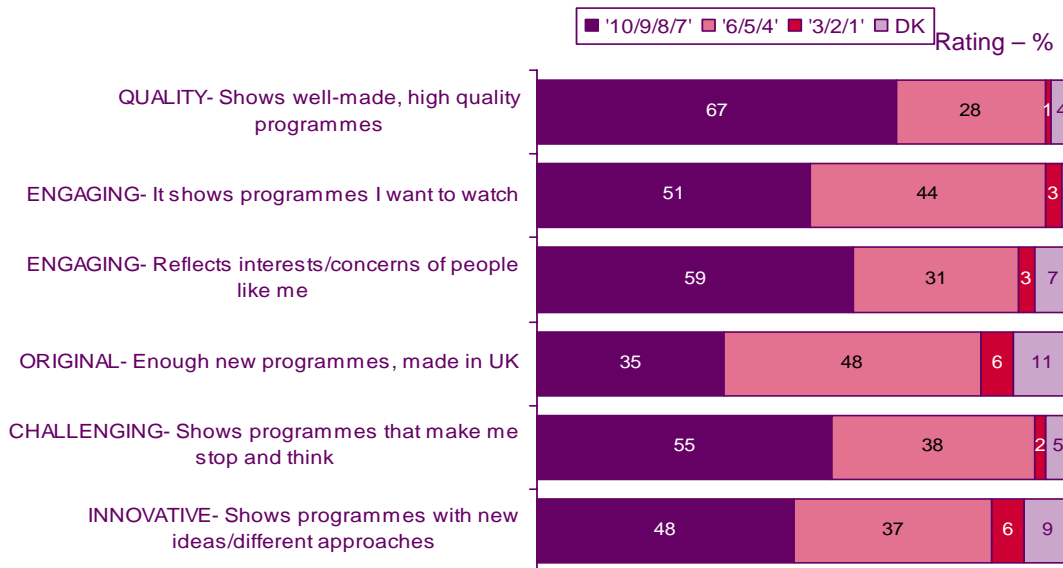
*Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all'*



Base = Viewers of Welsh language programming on S4C - self-reported regular viewers S4C (210) (amalgamated data: February 06, April 06, July 06, October 06)

**Figure 9.6: Welsh language viewer opinions of delivery of PSB Characteristics across all PSBs**

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



Base = Viewers of Welsh language programming on S4C (89), October 06

## Section 10

# Teletext

## 10.1 Summary findings

- Around half of the UK population (49%) claim to use Teletext via ITV1, Channel 4, Five or the digital channel 100. 26% claimed they used these services once a week or more and 35% said they used them once a month or more.
- The most frequently mentioned channel for access to Teletext was ITV1 (76%) and overall 88% of these Teletext viewers claim to use any of the three analogue channels to access Teletext services, in comparison to 8% who said they used the digital channel.
- The average number of adults viewing Teletext on a weekly basis between July 2005 and June 2006 was 13.7 million, a decrease from just over 15 million in 2005. This continues a trend of decline in use.
- Both regional and national news pages are ranked highly in the types of information said to be accessed through Teletext; these are viewed by just over a third of Teletext viewers (36% and 34% respectively). Any type of news is accessed by almost half of all Teletext viewers (46%). The other most popular pages are weather and sports (claimed to be read by 57% and 46% of viewers).
- Research found opinions of Teletext to be generally positive amongst those who use the service at least once a month:
  - 95% agree that there is a wide range of information available
  - 88% agree that they can trust the service to be accurate and impartial
  - 75% agreed that there is a good range of quality information about the local area

## 10.2 Introduction

This section focuses on the public Teletext provision, providing an indication of the PSB requirements of Teletext and the public's use of and views on the service. The public Teletext service is a designated public service broadcaster, as set out in the 2003 Communications Act.

The public teletext licensee is Teletext Limited and it provides 'Teletext' across ITV1, Channel 4 and Five and the digital channel 100.

The Communications Act 2003 outlines the PSB remit of the public teletext licensee as:

- contributing to the PSB objectives generally (s264) along with the TV networks,
- providing a range of high quality and diverse text material (s265),
- completing a similar statement of programme policy (SOPPs) process to the TV network, involving preparing a statement of service policy and monitoring performance in carrying out the proposals.

While both digital and analogue text services exist, the public service remit is required to be fulfilled separately by each type of service.

The public teletext licence specifies a certain amount of pages of text on genres which relate to the PSB remit and the PSB Purposes and Characteristics. Simplified, these requirements relate to regional news and non-news provision, and to the provision of national news:

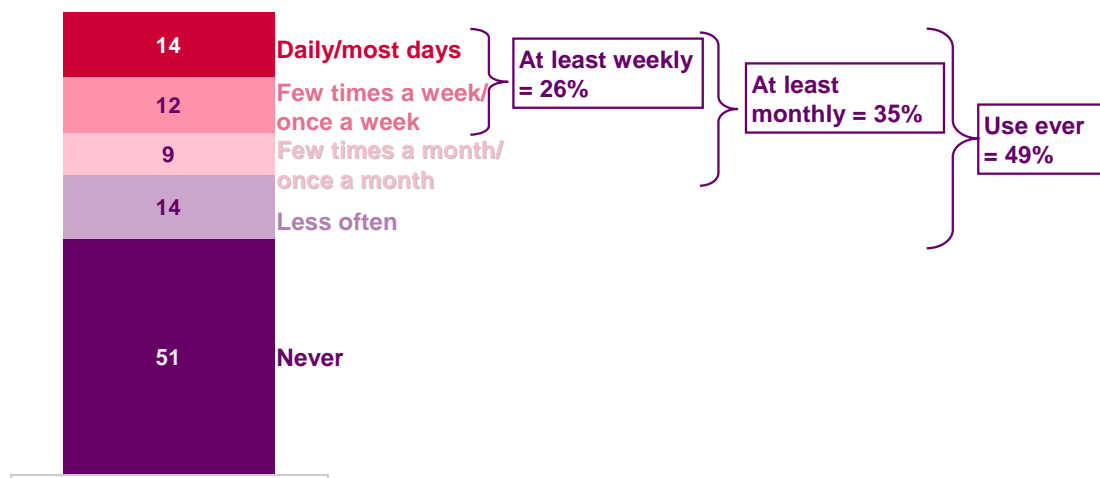
- not less than 30 main pages of non-regional news (on both the analogue and digital service);
- not less than 12 main pages of regional news (on both the analogue and digital service); and
- not less than 40 main pages of regional non-news pages on the analogue service and not less than 24 on the digital service (this requirement is for each regional ITV service).

### 10.3 Audience research

Separately from the PSB Tracker, Ofcom carried out a survey to examine claimed usage of Teletext and opinions of the service<sup>47</sup>. The findings are shown in Figures 10.1 – 10.3.

Around half (49%) of those interviewed said they use Teletext via ITV1, Channel 4, Five or the digital channel 100. 26% claimed they used these services once a week or more and 35% said they used them once a month or more (Figure 10.1).

**Figure 10.1: Claimed use of Teletext**



GfKNOP Omnibus September 2006. All UK adults unweighted 2009/ weighted 2000.

When people who used the services at least once a month were asked through which channels they used Teletext, the most frequently mentioned channel was ITV1 (76%) with fewer mentions of Channel 4 (24%), Five (9%) and channel 100 (8%)<sup>48</sup>. Overall, 88% of these Teletext viewers claimed they used any of the three analogue channels in comparison to 8% who said they used the digital channel.

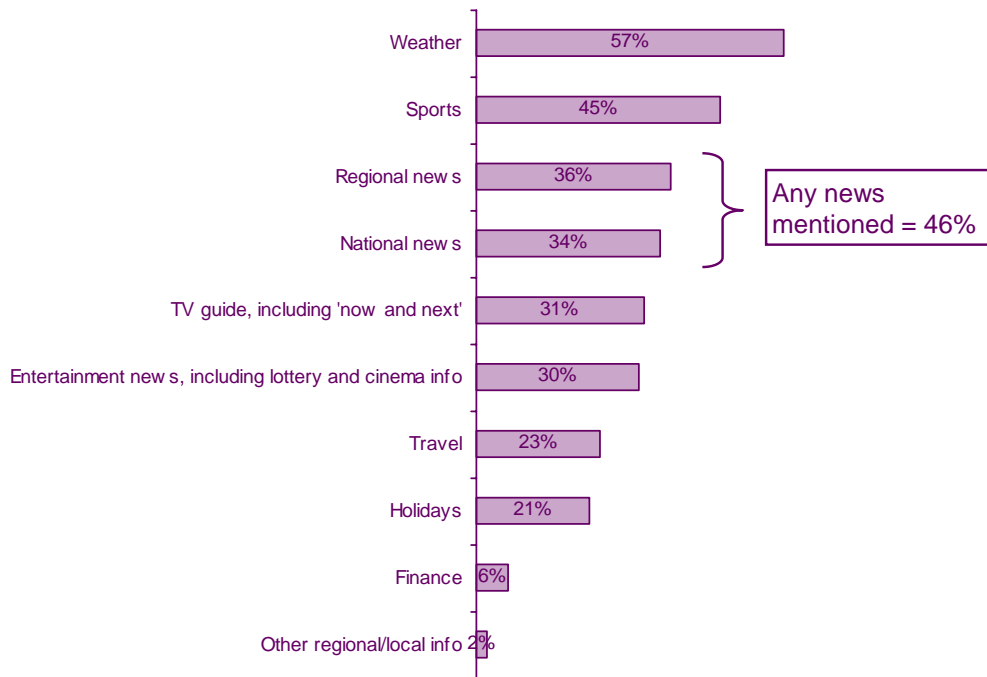
<sup>47</sup> Research was carried out via a telephone omnibus in September 2006 with 2099 respondents. Data was weighted to be representative of the UK.

<sup>48</sup> 7% of those asked were not sure which channel(s) they used Teletext.

The most popular types of pages among viewers who read pages at least once a month related to weather (57% of viewers), sports (45%), regional news (36%), national news (34%), TV listings/guide (31%) and entertainment (30%) (Figure 10.2).

Given its PSB remit in terms of informing viewers about the UK and the rest of the world, and representing and serving people from different areas in the UK (in addition to the licensing requirements on the numbers of new pages) it is interesting to see that both regional and national news pages are used by around one third of viewers, with any type of news being accessed by just under half (46%) of Teletext viewers.

**Figure 10.2: Claimed types of information accessed on Teletext**

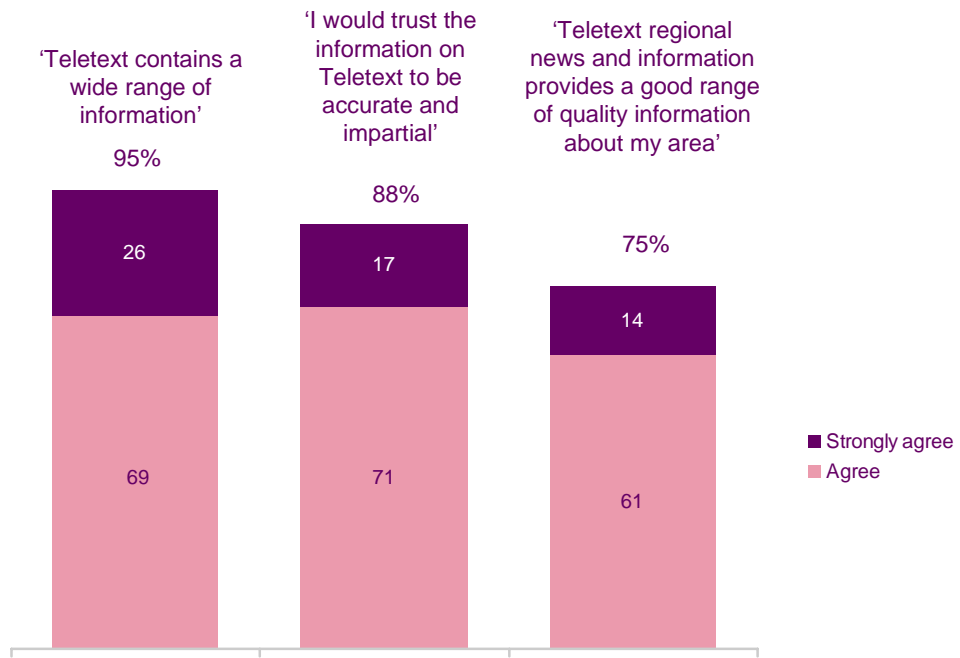


GfKNOP Omnibus September 2006. UK Teletext viewers that claim to use the service once a month or more; unweighted 737/ weighted 707.

Figure 10.3 provides information on how Teletext users (defined as having viewed pages once a month or more often) feel about the service.

There is an appreciation of the breadth of information available, with 95% agreeing that there is a wide range of information available. Nearly 9 in 10 viewers (88%) agree that they can trust the service to be accurate and impartial. Three-quarters of the viewers also agreed that there is a good range of quality information about their local area.

**Figure 10.3: Opinions of Teletext service**



GfK-NOP omnibus September 2006. UK Teletext viewers that claim to use the service once a month or more;  
Weighted base: 707

## Section 11

# Channel summaries

## 11.1 Summary findings

This section sets out what regular viewers think of each PSB channel. As Figure 3 in the Introduction of this report shows, Ofcom's PSB Tracker asked regular viewers of each of the channels to give their views about how well the channel delivered PSB Purposes and Characteristics, using viewer-friendly statements.

- BBC One is seen to contribute most strongly to PSB Purpose 1, *informing our understanding of the world*, and Purpose 3, *reflecting UK cultural identity* and the Characteristic of *quality*.
- BBC Two is particularly seen to contribute to PSB Purpose 2, *stimulating knowledge and learning* and the Characteristic of *quality*.
- ITV1 is most associated with Purpose 3, *reflecting UK cultural identity* with the key elements of having high quality soaps and dramas and covering big national events well. The channel is also associated with PSB Purpose 1, *informing our understanding of the world*
- Channel 4's strongest associations tend to relate to PSB Characteristics, in particular having *engaging* programmes and having *high-quality* programmes. Responses relating to innovation and challenging content, and the representation of diversity and alternative viewpoints, are positioned higher for Channel 4 than for the other terrestrial channels, taking all statements together. Of the PSB Purposes, Channel 4 is seen as most contributing to Purpose 1 - *informing our understanding of the world*. With the exception of statements about news and programmes about serious factual subjects, young people are far more likely to value Channel 4 than are its older viewers.
- The perceived profile of Five among its regular viewers tends to be similar to that of Channel 4 among its own regular viewers, albeit to a lesser extent.
- BBC Three is also most strongly associated with PSB Characteristics of *quality*, *engaging*, *innovative* and *original* and the channel is also seen by just under half (48%) as having high quality soaps and dramas made within the UK (*Purpose 3*).
- BBC Four is seen as having good *quality* programmes, helping viewers to understand what's going on in the world (*Purpose 1*), having interesting programmes about history, science or the arts (*Purpose 2*), having *challenging* programmes and having news programmes that are trustworthy (*Purpose 1*).

Whereas previous sections of this report have focussed on the PSB Purposes and Characteristics individually, this chapter provides a summary overview of regular viewers' opinions of each of the channels across all of the Purposes and Characteristics, in order to highlight which elements of PSB are seen to be delivered by which channels.

## 11.2 BBC One

Figure 11.1 shows the proportion of regular viewers of BBC One who said that each of the PSB Purposes and Characteristics particularly apply to the channel (rating 7-10 out of 10).

BBC One is seen by its regular viewers to contribute particularly to PSB Purpose 1, *informing our understanding of the world*. It is also seen to deliver Purpose 3, *reflecting UK cultural identity*.

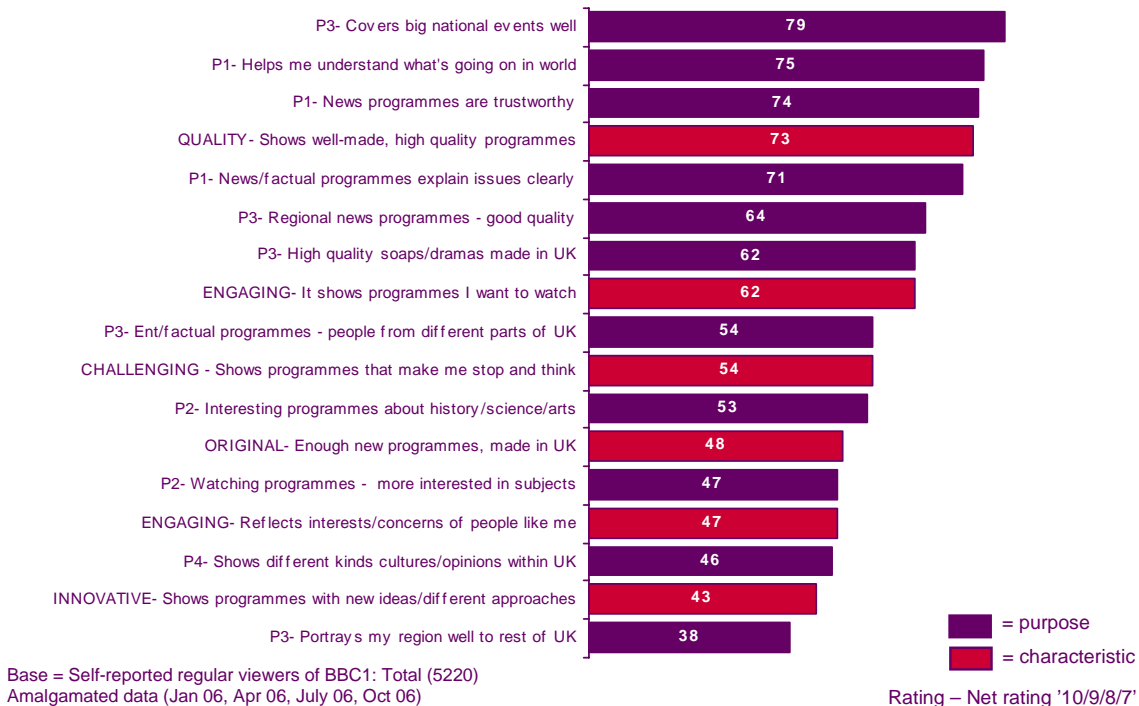
Relating to Purpose 1, it is seen as helping people to understand what is going on in the world (75%), having trustworthy news programmes (74%) and having news and factual programmes that explain issues clearly (71%). In terms of Purpose 3, it is seen to cover big national events well (79%), to have good quality regional programmes (64%) and high quality soaps and dramas made in the UK (62%).

Of the PSB Characteristics, BBC One was most closely associated with programme quality, with nearly three-quarters (73%) of regular viewers particularly valuing the channel for showing well-made and high-quality programmes.

There are some small variations by age-group, gender, socio-economic group and Nation. Women are more likely than men to say BBC One’s programmes make them stop and think, and also that it shows programmes they want to watch. Younger viewers are more likely to rate its dramas and soaps, and to say its programmes have made them become more interested in subjects. Broadly, younger people are more likely to agree with the PSB statements relating to the Characteristics of PSB – that BBC One’s programmes show new ideas and approaches, that the programmes reflect their interests and concerns. Those in socio-economic group AB are more likely to value BBC One’s news programmes.

**Figure 11.1: BBC One channel summary**

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



### 11.3 BBC Two

Regular viewers' opinions about BBC Two are shown in Figure 11.2. This channel is seen as particularly contributing to PSB Purpose 2, *stimulating knowledge and learning*, and the PSB Characteristic of programme quality.

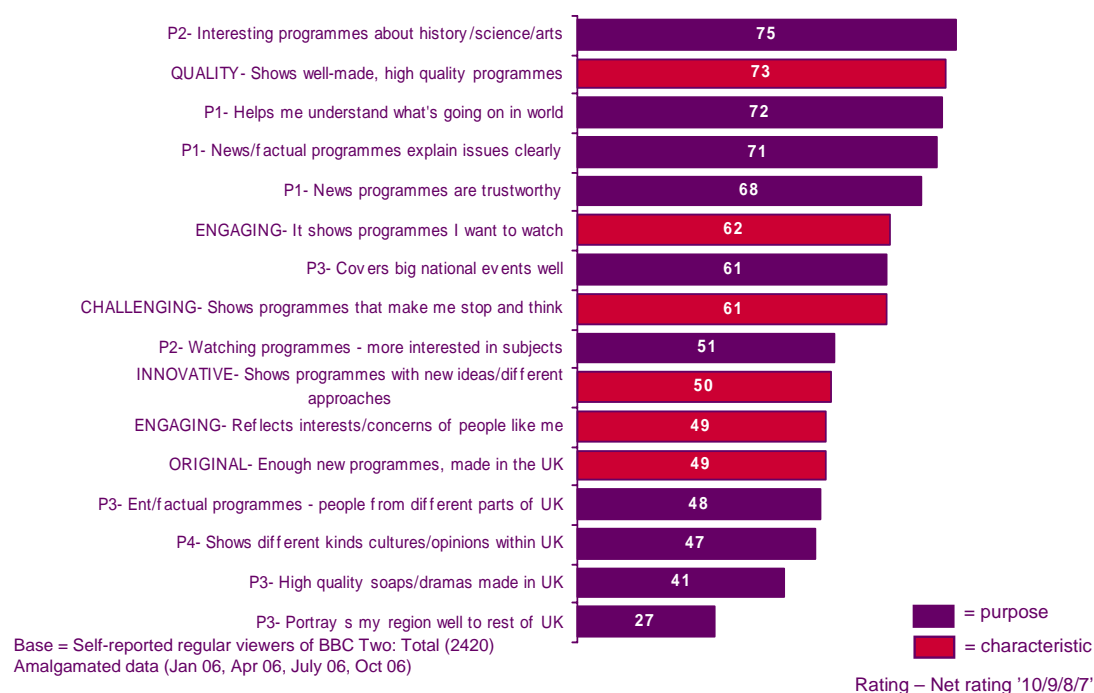
Three-quarters of the regular viewers strongly associated the channel with interesting programmes about history, science or the arts and 73% associated the channel with well-made, high-quality programmes.

BBC Two also is rated highly in relation to PSB Purpose 1, *informing our understanding of the world*; it is particularly thought to help people to understand what is going on in the world (72%), its news and factual programmes are thought to explain issues clearly (71%) and its news programmes are seen as trustworthy (68%).

Regular viewers aged 25-34 are more likely than other age-groups to value BBC Two's PSB Characteristics, particularly those relating to innovation and challenging content. Those in socio-economic group AB are more likely than DEs to value BBC Two across a number of elements of PSB. Minority ethnic groups are less likely to value the channel on many of these elements than are white respondents.

**Figure 11.2: BBC Two channel summary**

*Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' (%)*





## 11.4 ITV1

Regular viewers of ITV1 opinions on the channel are shown in Figure 11.3. The channel is seen as contributing most towards Purpose 3, *reflecting UK cultural identity*. The most highly-rated PSB statement is that of the provision of high-quality soaps and dramas (69%) followed by the coverage of big national events (67%).

ITV1 is also associated with PSB Purpose 1, *informing our understanding of the world*, with 64% saying that its news programmes are seen as trustworthy, 63% saying that it helps them to understand what is going on in the world and 62% believing that its news and factual programmes explain issues clearly.

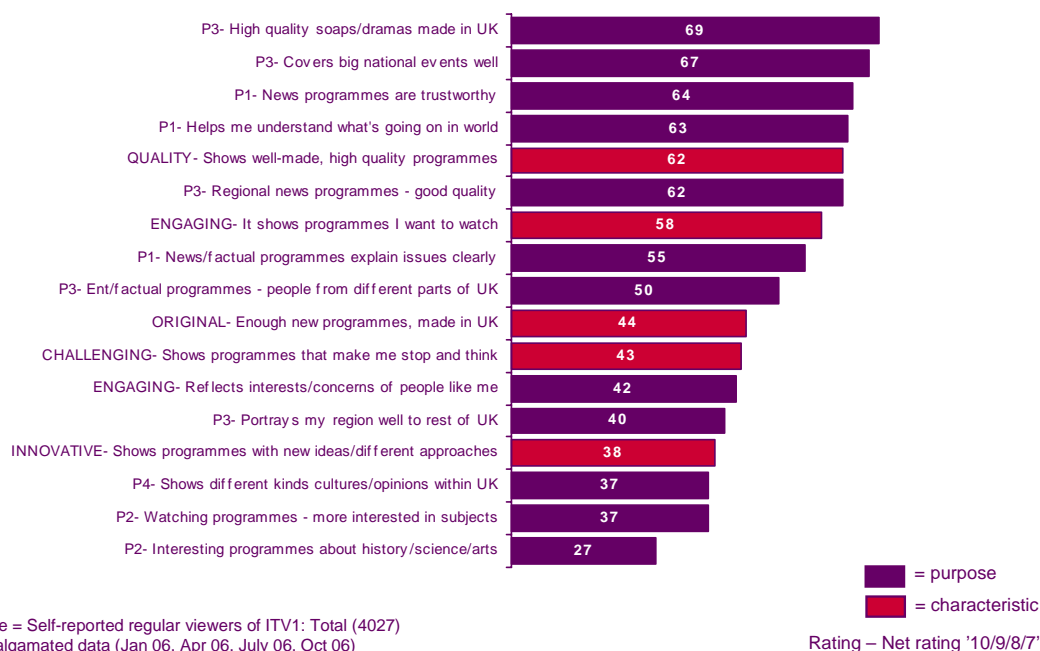
Of the PSB Characteristics, ITV1 is most associated by its regular viewers with programme quality (62%) and having engaging programmes (58%).

Women are more likely than men to say that it shows programmes they want to watch. There is little difference between age-groups in terms of responses to the different PSB Purposes, although young people are more likely to say that the channel shows programmes of high quality, and programmes with different approaches. People from socio-economic category DE are more likely to say that its programmes have made them more interested in particular subjects.

People in Northern Ireland are particularly appreciative of its regional news, and also somewhat more likely than people in the other Nations to value ITV1's programme quality, and to feel that the channel reflects their interests and concerns. People from minority ethnic groups are less likely than white respondents to value its soaps and dramas, but more likely to feel the channel shows innovative programmes.

### Figure 11.3: ITV1 channel summary

*Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' (%)*



## 11.5 Channel 4

Whereas regular viewers' opinions of BBC One, BBC Two and ITV1 are most associated with particular PSB Purposes, Channel 4's strongest associations tend to relate to PSB Characteristics (see Figure 11.4). Specifically having *engaging* programmes (60%) and having *high-quality* programmes are the features of Channel 4 cited by regular viewers (58%).

Just over half of its regular viewers say that it shows as showing programmes with new ideas and different approaches (51%), and 54% programmes that make them stop and think. The position of these elements relating to its PSB remit within the overall set of statements are higher than for the other terrestrial channels, as is the statement relating to the portrayal of diversity and alternative viewpoints. Unlike the other channels, minority ethnic groups are more likely to value Channel 4 than are white viewers. As stated earlier, Channel 4's younger viewers are considerably more likely to value the channel on these statements – 70% of its 16-24 regular viewers feel it is innovative, and 66% say that it makes them stop and think.

Channel 4 is also seen by viewers to contribute to Purpose 1, *informing our understanding of the world*, with 58% saying that its news programmes are seen as trustworthy, 57% saying that it helps them to understand what is going on in the world and 53% believing that its news and factual programmes explain issues clearly.

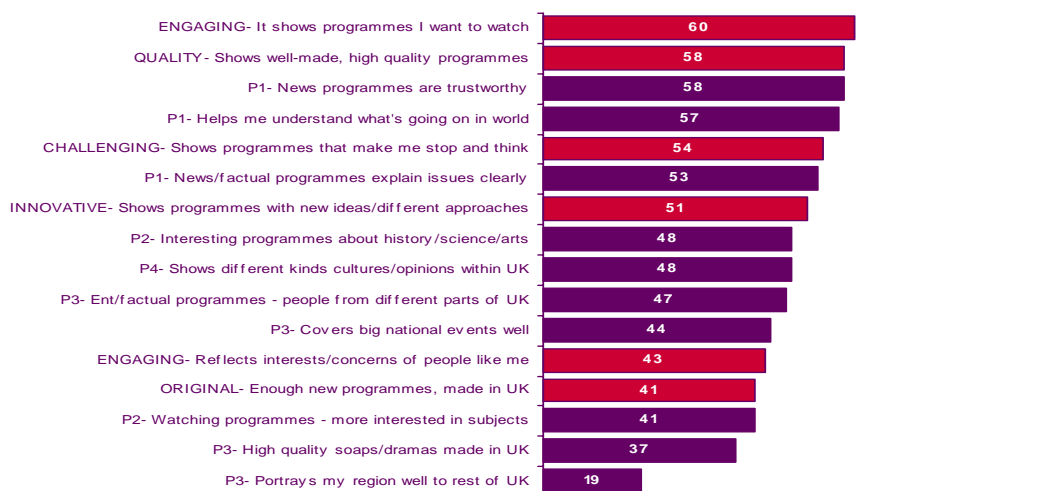
Few see it as portraying their region well to the rest of the UK (19%)– although it is of note that this rises to 30% of people in London.

Opinions about Channel 4 are more strongly differentiated among various groups of its regular viewers than is the case for the other terrestrial channels. Men are more likely than women to value many of its elements of PSB, although men and women say equally that it shows programmes they want to watch.

With the exception of statements about news and programmes about serious factual subjects, young people are far more likely to value Channel 4 than are its older viewers. DEs are less likely than ABs to value the channel across nearly all PSB elements.

**Figure 11.4: Channel 4 channel summary**

*Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' (%)*



Base = Self-reported regular viewers of Channel 4: Total (2746)  
Amalgamated data (Jan 06, Apr 06, July 06, Oct 06)

Legend:  
■ = purpose  
■ = characteristic  
 Rating – Net rating '10/9/8/7'

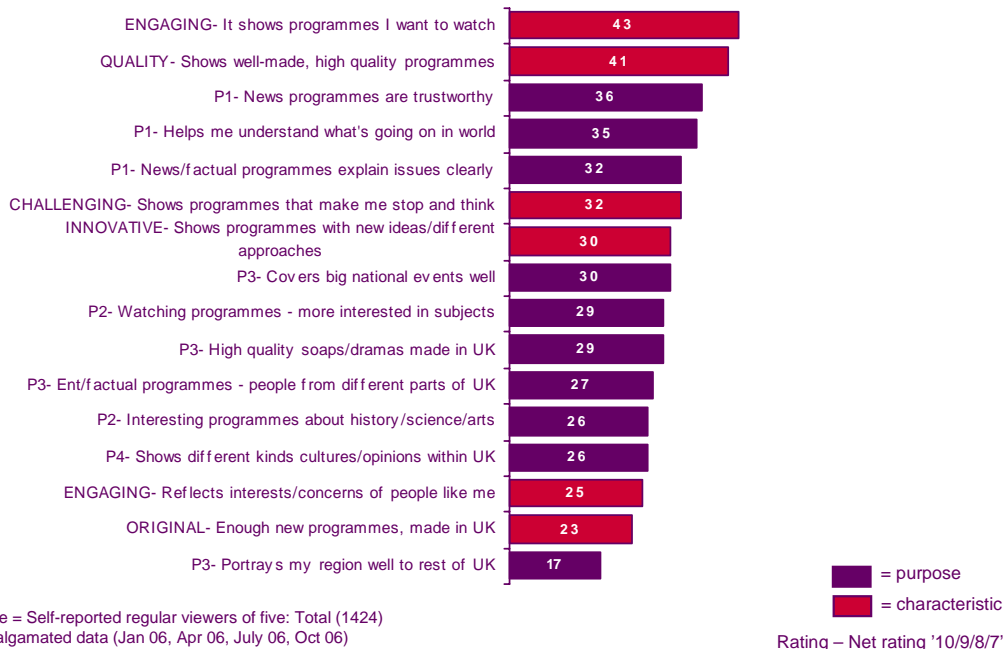
## 11.6 Five

Figure 11.5 shows regular viewers' opinions of Five. While responses are lower than for Channel 4, both sets of regular viewers perceive each channel's strengths in very similar ways. Thus, Five's strongest delivery is seen to be related to the PSB Characteristics of *engaging* programmes (43%), *high-quality* programmes (41%) and elements relating to Purpose 1 and the delivery of news.

There are few differences between men's and women's responses. Younger viewers are somewhat more likely than older viewers to respond positively in relation to Five's delivery of PSB Characteristics such as showing *high-quality* programmes, and *programmes that make them stop and think*. People from socio-economic group DE are more likely than ABs to value Five across the range of PSB statements. People from minority ethnic groups are also more likely to rate the channel than white respondents.

**Figure 11.5: Five channel summary**

*Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' (%)*



## 11.7 BBC Three

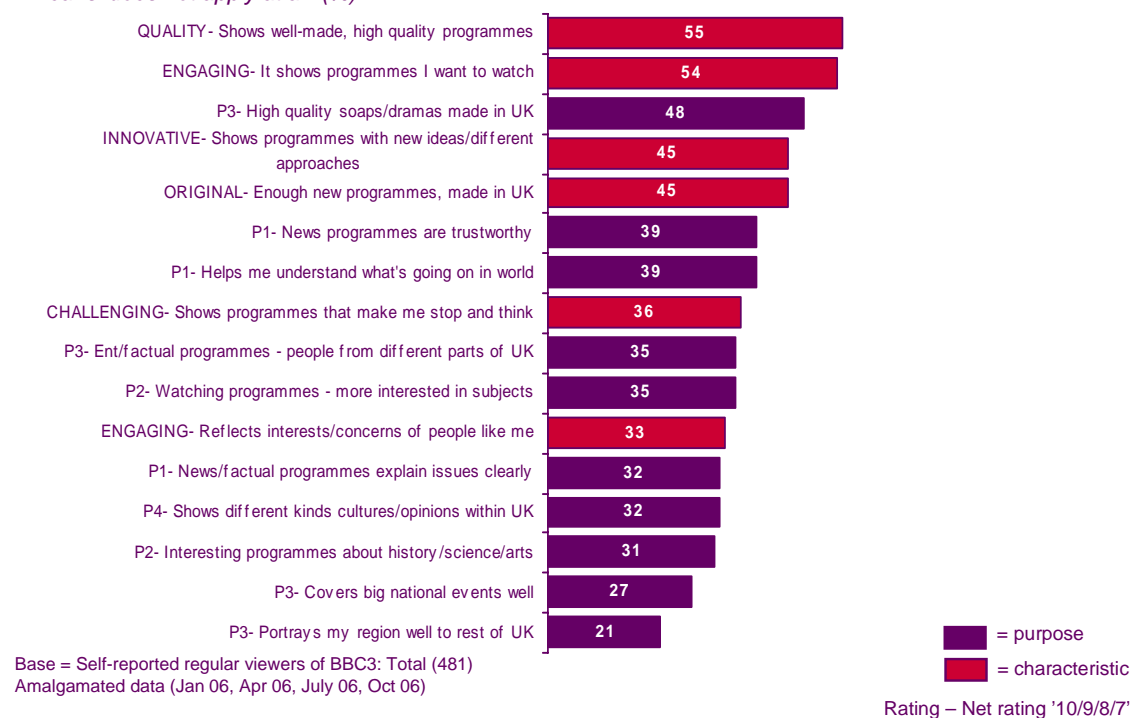
Regular viewers' opinions of BBC Three show that the channel is, like Channel 4 and Five, most strongly associated with PSB Characteristics, with 55% rating it on *high-quality* programmes, 54% saying it has *engaging* programmes, 45% seeing the channel as *innovative* and 45% appreciating its original content (see Figure 11.6).

The channel is also seen by just under half (48%) as having *high-quality* soaps and dramas made within the UK.

Base sizes are too small to examine sub-group differences to the same extent as for the terrestrial channels, but it appears that neither socio-economic group nor gender make little difference to responses.

**Figure 11.6: BBC Three channel summary**

*Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' (%)*



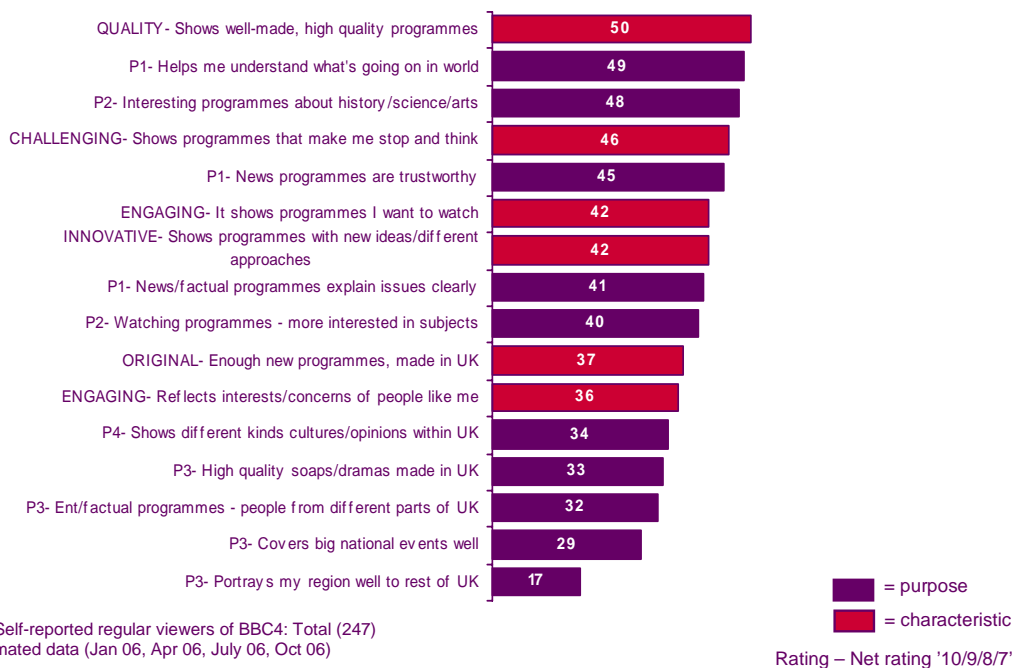
## 11.8 BBC Four

Opinions of regular viewers of BBC Four on the channel are shown in Figure 11.7. The channel is most associated with showing *high-quality* programmes (50%), helping viewers to *understand what's going on in the world* (49%), showing *interesting* programmes about history, science or the arts (48%), showing *challenging* programmes (46%) and news programmes that are trustworthy (45%). The range of the perceived delivery of PSB elements is therefore wider than for the other channels.

As with BBC Three, base sizes are not large enough to examine many sub-groups, except to show that the channel is more highly rated by men than women.

**Figure 11.7: BBC Four channel summary**

*Extent to which the purpose/characteristics applies to the channel(s), where 10 means 'applies completely' and 1 means 'does not apply at all' (%)*



## Annex 1

# Survey methodologies

## 1.1 Ofcom PSB Tracker

### Data collection

The Ofcom PSB Tracker is conducted via telephone interviews (CATI) with adults aged 16+. Fieldwork in 2006 (the first year of the survey) was conducted during four months: January 2006, April 2006, July 2006, and October 2006, chosen to represent the range of the broadcast year. Per wave, a total of 1,874 interviews were conducted (1070 in England; 268 in Scotland; 268 in Wales; 268 in Northern Ireland). The average interview length was 18 minutes. Fieldwork was conducted by GfK NOP.

The Welsh sample was boosted each quarter (an additional 200 interviews) to ensure a representative sample to report effectively on S4C Welsh language viewers.

### Weighting

Quotas were applied and survey data was weighted to be nationally representative of adults 16+. Weights were applied to: Gender, Age, Region, Social grade and Ethnicity using data from mid-2004 population estimates (ONS).

### Questionnaire

Respondents were asked to rate specific TV channels on four different aspects of broadcasting (each of the PSB purposes and characteristics – 17 statements in total).

Respondents who either regularly or occasionally watched a channel were asked to rate each of the seven channels (BBC One, BBC Two, ITV1, Channel 4, Five, BBC Three and BBC Four) separately and also to consider all of the channels together for each of the 17 statements. Statements on BBC Three and BBC Four were only asked of multi-channel households.

They were asked to rate on a 10-point scale the degree to which they felt the statement applied (10 = applies completely; and 1 = does not apply at all) to each channel.

The order of channels was rotated to minimise order bias. Fifty percent of the sample was asked about channels in order A below, and the remaining asked in order B<sup>49</sup>:

- A: BBC One, BBC Two, BBC Three, BBC Four, ITV1, Channel 4, Five, All channels combined
- B: ITV1, Channel 4, Five, BBC One, BBC Two, BBC Three, BBC Four, All channels combined

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<sup>49</sup> Randomising the order of all channels was piloted. However, this introduced interview fatigue. In the pilot, statements were both randomised and grouped together by area (e.g. News statements together). It was found that the number of incomplete interviews was lower where statements were grouped together.

## Analysis conventions

All of the channel summaries and sub-group analysis was carried out on ‘regular’ viewers. Regular viewers provide a more informed opinion as they are more involved with the channels, and rely less on potentially out-of-date or unfounded perceptions of the channel. Moreover, including occasional viewers increases the level of “Don’t know” responses, thereby reducing the granularity of the insight provided.

Two different questions were asked to ascertain frequency of viewing of each channel:

- i) 1. Asked of all with access to channel: How often do you watch <channel>? Regularly/Occasionally/Never/Don’t Know
- ii) Asked of all who code regular/occasional above: So is that...? (Every day/4-5 times a week/2-3 times a week/Once a week/less).

Data was analysed using two different definitions of regular viewers:

- Those who claimed to be ‘regular’ viewers at the first question
- Those who claimed to watch the channel at least 2-3 times a week

Using the second definition, almost all viewers of some channels became ‘regular’ viewers, as shown in Figure A.1. Therefore, the first definition was chosen to provide better granularity for analysis purposes.

**Figure A.1: Percentage of regular viewers as proportion of viewers to each channel**

% of respondents	<b>BBC One</b>	<b>BBC Two</b>	<b>ITV1</b>	<b>Channel 4</b>	<b>Five</b>	<b>BBC Three</b>	<b>BBC Four</b>
Self-defined regular viewers	74	40	60	44	29	18	13
Watch at least 2-3 times a week	94	75	87	79	62	47	40

## Reporting conventions

Viewers were asked to rate each channel (and the channels taken together) out of 10, and the top four scores (7-10) were used to calculate responses, correlating to a very/quite response.

## Additional omnibus questions

Additional data was required that was not covered in the PSB questionnaire, therefore four GfK NOP Omnibus surveys were commissioned and completed in January, July and August 2006. These are detailed below:

- i) The January omnibus asked viewers to rate the key statements in terms of their importance
- ii) The July omnibus asked viewers to choose the five types of programmes that were:
  - Personally valuable to them

- o Important for the good of society as a whole
- iii) An omnibus was conducted in August looking at delivery ratings for all channels combined
- iv) An additional omnibus was conducted in August looking at how many people use Teletext

## **1.2 Children's PSB Channel Tracker methodology**

The PSB Children's Tracker was carried out among parents of 2–15 year olds to ascertain their views on how well both Children's programming and all programming that children might watch was fulfilling the PSB Purposes and Characteristics. As with the main PSB Channel Tracker, the Purposes and Characteristics were translated into consumer-friendly language, and in this instance were made specifically relevant to children and young people (see Chapter 8). The survey was conducted by GfK NOP Media who carried out 803 interviews via computer-assisted telephone interviewing (CATI) in December 2006 and January 2007.

The sample for the Children's Tracker was made up of parents of four different age groups: 200 parents of a child aged 2-5; 200 parents of a child aged 6-9; 200 parents of a child aged 10-12 and 200 parents of child aged 13-15. Where there was more than one child in the household parents were asked which child had had the most recent birthday and that child was selected as the subject of the interview. Given that different channels appeal to different age groups, the number of regular viewers per channel differs by age group. This is important when looking at views on delivery of the Purposes and Characteristics, and is drawn out in the commentary where appropriate.

As with the main PSB Channel Tracker, the Children's PSB Channel Tracker concentrated on regular viewers. Therefore, parents who said their child was a regular viewer of a particular channel were asked to evaluate that channel against each statement, firstly thinking about the programming made specifically for children and young people, then thinking about all programming that children watch regardless of time of day shown or age of target audience.

The order of statements was rotated to prevent order bias. The order of channels was also rotated with 50% of the sample asked about channels in order A below, and the remaining 50% asked in order B

- A: BBC One, BBC Two, CBeebies, CBBC, ITV1, Channel 4, Five, all channels combined
- B: ITV1, Channel 4, Five, BBC One, BBC Two, CBeebies, CBBC, all channels combined

## **1.3 BBC-GfK Pulse Survey**

### **Methodology**

This report includes data from the BBC Pulse survey – an online, nationally-representative panel survey of 15,000 viewers (including Northern Ireland, Scotland, Wales and England), conducted on behalf of the BBC by GfK NOP.

Panellists are presented with the previous day's schedules for all the terrestrial channels plus BBC Three, BBC Four, E4 and Sky One, and S4C in Wales. Once they have selected the programmes they viewed they are asked a number of questions about them. Some questions are specific to the BDS (Broadcasting Dataservices) genre into which a



programme falls, some are cross-genre questions (e.g. on appreciation) and there are also sometimes panellists are asked additional programme-specific questions dependent on the research needs of the BBC.

The panel is not informed that the survey is conducted on behalf of the BBC to avoid influencing answers, and the survey is presented with GfK branding. The Pulse survey is also carried out online and therefore represents the opinions of online users, but demographically representative of the UK population.

### **Analysis considerations**

Panellists score only those programmes that they have watched for at least five minutes; generally they will be scoring programmes that they have chosen to watch. As such, average scores are relatively high, and lower scores in the Pulse survey are likely to represent strong dissatisfaction. In this report, ratings are aggregated into genre-level summaries.

It should also be noted that results are calculated on the basis of the number of responses, not respondents. In this way, multiple responses to a programme over a period of time from the same respondent are registered. This means that for any given rating, it is not possible to extrapolate views of the population as a whole. The rating provides an indication of the strength of opinion about a particular programme. Over 5,000 responses are collected each day.

This methodology is useful when looking at Pulse scores overall, as it can be considered that the opinions of dedicated viewers may greatly influence the rating. Therefore the rating and number of responses represents both a score for the programme and for its popularity. For example, if a programme has a high number of responses and a high score, this shows that lots of people watched the programme and liked it. A programme with fewer responses and the same high score, would suggest that not as many people watched it, but those that did liked it.

### **Genre classification**

In the Pulse survey, programmes are aggregated by genre lists in accordance with Broadcasting Dataservices' (BDS) classifications. This differs from BARB and broadcaster returns' genre classification. Genres are not, therefore, directly comparable.

The BDS Serious Factual genre was amended by Ofcom to more closely fit the BARB and broadcaster returns' classifications.

## Annex 2

# Glossary

**Average Weekly Reach (TV)** The number of adults aged 4+ who watch at least fifteen consecutive minutes of a specified TV channel or genre in a specific week (or in an average week over a longer period).

**BARB** The pan-industry body which measures television viewing (Broadcasters' Audience Research Board).

**CAGR** Compound Annual Growth Rate - The year-over-year growth rate over a specified period of time.

**Communications Act** Communications Act 2003, which came into force in July 2003.

**NAR** Net Advertising Revenue.

**Peak time** The period during which a television channel broadcasts its early- and mid-evening schedule, typically used by Ofcom to refer to the period between 18:00 and 22:30 each day (including weekends).

**Share (TV)** Proportion of total TV viewing to a particular channel over a specified time period.

**Simulcasting** The broadcasting of a television programme service on more than one transmission technology (e.g. analogue and digital terrestrial television, digital terrestrial and satellite).

**SOPPs (Statements of Programme Policy)** The annual process by which independent PSB broadcasters produce statements of programme policy, and reviews of the previous year's output. This was introduced by the 2003 Communications Act and is a statutory requirement.

**Total viewing hours** The total hours of viewing by an average individual (4+) to a given programme genre in a year.