

# **Free-to-Air Events**

## **Summary report on Qualitative Phase of work undertaken for DCMS**

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**Ben Hewitson and Sue Clegg**



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# 1 Introduction

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## 1.1 Background

European Community law lets Member States, should they so choose, draw up legislation to maintain and protect a list of sporting and/or other events which are deemed by the Member State to be of major importance to society and which should be made available on free-to-air<sup>1</sup> television. Member states draw up their own list, and the criteria they wish to apply to decide what is of major importance to their society.

In 1998 the UK list was reviewed under the terms of the Broadcasting Act of 1996. Currently there are two lists (A and B); List A protects live coverage of events and List B ensures delayed or 'highlights' coverage.

The criterion used in the 1998 review was, that to be listed, an event had a special national resonance, not just significant to those who ordinarily follow the sport concerned; further, the event should serve to unite the nation and be a shared point on the national calendar. Events which met this criterion were viewed as likely to fall into one or both of the following categories:

- it is a pre-eminent national or international event in the sport;
- it involves the national team or national representatives in the sport concerned.

Satisfying the essential criterion meant that events would be considered for listing, however, the listing of such events was not to be automatic. An event was more likely to be listed if it exhibited particular characteristics making listing an apt response, such as:

- it was likely to command a large television audience;
- it had a history of being broadcast live on free-to-air services<sup>2</sup>.

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<sup>1</sup> The definition of 'free-to-air' is that no payment needs to be made for reception, beyond normal TV licence fee costs and the costs of receiving equipment, and that the broadcast is capable of reaching at least 95% of the UK population. At the time of this research only BBC1, BBC2, ITV1, Channel 4 and Channel 5 currently had that reach.

<sup>2</sup> Further information on the history of the protected list in the UK, and more detail about the criteria and other factors the Secretary of State will consider can be found in a consultation document produced by DCMS:

[http://www.culture.gov.uk/freetoair/Consultation/documents/free\\_to\\_air\\_consultation.pdf](http://www.culture.gov.uk/freetoair/Consultation/documents/free_to_air_consultation.pdf)

The current lists are:

### **List A<sup>3</sup>**

- The Olympic Games
- The FIFA World Cup Finals Tournament
- The FA Cup Final
- The Scottish FA Cup Final (in Scotland)
- The Grand National
- The Derby
- The Wimbledon Tennis Finals
- The European Football Championship Finals Tournament
- The Rugby League Challenge Cup Final
- The Rugby World Cup Final

### **List B**

- Cricket Test Matches played in England
- Non-Finals play in the Wimbledon Tournament
- All Other Matches in the Rugby World Cup Finals Tournament
- Six Nations Rugby Tournament Matches Involving Home Countries
- The Commonwealth Games
- The World Athletics Championship
- The Cricket World Cup – the Final, Semi-finals and Matches Involving Home Nations' Teams
- The Ryder Cup
- The Open Golf Championship

The Secretary of State for Culture, Media and Sport (DCMS) commissioned an independent review of free-to-air listed events, appointing an Independent Advisory Panel to review:

- The principle of having a list
- The criteria against which events may be listed, and
- The content of any list itself

The panel will make recommendations to the Secretary of State in the second half of 2009.

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<sup>3</sup> There are some restrictions to events on both lists, depending on when rights were acquired, details can be found in the consultation document mentioned above.

A consultation exercise is running for 12 weeks, until 1<sup>st</sup> July 2009, to gain views from as wide a sample of people as possible, including the public, the broadcasting industry, sports governing bodies and rights holders. Accordingly DCMS commissioned BMRB Social Research to undertake qualitative and quantitative work to canvas the views of the general public.

This document reports the findings from the qualitative element of the research, comprising twelve group discussions across England, Northern Ireland, Scotland and Wales. Details of the quotas for the groups can be found in Appendix 1.

## **1.2 Aim and objectives**

The overarching aim of this research was to gain an understanding of the public's views about free-to-air content eligible to be listed as protected events.

The key objectives of the work were:

- To explore the levels of support within the UK population for the existence of a list of protected events for which the rights to broadcast must be offered to free-to-air broadcasters
- To determine the criteria which the public believes should be used to select these events
- To determine which events the public think should be on the protected list

To fully understand the public's views in relation to the objectives it was also necessary to explore people's beliefs and thoughts on cultural and national identity, as these are likely to underpin their views on, for example, what constitutes 'national resonance'. The qualitative nature of this element of the research was ideally suited to generating discussions which allowed an exploration of complex, and potentially emotive topics.

Another important aspect of the work was to explore people's views on events other than sport which might be considered for inclusion as protected events. Currently the UK list comprises only sporting events, however, non-sporting events which meet the criteria could be included, indeed, in other countries non-sporting events are on protected lists – these include:

- The Vienna Philharmonic Orchestra's New Year Concert (Austria)
- The Vienna Opera Ball (Austria)
- Queen Elisabeth Music Competition (Belgium)

### 1.3 About qualitative research

It is important to note that the methods employed in this element of the research were qualitative in nature. This approach was adopted to allow for individuals' views and experiences to be explored in detail. Qualitative methods neither seek, nor allow, data to be given on the numbers of people holding a particular view nor having a particular set of experiences. The aim of qualitative research is to define and describe the range of emergent issues and explore linkages, rather than to measure their extent.

### 1.4 Report outline

Following this introduction to the work the subsequent seven chapters discuss the research findings:

- **Chapter 2** examines people's views on cultural and national identities and events which are deemed to be culturally important
- **Chapter 3** describes how people watch sporting events on television
- **Chapter 4** focuses on television consumption and paying for TV
- **Chapter 5** examines what people think about the lists of protected events
- **Chapter 6** explores any potential links between watching sport and taking part in sport
- **Chapter 7** considers events other than sport which might be included in the protected lists
- **Chapter 8** reflects upon the key messages raised throughout the report

## 2 Cultural and National Identity

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People's beliefs and thoughts about cultural and national identity are likely to affect the national teams they follow, to underpin their views on what constitutes 'national resonance' and possibly to impinge on their views on what content other than sport might be included in the lists.

### 2.1 Nationalities

- Nationality was defined at four different levels:
  - Outside of UK (e.g. Afro Caribbean – however, these participants often described themselves as, for example, Afro-Caribbean British)
  - National – usually defined as British
  - UK Home Nation – Scottish, Northern Irish, English and Welsh
  - Local (this was amongst the English participants, e.g. Northern, Southern, Lancastrian)
- It was more usual for people to identify themselves as Scottish, Welsh or Northern Irish rather than British.
- In England, however, there were people who expressed a feeling that to identify oneself as English could be seen to be culturally divisive, and potentially less socially acceptable. The participants in England were more likely than participants in Scotland, Wales or Northern Ireland to talk about a more local identity, for example as Northerners, or Southerners, or from Lancashire.
- Black participants were likely to describe themselves as Black, Black British or, for example, Afro-Caribbean British.
- People felt that they were 'forced' to identify as British on official documents and forms and, to some extent, resented this.

### 2.2 What helps people to define their nationalities?

- Generally people struggled to specify cultural markers which might be used to specify someone as Welsh, English, Northern Irish or Scottish.
- Where people were born, and where their parents were born appeared to be the predominant factor in how they defined their national identity, as long as they were still living in the country in question. When people, or their parents, moved, this tended to result in people identifying as, for example, Irish-English.

- Supporting and watching national teams and players helps people to feel, for example, Scottish. However, it was noted that sports people could be 'adopted' as British if they were doing well, for example participants expressed the view that Andy Murray was defined as Scottish until he started to do well, when the media started to report on him as 'the British tennis player'. Participants described feeling more English when watching English teams play sport (e.g. football) than they did at any other time – supporting a team, therefore, appeared to help to define cultural identity for some people.
- Speaking Welsh was quoted as being an important contributor to identifying as Welsh.

## 2.3 Events deemed to be culturally important

Participants deemed events (both sporting and non-sporting) to be culturally important if they brought people together and encouraged people to bond

### 2.3.1 Sporting events

- Participants enjoyed watching a large number of sports, including individual and team events. In sports such as motor racing, golf and snooker people tended to follow the progress of individuals, whilst teams were followed in sports such as football. Sports fans tended to have an interest in several sports, and to watch matches and events whether or not their own team were playing. People who were not intrinsically sports fans would often follow home teams in events like the World Cup, supporting their home nation team.
- Football, rugby and cricket were most often mentioned as being sports of national importance.
 

*"Football brings people together. I've travelled around the world and everyone knows about football. You can talk to anyone about football."*
- The Olympics and Wimbledon, for example, were discussed as 'events', and appeared to be of importance beyond the sports they represented.
  - The interest expressed in the Olympics was more complex than for other sports, with a general interest in how Team GB fared, as well as a specific interest in individuals within the team who might be seen as representing a home nation as well as the whole country:
 

*"If a Scottish person goes to the Olympics - like Chris Hoy - you tend to want to watch them"*

- Wimbledon was seen as both quintessentially British and something which gave the rest of the world a view of Britain:  
*"Wimbledon is the heart of what Britain is... It's a massive sporting event that people the world over follow".*
- In Scotland golf was seen as nationally and culturally important because *"Scotland is the home of golf"* – the Ryder Cup and the Open were deemed to be particularly important.
- Six Nations Rugby was cited as important by participants in England, Scotland Wales and Northern Ireland as it was a chance to support home nations in a single event.

### 2.3.2 Non-sporting events

- A wide range of non-sporting events were deemed to be of cultural importance; as can be seen from the list below, events which highlighted cultural heritage, or which originated in a particular location were deemed to be important. Interestingly, Scottish participants mentioned three of the events listed under England as being of national importance; no other participants mentioned events held in other than their home nation.

#### 2.3.2.1 Scotland

- The Edinburgh Festival (both Fringe and Main Festival) – seen as being important to Scotland, Britain as a whole and recognised across the world
- Celtic Connections - annual winter music festival featuring Scottish music
- T in the Park - music festival, held in central Scotland
- Highland Games – many held across Scotland.
- The Edinburgh Tattoo
- Burns Day and the Burns Supper
- Hogmanay and New Year's Day

- Rock Ness - a music festival
- Piping Competition, Bellahouston
- Edinburgh Film Festival

#### **2.3.2.2 Wales**

- Royal Welsh Show, Builth Wells; related to farming heritage
- National Eisteddfod - a language based festival important in terms of Welsh heritage

#### **2.3.2.3 England**

- Glastonbury festival (also mentioned by participants in Scotland)
- Trooping the Colour (also mentioned by participants in Scotland)
- Last Night of the Proms festival (also mentioned by participants in Scotland)
- V Festival
- Gay Pride
- Remembrance Day
- Last Night of the Proms
- Chelsea Flower Show
- State events, such as State Funerals, coronations etc.

#### **2.3.2.4 Northern Ireland**

- Orange Day Parade
- St Patrick's Day

- West Belfast Festival

### **Chapter summary**

- Welsh, Northern Irish and Scottish participants were more likely to identify their nationality in terms of their home nation than English participants.
- Cultural markers were difficult for people to identify – nationality tended to be seen as depending on where one was born, and where one's parents were born.
- National identity was linked to which teams were supported.
- Football, rugby and cricket were deemed to be national sports, with people supporting a local or national team. Six Nations Rugby was important to participants across all four home nations. Golf was seen as important in Scotland.
- 'Event' sports such as the Olympic Games and Wimbledon were watched with an overall interest, but special interest was taken if someone for participants' home nations was taking part.
- A wide range of non-sporting events were thought to be culturally important, with particular emphasis on events which highlighted cultural heritage.

### 3 Watching sport and other events

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This chapter explores themes around the types of sporting events which are currently watched; how and where sport is watched; and types of events, both sporting and non-sporting which were considered to bring people together to watch. In particular, there were some interesting distinctions between participants that considered themselves to have an interest in sport and those that did not.

#### 3.1 Sporting events watched

- An extensive variety of sports and sporting events were watched by all participants. Those who considered themselves to be interested in sport were found to watch a greater range and volume of sports than those who did not consider themselves to have such an interest.
- Sporting events which were watched by all participants tended to be those that were considered to be 'major events', such as Wimbledon, the Six Nations rugby tournament, the football World Cup Finals and the Olympics. This was because people considered the events to be important, especially during the later stages of a tournament, or when a home nation, or neighbouring home nation, featured.

*"I'll watch it if England are on...because I want to know if they are going to win"*

- Participants with an interest in sport watched events beyond those which were considered to be major events, such as friendly matches, qualifiers and even age specific events, such as football under 21 tournaments.
- However, it was evident that there were people who were not interested in sport who did watch sporting events with other people, such as family members or friends. This was either in home, if sport happened to be on TV due to another family member watching, or in a public location, such as a pub when a social occasion had been organised around an event.

*"It's a case of having to watch it [sport] because of my husband and kids!"*

#### 3.2 How sport is watched

- Participants generally favoured watching most types of sport live, where possible; this depended on TV coverage and the time at which an event was shown. Exceptions to this were for events that lasted more than a few hours, such as cricket test matches and golf tournaments. In these cases,

highlighted coverage tended to be favoured unless a participant had a particular passion for these sports.

*"At the end of the day, you can't beat live coverage"*

- It was felt that watching live sport added emphasis and importance to the event. It was suggested that watching live sport:
  - Added excitement and anticipation to the occasion;
  - Gave an 'excuse' to create a social occasion based around the event, such as having a meal and drinks whilst watching the Six Nations or having a 'sweepstake' when watching the Grand National;
  - Made people feel included in social situations where the event was being discussed.

*"It's an event that's talked about through the week and I think it's like part of the community and everybody's interested in it."*

- Highlights coverage was generally seen as less exciting than live coverage as participants would often already know the outcome of an event. For this reason, only those who had missed a live broadcast and those interested in particular sports without access to live coverage tended to watch highlighted coverage. Despite this, highlighted coverage of events such as snooker championships and golf tournaments was seen to be a good way to watch all 'the best bits' of longer lasting sporting events.
- Delayed coverage of events tended to be favoured by participants who enjoyed sports taking place in other countries, which were often shown late at night, such as certain Formula One Grand Prix and American sports. Often, these events would be recorded and watched at a later, more suitable time.

### **3.3 Where sport is watched**

Sport was broadly watched in three locations: In own home, in friends/other family members' homes or in a pub.

#### **3.3.1 In own home**

- The extent to which participants watched sport at home largely depended on whether they had access to subscription based TV services. Those with such access would tend to watch more sport in their own homes as they had paid for doing so.

- It was common for those with access to subscription based TV to invite others round to watch events, particularly domestic football matches.
- The viewing of sports which were considered to be 'niche', or of little interest to others, tended to be watched in home, by one person on their own.
- Participants suggested that watching sport at home was a way of spending time together as a family, enjoying an event in each others' company.
- Watching sport at home tended to be favoured by some participants as it was felt they could actually watch an event, rather than in a pub where it was often difficult to see what was going on.
- There was a common feeling amongst female participants that they 'had to watch' or were 'forced' to watch sport at home because other family members were doing so.
- Watching sport at home tended to be the only place where highlighted coverage was watched as outcomes of these events were often already known and the excitement factor involved when watching with others tended to be absent.

### **3.3.2 In family or friends' homes**

- Watching sport in someone else's home commonly occurred when an event considered to be important was taking place and it was felt that watching with like-minded people would improve the viewing experience. Watching sport in a friend or family member's home was different from watching sport in a pub as it was considered to be a more family friendly atmosphere, where children could also watch an event in a safe environment.
- Sport was commonly watched in another person's home when a wider social occasion was arranged around a sporting event, for example, having a barbeque and drinks to coincide with Olympic track finals. Such occasions would also encourage those not particularly interested in sport to attend too.
- Watching sport in someone else's home was also facilitated by the level of access to subscription based TV services held. For example, it was common for those without access to cable or digital services to watch an event broadcast in this way with a friend or family who had such access. It was said that this was a cheaper and more comfortable way of watching sport than in a pub.

### 3.3.3 In a pub

- Sport tended to be watched in a pub when the event being shown was considered to be particularly important, either on a local or national level.
- Football, rugby union, boxing and horse racing and events taking place once a year or less were those commonly watched in a pub as these were seen to be special occasions.
- It was said that the atmosphere of being with other people in a pub (usually supporting the same team) facilitated excitement around the event.
- Participants who did not consider themselves to have an interest in sport would occasionally attend the pub to watch certain events, such as The Six Nations rugby tournament as these events were more seen as social occasions rather than just sporting events.

*"The Six Nations, everyone tends to go over to the pub and watch it there, it's more of a social thing as well"*

### 3.4 Events that bring people together

There were a number of both sporting and non-sporting events that were considered to bring people together to watch. These communal viewings would commonly take place in someone's home or in a pub. Furthermore, it was always live events that were said to bring people together to watch.

- Examples of events that were said to facilitate bringing people together included major sporting tournaments, especially where a home nation or representative, or local club was involved. This was because participants felt proud that their team was being shown on TV and this sense was heightened when these teams were competing in a match towards the end of a tournament.

*"Gaelic [football] is a family orientated parish...no matter what team it is, the players will be from that area...you're representing your area...that is the pride of Gaelic football".*

- Sporting and non-sporting events that were seen as being effective in bringing people together were often combined with food and drink, and sometimes decorations, to create a party atmosphere, making the occasion larger than the event itself for those involved.

- Certain events were perceived to be important for children to watch and these brought families together to watch. The opening ceremony of the Olympic Games and New Year's Eve celebrations around the world were examples of these types of event.

**Chapter summary:**

There are three main themes relating to how people watch sport and other events:

- Those interested in sport are happy to watch sport in a number of locations, with or without other people. Those not interested in sport will watch sport, especially involving a national side or representative, although often this will be because of a wider social event taking place around the event rather than the event itself.
- Live sport when available to watch, was almost always preferred to highlight coverage as it was perceived to be more exciting.
- Events that brought people together were often considered to be 'big' and 'important'. These were seen as so, because they either involved an interest from the home nation or because they were not common events that could be seen on a weekly basis, such as the Olympic Games opening ceremony.

## 4 Television consumption and paying for TV

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This chapter examines the attitudes of participants towards the amount of sports coverage on both on free-to-air and subscription based channels, and issues around paying for content. The chapter also presents views about entitlements to watch events as licence fee payers and tax payers.

### 4.1 Satisfaction with amount of sport on free-to-air TV

- Those interested in sport tended to believe that there was not enough sport on free-to-air channels, whereas those who did not have an interest in sport felt that there was too much sport on free-to-air television.
- There was, however a general consensus amongst participants that there are particular points in the year where sport was perceived to 'saturate' free-to-air TV.

*"It kind of takes over the channel for the whole season that it's on... it puts me off those channels for all the time it's on"*

- Despite the differences in satisfaction with amount of sport on free-to-air television, it was commonly felt amongst all groups that the amount of sport being shown on free-to-air channels had reduced over the years and that subscription based services such as Sky and Setanta had taken many events which used to be shown on free-to-air channels.

*"There's not that much sport on free-to-air. There's less of it now that the big events have gone to Sky and so on."*

- There were participants who expressed annoyance at sport interrupting regular programming on free-to-air channels (such as when extra time and penalties are played during a football match). This related to both live viewing and when wishing to record programmes – especially when sport pushed on the timings of regular programmes.

### 4.2 Paying for subscription based TV

- Those paying for subscription based TV packages, such as Sky, Virgin Media or Setanta had differing views as to whether they were felt to be worth the subscription fees. However, of those that suggested that they were not worth the money, it was unusual for people to have considered cancelling their subscription. Despite this, there was also a general feeling amongst subscribers that if they wanted to watch sport, they would need to pay for a subscription.

*"If you can't afford Sky, you can't afford sport"*

- Participants with access to subscription TV suggested a number of reasons for subscribing, including the fact that it enabled them to gain access to sport not shown on free-to-air television, such as Premiership football.

*"You have to go and pay £40 a month in order to get your sport"*

- Participants who had paid for ad-hoc events tended to be disappointed by the service received and the fact that they had to pay extra for events they felt they should be entitled to either as part of their subscription package or on free-to-air channels through their licence fee, especially when events such as boxing involving British fighters incurred an extra payment.

*"I forked out fifteen quid and got up at three in the morning ... I won't be doing that again"*

### **4.3 Entitlement to watch through licence fees and taxes**

There was a strong feeling that, by financing sport and other events through television licence fees and taxes, individuals should have an entitlement to watch particular types of content on free-to-air TV.

#### **4.3.1 Licence fees and the BBC**

- There were different interpretations of what paying a television licence entitled people to. Some felt that paying for a TV licence just enabled them to legitimately own a television set, whilst others felt that the TV licence was just 'another type of tax'. These differing views engendered different attitudes towards whether licence fee payers should have an entitlement to view particular types of content.
- Those who felt there should be an entitlement to view particular types of content believed that as they pay for the service of the BBC, they should be able to watch events that reflect the British culture.

*"At the end of the day we all pay out TV licence....so we should be expected to see something of our culture and large events..."*

- Despite strong beliefs that licence fee payers should be entitled to see particular types of content, it was understood that many events, sporting and non-sporting, were businesses and it was not possible to have access to all of these. However, it was felt that events that had previously been

shown on free-to-air television and that were considered 'traditional' should be available to the majority of the population.

*"These things are expected. You pay your licence fee and you expect to see the FA cup final."*

#### 4.3.2 Publicly funded sport

- Participants felt that if sports were publicly funded they should be shown on television without cost to the viewer.
- It was felt that where tax payers' money was used to fund events such as the 2012 Olympic Games in London, the public should be able to watch such events on free-to-air television. A further suggestion was that children should be given the opportunity to witness the games live, at the event.

*"We pay enough in taxes... Anything that's got England or Britain in it, we should be entitled to watch it"*

#### Chapter summary:

- There was a difference of opinion between participants interested in sport and those not interested in sport as to the level of satisfaction with the amount of sport on free-to-air television. Whereas those interested in sport felt there was not enough on free-to-air, participants that were not interested in sport felt there was too much. Notwithstanding this, it was generally felt by all that the amount of sport on free-to-air TV had declined over the years.
- It was generally felt that in order to have access to particular sports, such as football, an individual would need to pay for a subscription based TV service to receive this.
- Participants tended to believe that paying television licence fees, and sports being paid for from public funds, gave them an entitlement to watch sport on free-to-air television; this was particularly the case for events which were considered to be traditional and/or which were associated with cultural identity.

## 5 Lists of protected events

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This chapter discusses the views and attitudes of participants in relation to the lists of events that are protected to remain on free-to-air television. Specifically, it discusses participants' views on the principle of the lists and examines the level of support for having such lists. Furthermore, views on the current criteria of events being 'of national importance' and 'of major importance to society' are included, along with some suggestions of further criteria which could be incorporated to ensure that events are placed on the protected free-to-air lists. It also outlines some suggestions of specific events participants felt should and should not be included on the lists.

### 5.1 Views on the principle of free-to-air lists and support for these

- There was a general agreement amongst all participants that the principle of having lists which served to protect events to be shown on free-to-air television was a good idea.
- There were strong levels of support for retaining the lists of protected events as it was felt that certain events needed to remain on free-to-air television. This was because they were perceived to embody characteristics of tradition and heritage.

*"It's English, it's tradition. It's a necessity to hold on to our culture otherwise we won't have an identity."*

- It was felt that particular events, such as the FA cup final, contributed towards national and cultural identity and as such should be protected so that they were available to all.

*"They should be available to everyone, not just people who can afford to pay extra. It gives people the opportunity to witness the main important events. It shouldn't just be for special, privileged people who can afford it"*

- Despite the strong levels of support across all groups, there was also some cynicism expressed about the extent to which the events on both the A and B lists would continue to be protected. This view was grounded in the fact that participants had seen other events, such as English cricket matches, disappear from free-to-air television to subscription based television over the years.

## 5.2 Views on the criteria for ensuring events remain on free-to-air

- It was widely felt that the current criteria for events being selected to be included on the free-to-air lists, that is being 'of national importance' and 'of major importance to society' were fair, valid and relevant, however there were some difficulties in understanding the language and terminology used to frame the criteria.
- Despite support for the current criteria, participants felt that they were too exclusive as the lists comprised only sporting events. In particular, those who were not interested in sport felt that the lists excluded a number of programmes, such as Britain's Got Talent which were viewed more widely than some of the events currently on the lists.
- Further, participants from outside England felt that although the criteria outlined were fair and relevant, the lists did not include many events which could be considered of national importance for Wales, Scotland or Northern Ireland.

## 5.3 Alternative criteria

- Although participants agreed with the criteria for including events on free-to-air lists, it was felt that more could be done to make the lists more inclusive of events which would appeal to a broader population than just those interested in sport. The notion of including events that the majority of society is interested in was a common suggestion, although it was acknowledged that this would be a difficult criterion to determine.
- One suggestion given across the groups was that there should be some notion of selecting events to be protected on the basis of how popular they were with people. It was felt that ratings figures for particular events should be taken into account when updating and compiling lists.

*"Something along the lines of popular or public demand should be in there"*

- It was also felt that the economic impact a particular event had should also be borne in mind when considering what events should be included on free-to-air TV. It was suggested that events that significantly contribute to improving the economy should be included on free-to-air lists.
- The impact and influence that particular events had on people, particularly children was also felt to be a valid criterion to be included. This was perceived to be important because it was felt that certain events needed to remain on free-to-air so that as many people as possible could witness them and possibly take inspiration from them.

*"Success breeds success and these events can inspire children"*

- Finally, there was a suggestion that the criteria should also include a clause regarding the BBC sports personality of the year, whereby the events that the winner competes in should be shown on free-to-air television.
- Alternative criteria put forward by participants:
  - An event should be competitive, short in duration and fast paced enough to be exciting to watch. It should also be nationally/socially/culturally important.
    - An event would be 'nationally/socially/culturally important' if:
      - most of the population can identify with it in some way;
      - it instils national pride;
      - it provides an international platform for a home nation or the UK as a whole;
      - it is held in the UK, even if there is not likely to be a UK winner (as Wimbledon currently is);
      - it is economically or socially important (e.g. it generates investment);
      - a lot of UK investment has been used to create a team/sports person/venue;
      - it brings people together;
      - it is a national event;
      - it is seen as a major sporting event, even if a national or home team have dropped out.
    - Other factors which should be considered:
      - History
      - Tradition
      - Prestigious at a world level
      - Good for the country's reputation internationally
      - The number of viewers an event would be likely to attract
      - Addressing any imbalance between the representation of different home nations on free-to-air channels (e.g. between Scotland and England)
      - Where a team, or sports person is representing their national or home nation team, regardless of the type of sport
      - Events with a regional or local popularity, e.g. curling, could be included

## 5.4 Sporting events to be included in lists

- On the whole, participants tended to agree with the events categorised in the A and B lists. However, there were a host of sporting events that were suggested as needing to be protected. Some of these events are currently categorised on list B, and were felt to warrant inclusion on list A, whereas others were not included on either list. The most common examples were as follows:
  - The world snooker championship: This was felt to be a traditional British sport that needed to be protected to remain on free-to-air channels. Arguments for including this, as well as other snooker tournaments also focussed on the fact that it is a British game with a high volume of British players.
  - The formula one season: Due to the number of British teams and drivers this was also felt to be of national importance and of major importance to society. It was also perceived that formula one could be taken over by subscription based broadcasters and this was a further justification to protect it.
  - Boxing involving British fighters: It was widely felt that Britain was competing very well in a number weight categories in boxing and that the majority of the population should be able to watch them fight. Furthermore, it was believed that as Joe Calzaghe won the BBC sports personality of the year in 2007, his fights should have been available, at least on the B list during 2008.
  - The Six Nations rugby tournament was felt to be justified as being promoted to list A amongst participants from all nations. This tournament was considered as being particularly important for those from Northern Ireland and Wales as rugby was perceived as a national sport which these nations could compete in at the highest level and which facilitated a sense of national pride and cultural identity.
  - The Commonwealth Games was also seen to be justified in being promoted to the A list, as it was felt that as the head of the commonwealth, the United Kingdom should have this event available on free-to-air television as it is of cultural importance.
- There was also a tendency for participants to suggest that some local and regional sports, such as Gaelic football and Hurling in Northern Ireland and the Highland games in Scotland should be included on free-to-air lists. This was because these were considered to be of major importance to the

nation itself, rather than the whole of the United Kingdom. In England, it was suggested that the inclusion of coverage of local football teams would also be of importance to those living within a television region.

- However, despite the suggestion of including regional sporting events it was felt that the rugby league Challenge cup final did not meet the criteria of being of national importance or of major importance to society; there was a strong perception that rugby league was, on the whole only of importance to the North West of England.

**Chapter summary:**

- There was a strong level of support amongst participants for the concept of protected free-to-air lists
- It was felt that particular events, such as the Grand National contributed towards cultural identity and heritage and were considered to be traditional. It was felt that such events should be accessible to the widest possible audience through free-to-air television
- The current selection criteria of being 'of major importance to society' and 'of national importance' was felt to be fair and relevant. However, these were perceived to be too exclusive, not taking into account events other than sport.
- Those residing outside of England felt that the criteria could do more to incorporate Welsh, Scottish and Northern Irish events.
- A number of extra criteria were suggested to select protected free-to-air events. These ranged from considering which events were most popular to selecting events based on their capacity to be of widest interest and to selecting events based on their economic and influential impacts.
- A range of events were suggested to be included in the protected lists, including snooker, formula one and boxing.
- The Six Nations rugby tournament and the Commonwealth Games were perceived to be important enough to include on the A list.

## 6 Links between watching sport and taking part

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This chapter explores people's views on whether there is a relationship between watching sport on television and participating in sports activities.

- There were differences of opinion regarding the extent to which watching sport facilitated participation. Some groups felt there was a definite link, whilst others felt that at most, there was a very weak connection between the two.
- Even amongst those who thought there was a link between watching and playing sports, it was generally felt that watching sport did not facilitate participation amongst adults. However, there was a difference of opinion when it came to children, with most participants believing that children could be heavily influenced by television, and sport on television was no exception to this.

*"TV definitely has an influence on children"*

- It was generally believed that sporting events which are less common, such as Wimbledon, facilitated a higher level of participation than sporting events which are more common, such as league football. The opinion was regularly voiced that during Wimbledon fortnight tennis courts are very busy with adults and children alike playing tennis.
- Participants thought that children and adults took inspiration from different levels of competing in sporting events. It was felt that professional athletes could inspire children to take up sport, as they could look up to their idols, and aspire to replicate their skills. Adults appeared to be more inspired by celebrities and amateurs; an example often cited was the BBC's 'Dancing on Ice', with viewers witnessing 'people like them' progressing over time. This was seen as encouraging people to try out sports they might not have tried before, such as ice skating.

*"Seeing people who are not dissimilar to me being able to conquer things would probably motivate me more, but for children seeing people they know well, like [sports] stars, probably motivates them more"*

### Chapter summary:

- It was felt that watching sport did not really facilitate participation in sport, except amongst younger people who would watch professional

sportspeople and wish to emulate their techniques and success.

- Less common events, such as Wimbledon were considered to be more powerful in facilitating active participation in sport.
- Professional athletes were suggested as being more inspirational for younger people, whereas amateurs were more inspirational for adults.

## 7 Other events to be included in protected free-to-air lists

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The current protected lists only contain sporting events, but non-sporting events could be included in future lists, if they met the necessary criteria. As mentioned in the introduction, other countries include non-sporting events in their lists, such as The Vienna Philharmonic Orchestra's New Year Concert on the Austrian list.

Participants in the group discussions were asked what non-sporting events they thought should be included in the protected lists, why they considered them to be important, and how they thought they fitted the criteria for inclusion.

- Participants found it relatively easy to think of events which were culturally important, as listed in Chapter 2, and could justify their importance, and argue for why they thought some of the events fitted the criteria for inclusion. However, the types of events which people put forward are unlikely to be included in the protected lists for a number of reasons:
  - because the rights are complex, so that putting them on the list would be very difficult (e.g. music festivals)
  - because they are essentially news items (e.g. State Funerals and coronations)
  - because they are not events which could be televised (e.g. Hogmanay)
  - because the event is owned by a television company (e.g. Last Night of the Proms)
  
- Interestingly, the list widened beyond the events seen as culturally important in the early part of the discussions, to include extant television programmes. Participants wanted to see documentaries (e.g. by David Attenborough) protected because they thought they were high quality programmes which were good family viewing. The notion of being able to watch television with family and friends, and to know that the programming was of high quality, and unlikely to offend was important to people. As well as the events listed in Chapter 2, the following were discussed as important to people, with a desire that they be protected in some way:

### 7.1 Extant programmes

- X Factor
- Britain's Got Talent
- Royal Variety Show
- Children in Need

- Panorama
- Question time
- Coronation Street
- News programmes
- History programmes
- Eurovision Song Contest
- The Queen's Speech

## 7.2 Other events

- Farnborough Air Show
  - Royal Weddings, funerals etc.
  - Music Festivals
  - Elections
  - Brecon Jazz Festival
  - Notting Hill Carnival
  - Baftas
  - Opening of Parliament
  - National Ballet
  - National Opera
  - Boat Race
  - Parliamentary debates
  - Local events, such as carnivals
- There were suggestions that some events would not necessarily be of national interest, but that there would be sufficient interest locally to consider having regional or local protected lists, both for sporting and non-sporting events (e.g. local football league matches and local events such as carnivals, which could give more coverage than was currently available on local news or magazine programmes – showing live or highlighted elements).

### Chapter summary:

- Events suggested by participants for inclusion on protected lists are, largely, beyond the remit of the lists.
- Events, and extant programmes, suggested were of the type which participants deemed to be good family viewing, which could be watched by all age groups.
- There were suggestions for local or regional protected lists, both for sporting and non-sporting events, to allow a greater coverage of, for example, local league football and events of local importance.

## 8 Key findings

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This chapter pulls together the findings and considers them in relation to the three objectives of the study:

- To explore the levels of support within the UK population for the existence of a list of protected events for which the rights to broadcast must be offered to free-to-air broadcasters
- To determine the criteria which the public believes should be used to select these events
- To determine which events the public think should be on the protected list

### 8.1 Levels of support for the existence of protected lists

- Overall there was wide support for the idea of protected lists, with a feeling that, for sport, the lists were needed to ensure that sports fans who could not afford to pay for subscription services could still see sport on television.
- There was also a view that the protected lists could be used to reduce bias, for example ensuring that Scottish sport was included on free-to-air television, rather than there being a preponderance of English events on free-to-air channels.
- Whilst non-sports fans were generally in favour of protected lists of sporting events, because they could see that the events could be deemed to be of national importance, they were not necessarily interested in the sports events themselves.
- The protected lists were seen as a way of allowing children access to sporting events, to encourage interest, and, potentially, taking part in sports.
- A counter argument put forward by non-sports fans was that the existence of the protected lists maintains sports' perceived dominance in television schedules, and, more particularly, the dominance of certain sports at the expense of others (this was particularly seen as a dominance of male oriented sports).

## 8.2 Criteria for inclusion on lists

- The current criteria for inclusion were, for some participants, difficult to understand; the term 'national resonance' caused particular difficulties. There was general agreement that an *important event* should engage people other than those who would watch it as part of their normal routine. In terms of 'uniting the nation' there was a view that an event might unite part of the nation, but that there was a case for widening this clause, to ensure that events which would unite, for example, home nations, or even unite people at a more local or regional level could be included.
- An alternative to 'national resonance' might be 'an event which excites interest in the majority of people in the UK'.

## 8.3 Events which should be on lists

- A widely held view amongst sports fans was that more sporting events should be on the lists, and that events currently only available on subscription channels, and/or via pay-per view, should be made available on free-to-air channels. It was generally believed that there was far less sport available now on free-to-air television than there had been in the past, and that there should be more sport returned to free-to-air channels; this view tended to be linked to the notion that the licence fee should enable people to have access to high quality sporting events, and that paying for subscription services was 'paying twice'. There was some scepticism that the lists would diminish in the coming years, with subscription services taking more and more sport content. Amongst sports fans there was a general view that events on the current lists were all worthy of inclusion, but that the lists should be expanded.
- A number of suggestions were made about events which participants felt should be included in the lists, or should be moved from List B to List A.
- Whilst there was wide support for events other than sports to be included in the lists people had difficulty in identifying events which met the current criteria, or the criteria they suggested as alternatives.

## Appendix 1 - Methodology

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12 group discussions took place across the UK:

- Brighton x 2
- Nottingham x 2
- Rochdale x 2
- Glasgow x2
- Swansea x 2
- Belfast x 2

### Recruitment

Participants were recruited using a 'free find' method by specialist recruiters, whereby recruiters who know an area well go into communities and find people who fit the quota requirements of the study.

### Primary Quota

Two groups were undertaken in each area: one group comprised people who had an interest in sport, and the other comprised people who did not have an interest in sport. This quota was put in place to ensure that the voices of people who were not ardent sports fans were heard.

### Secondary Quotas

Across the 12 groups a mix of people was achieved in terms of:

- Gender
- Age (18-34 / 35-49 / 50-64 / 65+)
- Access to subscription TV at home / no access to subscription TV at home (NB: subscription TV was defined as TV content which was paid for over and above the television licence fee and receiving equipment)
- People with children under the age of 18 living with them / people without children under the age of 18 living with them
- Ethnicity

Anyone who worked in sport or television was excluded from taking part.

The recruitment profile was:

<b>Quotas</b>		<b>Totals</b>
<b><i>Interested in sport?</i></b>	Yes	47
	No	46
<b><i>Access to subscription based TV in the home</i></b>	Yes	53
	No	40
<b><i>Children under 18 in household</i></b>	Yes	41
	No	52
<b><i>Age range</i></b>	18-34	29
	35-49	26
	50-64	23
	65+	15
<b><i>Gender</i></b>	Male	47
	Female	46
<b><i>Ethnicity</i></b>	White	76
	BME/ Other	17

## Appendix 2 – Topic Guide and stimulus materials

Researchers used a topic guide as an aide memoire to ensure that all groups covered the major themes required.

### Topic Guide

Approx. Timings	Sections and aims	Topic areas	Notes etc.
10-15 minutes	<i>Section 1:</i> Introduction	About BMRB: study for DCMS Confidentiality and recording Length of group (approx 90 mins) Housekeeping Rules of discussion Aims of discussion: <ul style="list-style-type: none"> <li>To explore issues about sport, and other content, on television</li> </ul> Introductions	
10 minutes	<i>Section 2:</i> Cultural identity	Exploration of cultural identity <ul style="list-style-type: none"> <li>Local / national <ul style="list-style-type: none"> <li>How would they describe themselves? (e.g. British, Irish, Welsh, Scottish, English)</li> </ul> </li> <li>What events (sporting / non-sporting) are considered to be culturally important <ul style="list-style-type: none"> <li>Why such events are important</li> </ul> </li> </ul>	Be aware of potentially sensitive issues  What makes these events culturally important
10 minutes	<i>Section 3:</i> Current tv viewing habits	Current tv viewing habits re sport <ul style="list-style-type: none"> <li>How content is viewed (e.g. live / time shifted) – why</li> <li>Explore who content is viewed with (e.g. family, friends, other) <ul style="list-style-type: none"> <li>How is this content viewed</li> <li>What TV events bring people together to watch <ul style="list-style-type: none"> <li>Probe on what they currently do with their family, and/or what they did in the past</li> </ul> </li> </ul> </li> <li>Explore levels of satisfaction with amount of sport on free to air <ul style="list-style-type: none"> <li>Probe on too much, too little, about right <ul style="list-style-type: none"> <li>Feelings when sport interrupts regular schedule</li> </ul> </li> </ul> </li> <li>Paying for 'extra' tv services <ul style="list-style-type: none"> <li>Whether currently paying for content <ul style="list-style-type: none"> <li>How they pay for content – e.g. subscription or ad-hoc payment, e.g. sky box office</li> </ul> </li> <li>Why they do this – is it worth it</li> <li>What sort of content is important to them</li> </ul> </li> </ul>	Ensure topic doesn't stray too far to online – be aware that sports fans may have subscribed to their team's website to gain TV coverage  What do they watch with their children What did they watch with their parents
10	<i>Section 4:</i>	Explore views on paying for tv content	

Approx. Timings	Sections and aims	Topic areas	Notes etc.
minutes	Paying for content	<ul style="list-style-type: none"> <li>Issues around 'social contract' with BBC <ul style="list-style-type: none"> <li>Licence fee – any entitlement to content</li> </ul> </li> <li>Issues around taxes funding sport <ul style="list-style-type: none"> <li>Funding for sports via taxation – entitlement to view</li> </ul> </li> </ul>	
25 mins	<i>Section 5:</i> Protected free-to-air events	<p>Introduce concept of protected free-to-air events</p> <ul style="list-style-type: none"> <li>Explore views on: <ul style="list-style-type: none"> <li>Principle of having such a list</li> <li>What criteria should be applied <ul style="list-style-type: none"> <li>'National importance' <ul style="list-style-type: none"> <li>What if UK team do not qualify</li> </ul> </li> <li>'Of major importance to society'</li> <li>Any other criteria which they think should be included</li> </ul> </li> </ul> </li> <li>What events should be included <ul style="list-style-type: none"> <li>Qualifiers</li> <li>Finals</li> <li>Issues re length – e.g. cricket over 5 days</li> </ul> </li> <li>Explore views on Group A and Group B <ul style="list-style-type: none"> <li>Thoughts on what should be included in A/B</li> </ul> </li> </ul>	<p><b>Handout 1</b></p> <p>Explain not just sport</p> <p>If a fan of one type of sport, e.g. rugby, does this affect their view on other sports, e.g. football, tennis etc. – what effect?</p> <p><b>Handout 2</b></p>
10 mins	<i>Section 6:</i> Taking part in sport	<p>Explore whether they take part in sports activities</p> <ul style="list-style-type: none"> <li>Which sports</li> <li>Explore whether there are any links between watching sport and taking part <ul style="list-style-type: none"> <li>Any variations between annual events (e.g. Wimbledon) and more common events (e.g. football)</li> </ul> </li> <li>Explore whether and extent to which the <u>level</u> of sport watched is important in facilitating participation <ul style="list-style-type: none"> <li>Probe on professional athletes, celebrities and 'real' people, e.g. programmes such as <i>The Games</i> and <i>Beat the Star</i></li> </ul> </li> </ul>	<p>Does watching sport facilitate activity</p> <p>Does watching top class sport have more impact – if so, for the better (e.g. more likely to get them to take part), or for the worse (e.g. thinking 'I could never be that good')</p>
15 mins	<i>Section 7:</i> Other events	<p>Explore views on other events which might be included in free-to-air lists</p> <ul style="list-style-type: none"> <li>What events could be included <ul style="list-style-type: none"> <li>Why</li> <li>How do they fit the criteria – e.g. what makes them of national importance?</li> </ul> </li> </ul>	<p>Example: National Eisteddfod in Wales</p> <p>Remind what criteria are</p>
	Ends	Thank and close	

## Handout 1

**Q.** What is free-to-air television?

**A.** Free-to-air TV means that no payment needs to be made for reception beyond the normal TV licence fee and the cost of receiving equipment (e.g. TV set, aerials) and that the broadcast is capable of reaching at least 95% of the UK population. Only BBC, ITV, Channel 4 and Channel 5 currently have this audience reach.

As the UK moves closer towards full digital TV switch over in 2012, free-to-air TV will also encapsulate digital TV received via a 'freeview' box or similar reception device that is paid for in a one-off payment.

**Q.** Which channels are currently free-to-air

- A.**
- BBC 1
  - BBC 2
  - ITV1
  - Channel 4
  - Channel 5

**Q.** What is not free-to-air television?

**A.** Free-to-air TV does not include television services received through a subscription based provider, such as Sky, Virgin Media, NTL: Telewest or any other cable TV provider.

## Handout 2

Events scheduled for free-to-air coverage are categorised as either List A, or List B events. List A seeks to protect live coverage and List B to ensure delayed or 'highlights' coverage is broadcast.

### Events currently listed in group A:

- The Olympic Games
- The FIFA World Cup Finals Tournament
- The FA Cup Final
- The Scottish FA Cup Final (in Scotland)
- The Grand National
- The Derby
- The Wimbledon Tennis Finals
- The European Football Championship Finals Tournament
- The Rugby League Challenge Cup Final
- The Rugby World Cup Final

### Events currently listed in group B:

- Cricket Test Matches played in England
- Non-Finals played in the Wimbledon Tennis Tournament
- All other matches in the Rugby World Cup Finals Tournament
- Six Nations Rugby Tournament involving matches with Home Countries
- The Commonwealth Games
- The World Athletics Championships
- The Cricket World Cup – The Final; Semi-Finals; and Matches involving Home Nation sides
- The Ryder Cup
- The Open Golf Championship

## **Appendix 3 - The analysis of qualitative material using *Matrix Mapping***

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Material collected through qualitative methods is invariably unstructured and unwieldy. Much of it is text based, consisting of verbatim transcriptions of interviews and observational notes. Moreover, the internal content of the material is usually in detailed and micro-form (for example, accounts of experiences, inarticulate explanations, etc.). The primary aim of any analytical method is to provide a means of exploring coherence and structure within a cumbersome data set whilst retaining a hold on the original accounts and observations from which it is derived.

Qualitative analysis is essentially about detection and exploration - 'making sense' of the data by looking for coherence and structure within it. *Matrix Mapping* works from verbatim transcripts and involves a systematic process of sifting, summarising and sorting the material according to key issues and themes.

The process begins with a familiarisation stage and includes researchers reviewing the audio recordings and/or transcripts. Based on the coverage of the topic guide, the researchers' experiences of conducting the fieldwork and their preliminary review of the data, a thematic framework is constructed. The analysis then proceeds by summarising and synthesising the data according to this thematic framework.

When all the data have been sifted according to the core themes the analyst begins to map the data and identify features within the data: defining concepts, mapping the range and nature of phenomenon, creating typologies, finding associations, exploring differences and providing explanations. Perceptions, accounts and experiences are compared and contrasted; searches are made for patterns or connections within the data; and explanations are sought internally within the data set. Piecing together the overall picture is not simply aggregating patterns, but it involves a process of weighing up the salience and dynamics of issues, and searching for structures within the data that have explanatory power, rather than simply seeking a multiplicity of evidence.