

# Factsheet 5 – Audience opinions

Ofcom

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This factsheet has been compiled by Ofcom and provides some background information to aid discussion at the 2016 Oxford Media Convention. It provides TV audience opinion data from Ofcom's Media tracker survey for 2014 and 2015 published in Ofcom's CMR 2015 Report and the Consumer Experience of 2014 Report.

# Market Context

The following results are drawn from Ofcom's PSB tracker research. Respondents were asked on a scale of 1-10 the importance of the individual PSB purposes and characteristics. They were then asked how they feel the PSBs deliver each of these elements. These questions were asked for each of the PSB channels they regularly view, and about all the PSB channels as a whole. The analysis of importance and delivery of the PSB purposes and characteristics shows the proportion of UK adults who score each statement 7/8/9/10 out of 10 (described below as 'high') on importance and on delivery, for all the PSB channels as a whole. Significant differences referenced below are between 2013 and 2014 or 2008 and 2014, measured at the 99% difference level.

# Market Context

## Key points

- Importance and satisfaction towards PSB purposes and characteristics are increasing.**  
 The extent to which PSB services deliver on their objectives remains high among audiences, and in many cases is increasing. Satisfaction with delivery of purposes and characteristics as a whole has risen: up 10pp from 69% of respondents in 2008 to 79% in 2014. However, it is noteworthy that our audience research indicates that younger and more tech-engaged consumers find it increasingly difficult to distinguish between PSB and non-PSB channels.
- The importance placed on many PSB purposes by audiences increased significantly between 2008 and 2014.**  
 Trustworthy news programmes (86%) and good quality regional news (79%) remain the most importance aspects of PSB provision to audiences. Our research also shows that audience satisfaction with the delivery of ‘interesting programmes about history, science or the arts’, programmes ‘showing different kinds of cultures within the UK’ and ‘high quality UK-made soaps/dramas’ increased significantly between 2008 and 2014.

Figure 1 – Importance and delivery of PSB purposes: 2008 - 2014

Purpose	Metric	2008	2009	2010	2011	2012	2013	2014	
Its news programmes are trustworthy	Importance	82%	82%	84%	81%	85%	87%	86%	↑
	Delivery	64%	62%	65%	62%	64%	65%	66%	
Its programmes help me understand what's going on in the world today	Importance	81%	78%	81%	78%	80%	79%	80%	
	Delivery	67%	66%	67%	61%	58%	63%	66%	
Its regional news programmes provide a wide range of good quality news about my area	Importance	75%	74%	76%	76%	78%	81%	79%	↑
	Delivery	53%	51%	50%	58%	60%	64%	66%	↑
It shows interesting programmes about history, sciences or the arts	Importance	68%	66%	70%	65%	68%	69%	67%	
	Delivery	48%	49%	52%	46%	47%	52%	53%	↑
It portrays my region/Scotland/Northern Ireland/Wales fairly to the rest of the UK	Importance	58%	59%	60%	63%	66%	68%	66%	↑
	Delivery	34%	34%	33%	43%	40%	44%	46%	↑
Its programmes show different kinds of cultures within the UK	Importance	64%	63%	66%	58%	65%	65%	66%	
	Delivery	47%	46%	48%	43%	43%	46%	51%	↑↑
It shows high quality soaps or dramas made in the UK	Importance	50%	52%	54%	53%	57%	58%	60%	↑
	Delivery	49%	50%	52%	47%	47%	51%	53%	↑
It provides a wide range of high quality and UK made programmes for children	Importance	88%	84%	87%	81%	80%	85%	81%	
	Delivery	59%	60%	60%	60%	61%	68%	70%	
It shows high quality comedy made in the UK*	Importance				Not asked			65%	
	Delivery				Not asked			50%	
It shows different parts of the UK including England, NI, Scotland and Wales*	Importance				Not asked			65%	
	Delivery				Not asked			49%	

Source: PSB Tracker, 2008-2014, UK adults aged 16+

Notes: base = all watching at least one channel asked about, regularly or occasionally; 2008 n=976, 2009 n=998, 2010 n=987, 2011 n=459, 2012 n=454, 2013 n=452, 2014 n=462; for children's question, base = all whose children regularly watch any of the PSB channels: BBC One, Channel 5, Cbeebies, CBBC; slightly amended wording of some statements since 2011: previous wording: 'Its (regional)/ news programmes for people in Scotland/Wales/NI provide a wide range of good quality news about my area/ Scotland/Wales/NI'; 'It portrays my region/Scotland/Northern Ireland/Wales well to the rest of the UK'; \*new statement added in 2014

# Market Context

## Key points

- **The importance of, and satisfaction with PSB characteristics vary.** The importance placed on PSB characteristics is more varied among audiences, compared to the importance placed on PSB purposes. The importance of ‘new programmes made in the UK’ increased significantly between 2008 and 2014 (now at 74%), while the importance of ‘programmes that make me stop and think’ has significantly decreased during the same period. Satisfaction with the delivery of ‘well-made high quality programmes’, ‘new programmes made in the UK’ and ‘programmes with new ideas and different approaches’ have all increased significantly between 2008 and 2014.

**Figure 2 – Importance and delivery of PSB characteristics: 2008-2014**

Purpose	Metric	2008	2009	2010	2011	2012	2013	2014	
It shows well made high quality programmes	<i>Importance</i>	81%	82%	84%	78%	82%	83%	82%	
	<i>Delivery</i>	58%	57%	62%	59%	59%	65%	67%	↑
It shows programmes I want to watch	<i>Importance</i>	78%	78%	79%	77%	78%	78%	na	
	<i>Delivery</i>	50%	49%	52%	52%	51%	56%		
It shows programmes that make me stop and think	<i>Importance</i>	74%	71%	76%	67%	70%	76%	70%	↓
	<i>Delivery</i>	49%	48%	50%	43%	44%	49%	na	
It shows new programmes made in the UK	<i>Importance</i>	68%	70%	73%	67%	68%	73%	74%	↑
	<i>Delivery</i>	41%	42%	45%	47%	46%	53%	53%	↑
It shows programmes with new ideas and different approaches	<i>Importance</i>	71%	69%	73%	65%	70%	72%	73%	
	<i>Delivery</i>	45%	44%	48%	44%	44%	47%	52%	↑↑
The style of programmes is different to what I'd expect to see on other channels*	<i>Importance</i>							67%	
	<i>Delivery</i>							49%	

↑ Significantly higher than 2013    ↑ Significantly higher than 2008  
 ↓ Significantly lower than 2013    ↓ Significantly lower than 2008

Source: PSB Tracker, 2008-2014, UK adults aged 16+

Notes: base = all watching at least one channel asked about, regularly or occasionally; slightly amended wording of some statements since 2011: previous wording: ‘It shows *enough* new programmes, made in the UK’; 2008 n=976, 2009 n=998, 2010 n=987, 2011 n=459, 2012 n=454, 2013 n=452, 2014 n=462; \* new statement added in 2014.

Ofcom’s Third Review of Public Service Broadcasting 20165 is available here: [http://stakeholders.ofcom.org.uk/binaries/consultations/psb-review-3/statement/PSB\\_Review\\_3\\_Statement.pdf](http://stakeholders.ofcom.org.uk/binaries/consultations/psb-review-3/statement/PSB_Review_3_Statement.pdf)

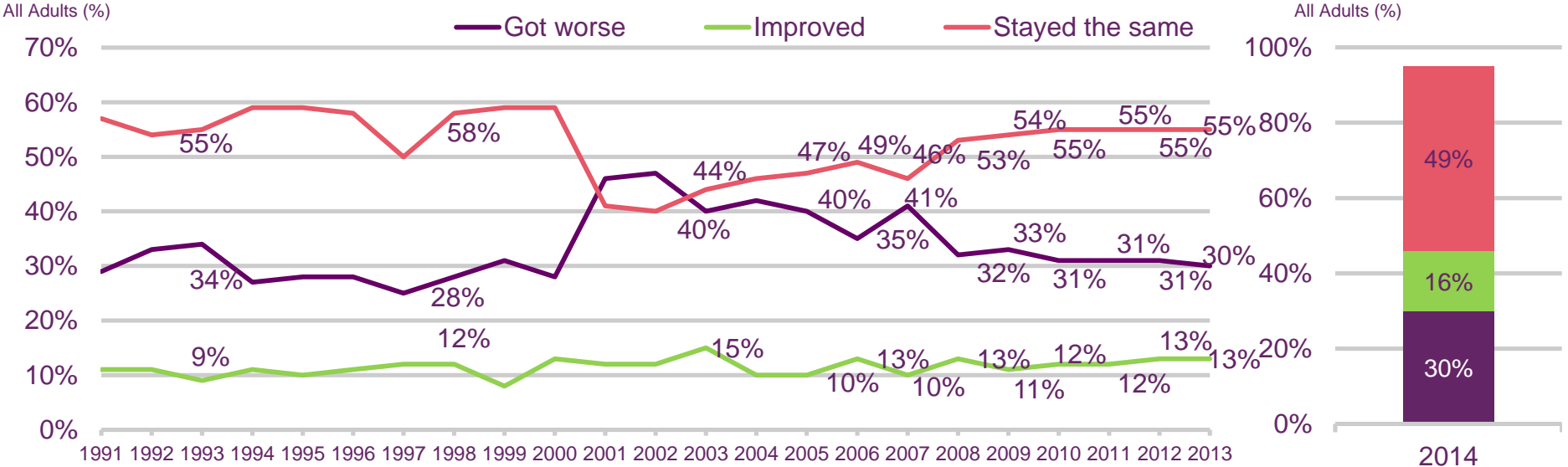
# Market Context



## Key points

- Quality of TV programmes:** According to Ofcom consumer research, almost half of UK adults (49%) who watch TV felt that programme quality had ‘stayed the same’ over the past year. Three in ten adults (30%) felt that TV programmes had ‘got worse’ in 2014. Older viewers were more likely than younger viewers to say that programming had worsened: 52% over 65s vs 18% 16-24s (significantly lower than over-65s). Among those who felt that TV programmes had worsened over the past 12 months, the most common reasons given were ‘more repeats’ (57%), followed by ‘lack of variety’ (43%). Around a third of viewers (32%) said that programmes has worsened due to a ‘general lack of quality’.

Figure 3 – Opinion on the quality of programmes over the last 12 months



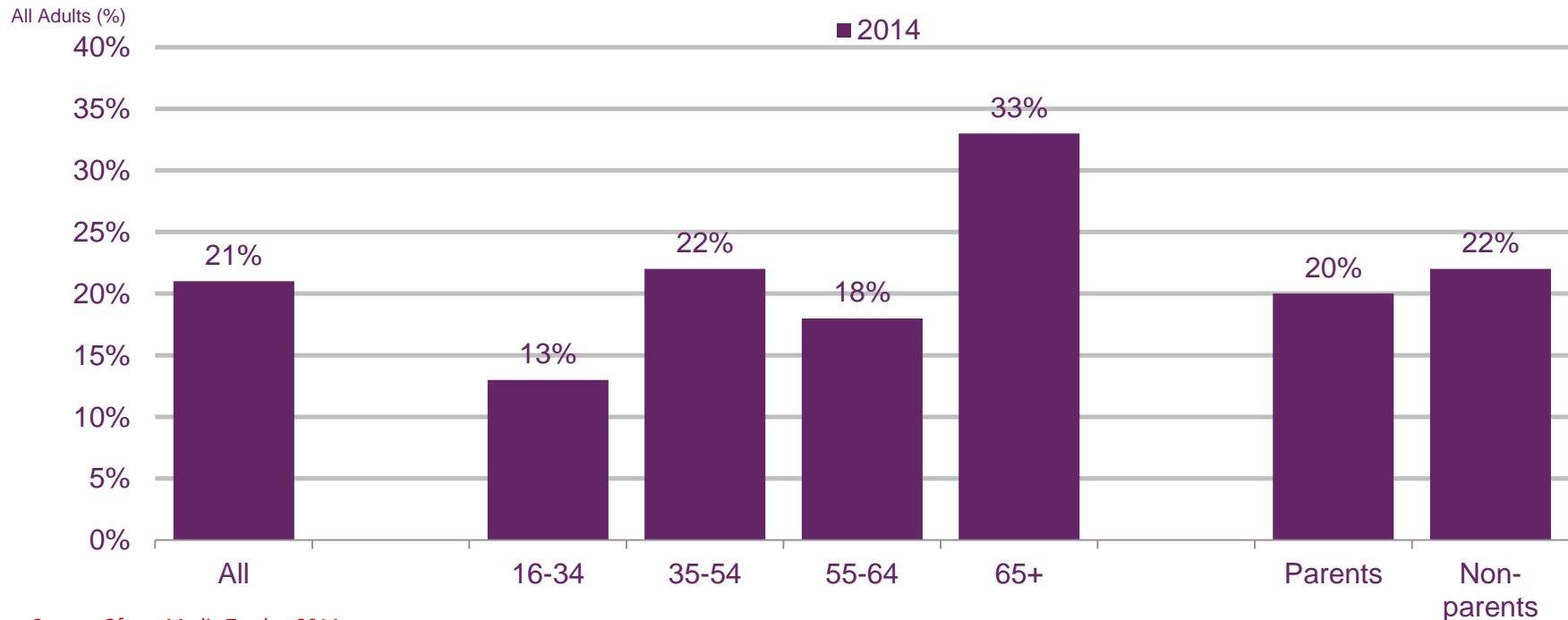
Source: Ofcom Media Tracker 2014

# Market Context

## Key points

- Levels of offence on TV:** Two in ten adult viewers (21%) said that they had been offended by something on TV in the past 12 months. As with quality of TV programming, the perception of offence varied by age, with younger viewers less likely to be offended than older viewers (13% 16-34s vs 33% over 65s). Among those offended in 2014, the majority found 'bad language' to be the most cause of offence, at 44%. An equal proportion of viewers were offended by 'violence' and 'sex/sexually explicit content', at 41% each.

Figure 4 – Overall % of respondents who have been offended by something on TV



Source: Ofcom Media Tracker 2014

Note: due to change in methodology 2014 data is incomparable with 2013 data

Ofcom's UK Audience Attitudes to the Broadcast Media 2015 report, which includes a summary of findings from our Media Tracker is available here:

[http://stakeholders.ofcom.org.uk/binaries/research/tv-research/attitudes-to-media/UK\\_audience\\_attitudes\\_towards\\_broadcast\\_media\\_2014.pdf](http://stakeholders.ofcom.org.uk/binaries/research/tv-research/attitudes-to-media/UK_audience_attitudes_towards_broadcast_media_2014.pdf)