

Quantitative Research to Inform the Preparation of the BBC Charter Review 2004

**Report of a Research Study Conducted for COI
Communications Research Unit on behalf of the Department
for Culture, Media and Sport**

MORI

Contents

Introduction	2
Background	2
Objectives	3
Methodology	3
Presentation & Interpretation of Results	4
Executive Summary	5
1. The BBC Today	5
2. Current awareness and usage of the BBC	5
3. Publicly funded services and functions	6
4. Commercial Services	6
5. Paying for the BBC	6
6. Future funding of the BBC	7
7. Organisation, Governance and Regulation	7
8. Accountability	8
Main Findings	9
The BBC Today	11
Satisfaction with the BBC	11
Image of the BBC	14
Image of the BBC in comparison with other broadcasters	14
Detailed image of the BBC	19
What people value about the BBC	21
What people dislike about the BBC	22
Current awareness and usage	24
Awareness and use of television channels	24
Watching BBC Channels	26
Types of programmes watched	27
Awareness and use of Radio Stations	29
Types of radio programmes listened to	31
Awareness of BBC non-TV/radio services and products	33
Changes in broadcasting over time	34

Publicly Funded Services and Functions	38
Comparative attitudes to different genres	38
Detailed image BBC programmes	40
Commercial activities	43
Paying for the BBC	45
The Television Licence Fee	45
Future Funding of the BBC	47
Organisation, Governance and Regulation	51
Accountability	55
Segmenting the population	60

Appendices

Statistical Reliability	
Social Class Definitions	
Sample Profile	
Viewing and Listening profile	
Perceptual Maps	
Pricing Analysis	
Identifying Typologies	
Ethnic Minority and Regional Summaries	
Marked-up Questionnaire	

Introduction

Background

The BBC was first established as a corporation by means of a Royal Charter in 1927. The first and subsequent charters have each run for a period of approximately ten years. Towards the end of the life of each charter, a review of the BBC is conducted, to ensure that the BBC is fulfilling its obligations. The current charter dates from 1996 and will run to the end of 2006.

The main themes of the DCMS consultation are as follows:

- ‘What do you value about the BBC?’
- ‘How should the BBC adapt to cope with changes in technology and culture?’
- ‘What do you think of the television, radio and online services the BBC provides?’
- ‘Should the BBC should run commercial services?’
- ‘How should we pay for the BBC?’
- ‘Is the BBC organised in the most effective and efficient way?’
- ‘How should the BBC be governed and regulated?’
- ‘How do we ensure that the BBC is properly accountable to the public and Parliament?’

As part of the review process the DCMS is involving the public in wide-ranging and informed debate. This piece of quantitative research amongst the public was conducted in order to measure their attitudes towards the BBC and to gain a picture of how the BBC performs in the context of the wider broadcasting environment.

Objectives

This piece of research is the third in a programme designed to gather the views of the UK viewing and listening public.

The objectives of the quantitative research are to quantify the findings from the qualitative and deliberative stages of research and to probe further into specific issues raised in the Charter Review consultation document. The main areas covered are:

- The BBC today, attitudes to the BBC – overall, and in comparison with other broadcasters
- Awareness and usage of television and radio broadcasters
- Publicly funded services and functions
- The BBC's commercial services
- How the BBC is paid for
- The organisation, infrastructure and governance of the BBC
- Accountability

Methodology

MORI carried out 2,068 interviews with a stratified sample across the UK, with a minimum of 250 interviews being conducted in each of five English regions, Scotland, Wales and Northern Ireland. Data were weighted by age, sex, work status and region during analysis in order to ensure the final sample is representative of the UK population as a whole.

In addition to the main sample, two boost samples were interviewed. These consisted of young people of Asian origin and black people in the 21-30 age group, two groups that had been identified in the qualitative research as having different views from the population as a whole. The total numbers of young people of Asian origin and young black people interviewed were each around 200.

The sample was picked using random-location quota sampling in Output Areas, using 2001 Census data to set quotas on age, sex, work status and ethnicity. Interviewing was conducted face-to-face using CAPI (Computer Aided Personal Interviewing) and took place between 10th May and 6th June 2004.

Details of the achieved and weighted sample can be found in the appendices.

Presentation & Interpretation of Results

This report comments on the topline results and on relevant differences between sub-groups in the analysis where there is a significant difference at the 95% Confidence Interval (see appendices for a guide on statistical reliability). Aggregate results for all questions can be found in the appended questionnaire, which is 'marked up' with the survey findings. Breakdowns of results by key sub-groups are available in the computer tabulations.

Where percentages do not add up to 100%, this may be due to computer rounding, the exclusion of "don't know" categories, or multiple answers. Throughout the volume an asterisk (*) denotes any value less than half a per cent.

Executive Summary

1. The BBC Today

- Seventy-five per cent are satisfied with the BBC, an improvement of five percentage points since the same question was asked in 1999. This compares very favourably with the other terrestrial channels: 61% are satisfied with ITV, 59% with Channel 4 and 51% with Five.
- The BBC has the strongest image of all four terrestrial broadcasters, especially for worldwide reputation, quality, accuracy and educational value. It is also seen as the most traditional of the four.
- However, other channels are seen to be equal to, and in some cases better than, the BBC in terms of independence, being entertaining, modern/cutting edge, multicultural and offering something for everyone. These findings are broadly in-line with the findings of the qualitative work, where the BBC was particularly seen to be less cutting-edge than other broadcasters.
- The public value the BBC's quality of programming, especially its news programmes, its reliability and its lack of advertising. These qualities were also valued by participants in the qualitative and deliberative research stages.
- The vast majority think that the BBC has an important role to play in keeping the public informed about what is going on in the UK and agree that they would miss the BBC if it wasn't there. This confirms the conclusion of the deliberative stage that the majority would like to see the BBC's existence continue.

2. Current awareness and usage of the BBC

- There is a high level of awareness of the principal BBC television and radio channels (BBC One, BBC Two, Radio 1, Radio 2 and Radio 4). BBC Three and BBC Four are the most-mentioned digital channels, even amongst those who do not have access to digital television.
- Films, news, comedy, drama, documentaries and soap operas are the most popular types of programmes watched and people would on the whole like to see more of such programmes.
- Reality television, lifestyle shows and games shows are less popular and some people think there are too many such programmes.
- Music programmes (pop/rock, classical and other) are the most popular amongst radio listeners, with news also having high levels of listeners.

- Overall opinion is split over whether television programmes in general, and those produced by the BBC, have got better or worse over time. The qualitative and deliberative research stages identified feelings that the quality of television programmes, including those made by the BBC, had declined over recent years. In the current research this was found to be more true for older people and less so for younger people.
- The quality of radio programmes in general and those produced by the BBC are seen by the majority to have either improved or stayed the same. Very few people think that they have got worse over time.

3. Publicly funded services and functions

- The BBC is seen as best for news, documentaries and features about people's personal interests. It is also rated highly for its children's programmes and cultural diversity.
- The BBC and ITV are seen by similar proportions to be best for entertainment and regional programmes. However Sky is thought to be best for sport by more people than think any of the terrestrial channels best for this type of programme. Almost one-third of the population thinks that the BBC has poor sports coverage. This confirmed the findings from the qualitative stage, where the BBC's sports coverage was seen to have lost out to Sky and ITV, who are thought to have superior buying power to the BBC.

4. Commercial Services

- As was found in both the qualitative and deliberative stages of research, there are very high levels of support for the BBC to continue to sell its programmes to other broadcasters and to continue to sell books, DVDs, videos etc. to the public. These activities should make as much money as possible for the BBC.
- Around half would like to see the funds raised in this manner reinvested into programme making and 30% would like the funds to be used to reduce the licence fee. A fifth think the money raised should be partly reinvested in programme making and partly used to reduce the licence fee.

5. Paying for the BBC

- Findings from the quantitative research are in line with the findings from the qualitative and deliberative stages. Although some people view the licence fee as providing good value for money, others do not. There is also some degree of resentment at having to pay the fee at all, especially amongst those who do not watch the BBC as much as they watch other channels.

- Of those who are able to give an estimate of the current licence fee (a quarter are unable to) the majority are roughly correct - the mean figure given by this group being £124, just £3 higher than the actual cost. Forty-four per cent think the current licence fee of £121 represents good value for money, although 35% disagree.
- The money raised by the licence fee is thought to be used to fund BBC television programmes, and to a lesser extent to pay for BBC staff costs and radio programmes.

6. Future funding of the BBC

- There is no clear-cut majority decision on how best to pay for the BBC. The deliberative and qualitative research identified the many factors that people take into account when trying to decide which method of funding would be best for the BBC. This study confirms that opinions are divided and that any new method of funding suggested would have support from some people and be opposed by others.
- The licence fee remains the most popular method of funding, but only for a third of the public. A quarter thinks the BBC should be funded by advertising or through sponsorship of programmes.
- These findings confirm those of the qualitative and deliberative stages, where views on future funding of the BBC were also mixed. However, this research shows that there is an equal amount of support for funding from advertising as for funding from sponsorship, whereas participants in the qualitative stage were more likely to favour sponsorship.
- However, there are concerns about the implications of funding through advertising or sponsorship. People agree that there may be a negative impact on the quality of programmes, the enjoyment of programmes and the independence of the BBC. Similar concerns were also voiced by participants in the qualitative and deliberative stages.
- There is very little support for the BBC to be funded by either subscription or through general taxation.
- Although a majority support the principle that people ought to be able to choose whether to pay to receive BBC services, 29% disagree. There is some degree of concern that if the BBC were to be funded by subscription, this would not be fair on those who were unable to pay.

7. Organisation, Governance and Regulation

- As was found in both the qualitative and deliberative stages of research, the public has very little knowledge of how the BBC is run.

There is some degree of feeling that the BBC is, or ought to be, regulated but knowledge about whose responsibility this should be is low.

- Only a few (14%) claim to know much about how the BBC is run and only half would know where to look for such information – primarily the Internet and the BBC itself.
- Similarly, most do not know who is responsible for the day-to day running of the BBC, although a third do mention the Director-General or the Management Board.
- The BBC governors, part of whose role is to regulate the BBC on behalf of the public, are seen to have the most influence over the services the BBC provides. Around half think the Government and listeners and viewers have some influence but around two in five do not.
- When specifically asked, just under half think that Ofcom has some degree of influence over the BBC but a quarter are unable to say, indicating a low level of awareness of the role of Ofcom. The qualitative research also indicated that few people are aware of Ofcom and the role it plays in broadcasting regulation.

8. Accountability

- Almost half do not know to whom the BBC is accountable. When prompted, the public, the BBC itself and Ofcom are most likely to be thought to be the people or organisations to which the BBC should be accountable. As was found in the deliberative research, very few people think that the BBC ought to be accountable to either Parliament or the Government.
- Over half think the BBC takes at least some notice of the opinions of its listeners and viewers, although a third disagree with this.
- Similarly, one in three do not think that the BBC takes much notice of complaints made by its listeners and viewers.
- Surveys and comments and complaints from viewers and listeners are seen as the best ways for the BBC to decide what sort of programmes to show.

Main Findings

- Levels of satisfaction with the BBC are high, both overall and in comparison with the other three terrestrial broadcasters. The Corporation and its services have a strong image.
- The BBC is valued for producing high quality news programmes, documentaries, entertainment and regional programmes. However, there are some sections of the population who are less satisfied with the services provided by the BBC. The BBC does not perform so well on its sports coverage as it does in other areas.
- Opinions are divided on whether £121 for a television licence fee represents good value for money although more people think this is good value for money than think it poor value for money.
- The proportions of people thinking that programmes provided by broadcasters in general and those provided by the BBC have got better, stayed the same or got worse over the years are almost equal. Those who think programmes have got worse tend to be older.
- There is almost unanimous support for the BBC to continue to sell its programmes and products to other broadcasters and to the public and to raise as much money as it can from these activities. This is despite only half of the population ever buying or using other BBC services, such as BBC books and the BBC's Internet service. There is slightly more support for the money raised from these activities to be re-invested in programme making than to reduce the licence fee.
- There is no conclusive answer to the issue of how the BBC should be funded in the future. Although the continuance of the television licence fee has the highest level of support of all the options considered, many people are also open to other ideas for funding, such as advertising, sponsorship and subscription. However, there is clear concern amongst some people that the quality and enjoyment of programmes from the BBC would suffer if the licence fee were ever to be replaced by funding from other sources. In particular, there are some strong feelings against advertising as a funding option.
- The public has a low level of knowledge about how the BBC is run and who is responsible for ensuring the quality of the programmes produced by the BBC are of a good standard. There is a general feeling that the BBC ought to be self-governing but people also recognise the need for an independent regulator.

- Opinions on whether or not the BBC takes notice of the views and complaints of its viewers and listeners are divided, however more people think the BBC does take notice than think it does not. Although there is support from the public for the BBC to take notice of their views via public meetings, surveys, comments and complaints, there is less enthusiasm to be personally involved in each of these activities.

©MORI/22225

Greg Smith

Alison Bigsby

Gideon Skinner

The BBC Today

Satisfaction with the BBC

The BBC is the broadcaster that respondents are most satisfied with. In our survey, 75% are satisfied with the BBC. This represents a rise in satisfaction of 5% since the same question was asked as part of the Davies Review research in 1999¹.

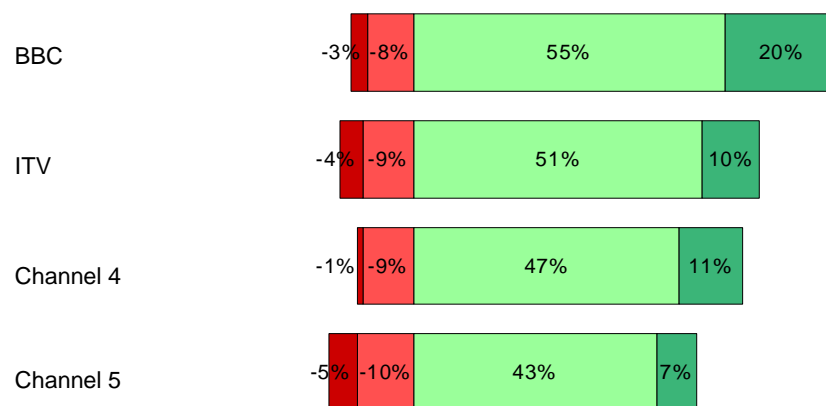
Groups which are more satisfied than average are those who watch the BBC for half or more of their viewing time (83% satisfied), those aged 16-30 (80% satisfied), those living in Wales (81% satisfied) and those living in the South East (80% satisfied). Groups more likely to be dissatisfied with the BBC are those in the North East (17% dissatisfied) and Scotland (16% dissatisfied). Satisfaction levels are almost equal across all social grades, and having access to multi-channel television has a neutral effect on the level of satisfaction with the BBC, with 75% of each group being satisfied and 12% dissatisfied.

All respondents were asked to give their overall satisfaction levels with the BBC. The sample was then split and approximately one third were asked about each of the other three TV broadcasters. All those asked about Five were able to receive this channel.

Satisfaction with Broadcasters

Q Overall, how satisfied or dissatisfied are you with . . . ?

■ % Very dissatisfied ■ % Fairly dissatisfied ■ % Fairly satisfied ■ % Very satisfied



Base: All respondents (2,068)

Source: MORI

¹ *Attitude Survey on behalf of the BBC Funding Review*, MORI study conducted on behalf of the DCMS, April 1999. Face to face survey with a sample of 1000.

In comparison with the other three terrestrial broadcasters, satisfaction levels are highest for the BBC. Levels of *dissatisfaction* with any channel are fairly low, the highest level of dissatisfaction being 15% with Five.

Satisfaction with broadcasters									
	Total	16-30	31-45	46-60	61+	AB	C1	C2	DE
BBC									
<i>Unweighted base</i>	2068	402	604	501	561	461	588	431	581
	%	%	%	%	%	%	%	%	%
Satisfied	75	80	71	74	76	77	76	75	73
Dissatisfied	12	5	13	15	14	12	10	11	13
ITV									
<i>Unweighted base</i>	690	127	197	164	202	145	190	162	191
	%	%	%	%	%	%	%	%	%
Satisfied	61	66	62	58	58	53	54	67	70
Dissatisfied	13	12	11	14	15	21	17	8	5
Channel 4									
<i>Unweighted base</i>	813	159	234	203	217	186	235	157	230
	%	%	%	%	%	%	%	%	%
Satisfied	59	71	56	55	55	53	65	55	61
Dissatisfied	10	7	9	12	13	10	9	12	10
Five									
<i>Unweighted base</i>	565	116	173	134	142	130	163	112	160
	%	%	%	%	%	%	%	%	%
Satisfied	51	48	50	50	55	40	47	55	61
Dissatisfied	15	20	15	12	13	20	20	11	8

Source: MORI

Satisfaction with broadcasters									
	Total	North West	North East	Mid-Lands	South East	South West	Scotland	Wales	Northern Ireland
<i>Unweighted base</i>	2068	251	265	258	257	259	268	251	259
	%	%	%	%	%	%	%	%	%
BBC									
Satisfied	75	74	68	74	80	75	72	81	78
Dissatisfied	12	9	17	12	10	13	16	7	9
ITV									
<i>Unweighted base</i>	690	80	88	86	92	93	76	92	83
	%	%	%	%	%	%	%	%	%
Satisfied	61	69	68	55	55	58	69	69	84
Dissatisfied	13	9	11	12	17	10	13	15	4
Channel 4									
<i>Unweighted base</i>	813	85	97	101	109	106	111	79	125
	%	%	%	%	%	%	%	%	%
Satisfied	59	60	49	56	64	61	64	52	59
Dissatisfied	10	10	17	13	7	8	11	11	5
Five									
<i>Unweighted base</i>	565	86	80	71	56	60	81	80	51
	%	%	%	%	%	%	%	%	%
Satisfied	51	41	54	42	58	52	68	48	46
Dissatisfied	15	21	17	14	16	11	10	11	14

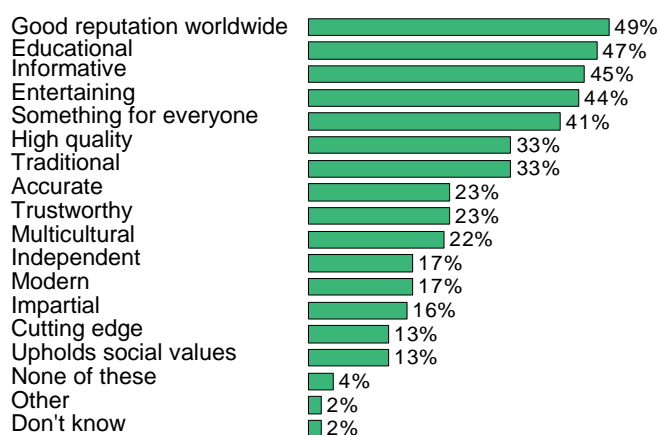
Source: MORI

Image of the BBC

Overall, the BBC has a strong image. The BBC is seen to have a good reputation worldwide, to be educational, informative, entertaining and to provide something for everyone. It is also described as high quality, traditional, accurate, trustworthy and multi-cultural. It is relatively less likely to be seen as cutting-edge, impartial, modern or independent.

Image of the BBC – overall

Q Which of the descriptions on this card do you think apply to the BBC?



Base: All respondents (2,068)

Source: MORI

Those in the ABC1 social classes tend to think that more of these statements apply to the BBC than do C2DEs. Those who watch the BBC for over half their television viewing time, those who are satisfied with the BBC and those in the South East also mention higher than average numbers of attributes.

Those living in rural areas are more likely to think that the BBC is informative (54%) but less likely to say it is multi-cultural (14%). People with access to multi-channel television are more likely to say the BBC is traditional (35%) whereas those with terrestrial access only are more likely to say the BBC is informative (50%).

Image of the BBC in comparison with other broadcasters

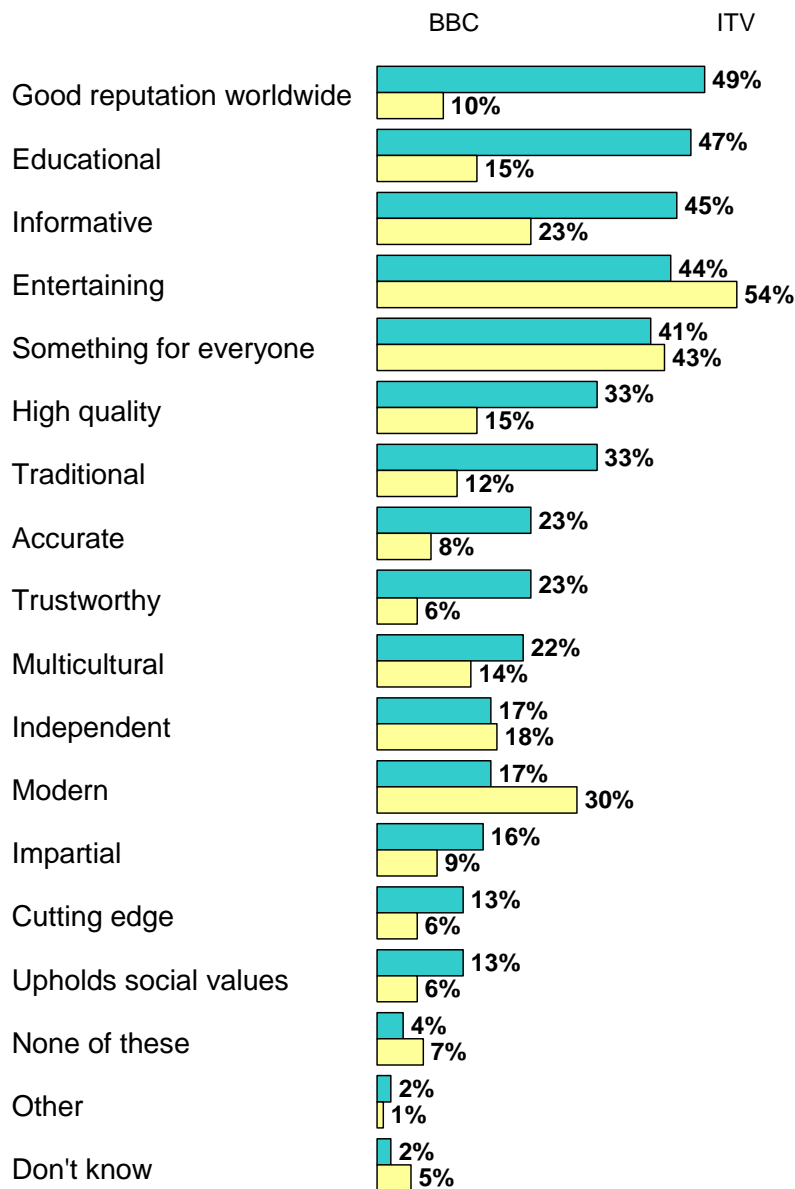
ITV

When compared with ITV, the BBC is rated higher on all attributes apart from being modern (almost twice as many think ITV is modern than think this of the BBC), being entertaining, and to a lesser extent providing something for everyone and being independent.

ITV is rated much lower than the BBC on having a good reputation worldwide, being educational, informative, trustworthy, accurate, traditional and high quality. It is also rated lower than the BBC on upholding social values, being cutting-edge and being impartial.

Image of the BBC – in comparison with ITV

Q *Now thinking about ITV, which of the descriptions do you think apply to ITV?*



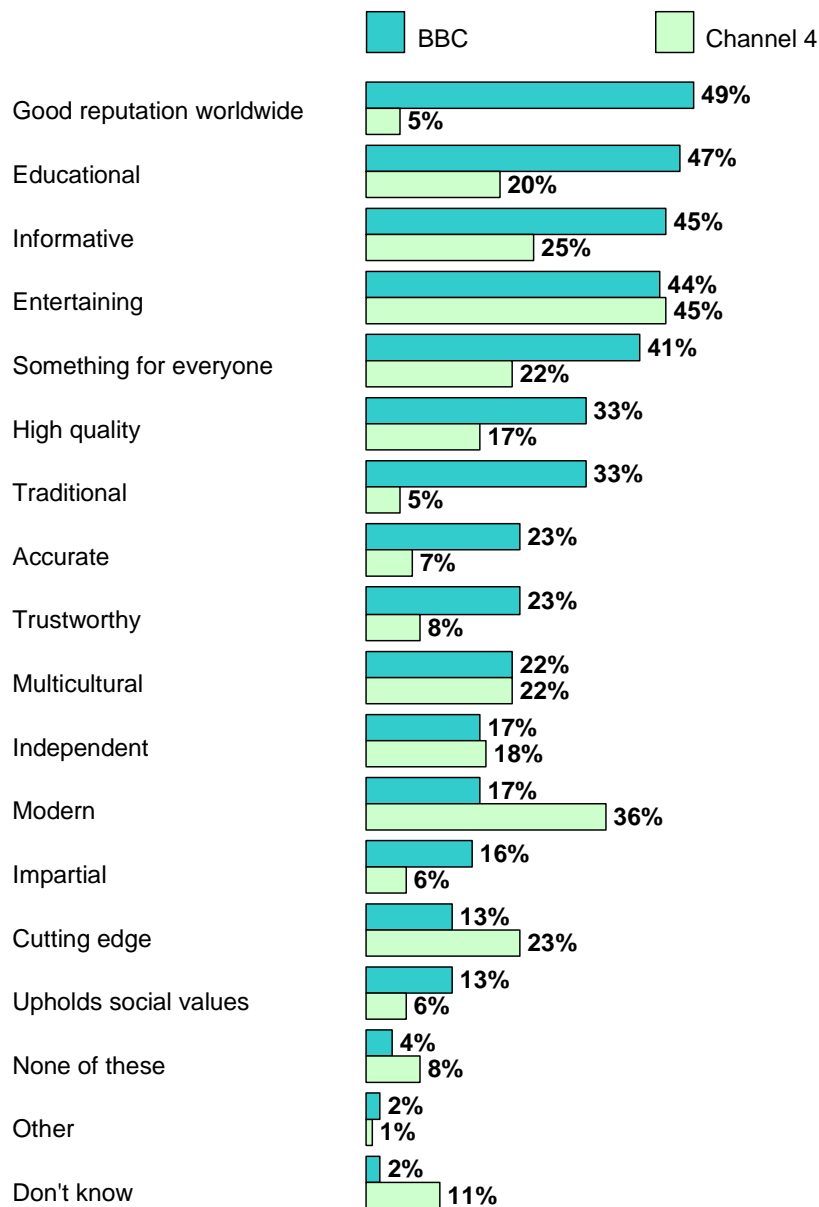
Base: All Respondents (2,068); ITV (690)

Channel 4

Channel 4's main strengths are being entertaining, on which it is seen to be very similar to the BBC, and being modern, an attribute which twice as many people apply to Channel 4 than do to the BBC. Channel 4 is also seen to be more cutting-edge than the BBC.

Image of the BBC – in comparison with Channel 4

Q Now thinking about Channel 4, which of the descriptions do you think apply to Channel 4?



Base: All Respondents (2,068); Channel 4 (813)

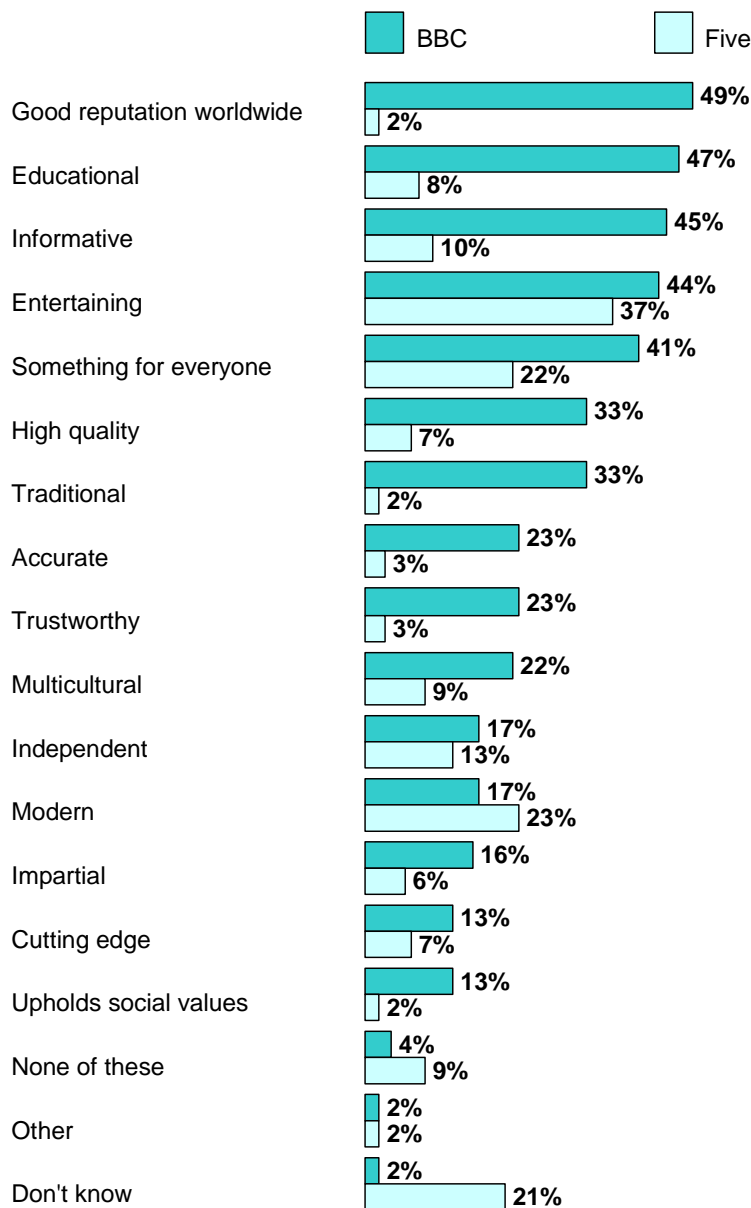
Source: MORI

Five

Respondents found it more difficult to be able to say any of the attributes apply to Five, with 21% of the population being unable to say any attribute applied to this channel and a further 9% saying none of the attributes applied. Three attributes stand out as particularly applying to Five: modern, on which it is rated more highly than the BBC, entertaining, on which it is rated slightly lower than the BBC and providing something for everyone.

Image of the BBC – in comparison with Five

Q Now thinking about Channel 5, which of the descriptions do you think apply to Channel 5?



Base: All Respondents (2,068); Five (565)

Source: MORI

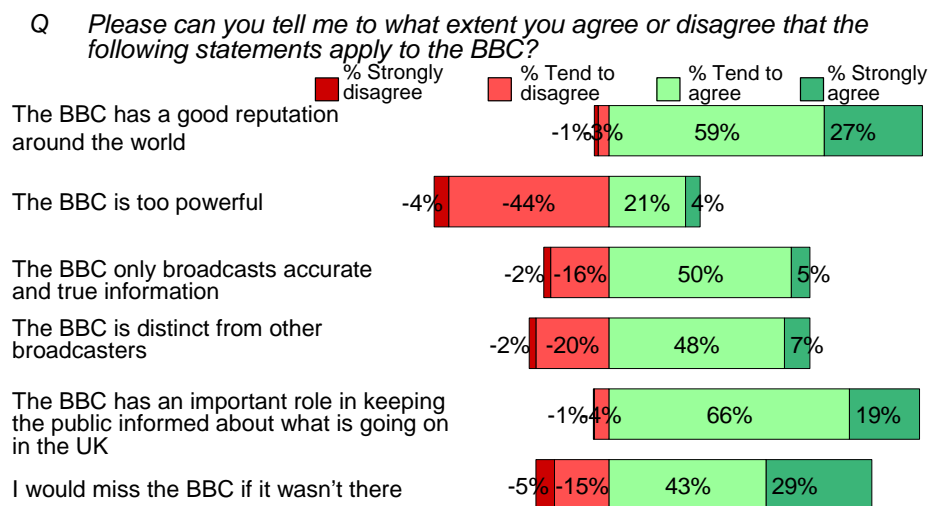
A perceptual map, illustrating the relative strengths of the four channels can be found in the appendices.

Detailed image of the BBC

As noted above, there is a high level of agreement that the BBC has a good reputation around the world. The BBC is also thought by the majority to have an important role in keeping the public informed about what is going on in the UK.

Nearly three quarters of the population say they would miss the BBC if it was not there. Just over half think that the BBC only broadcasts true and accurate information, and say that the BBC is distinct from other broadcasters. However, there is a more critical minority, with around a fifth of the population disagreeing with each of these statements.

Detailed image of the BBC



Base: All respondents (2,068)

Source: MORI

Older people (61% of those aged 46+) and ABC1s (61% of this group) are more likely than average (55%) to agree **the BBC is distinct from other broadcasters**, whereas lower proportions of those in the North East (43%) and Northern Ireland (44%) agree. A higher proportion (26%) of those with access to multi-channel television disagree that the BBC is distinct from other broadcasters than do those with terrestrial access only (17% disagree).

The groups most likely to agree they **would miss the BBC if it wasn't there** are people aged 61+ (81% agree), ABC1s (79% agree) and those living in Wales (78% agree). The groups least likely to miss the BBC if it wasn't there are those in the North East (62% agree), young black people (42% agree), and to a lesser extent young people of Asian origin (63% agree). Those with access to multi-

channel television are less likely (69% agree) to agree they would miss the BBC than are those with terrestrial access only (76% agree).

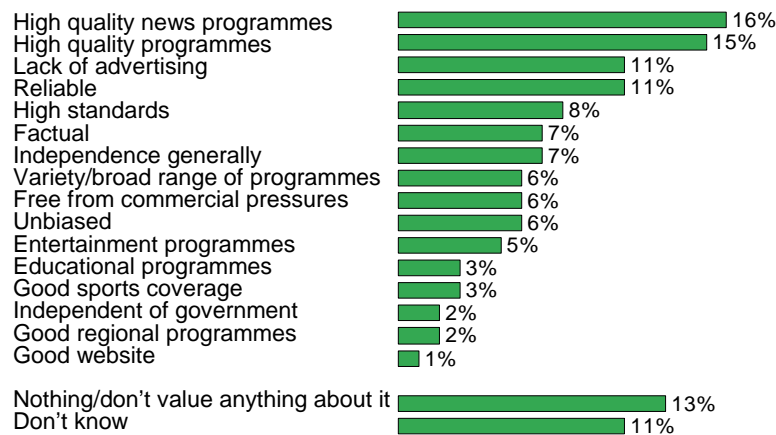
Almost twice as many (48% of the population) disagree that **the BBC is too powerful**, than agree (25%) with this statement. Those who watch the BBC for less than half of their viewing time are more likely to agree the BBC is too powerful (31% agree) than are those who watch the BBC for more than half of their viewing time (20% agree). People with access to multi-channel television are more likely to agree the BBC is too powerful (27% agree) whereas those with terrestrial access only are more likely than average to disagree (51% disagree). Those in Wales are the most likely to disagree that the BBC is too powerful (59% disagree). Other groups more likely to disagree that the BBC is too powerful are ABs (57%), those aged 61+ (56%), people who watch the BBC for half or more of their viewing time (53%) and people who are satisfied with the BBC (53%).

What people value about the BBC

Respondents were asked what they value most about the BBC. In order to obtain genuinely top-of mind opinions, responses to this question were spontaneous and were not taken from a prepared list of possible responses.

Spontaneous good points

Q *Thinking about the BBC in general, what do you personally value most about the BBC?*



Base: All respondents (2,068)

Source: MORI

High quality programmes, and news programmes in particular, receive the highest level of spontaneous mentions. This is followed by the lack of advertising and the reliability of the BBC. Light viewers, (21% of this group) and those with terrestrial television only (19%) are more likely than other groups to value high quality news programmes. Those in Northern Ireland are the most likely to value good regional programmes (mentioned by 10%) and also more likely than average to value high quality news programmes (mentioned by 17%) and lack of advertising (mentioned by 15%).

Those in the South East are the most likely to value high quality programmes (21%) and independence generally (15%). People in the South West are more likely to say the BBC is factual (10%) and unbiased (9%). Those in the North East value the lack of advertising (17%). People in Scotland are the least likely to value anything about the BBC, 23% saying there is nothing they value about the BBC, compared with 13% of the population as a whole. Those in the North East (19% of this group) and those in the North West (18% of these people) are also more likely than average to say there is nothing they value about the BBC.

Young black people (21% of this group) and young people of Asian origin (23% of these people) are more likely to mention high quality programmes in general and young black people also value high standards (13%), entertainment (12%), educational programmes (10%) and sports programmes (7%).

What people dislike about the BBC

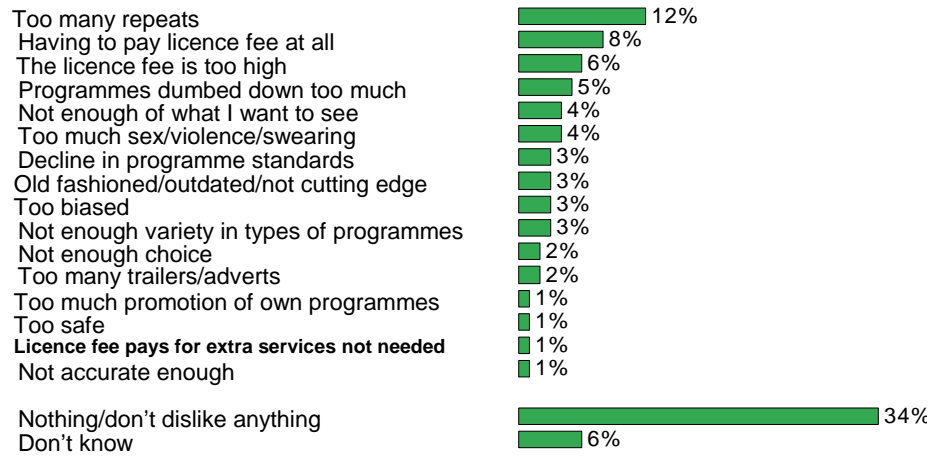
Just over one third of the population do not have any spontaneous criticisms of the BBC. The main two criticisms concern the licence fee – either having to pay it at all or it being too high, and “too many repeats”. Those in the DE social classes and Northern Ireland, and to a lesser extent those in Scotland, are most likely to mention the licence fee either being too high or having to pay it at all and those in Northern Ireland are also critical of repeats (mentioned by 25%) and sex, swearing and violence (mentioned by 9%).

Groups amongst whom there were higher than average mentions that programmes produced by the BBC have “dumbed down” too much are those dissatisfied with the BBC (12% of these people), ABs (10% of this group), light viewers (10% of these people) and those aged 46-60 (7% of this group). Those in Scotland and Wales (7% of each of these groups) are more likely to say the BBC does not provide enough choice.

Young people of Asian origin (10% of this group) and young black people (8% of this group) are the most likely to mention that the BBC does not show enough of the type of programmes they want to watch. These two groups are also the most likely to say the BBC does not provide enough choice (9% of young black people and 5% of young people of Asian origin). Younger people and people of ethnic origin of all ages in the population as a whole are no more likely than average to think the BBC does not show enough of the type of programmes they want to see or to think the BBC does not provide enough choice.

Spontaneous criticisms

Q What do you dislike most about the BBC?



Base: All respondents (2,068)

Source: MORI

Current awareness and usage

This is not a listening and viewing survey. However a series of questions were asked about access and consumption of television and radio, to ensure the sample was broadly representative, and to be used for analysis purposes. These questions also give some indication of the different levels of awareness of different channels (and other services), and the types of television and radio programmes people would like to see to see given more (and less) emphasis.

Details of access to and consumption of television, radio and Internet can be found in the appendices.

Awareness and use of television channels

When asked which television channels respondents could think of without any prompting, BBC One has almost universal spontaneous awareness at 92%, closely followed by BBC Two (81%) and ITV1 (79%). Two-thirds spontaneously mention Channel 4 and 57% mention Five. As would be expected, those with access to multi-channel television (84% of these people) are more likely than those who only have terrestrial access (37% of this group), to mention digital channels. Awareness of the BBC's digital channels BBC Three and BBC Four is relatively high amongst those with access to terrestrial channels only, suggesting that awareness has been created by the promotion of these two channels on the main BBC terrestrial channels.

Nine in ten (91%) of the population ever watch BBC One, 77% watch BBC Two, 78% ITV1, 68% Channel 4 and 52% Five. With the exception of Five, the main terrestrial channels are more likely to be watched by those without access to multi-channel television.

The higher up the social scale and the older that people are, the more likely they are to watch BBC One and BBC Two. In addition, young black people are the least likely group to watch BBC One (72%) and young people of Asian origin the least likely to watch BBC Two (37%), with young black people second least likely to watch this channel (44%).

Awareness and use of television channels

	Total	16-30	31-45	46-60	61+	AB	C1	C2	DE
<i>Unweighted base (all who watch television):</i>	2,045 %	398 %	594 %	498 %	555 %	452 %	581 %	429 %	576 %
Aware of:									
BBC One	92	90	91	93	94	93	93	92	90
BBC Two	81	73	79	84	86	86	83	79	73
ITV1	79	76	81	80	79	79	81	79	77
Channel 4	66	66	67	69	63	69	67	62	67
Five	57	59	59	53	56	53	57	61	57
Any cable/satellite	65	72	75	64	49	67	72	69	53
Ever watch:									
BBC One	91	89	90	91	94	93	92	90	88
BBC Two	77	70	76	79	83	87	79	73	67
ITV1	78	76	79	77	82	75	80	80	78
Channel 4	68	68	70	67	67	74	72	60	64
Five	52	51	58	49	52	53	54	48	54
Any cable/satellite	60	70	67	60	45	62	63	63	54
Watch most often:									
BBC One	31	25	27	33	40	37	35	27	23
BBC Two	6	3	5	8	7	12	5	3	2
ITV1	24	23	26	22	25	13	21	33	32
Channel 4	7	12	5	6	4	9	6	5	6
Five	3	4	2	4	3	2	3	2	6
Any cable/satellite	16	18	22	15	8	14	15	18	17

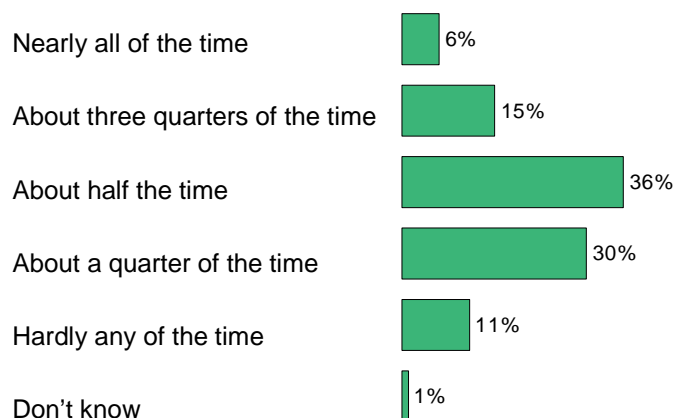
Source: MORI

Watching BBC Channels

Amongst those who ever watch any BBC channels, 58% watch the BBC for at least half the time they spend watching television and a further 30% watch the BBC for about a quarter of their television viewing time. Light television viewers tend to spend a higher proportion of their viewing time watching the BBC than do medium or heavy viewers – 66% of light viewers watch the BBC for half or more of their television viewing time compared with 55% of heavy viewers.

Relative weight of watching BBC TV

Q *Thinking about the total amount of time you spend watching television in an average week, approximately how much of that time would you say you spend watching a BBC channel?*



Base: All who watch at least one BBC channel (1,931)

Source: MORI

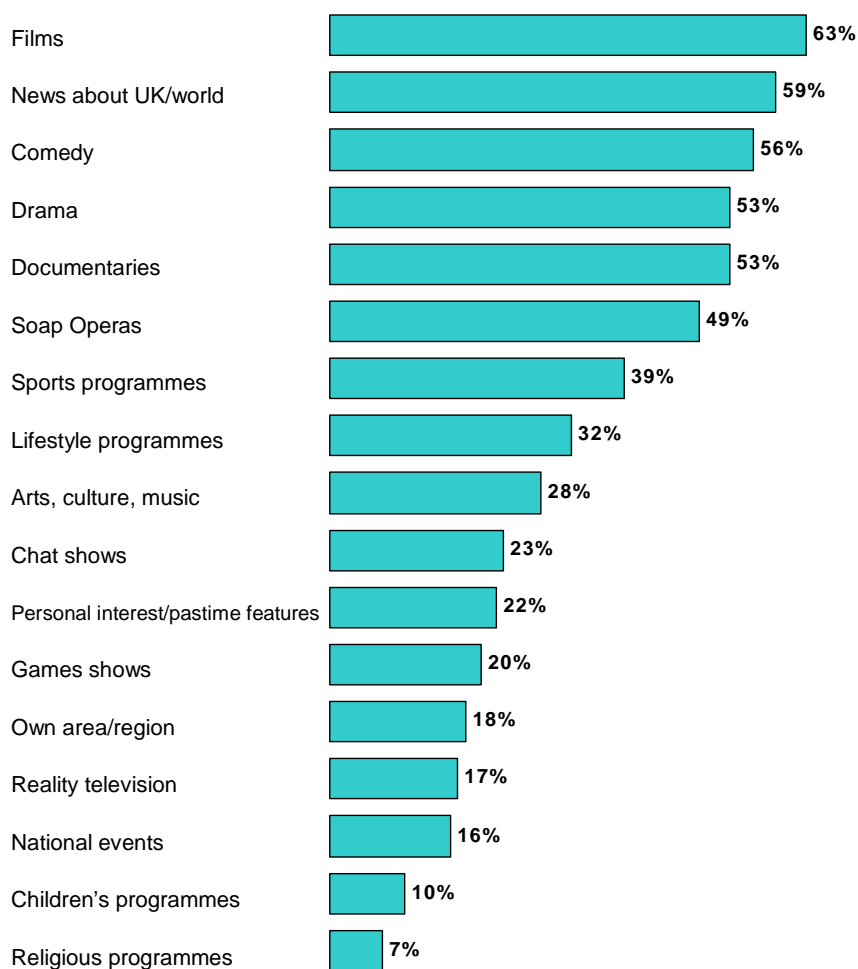
Those living in the South East, those in the AB social group and older people, spend higher than average proportions of their viewing time watching the BBC, with 69% of those in the South East, 66% of ABs, and 64% of those aged 46+ watching the BBC for half or more of their viewing time.

Types of programmes watched

The most popular types of programmes are films, news, comedy, drama, documentaries and soap operas. Older people are the most likely to watch arts, drama, news, national events, games shows, chat shows, religious programmes and sports whereas younger people are more likely to watch films, comedy, reality TV and soap operas.

Types of programmes watched

Q Thinking about when you watch television, which of these types of programmes, if any, do you personally watch nowadays?



Base: All who watch television (2,045)

Source: MORI

Those in the AB social group are more likely to watch arts (42%) and national events (22%) than is the population as whole. They are less likely to watch chat shows (17%) or soap operas (37%). ABC1s are more likely than C2DEs to watch drama (58% of ABC1s, 46% of C2DEs), programmes about their own personal interests (26% of ABC1s, 16% of C2DEs), documentaries (59% of ABC1s, 46% of C2DEs) and news (67% of ABC1s, 50% of C2DEs). C2DE's are more likely than ABC1s to watch games shows (26% of C2DEs, 15% of ABC1s).

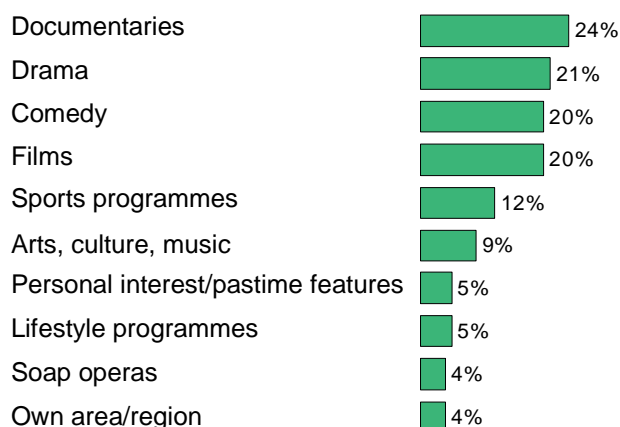
Some types of programmes have more appeal to some age groups than to others. Those aged 16 to 30 particularly like to watch films (75%), comedy (71%), soap operas (55%) and reality television (28%). People aged 31-45 are more likely than average to mention lifestyle (40%) and reality programmes (23%). Those aged 46-60 are more likely to watch news programmes (69%), documentaries (62%), programmes featuring their personal interests (26%) and programmes about their own local area (23%). Those aged 61+ watch a wider range of programmes than people younger than this. They are particularly likely to watch news programmes (71%), drama (59%), sports (45%), arts (32%), National events (32%), chat shows (27%), games shows (27%), information about their local area (26%) and religious programmes (14%).

Young people of Asian origin are more likely than average (14% compared with 7%) to watch religious programmes.

When asked what types of programmes they would like to see more of, this generally falls in line with the types of programmes people are watching already.

Types of programmes would like to see more of

Q Which types of programmes, if any, would you like to see more of?



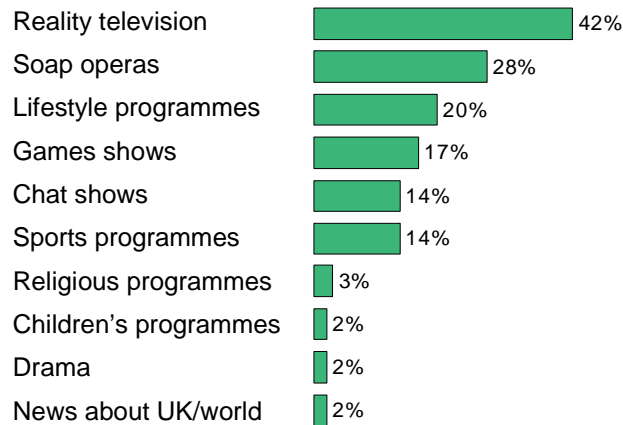
Base: All who watch television (2,045)

Source: MORI

Just over two-fifths of the population think that there are too many reality TV shows. Soap operas, lifestyle programmes games shows, chat shows and sports programmes are also mentioned as types of programmes there are currently too many of.

Types of programmes there are too many of

Q Which types of programmes, if any, do you think there are too many of?



Base: All who watch television (2,045)

Source: MORI

Awareness and use of Radio Stations

Just over three quarters of the population (76%) ever listens to the radio. The percentages in the following section are based on those who ever listen to the radio.

When asked what radio stations they can think of, around half of all radio listeners mention each of BBC Radio 1 (51%), BBC Radio 2 (50%) and local commercial stations (48%). One third (28%) mention national commercial stations and BBC Radio 4 is mentioned by two fifths (38%) of the sample.

Young black people (35% of this group) are the most likely group to mention national commercial stations. Thirty-eight per cent of young Asian radio listeners mention BBC Asian Network, compared with 1% of radio listeners as a whole. Almost half (48%) of those in Northern Ireland mention Radio Ulster, 26% of those in Scotland mention Radio Scotland and 26% of those in Wales mention Radio Wales.

The most popular radio stations listened to are local commercial stations, listened to by 46%, BBC Radio 2 (34%), BBC Radio 1 (27%), BBC Radio 4 (27%), national commercial stations (23%), BBC local radio (15%) and BBC Radio Five Live (13%).

BBC Radio 2 has the widest range of listeners and is equally popular across all ages from 31 upwards and social classes AB, C1 and C2. BBC Radio 1 is most popular amongst 16-30s with 57% ever listening to this station. A slightly higher proportion (38%) of young people of Asian origin radio listeners listen to BBC Asian Network than to BBC Radio 1 (32%). One tenth of young black people who listen to the radio listen to 1 Xtra, compared with 1% of radio listeners as a whole. The popularity of BBC Radio 4 increases with age and social class. Those aged 61+ (25% of these people) are the group most likely to listen to BBC local radio.

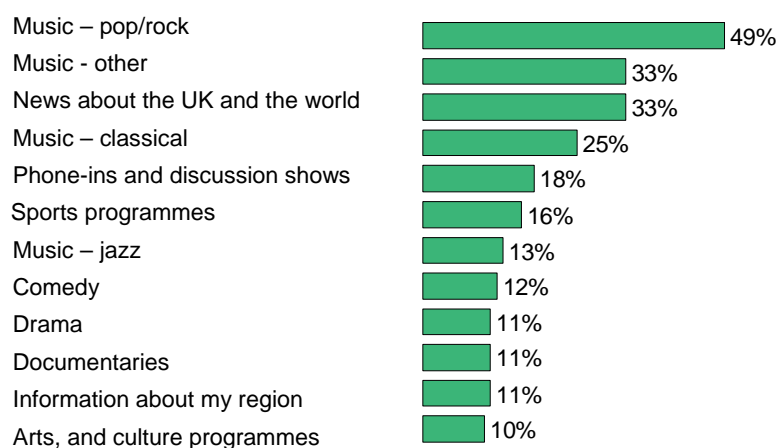
Awareness and use of radio stations									
	Total	16-30	31-45	46-60	61+	AB	C1	C2	DE
<i>Unweighted base (all who listen to radio):</i>									
	1,585	294	491	402	398	394	466	342	377
	%	%	%	%	%	%	%	%	%
Aware of:									
BBC Radio 1	51	68	59	46	32	51	55	51	46
BBC Radio 2	50	34	55	56	50	57	54	48	35
BBC Radio 3	25	11	25	34	27	34	25	21	15
BBC Radio 4	38	18	38	50	46	56	40	29	20
BBC Radio									
Five Live	17	11	20	19	15	21	19	14	10
Local									
commercial	57	71	70	54	29	45	63	62	57
National									
Commercial	31	38	30	30	26	37	39	23	16
Ever listen to:									
BBC Radio 1	27	57	30	15	9	21	31	30	27
BBC Radio 2	34	24	37	39	37	38	39	36	19
BBC Radio 3	8	2	3	13	14	12	9	5	5
BBC Radio 4	27	10	22	37	40	44	27	17	15
BBC Radio									
Five Live	13	9	14	14	12	14	16	11	7
Local									
commercial	46	60	57	41	24	34	51	51	49
National									
Commercial	23	26	21	23	25	27	29	19	13
Listen to most often:									
BBC Radio 1	12	33	10	4	1	8	14	12	13
BBC Radio 2	17	7	18	22	20	20	16	18	11
BBC Radio 3	2	0	0	3	4	3	1	1	1
BBC Radio 4	15	3	12	23	21	29	11	7	8
BBC Radio									
Five Live	4	1	5	4	5	5	5	2	3
Local									
commercial	23	27	33	18	12	12	24	30	30
National									
Commercial	8	10	6	10	8	11	10	8	3

Types of radio programmes listened to

Music programmes (pop/rock, classical and other) are by far the most popular type of programme listened to, followed by news. The older that people are, the more likely they are to listen to a wider range of different types of programmes, as are the middle classes and heavier radio listeners.

Types of radio programmes listened to

Q Which of these types of programmes, if any, do you personally listen to nowadays?



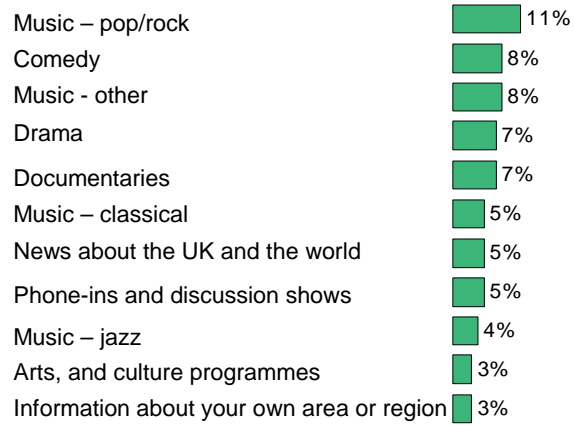
Base: All who listen to the radio (1,585)

Source: MORI

As with television programmes, the types of radio programmes people want to hear more of are generally the same as the types of programmes they already listen to. Very few people think there are too many of any type of radio programme.

Types of radio programmes would like to hear more of

Q Which types of programmes, if any, would you like to hear more of?



Base: All who listen to the radio (1,585)

Source: MORI

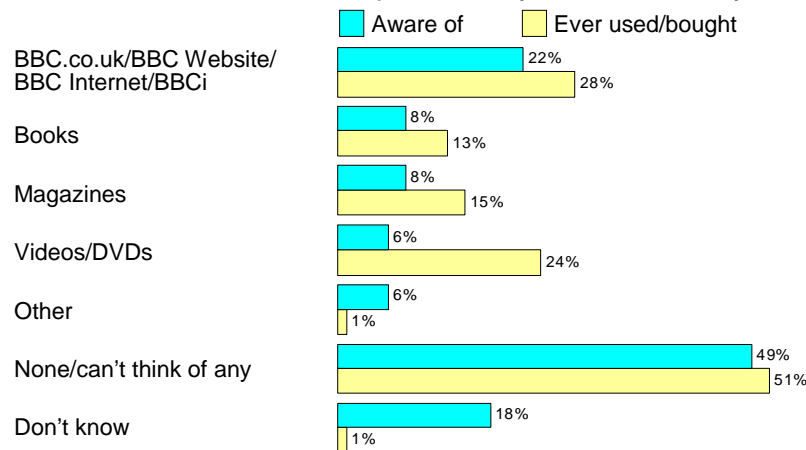
Awareness of BBC non-TV/radio services and products

When asked what services other than television and radio, are provided by the BBC, around half cannot think of anything. A fifth spontaneously mention the BBC's Internet service, 8% mention each of books and magazines and 6% mention videos/DVDs.

Awareness of other services & products

Q What services other than television and radio can you think of that the BBC provides?

Q Which of these BBC services or products do you ever use or buy?



Base: All respondents (2,068)

Source: MORI

The most likely groups to mention the BBC's Internet service are ABs (33% of this group), 16-30's (30%), 31-45s (26%), young black people and young people of Asian origin (42% of each of these two groups). Those in the DE social group are least likely to mention any service provided by the BBC, with only 16% being able to give examples. 32% of those with Internet access spontaneously mention the BBC's Internet service.

People in the South East (41% of this group) are most likely to be aware of one or more other service. Levels of spontaneous awareness of any other service provided by the BBC are lowest in Scotland (24%) and Northern Ireland (27%).

Young black people, and to a lesser extent young people of Asian origin, are the most likely groups to be aware of videos/DVDs and magazines from the BBC.

When prompted, 28% of the population have used the BBC's Internet service, rising to 43% of those who have access to the Internet. 24% of the population have bought BBC videos/DVDs, 15% have bought magazines and 13% have bought books. Just over half (51%) have never bought or used any of these products or services from the BBC.

The BBC's Internet service is most used by those aged 16-45 (38% of this group) and those in the ABC1 social group (37% of this group). Buying of BBC videos/DVDs is highest amongst those aged 16-30 (31% buy these products) and buying of BBC books is highest amongst those aged 46-60 (19% buy books).

Changes in broadcasting over time

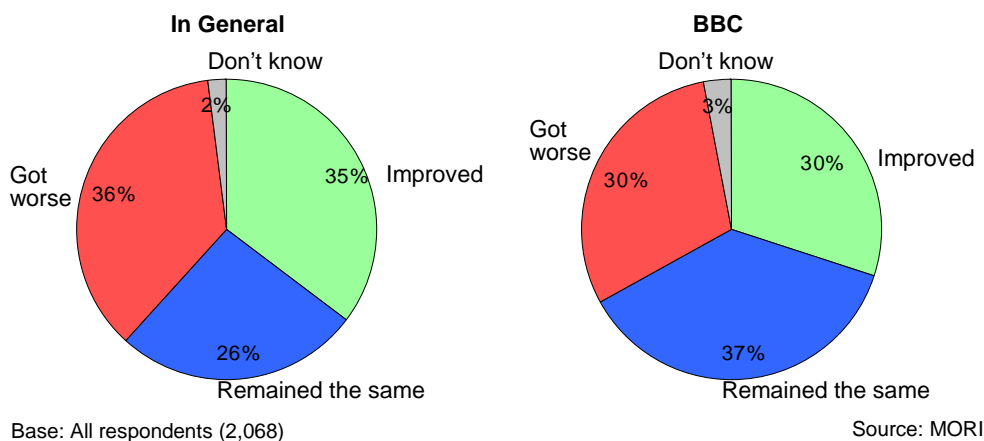
Television

When asked whether the programmes provided by television broadcasters in general had improved, remained the same or got worse, opinions are polarised, with almost as many people (35% of the population) saying programmes have improved as saying they have got worse (36%). A quarter think the quality of programmes have remained the same.

When asked the same question specifically about the BBC, people are more likely to say that the BBC's programmes have remained the same (37% of the population) than have improved or got worse. Opinion on whether the BBC's programmes have improved or got worse is equally split, with 30% saying they have improved and 30% saying they have got worse.

Changes in TV over time

- Q *Do you think the programmes provided by television broadcasters in general have improved, remained the same or got worse?*
- Q *Thinking about the television programmes provided by the BBC, do you think these have improved, remained the same or got worse over the years?*



For both television programmes in general and those provided by the BBC, those aged 16-30 are more likely than older people to think that programmes have improved. Those in the AB social group are less likely to think that television programmes in general (29%) and those provided by the BBC (26%) have improved over time.

People who have access to multi-channel television are more likely to think that programmes in general have improved (39%) but are no more or less likely than average to think that programmes provided by the BBC have improved. Those with access to terrestrial television only are more likely than those with multi-channel access to think that both programmes in general and those provided by the BBC have got worse.

Changes in TV over time						
	Total	16-30	61+	AB	Multi-channel	Terrestrial only
<i>Unweighted base:</i>	2068	402	561	461	1239	807
	%	%	%	%	%	%
Television in general						
Improved	35	44	24	29	39	28
Got worse	36	23	49	45	32	43
BBC Television						
Improved	30	39	20	26	31	28
Got worse	30	16	41	39	28	34

Source: MORI

Those living in Wales, Northern Ireland and Scotland are the most likely groups to say that television programmes in general, and those provided by the BBC, have improved. Those in the South West are the most likely to think that television programmes in general and those provided by the BBC have got worse over the years.

Changes in TV over time					
	Total	Wales	N. Ireland	Scotland	South West
<i>Unweighted base:</i>	2068	251	681	259	259
	%	%	%	%	%
Television in general					
Improved	35	45	44	42	35
Got worse	36	28	25	33	43
BBC Television					
Improved	30	42	38	37	28
Got worse	30	24	20	30	35

Source: MORI

Radio

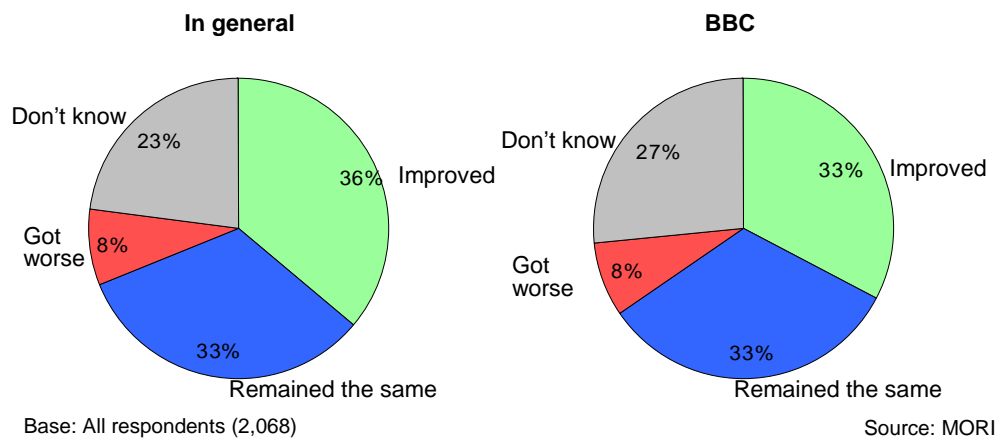
When asked whether the programmes provided by radio broadcasters in general have improved, remained the same or got worse over time, a third of the population think they have remained the same and slightly more (36%) think

they have improved. Very few people (8%) think radio programmes have got worse and almost a quarter (23%) are unable to give an opinion.

The picture for radio programmes provided by the BBC is very similar to the overall picture, with slightly fewer people thinking the BBC's programmes have improved and slightly more being unable to answer the question.

Changes in radio over time

- Q Do you think the programmes provided by radio broadcasters in general have improved, remained the same or got worse?
- Q Thinking about the radio programmes provided by the BBC, do you think these have improved, remained the same or got worse over the years?



Around the same proportions think radio in general and the programmes provided by the BBC have improved as think it has remained the same. Compared with opinions of television programmes over time, much smaller proportions think that radio has got worse than think television has got worse.

The relatively high levels of respondents who do not know whether radio programmes in general and those provided by the BBC have improved, remained the same or got worse, are due to the fact that many people (24%) never listen to the radio and are therefore unable to give an opinion on this matter. Young black people are the least likely to be able to give an opinion, due to the fact that almost half of this group do not listen to the radio.

The heaviest radio listeners and those living in Wales are the most likely to think that radio programmes in general and those provided by the BBC have improved over time.

Those aged 61+ are less positive about both radio programmes in general and those provided by the BBC. People living in Northern Ireland are more likely to think programmes provided by the BBC have improved.

Changes in Radio over time

	Total	Heavy listeners	Wales	N. Ire- land	61+
<i>Unweighted base:</i>	2068	602	251	259	561
	%	%	%	%	%
Radio in general					
Improved	36	55	44	39	24
Got worse	8	7	6	4	8
BBC Radio					
Improved	33	49	41	38	24
Got worse	8	8	5	5	8

Source: MORI

Publicly Funded Services and Functions

Comparative attitudes to different genres

Respondents were shown a card that listed the names of the four terrestrial broadcasters, (the BBC, ITV, Channel 4 and Five) plus Sky. They were then read a list of different types of television programmes and asked which of these five broadcasters they thought provided the best of each type of programme.

The BBC is thought to produce the best programmes across all genres, with the exception of sport, for which Sky is thought to be best. News, current affairs programmes and documentaries are considered to be the BBC's best output.

Comparative attitudes to different genres

	BBC	ITV	Channel 4	Five	Sky
<i>Unweighted base</i>	<i>2068</i>	<i>2068</i>	<i>2068</i>	<i>2068</i>	<i>2068</i>
	%	%	%	%	%
News and current affairs about Britain and the world	62	11	8	2	13
Documentaries about science, Nature, history etc.	52	3	13	3	18
Information about my area/region	42	42	1	1	1
Entertainment (chat shows, Soap operas, drama)	37	36	6	2	9
Features about my personal interests and pastimes	34	14	14	4	18
Sports programmes	23	16	2	2	36

Source: MORI

Those with access to multi-channel television (50% of this group) are more likely than those with terrestrial access only (15% of these people) to say that Sky provides the best sports programmes. However, with the exception of sports programmes, higher proportions of those with access to multi-channel television think the BBC provides the best programmes of each genre than think Sky does.

Those without access to multi-channel television are more likely than those who do have access to say that the BBC provides the best news and documentaries.

Those aged 61+, those in the AB social class and people who watch the BBC for half or more of their television viewing time are more likely to say the BBC provides the best of any type of programme, with the exception of ABs being less likely than DEs to think the BBC provides the best sports programmes.

BBC Provides the best...						
	Total	61+	AB	Watch BBC more than half time	Multi- channel access	Terrestrial only
<i>Unweighted base:</i>	2068	561	461	1081	1239	807
	%	%	%	%	%	%
News and current affairs about Britain and the world	62	66	69	70	59	66
Documentaries about science, Nature, history etc.	52	60	58	64	44	64
Information about my area/ region	42	46	53	49	42	40
Entertainment (chat shows, Soap operas, drama)	37	42	44	45	37	37
Features about my personal interests and pastimes	34	41	41	45	31	38
Sports programmes	23	32	21	27	18	29

Source: MORI

There are very few regional differences in levels of thinking that the BBC provides the best of each type of programme. However, those in the South East and Wales (49% of each of these groups) are more likely to think the BBC provides the best information about their own area/region. Those in the South East are more likely to think the BBC provides the best features about their personal interests and pastimes (40% think this).

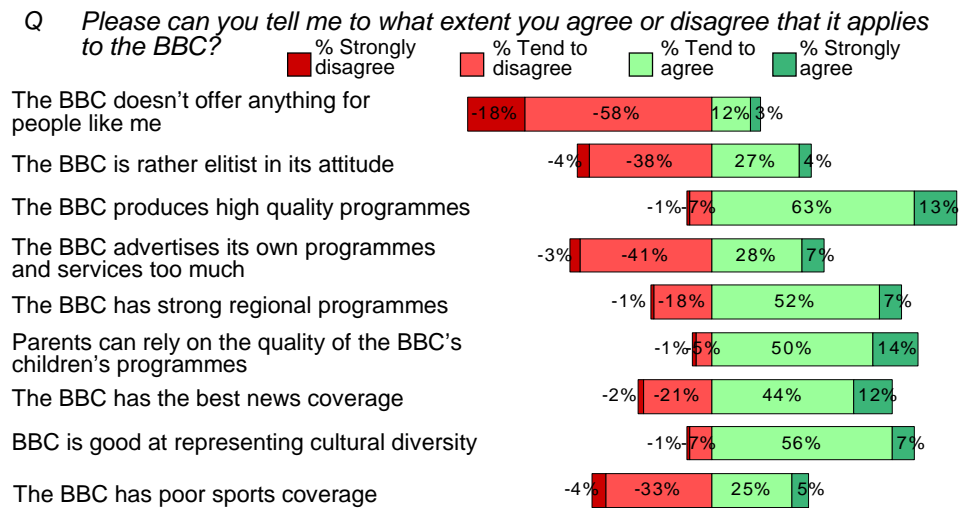
People living in the South West are the most likely to think the BBC provides the best entertainment programmes (43% think this) and those in the Midlands are most likely to think the BBC provides the best sports programmes (29% think this).

A perceptual map illustrating the types of programme each broadcaster is thought to be best at can be found in the appendices

Detailed image BBC programmes

To understand the image of the BBC in finer detail we asked respondents how much they agreed or disagreed with a series of statements about the BBC. These are summarised in the chart below.

Image of the BBC



Base: All respondents (2,068)

Source: MORI

Over three quarters of the population disagree with the statement **“The BBC does not offer anything for people like me”**. Sub-groups more likely than average to agree that the BBC does not offer anything for people like them are young black people (30%), those in the DE social group (21%), those who watch the BBC for less than half their viewing time (23%) and people living in Scotland (20%) or the North West (19%).

Three-quarters of the population agree that the BBC produces **high quality programmes**. There is the same general level of agreement with this statement across all sub-groups, although those who watch the BBC for half or more of their viewing time (84% of these people) and those in Wales (81% of this group) and those with access to terrestrial television only (78%) are more likely to agree with this statement. Young black people (57% of this group) are less positive.

Almost two thirds (64%) of the population agree that **parents can rely on the quality of the BBC's children's programmes**. Indeed, those with children themselves are the most likely group to agree with this statement (81%). Those with multi-channel access (68% of this group) are more likely to think parents can rely on the quality of the BBC's children's programmes than are those with access to terrestrial channels only (58% of these people). Levels of agreement with this statement are higher amongst those in Wales (76% agree) and those in Northern Ireland (70% agree) than in other regions.

Sixty-three per cent of the population agree that the BBC is **good at representing cultural diversity in the UK** and 8% disagree. Those aged 61+, people who are satisfied with the BBC, those who watch the BBC for half or more of their viewing time (68% of each of these three groups) and those with access to terrestrial television only (66% of these people) are the most likely to agree with this statement. Young black people (20% of this group) are more inclined than average (8%) to disagree with this statement.

Fifty-nine per cent of the population agree that the BBC has **strong regional programmes** and 19% disagree. Agreement levels are higher amongst people living in Wales (73% agree) and Northern Ireland (71% agree) and those aged 61+ (65% agree). Those in Scotland are more inclined than average to disagree (26% disagree).

Just over half (56%) of the population agree that the BBC has **the best news coverage** and 23% disagree. Levels of agreement are highest in Northern Ireland (64%), Wales (62%) and amongst those aged 61+ (61%). Young people of Asian origin are the most likely group to agree with this statement (65% agree). Levels of disagreement that the BBC has the best news coverage are highest in the North East (29% disagree). Those with access to multi-channel television, and therefore most able to compare BBC news programmes with other news channels, are also more likely to disagree (27% disagree) whereas those with terrestrial only access are more likely to agree (63% agree).

Views on whether the BBC **advertises its own programmes and services too much** are divided, with 43% of the population disagreeing and 35% agreeing with this statement. Those most likely to agree that the BBC advertises its own products and services too much are people who are dissatisfied with the BBC (57% of this group) and those living in Scotland (41% of these people). People living in Wales are most likely to disagree (50% of this group disagree).

Forty three per cent of the population disagree that the BBC is **rather elitist in its attitude** and 31% do agree that it is elitist. Sub-groups most likely to disagree that the BBC is elitist are those aged 61+, those living in Wales (52% of each of these groups), people who watch the BBC for half or more of their viewing time (50% of this group) and those without access to multi-channel television (46% of these people).

Sub-groups most likely to agree the BBC **is elitist** are those aged 46-60 (36%) those who watch the BBC for less than half their viewing time (38%) and those who are dissatisfied with the BBC (51%).

Just over one-third (37%) of the population do not agree that the BBC has **poor sports coverage**, although 29% are critical of the BBC in this area. The most likely groups to agree that the BBC has poor sports coverage are those who are dissatisfied with the BBC (38% of this group), those with multi-channel television access (32% of these people) and those in the C2 social group (36% of this group). People in the DE social group (41% of this group), those who watch the BBC for half or more of their viewing time (40% of these people) and those who are satisfied with the BBC (39% of this group) are the most likely groups to disagree with this statement.

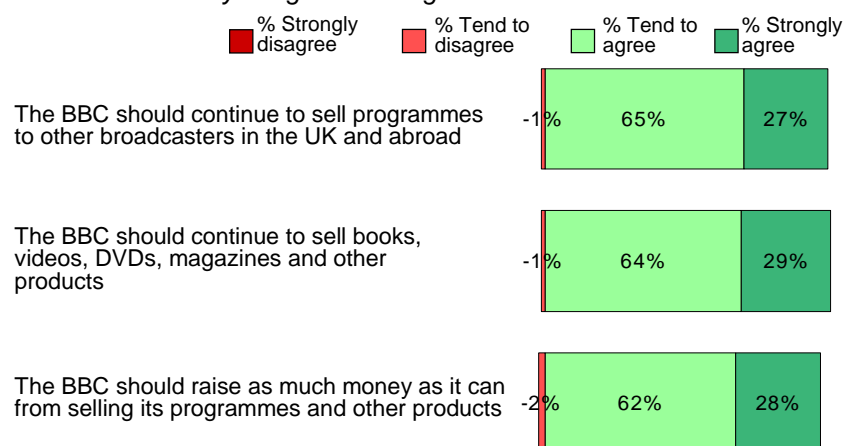
Commercial activities

Around half the population (49%) has ever bought or used other services provided by the BBC.

The vast majority of respondents agree that the BBC should continue to engage in commercial activities: selling its programmes to other broadcasters in the UK and abroad (92%), selling books, DVDs, magazines and other products to the general public (93%) and that it should raise as much money as it can through these activities (90%).

Selling programmes and products

Q *I am going to read you out a number of statements and I would like you to tell me to what extent you agree or disagree with each?*



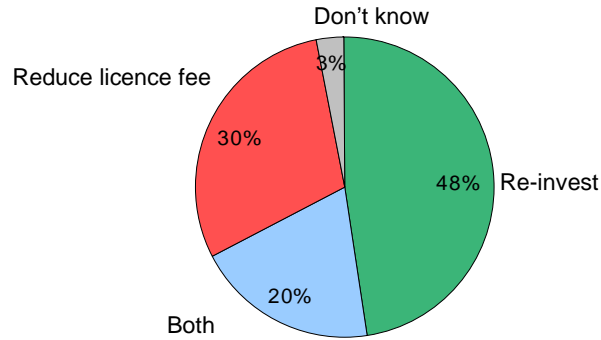
Base: All respondents (2,068)

Source: MORI

When asked what the funds raised through these activities should be used for, opinion is divided. Almost half (48%) think that the money should be used solely to re-invest in programme making, 30% think the money should be used solely to reduce the licence fee and a further 20% think it should be used for both these purposes.

Re-invest or reduce licence fee?

- Q *By selling its programmes, books, magazines, DVDs etc, the BBC raises a significant amount of money each year. Do you think this money should be used to re-invest in programme making or should it be used to reduce the cost of the licence fee?*



Base: All respondents (2,068)

Source: MORI

Groups which are more likely to think the money should be re-invested in programme making are those in the AB social class (65%), light television watchers (60%), those who watch the BBC for half or more of their viewing time (58%), those living in the South East (55% of these people), those with terrestrial access only (52%) people aged 46+ (51%) and those satisfied with the BBC (50%).

Groups more likely to think the money should be used to reduce the licence fee are those living in Northern Ireland (40%), those dissatisfied with the BBC (39%), those who watch the BBC for less than half their viewing time (39%), people in social classes C2DE (38%), those in the North East (36%), those aged 16-30 (39%), heavy television watchers (35%) and those with multi-channel access (32%). Young people of Asian origin (43% of this group) and young black people (40% of these people) are also more likely to think the money should be used to reduce the licence fee.

Paying for the BBC

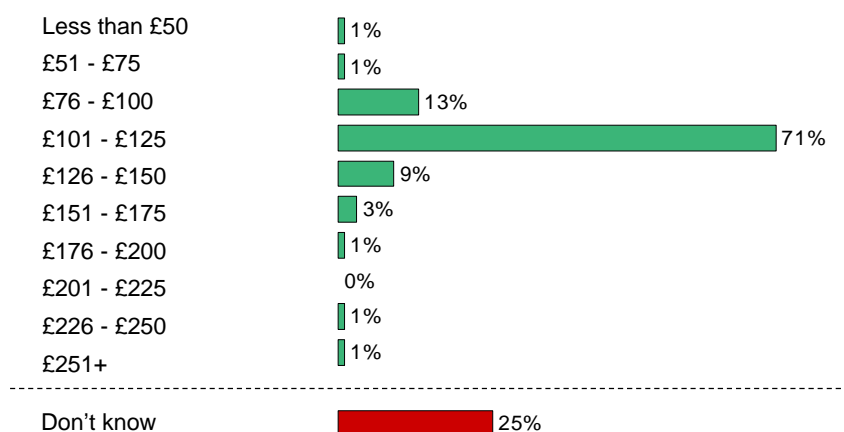
The Television Licence Fee

Although a detailed pricing study is outside the scope of this research, the survey included a series of questions to examine people's views towards the licence fee. The results suggest that the majority are aware of the approximate cost of the licence fee, and are more likely than not to describe it as value for money, even though relatively few describe the licence fee as “cheap” – this may be because they are not aware of all the activities the licence fee pays for. Perceptions of “cheap” and “expensive” may also be influenced by an individual's own circumstances, for example someone with a relatively low income may think of £100 as a large amount of money and therefore “expensive” for any purchase, whereas to someone with a higher income, £100 may be considered a small amount of money and therefore “cheap”. A chart detailing the levels at which the licence fee is thought to be “cheap” and “expensive” can be found in the appendices.

A quarter of the population does not know how much the television licence fee costs. Almost three quarters of those who do know the cost put it at between £101 and £125. The current fee is £121.

Cost of licence – level of knowledge

Q Do you know how much a television licence costs?



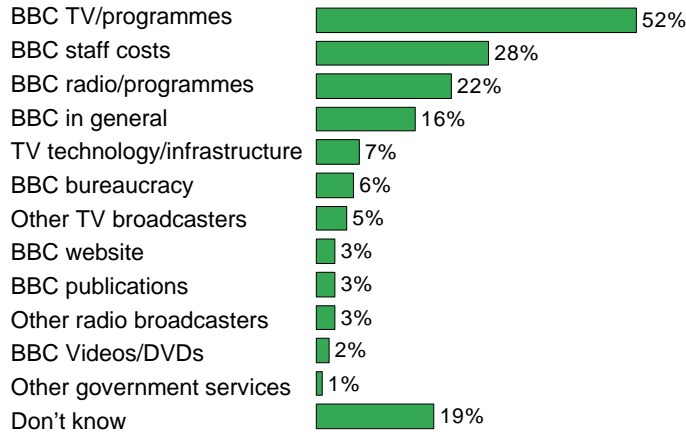
Base: All (2,068)/All who know the cost of a licence (1,563)

Source: MORI

Just over half associate the money raised by the television licence fee with paying for BBC television programmes. Twenty-two per cent think it is used to fund BBC radio programmes and 28% think it is used to fund BBC staff costs. A further 16% think the money is used to fund “the BBC in general”.

What does the fee pay for?

Q What do you think the money raised by the television licence fee pays for?



Base: All respondents (2,068)

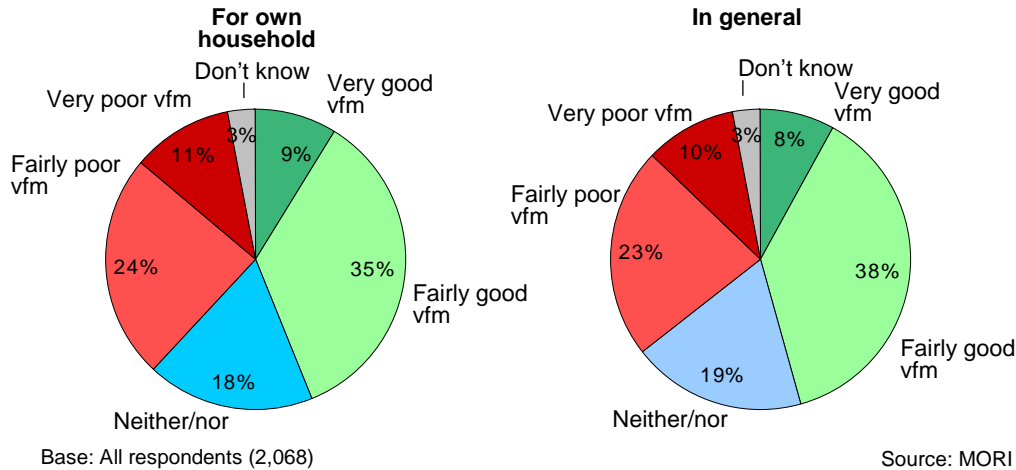
Source: MORI

Those in the DE social group (30% of these people) are less likely to be able to say what the television licence funds. Young people overall (30% of those aged 16 to 30) and especially young black people (46% of this group) are the least likely to be able to say what it funds.

When told that the annual cost of the television licence fee is £121, 43% of the population think that this represents good value for money for their household. However, a third (35%) think it is poor value for money. Responses are very similar when asked whether this represents good value for money for the population as a whole.

Value for money

Q The television licence fee is now £121 per year and funds BBC television, radio, website and publications. Bearing this in mind, what value for money does this represent . . . ?



The most likely groups to think the licence fee represents good value for money for their household are those aged 61+ (51% of this group), those in the AB social group (59% of these people), light television viewers, those who watch the BBC for at least half their viewing time (53% of each of these two groups) and people who are satisfied with the BBC (50%). Groups more likely to think this represents poor value for money are those with multi-channel television access (39%), people aged 31-45 (42%), C2DEs (44%), those living in Northern Ireland (47%), young people of Asian origin (53%) and young black people (45%).

Future Funding of the BBC

Over the years various different alternative methods of funding the BBC have been considered. More recently, the Davies Review (1999) concluded that although not perfect, the licence fee was still the best solution for the funding of the BBC. The Davies report recommended that the funding of the BBC be further reviewed at the time of the charter review and is therefore covered in the present research.

We asked respondents to consider how the BBC should be funded in future, allowing comparison of the licence fee with other funding options: raising money through advertising and/or sponsorship, charging a subscription specifically to receive BBC services, making some programmes available on a pay-per view basis or funding directly from general taxation.

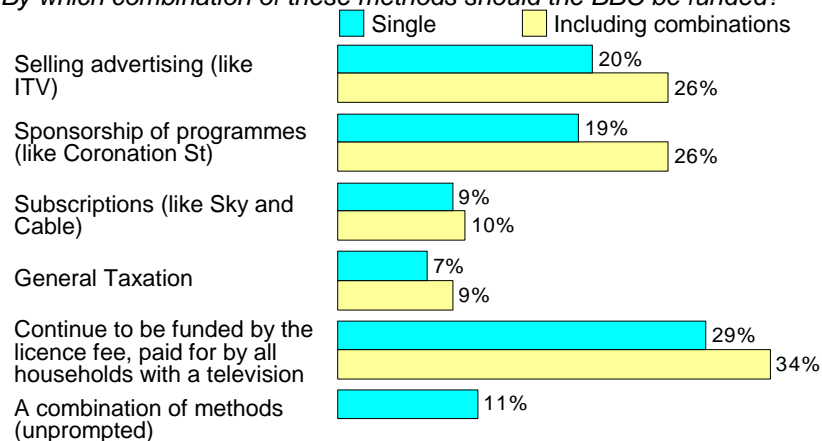
The **licence fee** remains the single most popular option for funding the BBC, but a majority are open to other ideas. Just over a third think that the BBC should continue to be funded by the licence fee. However, there is some degree of support for **advertising** and **sponsorship**, each supported by 26%. Very few people think that the BBC should be funded by **subscription** (10%) or through **general taxation** (9%).

Eleven percent thinks that the BBC should be funded by more than one of the above methods. Over two thirds of these people (68%) were in favour of **sponsorship**, 53% thought the BBC should sell **advertising** and 42% thought the **licence fee** should be retained.

Future funding

Q Which of these methods, if any, do you personally think is the best way to fund the BBC in the future?

Q By which combination of these methods should the BBC be funded?



Base: All respondents (2,068)

Source: MORI

The higher up the social scale that people are, the more likely they are to favour keeping the **licence fee**: 49% of those in the AB social class are in favour of keeping the licence fee compared with 20% of those the DE group. People living in the South East (43% of these people) are the most likely region to favour the licence fee. Those who have access to terrestrial television only (38% of this group) are also more likely than average to favour keeping the licence fee.

Groups least likely to favour the licence fee are those living in Wales (29% of this group), Scotland (27% of these people), the North East (28% of this group) and Northern Ireland (23% of these people). Young people of Asian origin and young black people are the least likely groups to favour the licence fee (15% of each of these groups are in favour).

People most likely to be in favour of raising funds through **advertising** are those who watch the BBC for less than half their viewing time (37% of these people), those in social classes C2DE (33% of this group) and heavier television viewers (29% of these people). Younger people (33% of 16 – 45s) are most in favour of **sponsorship**. Those with multi-channel access are slightly more in favour of the BBC being funded by **subscription** (12% favour subscription) and slightly less likely to think it should continue to be funded by the television **licence fee** (31% favour the licence fee).

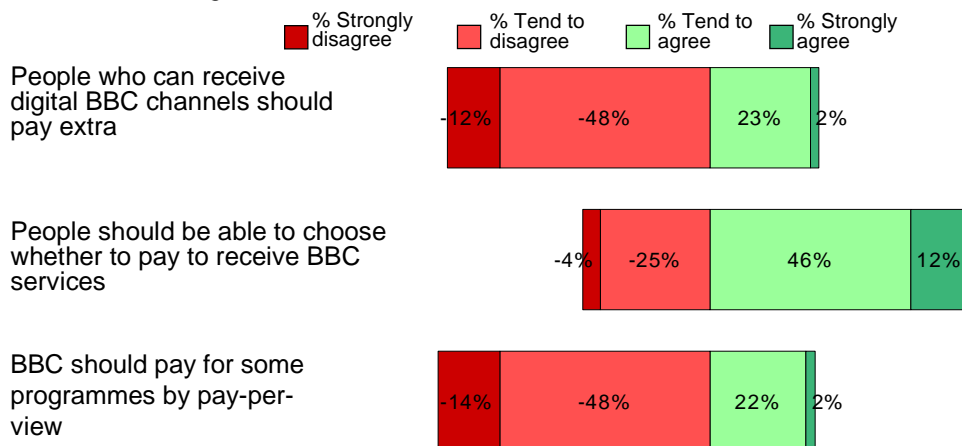
There is a fairly high level of agreement (58% of the population) that **people should be able to choose whether they receive BBC services or not**, although a significant minority (28%) disagree with this. Agreement levels that people should have this choice are highest in the North West (66% agree), the North East (64% agree) and Northern Ireland (64% agree).

Fifty nine percent of the population disagree that **people who are able to receive the BBC’s digital channels should pay extra to do so** and around half as many (26%) agree they should pay extra. Those who already have access to multi-channel television (70% of these people) are the most likely to disagree that people should pay extra.

There is also a high level of opposition (62% disagreement) to the idea of paying for some BBC programmes by **pay-per-view**.

Attitudes towards funding issues

Q To what extent do you agree or disagree with each of the following statements about funding the BBC?



Base: All respondents (2,068)

Source: MORI

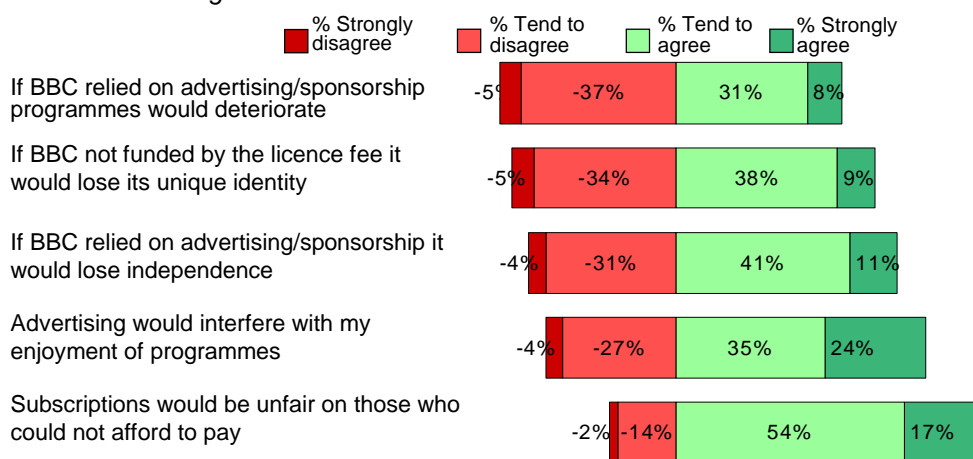
As was found in the Davies Review, although some people are in favour of the BBC being funded by advertising and/or sponsorship, there are concerns relating to the quality of programmes and the independence and identity of the BBC, should advertising or sponsorship be introduced.

The main concern is that if the BBC was funded by **subscription** this would be unfair on those who could not afford to pay. Concern about this is similar across all social classes.

Almost twice as many people agree (60%) that advertising would interfere with their enjoyment of programmes than disagree (31%). There are also higher levels of agreement (52%) than disagreement (36%) that the BBC would lose its independence if it relied on advertising and/or sponsorship. Levels of agreement/disagreement that the BBC would lose its unique identity if it was funded by advertising/sponsorship are closer - 47% agree and 39% disagree. However, more people disagree (43%) than agree (39%) that programmes would deteriorate if the BBC relied on advertising and/or sponsorship.

But clearly some concerns

Q To what extent do you agree or disagree with each of the following statements about funding the BBC?



Base: All respondents (2,068)

Source: MORI

Those with access to multi-channel television are more likely than average to disagree that the quality of programmes and the identity and independence of the BBC would be affected if the BBC were to rely on income from advertising or sponsorship. Those in the AB social class, light television viewers and people who watch the BBC for over half their viewing time are most concerned about the possible impact of advertising and/or sponsorship on the quality and their enjoyment of programmes and the impact on the independence and unique identity of the BBC.

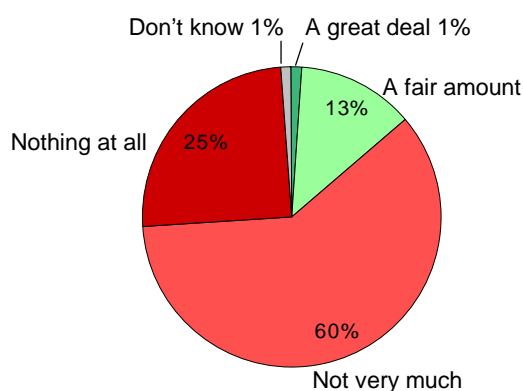
Organisation, Governance and Regulation

The vast majority of the population know “not very much” or “nothing at all” about how the BBC is run. Awareness of how the BBC is run is particularly low amongst the DE social group (92% know “not very much” or “nothing at all”). People living in Scotland and the North West are less well informed (90% of each of these groups know “not very much” or “nothing at all”).

Those in the AB social class (21% of this group) and those in the South East (18% of these people) are most likely to say they know a great deal/fair amount about how the BBC is run

Knowledge of how the BBC is run

Q How much, if anything, do you feel you personally know about how the BBC is run?



Base: All respondents (2,068)

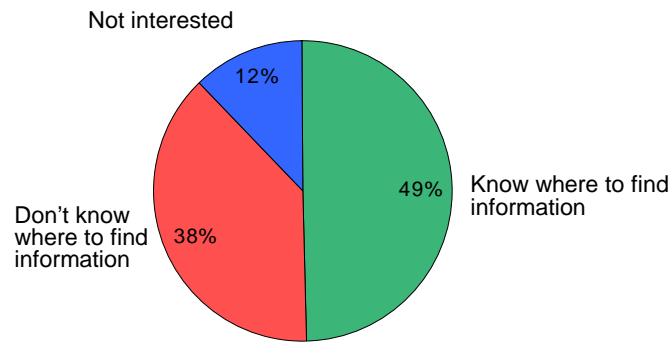
Source: MORI

When asked if they know where to look for information about how the BBC is run, 12% claim not to have any interest in finding out more than they already know. Proportions of sub-groups saying they are not interested in finding out more than they already know are highest amongst those living in Northern Ireland (23%) and Scotland (21%), those in the DE social group (24%) young black people (29%) and young people of Asian origin (24%).

Groups less likely to know where they would look for information about the BBC are those aged 61+ (53% of this group do not know where they would look), people in the DE social group (49% of these people) and those in Northern Ireland are least likely to know where they could find such information (49% of this group).

Where to find information on how BBC is run

Q *If you wanted to find out more information about how the BBC is run, do you know where you could find such information, or not?*



Base: All respondents (2,068)

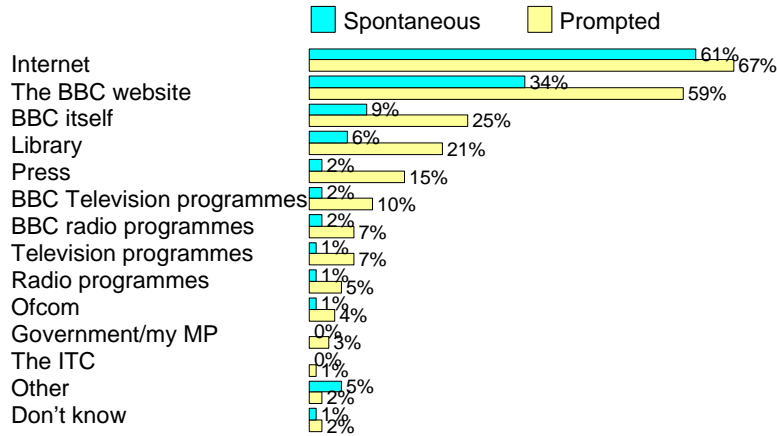
Source: MORI

ABC1s (61% of this group) are more likely to know where to find out more about how the BBC is run. Lighter television viewers (60% of these people) and medium television viewers (54% of this group) are more likely than heavier viewers (39% of this group) to know where to look. Those aged 61+ (31% of these people) are less likely to know where to look than are younger people (56% of those aged 60 or younger).

The Internet is the most popular source that people would look to for information about how the BBC is run. Almost two-thirds of those who know where they would look spontaneously mention the Internet and a further third mention the BBC's website specifically. Other sources people would use, but to a much lesser extent, are the BBC itself, libraries, press and television and radio programmes (including the BBC's own).

Sources of information available

- Q Where would you look for information about how the BBC is run?
 Q And from which of these, if any, would you look for information about how the BBC is run?



Base: All who know where to find information (974).

Source: MORI

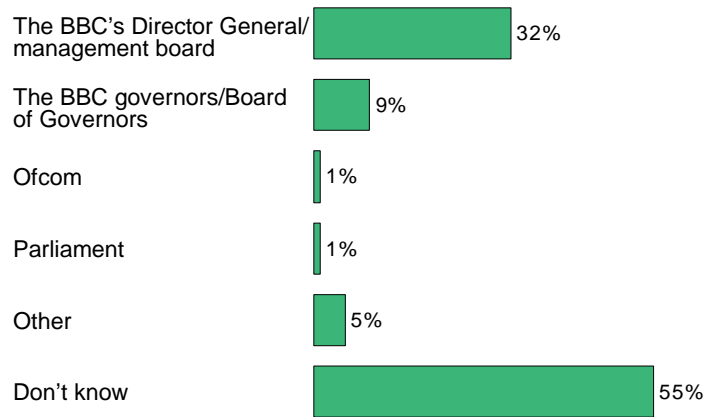
The Internet is most likely to be used as source of information about the BBC by younger people (74% of 16-30s), especially young black people (84%) and young people of Asian origin (80%) and those in the C2 social class (70% of this group).

Those aged 61+ are more likely than other groups to look to the BBC itself (22%) or in a library (11%) for information about the BBC.

Knowledge of who is responsible for the day-to-day management of the BBC is equally low. Over half (55%) do not know who is responsible for the day-to-day running of the BBC. One third think the BBC's director general and/or management board are responsible and 9% mention the BBC governors/board of governors.

Who is responsible for running the BBC

Q Do you know who, if anyone, is responsible for the day-to-day running of the BBC?



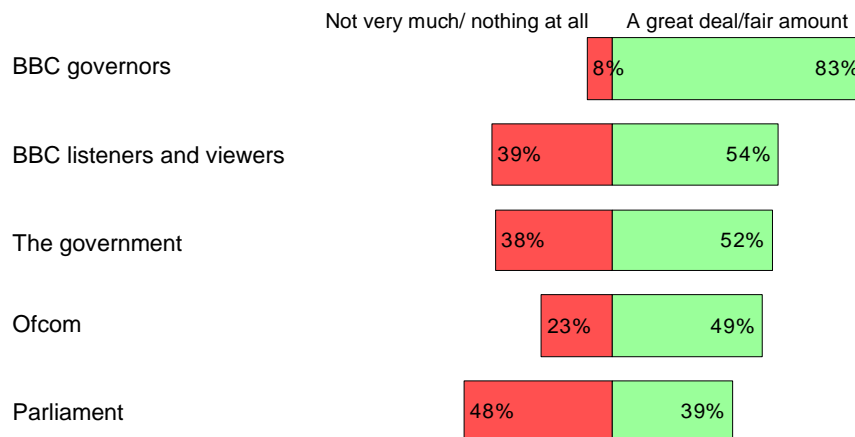
Base: All respondents (2,068)

Source: MORI

When asked how much influence specific bodies have over the types of services the BBC provides, the BBC governors are seen to have the most influence and Parliament the least. Although just over half think that the BBC's listeners and viewers have at least a fair amount of influence, over a third think they have not very much or no influence at all.

Levels of influence

Q How much influence, if any, do you think each of the following bodies has over the types of services the BBC provides?



Base: All respondents (2,068)

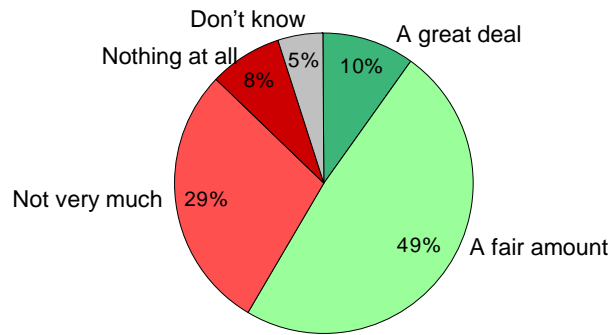
Source: MORI

Accountability

When asked how much notice the BBC takes account of the views of its viewers and listeners, 10% think it takes a great deal of account and a further 49% think it takes a fair amount. However, 37% think the BBC does not take very much account or takes no account at all of the opinions of its viewers and listeners.

Taking account of viewers and listeners

Q To what extent, if at all, do you feel that the BBC takes account of the views of its viewers and listeners when deciding what it broadcasts?



Base: All respondents (2,068)

Source: MORI

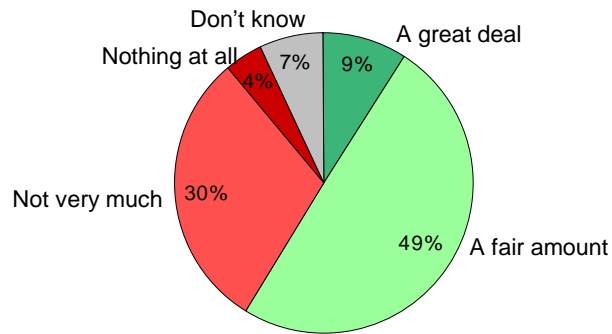
The younger that people are and the higher up the social scale, the more likely they are to think that the BBC takes account of the views of viewers and listeners. Lighter television viewers (71% of this group) are the most likely group to think that the BBC takes account of its audiences' views.

The groups least likely to feel the BBC takes account of their views are those living in Scotland (49% of these people) or Northern Ireland (45% of this group), young people of Asian origin (50%) and young black people (46%).

The picture is much the same when it comes to the amount of notice the BBC takes of complaints from its viewers and listeners. Although 58% overall think that the BBC takes either a great deal or a fair amount of notice of complaints, only 27% of those dissatisfied with the BBC are of this opinion.

Complaints

Q How much notice, if at all, do you think the BBC takes of complaints made to it by viewers and listeners?



Base: All respondents (2,068)

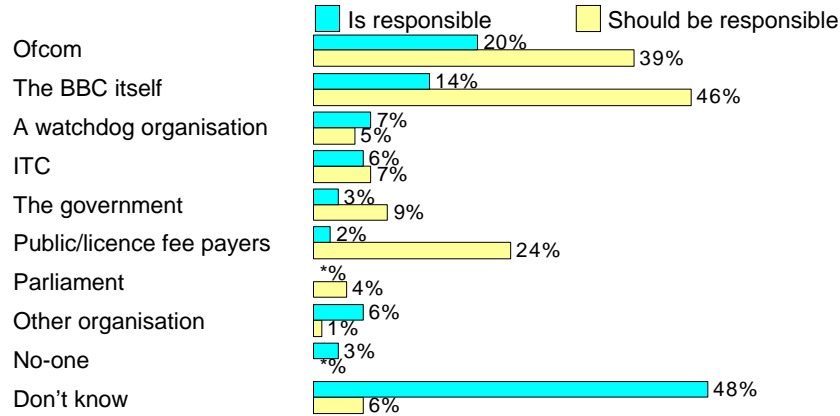
Source: MORI

The level of knowledge about to which body or bodies the BBC is accountable is slightly higher than the level of knowledge about how the BBC is run. However, almost half (48%) of the population do not know who is responsible for making sure that the services provided by the BBC are of an acceptable standard.

Ofcom, the BBC itself, “a watchdog organisation” and the ITC are all mentioned spontaneously but only by a fifth or less of the sample. When prompted, the BBC itself and to a lesser extent Ofcom, are the bodies which most think should hold the BBC to account. Around a quarter think that the public/licence fee payers should be responsible for holding the BBC to account when things go wrong.

To whom is the BBC accountable?

- Q Do you know who, if anyone, is responsible for making sure that the services provided by the BBC are of an acceptable standard?
- Q And who of these, if anyone, do you think **SHOULD** be responsible for holding the BBC to account when things go wrong?



Base: All respondents (2,068)

Source: MORI

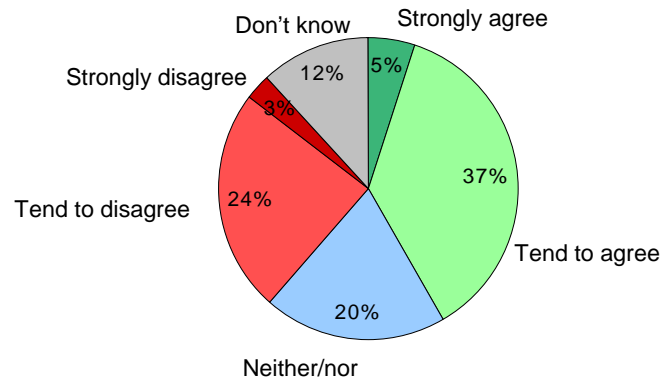
Those in the ABC1 social classes (48% of this group) are most likely to think that BBC should be responsible to Ofcom. Younger people are more likely to think that the BBC itself ought to be responsible (57% of those aged 16 - 30), while those dissatisfied with the BBC are more likely to think it should be responsible to the public/licence fee payers (35%).

Those in the DE social group are least likely to be able to say to whom they think the BBC should be responsible (14% don't know). Young black people (15% of this group) and young people of Asian origin (14% of these people) are also less likely to be able to say to whom they think the BBC should be responsible.

When asked whether the BBC is independent of Government, 42% agree it is, 27% disagree and 32% are either not sure or do not know. This again suggests a relatively low level of awareness of how the BBC is governed and run.

Is the BBC independent?

Q How strongly do you agree or disagree that?:
"The BBC is independent of government"



Base: All respondents (2,068)

Source: MORI

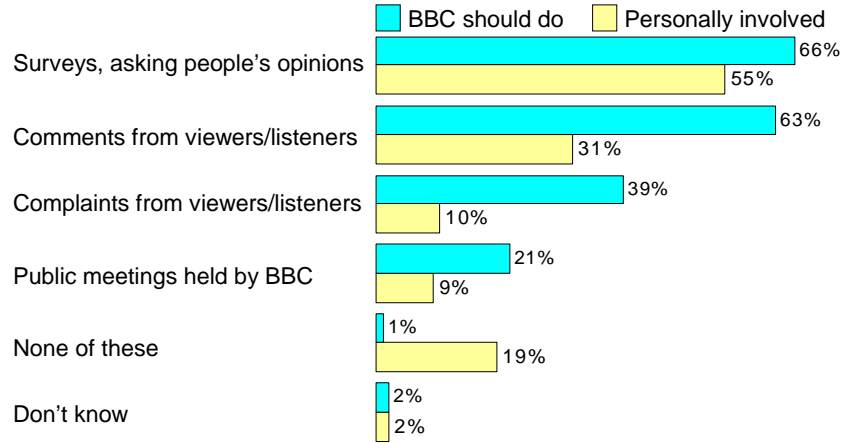
The public is open to the idea of the BBC using various methods to obtain its input into deciding what types of programmes to make or show. Surveys asking people's opinions and comments from viewers and listeners are the most popular methods for the BBC to use, followed by complaints from viewers and listeners and public meetings.

When asked which of these they personally would like to be involved in, there is a higher level of enthusiasm for surveys and lower levels for comments, complaints and attending public meetings. This is perhaps due to the fact that people have to make more effort to make a complaint or comment or to attend a public meeting than they do to take part in a survey where they are approached by an interviewer rather than having to take any pro-active initiative themselves. (It should also be noted that by the very nature of this research, all who participated did so voluntarily and were therefore perhaps more disposed to participating surveys than other members of the public who did not take part).

Input from the public

Q Which of these things, if any, do you think would help the BBC to decide what sort of programmes to make and show?

Q And which, if any, of these things would you personally like to be involved in?



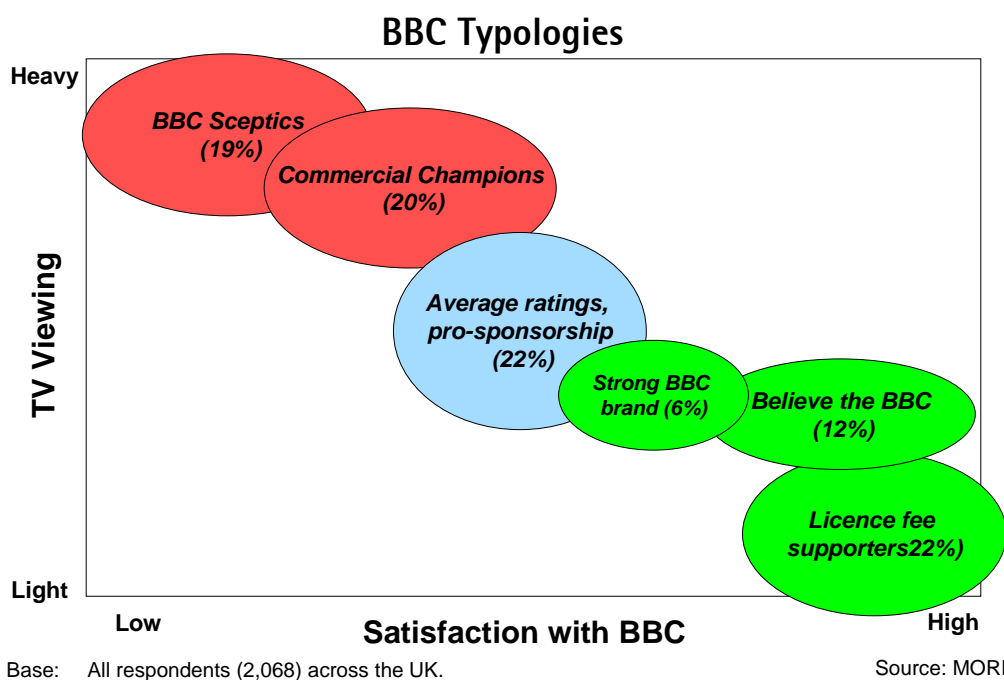
Base: All respondents (2,068)

Source: MORI

Segmenting the population

BBC television has a weekly reach of around 85 to 88% of the UK population and so is watched at some point every week by the vast majority of the UK viewing public. Further analysis of the survey data shows that people fall naturally into some relatively discrete ‘typologies’. The typologies represent people with different views towards the BBC, different viewing and listening habits, and different demographic characteristics. Although the generalisations that are made about each group are not true of every person within that group, the analysis does produce a useful means of characterising different groups of people, and developing a more sophisticated understanding of attitudes to the BBC².

These typologies are illustrated graphically below. There is a wide range of interacting influences on people’s views, but two are picked out in the chart. This suggests that groups who tend to watch less TV overall (but for whom the BBC makes up a relatively higher proportion of their overall consumption) are the most satisfied overall with the BBC. The commentary afterwards highlights characteristics (e.g. ‘relatively young’ or ‘ABC1’) shared by a particular group – although again it should be noted that this does *not* imply that *all* members of each group are characterised in this way.



² This technique is explained in more detail in the appendices

Typology 1: 'Licence fee supporters' (22% of the population)

- **Attitudes:** This group is among the most satisfied with the BBC, and most likely to think it is the best provider of programmes. They agree the BBC is distinct from other broadcasters, and has a good worldwide reputation. They are the group most in favour of the licence fee (and against advertising and sponsorship), and most likely to think it represents good value for money.
- **Habits:** This cluster tends to watch less TV overall, but what they do watch is more likely to be the BBC (especially BBC One and BBC Two). They are avid watchers of news (69%) and arts and culture programmes (39%). On the radio, they listen to BBC Radio 2, 3 and 4, and they are also more familiar with BBCi than the population as a whole (36% compared with 28%)
- **Demographics:** These people tend to be older (58% are 46+), retired, AB men. Educated to degree-level, they are heavier readers (54% compared with 23% of the population as a whole) of broadsheet newspapers – especially the Guardian and Independent.

Typology 2: 'Commercial champions' (20%)

- **Attitudes:** This group are less satisfied overall with the BBC, and more likely to praise the programmes broadcast by ITV and Sky. They are least likely to think the licence fee provides value for money (and want money raised by the BBC's commercial services used to bring the cost of the licence fee down (43%)), while preferring advertising as a source of funding for the BBC (88%) (They are also against sponsorship (favoured by only 17%)).
- **Habits:** This group has high levels of multi-channel access (66%), and are heavy TV viewers, especially of channels such as Sky Movies, Sky News, Sky Sports, Sky One and UK Gold (while being proportionately lighter viewers of the BBC). They are most likely to watch soap operas, sports and reality TV programmes, and more likely to listen to BBC Radio 1 (33%) and local commercial stations (57%).
- **Demographics:** People in this typology tend to be aged 31-60 years old, working full-time, in social classes C2D (blue-collar and unskilled workers). They read red-top newspapers, have secondary school age children (40%) and live in the North of England or Scotland.

Typology 3: 'BBC Sceptics' (19%)

- **Attitudes:** This typology is most negative towards the BBC. They are less likely to agree the BBC produces high-quality programmes or fulfils a public service function, and are the least likely to agree the BBC is distinct from other broadcasters. They think the BBC doesn't listen to its viewers, and are most likely to say the BBC is too powerful, and 'doesn't offer anything for people like me'. This group

is most in favour of subscriptions, pay-per-view, and giving people the choice of paying to receive the BBC's services.

- **Habits:** This cluster is also made up of heavier TV viewers, but relatively light BBC watchers. They watch more games shows than other clusters, but are less likely to listen to the radio.
- **Demographics:** This group tends to be made up of single men (28%), aged under 30 (27%) or over 75 (15%). They have few formal qualifications, (30% have no formal qualifications) and are more likely to come from social classes DE (unskilled workers, the unemployed, state pensioners and those relying on other state benefits). There is a higher proportion of ethnic minority citizens in this cluster.

Typology 4: 'BBC Believers' (12%)

- **Attitudes:** This group is also satisfied with the BBC, and particularly value its independence and reliability. They are most likely to describe the BBC as trustworthy, traditional, informative and accurate, and as independent of Government. They would prefer the BBC to be funded through general taxation (45%) and the licence fee (29%), and 'would miss it if it wasn't there'.
- **Habits:** This group are light – medium TV viewers, and watch BBC One and Two most often. They enjoy documentaries, news, features about their personal interests, drama, arts/culture and lifestyle programmes, and regional information. They listen to BBC local radio (22%), Radio 4 (39%), Five Live (19%) and the World Service (11%).
- **Demographics:** These people are more likely to be aged over 60, (36% as opposed to 27% of the general population) working full-time or retired, educated to degree level, and readers of broadsheets (especially the Times, Guardian and FT).

Typology 5: 'Average ratings, pro-sponsorship' (21%)

- **Attitudes:** This group gives the BBC average satisfaction levels, but are most likely to think that BBC television programmes are getting worse. They are least likely to think the BBC is independent of Government, and do not feel well informed about how the BBC is run. Their preferred method for funding the BBC is through sponsorship.
- **Habits:** This group has high levels of multi-channel access (especially satellite), are medium TV watchers and average consumers of the BBC. They are particularly fond of drama, and on the radio listen to BBC Radio 1 and 2, and local commercial stations.
- **Demographics:** This group tends to be aged 21-45 (54%), and to be women (59%) in full or part-time work (65%) with children in the

household. They have GCSEs and A-levels, and are most likely to live in the Midlands and North West (41%).

Typology 6: 'Strong BBC brand' (6%)

- **Attitudes:** This group has only average overall satisfaction ratings of the BBC, but has the strongest image of it. In particular, they are the most likely to describe the BBC as educational, high quality, entertaining, modern and cutting edge, and as offering something for everyone. They prefer the licence fee for funding the BBC, but are also open to the idea of subscriptions. Despite this positive image, they are also the most likely to say the BBC needs an independent watchdog to hold it to account.
- **Habits:** This group is the most likely to have terrestrial-only TV, and Freeview rather than satellite. They are medium watchers of television, and watch the BBC about half the time (especially BBC One and Two, and also BBC Three), while also watching Channel 4 and ITV2. They are more likely to watch films and children's programmes, news (including regional information) and soap operas. They are less likely to listen to the radio.
- **Demographics:** This segment tends to be made up of women (63%) aged under 30 (33%), in part-time work (29%) or looking after the home and family (with younger children (35%)). They are educated to GCSE/A-level (43%), from social class C1 (39%) (white-collar households), living in the South East and London (50%).