



RESEARCH TO EXPLORE PUBLIC VIEWS ABOUT THE BBC

For the Department for Culture, Media and Sport

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1 Key findings

This summary section highlights the key findings from a programme of research conducted by GfK Social Research on behalf of the Department for Culture, Media and Sport (DCMS) during the first quarter of 2016. The commentary draws on evidence from two in-home surveys, each with a representative random location sample of over 2,000 UK adults, and 16 focus groups with a range of the general public, including representation of the UK nations and ethnic minority groups.

1.1 Attitudes toward the BBC

- Overall, the public were quite positive towards the BBC, with an average favourability rating of 6.4 out of 10. However, views varied from significantly higher scores among professional and managerial households to lower ratings among social grade DE (see 14.2 for definitions) and those living in Scotland.
- Most people saw the BBC positively in its mission to inform, educate and entertain, with about three quarters saying it was doing very or fairly well in these respects. Again, those from AB social grades were more positive and people from DE households (and Scotland) were more negative.
- Spontaneous attitudes towards the BBC across the qualitative research were fairly polarised, mirroring the diverse views in the quantitative research.
- Positive comments focused on: familiarity and warmth towards the BBC; positive reaction towards the diversity of services to meet the needs of a diverse audience; and the view that BBC services – especially news coverage – are good quality and reliable.
- Negative views focused on: perceived lack of differentiation, lack of freshness and innovation in BBC content when compared to other broadcasters; lack of sports and light-entertainment content; and queries regarding transparent use of the licence fee and the role of the government in BBC decisions.

1.2 BBC expansion

- After comparing the current BBC with the offer from 20 years ago, over half of those interviewed (55%) said they were glad that there are more channels and content while about a third (32%) said they would prefer to 'pay less for less'.
- Support for the BBC expansion was most marked among younger people (under-25) and in ABC1 homes. Again, views were more negative in Scotland.
- About half of those interviewed (46%) agreed that the BBC doesn't need to expand its services any further because of the new types of media services provided by other organisations.
- However, half of the sample agreed that the BBC should expand via new technologies but without adding TV channels to its current roster. ABC1s were especially keen on this type of expansion.

- There was agreement (52%) that the growth of commercial services like Netflix shows that the BBC is not crowding out the competition – only 14% disagreed.
- Views were evenly split about the impact of the BBC on commercial radio. A third agreed while another third disagreed that the number of BBC radio stations makes it hard for the commercial sector to win listeners.

1.3 Licence fee and value for money

- More people saw the current licence fee as being good value (44%) rather than bad value (32%) but views were quite polarised with the same proportion (14%) saying very good as rated it as very bad value for money.
- Those from ABC1 homes again gave higher ratings, with critical views more common among DE social grades and in Scotland.
- Although the licence fee was often seen as giving good value, only a minority of people (22%) opted to keep it matched with or ahead of (currently very low) inflation. Greater numbers favoured a frozen fee (30%) or an actual reduction (31%).
- These findings might reflect more people thinking the BBC is inefficient with money (35%) than rating it as efficient in this respect (23%).
- Across the qualitative research views regarding value for money of the BBC were influenced by: whether participants found BBC content relevant, appealing and something that could not be accessed elsewhere; whether participants felt that it was important for the BBC to provide a range of services; and views towards the BBC playing (and licence fee payers funding) a wider cultural, societal or public service role.
- Views regarding value for money of the licence fee were mixed. Some felt the current level was 'about right'. However others felt that they should pay less as they only accessed a few BBC services. A couple of participants noted that they would pay a little more to maintain the current diversity of BBC services but this was very much a minority view.

1.4 Future funding options

1.4.1 Views on funding models

- The survey presented a choice of five funding options, including two variations on the current licence fee, a universal household levy and mixed fee plus subscription models.
- There was more support for the BBC being funded by the licence fee than by any of the alternatives. Over half (54%) chose the current fee or a variant with more exemptions for those on lower incomes.
- The two subscription models were backed by almost a quarter of the sample (22%) while the levy was chosen by only 11% of those interviewed.

1.4.2 Alternative funding suggestions

- Qualitative participants spontaneously suggested alternative ways to fund the BBC either instead of, or in addition to the current licence fee. This included: advertising on the BBC; continuing to sell content or programme formats; and moving to a subscription model.

1.4.3 Part subscription

- Qualitative views were mixed but many expressed concerns that part subscription would result in a fragmented BBC ultimately leading to a reduction in services. Some simply disliked the idea, noting that services should be provided as part of the licence fee.
- Sports and films were considered to have the best fit for part subscription but there was scepticism about whether the BBC could really compete with other commercial broadcasters for these types of programmes.
- Some queried how part subscription would work in practice and whether there would be a direct correlation between funds raised via part subscription for a particular programme or event and the ability for the BBC to provide this.

1.4.4 Universal household levy

- Many qualitative participants expressed scepticism that the levy would result in cost savings or reduce the number of evaders.
- Those less sceptical were more positive but overall it was clear that the levy is only likely to be palatable if it provides a cost saving to households.

1.5 Contestable funding

- Half of those interviewed thought that more of the licence fee should be made available to other free-to-air broadcasters or independent producers to make public service broadcasting while a large minority (39%) backed the BBC to keep all of this funding.
- Qualitative participants often struggled with the concept and raised a range of queries regarding how it would work in practice.
- Negative views regarding contestable funding focused on a concern that it would impact on quality.
- Positive comments were raised regarding the potential for contestable funding to encourage new ideas or broaden the diversity of people making programmes to reflect the diversity of UK society.

1.6 Government ring fencing

- Exactly half of the sample polled said that the decisions about the BBC's own public service broadcasting should be made by the corporation rather reflect a requirement from government. A large minority (38%) took the opposite view.
- People who backed government intervention in this respect were especially keen on ring-fencing for news, children's programmes, current affairs, the World Service and local TV.

- In the qualitative research, positive views regarding ring fencing were most likely to come from those who reflected that it was important for the BBC to ensure services for different groups in society.
- Participants struggled to suggest where ring fencing should be implemented but overall there were comments that native language and World Service provision should be covered.
- Many participants felt that the BBC should make decisions regarding the use of funds and there was some unease regarding the perceived lack of flexibility in ring fencing funds.
- Those with the strongest negative reaction to ring fencing queried government involvement in these decisions, and felt that this was an outdated approach.

1.7 Quality and distinctiveness

- Most people (59%) agreed that the BBC made consistently high quality programmes and content but only a minority (22%) disagreed that the BBC showed too many repeats.
- Views were quite evenly split about any decline in BBC quality and how the BBC compares to other broadcasters in terms of quality.
- A quarter of respondents (24%) felt that the BBC showed too many imported programmes rather than British-made content.
- Most people (59%) expected the BBC to be distinctive because it was largely funded by the public
- There was considerable support (50%) for the BBC showing the same sort of programmes as commercial broadcasters, provided that they aren't shown at the same time – only 15% disagreed.
- There was some recognition that the BBC makes programmes no other broadcaster would make (38%) but there were mixed views about whether the BBC is more innovative than others.
- Many listeners considered BBC1, Radio 1 and Radio 2 to be similar to commercial rivals, other than the adverts.
- There was also more agreement than disagreement that much of the BBC's online content including news was the same as that from other providers.
- Across the qualitative research quality and distinctiveness were interrelated. Specifically, some participants felt that the quality of the BBC often made the BBC distinctive.
- The reputation of the BBC meant that many qualitative participants felt confident and trusted that the BBC would provide good quality content. This was particularly the case for news coverage, factual content and current affairs. Whilst some felt the BBC was biased in its reporting, it was noted that this was also an issue across other broadcasters.
- Participants were very positive towards the quality of BBC production values including camera work, costumes, scripting and acting. This was particularly noted for documentaries and dramas.
- Providing relevant content, that was appealing and aimed at the required audience and reflected modern UK society was often equated to being a good quality provider. Views were mixed in

this respect, some felt that BBC content was appealing or recognised that it could be for others, whilst some simply did not find BBC content personally relevant.

- Participants felt that being fresh and innovative was a way in which a broadcaster could demonstrate that it is a quality broadcaster, thinking about ways to engage with and provide relevant content to its' audience. Not all participants felt that the BBC was good at doing this, noting that the BBC tended to be less 'daring' compared to other broadcasters, and often showed repeats or used repeated formats.
- There were mixed views regarding whether the BBC provides distinctive content. Some felt that, native language provision, coverage of annual events (e.g. Remembrance Sunday) and local news could not be accessed elsewhere. However some felt that the other types of content on the BBC could be accessed from alternative providers.
- Views regarding the distinctiveness of BBC entertainment were also mixed and driven by personal preference. Participants noted that the serious and formal tone of the BBC stood out as distinctive; this was a positive attribute for some, and less so for others.
- Overall participants felt that the serious and formal tone of the BBC was a good fit for educational content. Most felt that this made the BBC positively distinct from other broadcasters although some found the formal tone less accessible. Some participants noted that the BBC stood out from other broadcasters as showing and discussing fewer daring and thought-provoking topics.
- For some participants, the distinctiveness of the BBC was based on personal familiarity with the brand and services.

1.8 Representation of groups in society

1.8.1 Young people

- Overall, young people did not feel that the BBC was aimed at their age group as it did not provide the type of entertainment they found appealing – comedy programmes, documentaries that explored taboo topics and reality television. Whilst they agreed that this type of content would attract them to the BBC, they were unsure whether this was a good 'fit' for the BBC.
- Young people also struggled to identify young presenters apart from those noted for BBC Radio 1, and therefore felt that the BBC could be difficult to relate to.
- However, participants were positive towards the BBC's use of technology and platforms and felt that they should continue to invest in this to keep up to date.

1.8.2 Black African and Caribbean groups

- Overall participants agreed that the BBC and other broadcasters could be better at providing services for Black people and felt that the BBC had a responsibility to lead the way in making improvements.
- Participants felt that there was lack of representation of Black people across BBC services including presenters and actors. They also noted that representation could be tokenistic, and did not reflect modern society and the real world. It was felt that this type of representation

across both television programmes and news coverage could reinforce and promote negative stereotypes.

- American broadcasters were often seen as providing better representation of Black people, particularly amongst younger participants, but many agreed that across broadcasters there was a lack of content aimed at British Black people. This led some to conclude that there was lack of diversity in decision making regarding BBC services and content.

1.8.3 Asian groups

- Overall participants agreed that improvements were needed in terms of representation of Asian people on the BBC.
- Some noted lack of diversity across the types of Asian people (presenters and actors) included on the BBC.
- Others felt that content did not represent the modern British Asian community often showing outdated views of the Asian community and reinforcing negative stereotypes across television programmes and news coverage.

1.8.4 Native language speakers

- The amount and frequency of native language services provided by the BBC was often noted by Ulster-Scots and Irish language speakers. Both of these groups felt that there were limited services in their language and were keen to see these.
- The content of native language services was most often noted by Gaelic and Welsh speakers. These groups discussed a number of services and therefore their focus was often on the relevance and quality of the content of these.

1.8.5 Nations and regions

- Views regarding BBC provision of local news coverage were mixed. Some valued local BBC coverage whilst others noted that they could access this elsewhere.
- Participants agreed that it was important for their nation to be represented on the BBC. Participants in Wales generally felt well represented whilst those in Scotland and Northern Ireland were less positive regarding this.
- Whilst participants in Wales were positive regarding the local programmes on the BBC, those in Scotland and Northern Ireland were generally less satisfied. In particular, participants in Scotland felt that the quality of local programmes lacked when compared to other BBC content.

1.9 Genre mix

- Overall, qualitative participants were not surprised to see the amount of BBC air time dedicated to news and factual coverage although there was some surprise at the small amount of time for current affairs as this genre was often strongly associated with BBC provision.
- They were similarly unsurprised to note the low coverage of sports and films was in line with expectations; content in these areas was perceived to be financially competitive and therefore shown by other broadcasters.

- Overall participants felt that there was not enough comedy or entertainment provided by the BBC.
- Whilst many were surprised by the amount of air time dedicated to children's content, most felt that this was important to include.
- Some felt that religious faith-based content could be cut from the BBC, feeling that it lacked relevance if not fully inclusive, and was perceived to have very low viewing figures.

1.10 Cross-promotion

- Just over half of those interviewed (54%) said that they were aware of cross-promotion of BBC services (i.e. promoting TV via radio and vice versa). The level of awareness was especially high (72%) among the ABC1s, who are heavier consumers of BBC content and services.
- Most (59%) of those aware of cross-promotion had at some point chosen to watch or listen to something as a result of cross-promotion. Across the entire sample, this represents 32% of those interviewed.
- Respondents as a whole were generally supportive of the BBC using cross-promotion
- Two-thirds (65%) agreed that the BBC should be able to promote its services as it likes and the same fraction backed the idea that it made sense for the BBC to tell people about its other services/offerings in different ways.
- Nearly a third (30%) agreed that the BBC has an unfair advantage because it can promote its TV via the radio and vice versa but more disagreed (39%)
- Two-thirds (68%) agreed that they liked to hear about BBC content via cross-promotion and only a quarter (23%) thought that the corporation did too much of this sort of thing. A fifth of people (21%) agreed that cross-promotion was pointless because it told you about programmes you didn't want to see or hear.

2 Background and objectives

The BBC is a widely respected institution, both in the UK and around the world. It is governed by its Royal Charter, which is the constitutional basis of the BBC. This sets out the high-level obligations on the BBC and how it should operate, including how it should serve the public (such as 'representing the UK, its nations, religions and communities'), and the duties of the BBC Trust and the Executive Board. The Trust is the independent governing body which sets the overall strategic direction of the BBC and was established by the 2007 Royal Charter. Alongside the Charter is the Agreement, which provides more detail on many topics in the Charter, such as rules covering changes, funding and commercial activities.

Each Royal Charter runs for 10 years. The current Charter took effect on 1st January 2007 and is set to run until 31st December 2016.

The renewal of the Charter provides an opportunity for the Government, Parliament and the public to debate and address fundamental questions, including:

- How the BBC should be funded
- How the BBC should be governed
- How the BBC should ensure that it serves the public interest

Over the decade since the current Charter was set out, the media landscape has changed dramatically. An ever-increasing array of TV channels and radio stations are available, and the internet has expanded rapidly has exploded in this time, including with catch-up television. Due to this, the Charter needs updating to take into account the explosion of new services such as subscription TV, online services including on-demand shows, and increasing use of portable internet devices such as smartphones and tablets, which enable people to gain access to television and online services almost anywhere.

The BBC has been adapting to this changing landscape, for example by founding new services such as the iPlayer. Regardless of change, the BBC's services remain much-used and generally trusted by the public. The World Service reaches a global audience of 210 million; half of all adults in the UK listen to one or more of the BBC's music stations each week; and millions of people watch BBC TV shows, including The Great British Bake Off, Strictly Come Dancing and coverage of the Olympics.

The Department for Culture, Media and Sport (DCMS) oversees policy on media and the broadcasting sector, and has an important role to play in relation to the BBC. It represents the Government in setting a new Charter to ensure the BBC and its services evolve over the next decade and continue to meet the needs of its audiences.

The Government officially started the Charter review process in 2015, in readiness for the new Charter to be put in place on 1st January 2017. Part of the review involves providing the opportunity for a public debate about the future of the BBC and a public consultation ran from 16th July 2015 to 8th October 2015.

The consultation allowed for in-depth analysis into public opinion on the BBC as it currently stands. Although the BBC remains valued and well-used by the majority of people within the UK, it does face some challenges in reaching certain groups, particularly black and minority ethnic audiences and in meeting the needs of younger age groups who increasingly access online content rather than using traditional TV and radio platforms. There are also service variations across nations and regions in the UK. The consultation allows issues like this to be explored, as well as gathering opinions on the BBC's genre mix, quality, distinctiveness and funding models.

As part of a wider programme of work surrounding the review of the BBC's Royal Charter, DCMS commissioned additional research to better understand the public's views of the BBC. This programme, carried out by GfK, an independent research agency, involved both nationally-representative quantitative polling and in-depth qualitative research investigating particular issues. The quantitative polling research was commissioned to be viewed alongside the public consultation data, as the members of the public who responded to the latter exercise are necessarily self-selecting and may have more of an interest in the subject. They may also have a higher level of knowledge about how the BBC operates than the wider population.

The qualitative and quantitative research programme was designed to cover these main areas:

- The mission, purpose and values of the BBC
 - Including the BBC's mission to inform educate and entertain
- The scale and scope of the BBC
 - Including what services the BBC should deliver and the audiences it should be seeking to serve, as well as its impact on its commercial rivals
- The funding of the BBC
 - Including how the BBC should be paid for

When designing the research programme, the focus was on covering some new ground and not simply repeating existing research as there is already a large volume of data on public attitudes to the BBC including around its independence. A full list of the elements under investigation in the research is given below:

- General attitudes
- Quality and distinctiveness
- Current and future expansion of BBC services
- Funding models
- Contestable funding
- Ring-fencing of public service broadcasting (PSB) budgets
- Representation of regions within the UK
- Representation of minority ethnic groups
- Cross-promotion of BBC content

The results discussed in this report will feed into a wealth of other research, reviews and studies that have been commissioned in 2015 and 2016, which will serve to inform the Government's proposals that will be put forward for further consultation later in 2016.

3 Method and sample

3.1 Qualitative research

The qualitative element of the study included 16 mini-group discussions and 12 telephone depth interviews. Each mini-group discussion included 5-6 participants and lasting for 2 hours. Each telephone depth interview included 1 participant and lasted for 1 hour.

These qualitative sessions were split across three key objective areas, to ensure that all of the objectives across the study were explored qualitatively.

- Objective Area 1: gathering views of the BBC amongst underserved audiences.
- Objective Area 2: exploring the Charter Review consultation themes amongst the general public.
- Objective Area 3: investigating attitudes towards willingness to pay for BBC services, and reaction to funding models amongst the general public.

The methods and sample for the qualitative research sessions are outlined below.

Objective Area 1: Underserved audiences

Mini-group	18-24 years C2DE Black African/ Caribbean Male London
	18-24 years BC1C2 Asian Female Glasgow
	18-24 years C2DE Female Exeter
	25-45 years BC1C2 Black African/ Caribbean Birmingham
	18-24 years BC1 Male Belfast
	45+ years C2DE Asian Bradford
	Telephone depth
	3 x Gaelic speakers
	3 x Irish speakers
	3 x Ulster-Scots speakers

Objective Area 2: feedback on BBC Charter Review Consultation themes

Mini-group	25-45 years BC1 London
	45+ years C2DE Glasgow
	45+ Years BC1 Aberystwyth
	25-45 years C2DE Birkenhead

Objective Area 3: Willingness to pay for services

Mini-group	18-24 years C2DE Male Aberystwyth
	25-45 years BC1 Exeter
	45+ years C2DE Birmingham
	45+ years BC1 Birkenhead
	25-45 years C2DE Belfast
	18-24 years BC1 Female Bradford

3.2 Quantitative polling

Two waves of polling were conducted to inform the reporting on this project, dealing with issues as details become available. The first quantitative phase of the research was carried out between 20th and 25th January 2016 with a module of questions placed on a UK omnibus survey (with 2093 respondents aged 16+) and the second phase of interviewing followed between 26th February and 1st March, using the same vehicle (and 2119 different respondents).

The omnibus uses random location sampling to ensure a representative sample of approximately 2,000 adults (aged 16+) across the UK are interviewed on each survey. Omnibus surveys of this kind are used regularly by public and private sector clients who require timely and robust data. The Postcode Address File (PAF) and 2011 Census small area statistics are used to define sampling points. Points are areas of similar population sizes (Census Output Areas) and are selected to be representative of Government Office Region (GOR), social grade and urban/rural populations. Government Office Regions are groups of Parliamentary constituencies.

Once sampling points are selected, addresses within these points are issued to interviewers. Interviewing is conducted during the hours of 2-8pm on weekdays and at the weekend. Interviewers have quotas (which outline certain local Census-driven demographic variables that a specific number of interviews must be achieved with) to obtain within their sampling point and these include gender, age and working status.

Interviews take place face-to-face in the respondent's home and interviewers use Computer Assisted Personal Interviewing (CAPI) machines to conduct the fieldwork and the questionnaire is pre-programmed into a handheld computer device which the interviewer uses to go through the script with the respondent.

Survey data was analysed by a range of variables, using a mixture of standard demographics including gender, age and social grade (see 14.2 for definitions of the latter groups) and nations/regions of England as well by individual module questions and categories derived from consumption (i.e. classifying people by which BBC platforms they used and by how much of their viewing and listening time was spent on the corporation's channels and stations).

The survey method employed means that true statistical significance cannot be inferred but, as is commonly done, we have used it as a proxy for the analysis and any differences reported would be statistically significant at the 95% confidence level. In order to conduct this significance testing, we have used the effective sample size for the research, which takes into account the impact of weighting.

All base sizes show the unweighted base, which is the number of people answering that question and all survey results shown have been weighted. Unless otherwise stated the commentary is based on all of those interviewed. In some cases percentages shown in the figures may sum to more or less than 100% because of rounding error, because the question was a multi-coded option or because 'Don't know' answers are not shown

3.3 Presentation of findings

There are strengths and limitations of qualitative research - employing this approach to the research to explore peoples' views allowed researchers to gather rich insights into their views of the BBC and reaction to suggestions for BBC funding, contestable funding and government ring fencing.

The key strength of a qualitative approach is that it enables researchers to gather spontaneous attitudes and insights, as well as highly nuanced feedback about the research questions. Whilst qualitative discussions follow a clear structure, they emphasise the role of the participant in leading and driving the conversation through allowing them to answer in their own words and leading to responses that are full of rich insights.

The main limitation to using a qualitative research approach is that it emphasises self-expression and insight over numerical outcomes and so relies on detailed discussion with relatively small sample sizes. Whilst we included people from a wide range of backgrounds and with a variety of demographic characteristics, the overall sample size means it is not statistically representative. The qualitative findings in this report focus on participant views and do not attempt to quantify the number of participants who held these different views.

It should be noted that the qualitative research was carried out prior to completion of all quantitative waves of research.

Each section of the report, where applicable, begins with quantitative findings to set the scene, with qualitative insight following to provide additional detail and perspective. Necessarily, the qualitative research draws out a wider range of findings and will therefore include critical comments from people who might have a generally favourable perspective on an issue and vice versa.

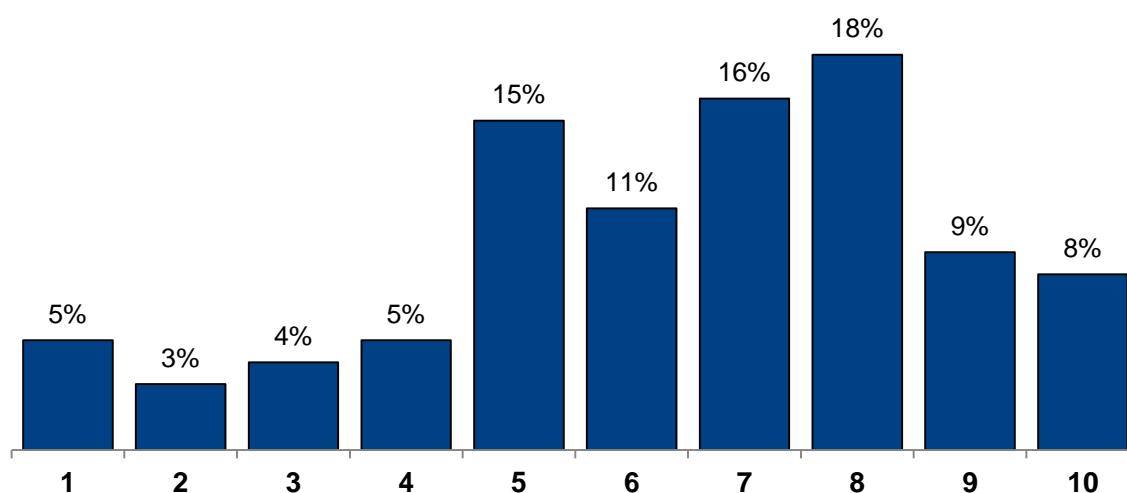
4 Attitudes toward the BBC

4.1 Quantitative polling

4.1.1 Overall impression of the BBC - favourability

Most people had a quite favourable view of the BBC. Using a scale of 1-10, anchored with extremely unfavourable (1) and extremely favourable (10), the mean score was 6.4, rather higher than the actual halfway point (5.5).

Chart 1: Favourability



Q1. Thinking about the BBC generally, what is your overall impression, on a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourable?

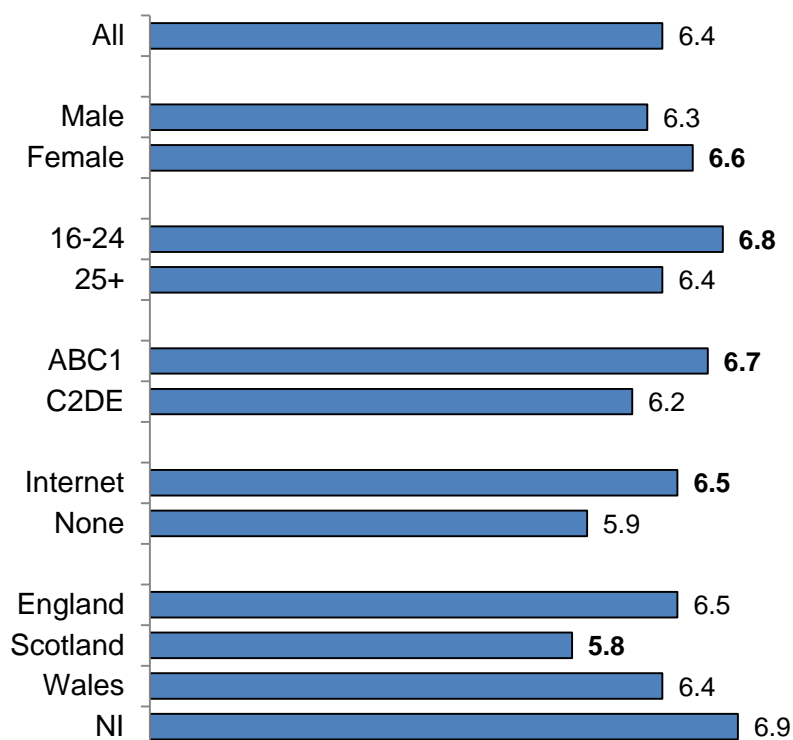
Base: All respondents (2093)

While these quite positive views were common across most demographic groups, there were a number of notable differences, with women being more favourable than men (6.6 v 6.3) and younger people (6.8) more positive than the over-25s (6.4). Views were markedly more favourable among those from middle class households (6.7 among ABC1 social grades – see 14.2 for definitions) than among other respondents (6.4 for C2s and 6.0 for DEs). This is also reflected in lower favourability among those with no internet access (often DEs).

While attitudes were similar in England and Wales (mean 6.5 and 6.4), favourability was significantly lower in Scotland (5.8). Similarly, views were generally somewhat less favourable in much of the north of England, compared with most parts of the south.

Favourability towards the BBC did not vary by TV platform (notably Pay v Free-to-air) but there were more predictable differences between those who support and those who oppose BBC expansion, by different attitudes towards the value for money of the licence fee, weight of BBC TV/radio usage and by the number of BBC platforms utilised.

Chart 2: Mean favourability scores by demographics



Q1. Thinking about the BBC generally, what is your overall impression, on a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourable?

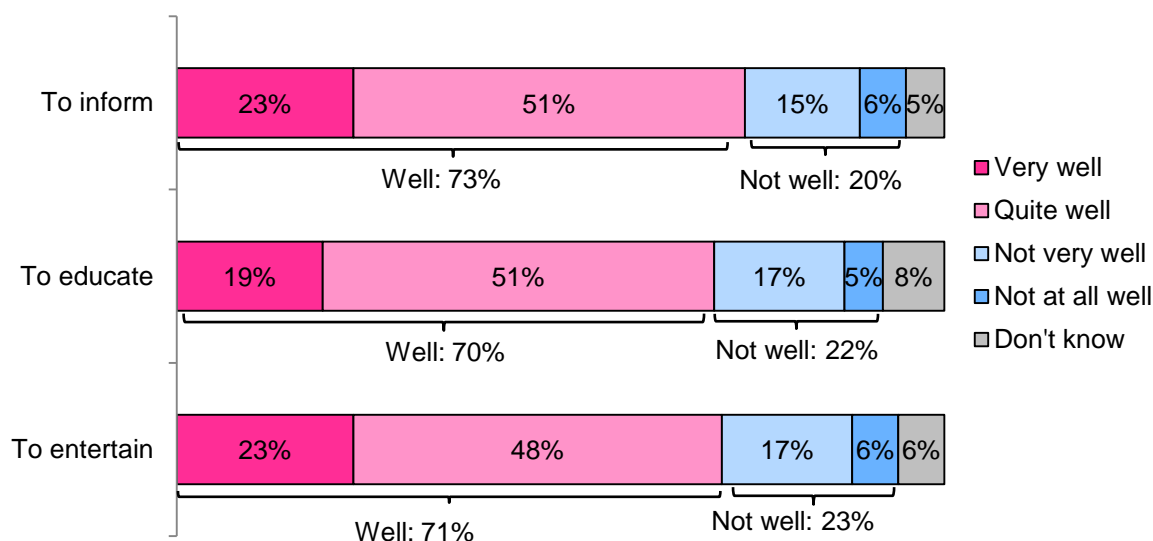
Base: All respondents (2093); male (1024); female (1069); 16-24 (307); 25+ (1786); AB (349); C1 (568); C2 (404); DE (772); Internet access (1742); no internet access (351); England (1739); Scotland (183); Wales (105); Northern Ireland (66)

Please note: **bold** indicates a statistically significant difference

4.1.2 The BBC's mission to inform, educate and entertain

When asked about how well the BBC carries out its stated mission to inform, educate and entertain, views were again positive, with towards three-quarters saying that the corporation does this very or quite well, while about a quarter felt it wasn't doing well in these respects. These findings were broadly in line with other published research (BBC Trust 2015¹).

Chart 3: The BBC's mission



Q2/Q3/Q4. The BBC's mission is to inform, educate and entertain audiences with programmes and services of high quality, originality and value. Thinking about the aim to inform/educate/entertain, how well do you think the BBC serves your household?

Base: All respondents (2093)

There were no significant gender differences and quite consistent views across the age groups (although one-in-ten under-35s could not answer these questions). Differences by social grade were rather more clear-cut, with ABs having high positive score for each aspect with this dropping for C1s, falling further for C2s and further still for DEs. Again, those with no internet access were less positive than those with access but views were consistent by TV platform. Scotland was again significantly less content than the rest of the UK, including the English regions.

Those from ethnic minority backgrounds had lower positive scores than the white population but this is largely explained by a higher proportion of this group not feeling able to rate these aspects of the BBC's performance. As with favourability, ratings were more positive for those who support BBC expansion, regard the licence fee as good value for money, use multiple platforms and the iPlayer and are heavier users of BBC services.

Table 1: ‘Demographic’ differences in respondents thinking the BBC serves their household well (very well or quite well)

Aim	All	ABC1	C2DE	Internet access	No internet access	White	BME
<i>Unweighted base</i>	2093	917	1176	1742	351	1843	242
	%	%	%	%	%	%	%
To inform	73	78	67	75	65	75	65
To educate	70	75	63	72	59	71	64
To entertain	71	75	65	72	61	73	59

Q2/Q3/Q4. The BBC’s mission is to inform, educate and entertain audiences with programmes and services of high quality, originality and value. Thinking about the aim to inform/educate/entertain, how well do you think the BBC serves your household?

Base: all who feel the BBC is serving them well (very well or quite well). Base sizes shown in table. Please note: **bold** indicates a statistically significant difference

4.2 Qualitative research

Qualitative participants were asked for their spontaneous views regarding the BBC. Both positive and negative views were cited reflecting the polarized views found in the quantitative research.

4.2.1 Positive views

Positive views regarding the BBC were often driven by familiarity with the BBC. This created a warmth towards the BBC.

“People call it auntie don’t they, so it’s like a family.”

25-45 years, BC1, Exeter

“I was brought up with the BBC so it is part of my DNA.”

45+ years, C2DE, Birmingham

“It’s a bit of an institution.”

25-45 years, C2DE, Birkenhead

Some participants noted that they used a BBC service every day, and these participants tended to be most positive towards the BBC.

It’s always there isn’t it...it’s what we wake up to – the BBC...and in the evening I get my laptop out and find out what the weather’s going to be tomorrow morning.”

25-45 years, BC1, Exeter

The diversity of services provided by the BBC was also spontaneously noted as a key positive. Participants reflected that the BBC provided a range of services to suit the diverse audience it services.

.....
"They cater to everybody."

45+ years, C2DE, Glasgow

"It is well-rounded. It has got something for everyone. BBC3 is for younger ages, BBC4 for older people."

18-24, C2DE, Male, Black African/ Caribbean, London

"It caters for young children to the older generation as well."

45+ years, C2DE, Birmingham
.....

In addition to this, there were many comments that the BBC provided good quality services and content. The words 'quality' and 'reliable' were repeatedly used to describe the BBC.

.....
"It's reliable, the BBC is a steady ship. There are good services across the board."

45+ years, BC1, Aberystwyth
.....

This was particularly the case for news coverage.

.....
"I think it's good when it comes to the news or something like big has happened, like a big event. I think it gets reported back well."

25-45 years, C2DE, Birkenhead

"No one can beat the BBC Question Time – I love it on a Thursday night. I think no one touches [the BBC] when it comes to things like that."

45+ years, C2DE, Glasgow
.....

Diversity of platforms was also mentioned by a few who valued being able to access BBC services in a range of ways.

.....
"They do more than anyone else because they have got the red button and they have got the BBC iPlayer because I use that from time to time. You can download apps on your phone. I have got a BBC weather app on my phone."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

4.2.2 Negative views

Negative views cited by participants were varied. Some simply felt that the BBC was no different to other broadcasters; in this respect they were not negative towards the BBC, but simply felt it did not offer anything that could not be accessed elsewhere.

“I don’t feel any differently than I would about Channel 4. If there’s something on the BBC that I want to watch then I watch it but I wouldn’t choose not to watch it because I don’t like the BBC...it just provides me with my TV.”

18-24, C2DE, Female, Exeter

“You don’t need the BBC now because you have other channels.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

This led some participants to consider the licence fee. At a spontaneous level, some were negative towards paying the licence fee, especially if they felt that did not access many BBC services.

“If it wasn’t there I wouldn’t miss it because there are so many channels there. I don’t get anything from BBC so there is no value for what we are paying for it.”

45+ years, C2DE, Asian, Bradford

Some queried how funds were used, with scepticism that there was a lack of transparency in use of funds for salaries and staff expenses.

“I think there are a lot of people lining their pockets.”

25-45 years, C2DE, Birkenhead

When reflecting on the content provided by the BBC, negative comments included dissatisfaction with the loss of sporting coverage to commercial broadcasters. Others felt that the BBC did not provide much ‘light entertainment’ when compared to other providers. Further comments related to lack of freshness and innovation in programming provided by the BBC. Some felt that the BBC repeated a lot of content whilst others felt that when compared to other broadcasters, it showed fewer new formats or programmes.

Channel 4 shows new things all the time, but BBC doesn’t try out new things.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

Overall, some participants spontaneously noted that they felt that the BBC was biased in its news coverage and reporting.

“Because I am paying for it, I expect the BBC to provide a variety and fair reporting. But I am increasingly getting more disillusioned with it. I like some of their documentaries and Panorama, but I have more negative views about BBC over time because it has become biased.”

.....
45+ years, C2DE, Asian, Bradford
.....

However many reflected that this was a wider concern across all broadcasters.

.....
“Like any other news provider they tend to filter out what they want you to hear and what they don’t want you to hear.”
.....

25-45 years, C2DE, Birkenhead
.....

Those who felt strongest that the BBC was biased in news coverage and reporting often aligned this with the perceived role that the government played in making decisions regarding the BBC’s activities.

.....
“It comes across as a mouthpiece of the government and is meant to make people to believe in certain things.”
.....

25-45 years, BC1, London

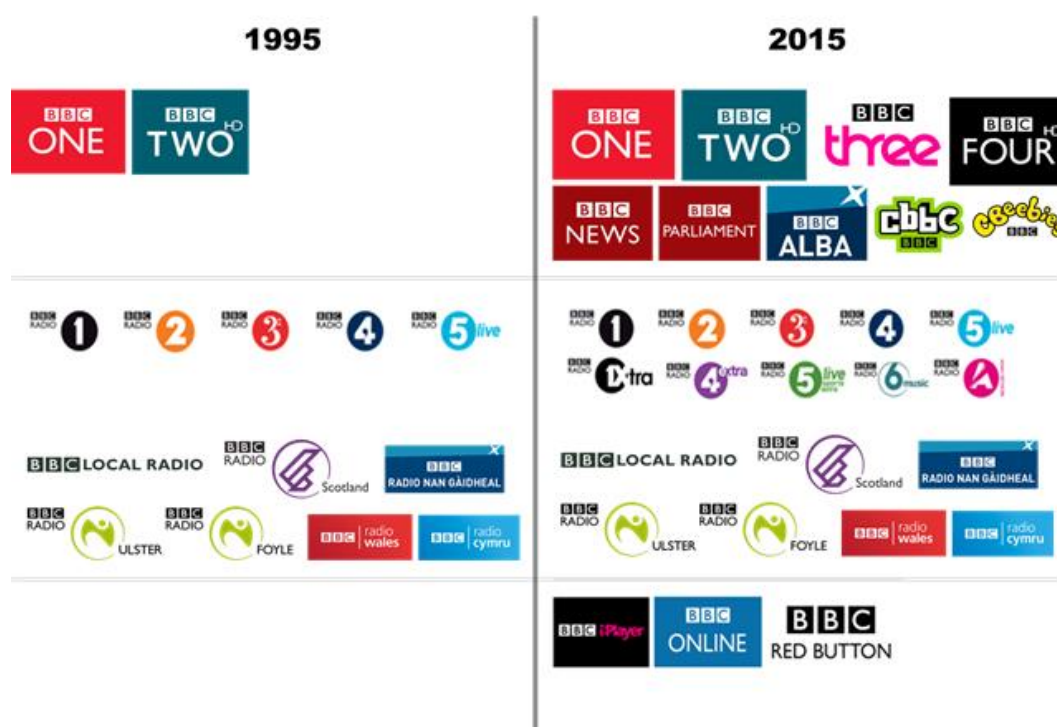
“Government owned, Government run, for the Government sort of thing.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

5 BBC expansion

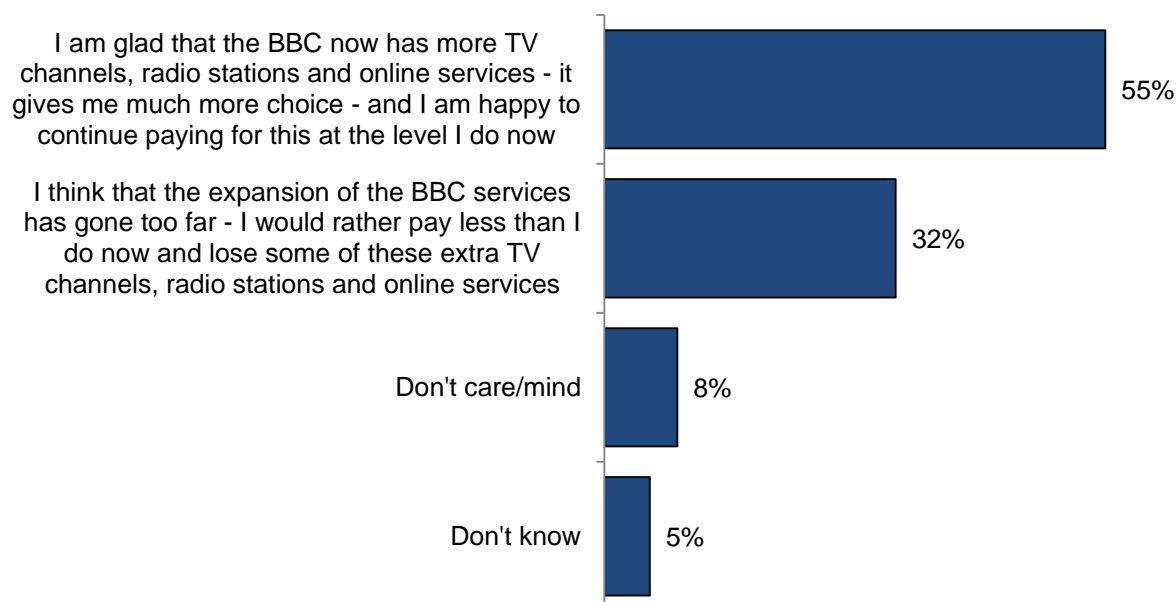
5.1 Quantitative polling

The last two decades have seen a rapid growth in the number of channels and services offered by the BBC and other broadcasters. A visual prompt was used to show people how the BBC has added to its offer since 1995:



The sample was asked to choose between two quite different views about the BBC's expansion since 1995, either to back what has been done (and to continue to pay for it) or to support paying less for a smaller BBC. A clear majority (55%) favoured the expansion.

Chart 8: Views on the expansion of BBC services



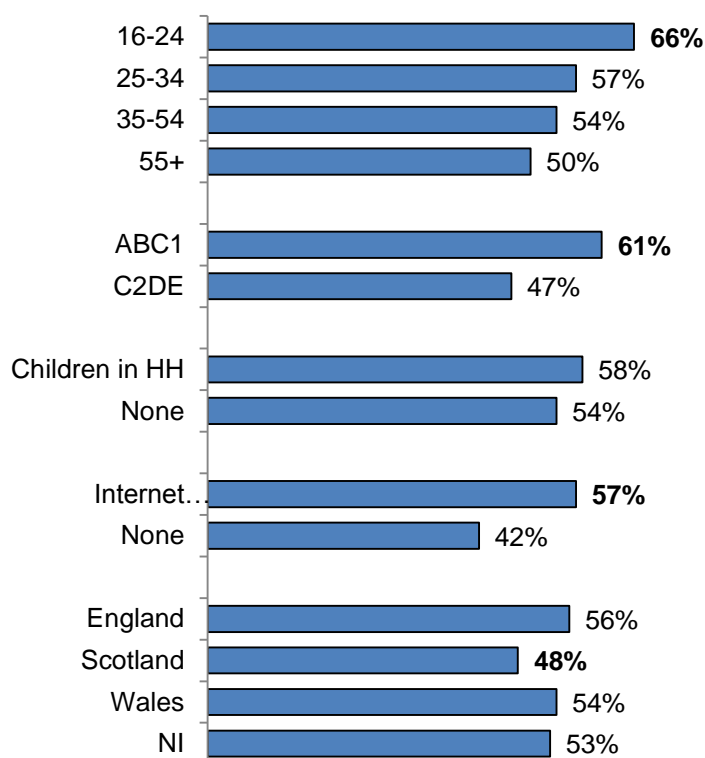
Q5. There are different views on the expansion of BBC services. Which of the two views on this card comes closest to your own?

Base: All respondents (2093)

While there were no gender differences, a majority of all age groups supported the expansion rather than the scaling back of the BBC, with the highest rating being among 16-24s (66%, dropping steadily across age bands to 50% among those aged 55 and over). There was a similar trend by social grade with two-thirds of ABs backing the expansion, falling away to just under half of DEs. No demographic group, nation or region of the UK had majority support for a smaller BBC over the expanded offer, although Scotland was again less positive about the BBC's changes than the rest of the country (with 39% backing scaling down).

Interestingly, there were no differences by type of TV platform and even among light users of the BBC and non-users of the iPlayer or website, more people supported the expansion than advocated the reduction in fee leading to fewer stations or channels.

Chart 9: Those who are glad the BBC has expanded and are happy to continue paying at the current rate: Demographic differences



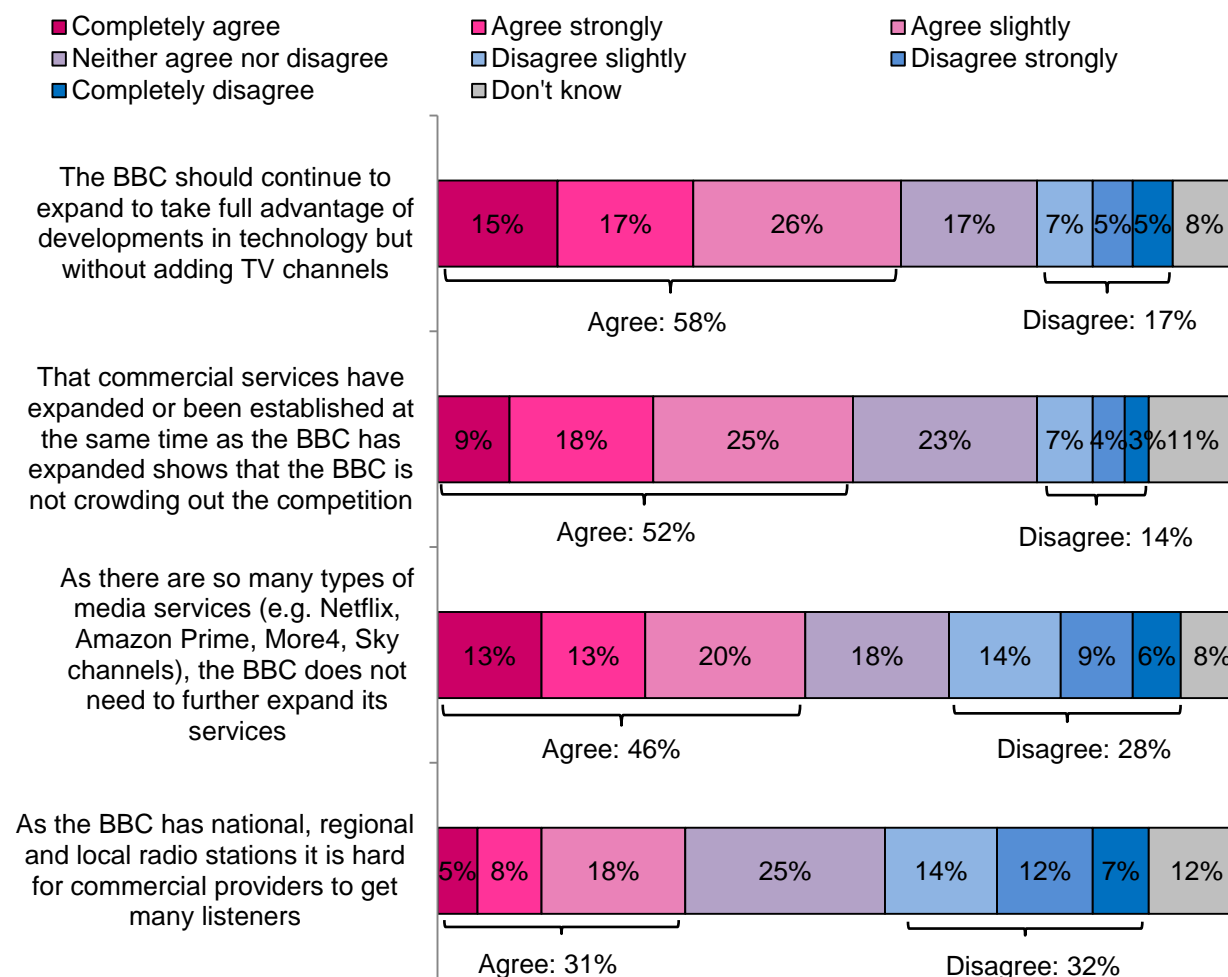
Q5. There are different views on the expansion of BBC services. Which of the two views on this card comes closest to your own?

Base: 16-24 (307); 25-34 (325); 35-54 (568); 55+ (893); ABC1 (917); C2DE (1176); children in HH (550); no children in HH (1543); internet access (1742); no internet access (351); England (1739); Scotland (183); Wales (105); Northern Ireland (66)

Please note: **bold** indicates a statistically significant difference

In the second survey, more questions were asked about the expansion of the BBC, including a series of rotated statements with which respondents were asked to say how much they agreed or disagreed.

Chart 10: Opinion of the effect the expansion of the BBC has had on other providers



Q7. The BBC has introduced a wide range of new channels, radio stations and online services. At the same time, commercial broadcasters have also expanded what they do. There are many different views on the expansion of BBC services. Please indicate how much you agree or disagree with the following statements.

Base: All respondents (2119)

Over half of respondents were in agreement (58%) that “The BBC should continue to expand its services to take full advantage of developments in technology but without adding TV channels”. Only 17% disagreed with this statement. Agreement was highest among men (62% compared with 55% of women) and those in ABC1 household (64%, v 53% of C2DEs).

There was a fairly similar distribution when the sample was asked about the impact of the BBC was having on the wider broadcasting market. Half of those interviewed (52%) agreed to some extent that *“The fact that commercial services have expanded or been established (e.g. ITV digital channels and Netflix) at the same time as the BBC has expanded shows that the BBC is not crowding out the competition”*. Just 14% disagreed with this statement. Agreement was again higher among men than women (54% v 49%) and among ABC1s than C2DEs (58% v 46%). Support was more muted among ethnic minorities (40%, although only 14% actually disagreed).

Somewhat fewer respondents (46%) agreed to some extent that *“As there are so many new types of media services provided by other organisations (e.g. Netflix, Amazon Prime plus channels like More4 and new Sky channels), the BBC does not need to further expand its services”*, although over a quarter (28%) disagreed and others placed themselves at the mid-point of the scale (18%) or were unable to give an answer (8%). Levels of agreement were very consistent across demographic groups but disagreement was notably higher among AB respondents (37%).

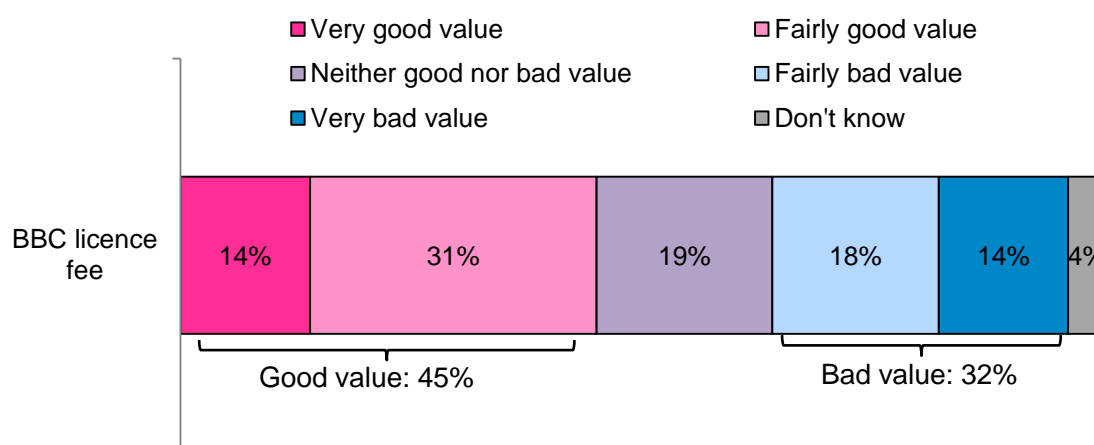
Views were evenly split when it came to the impact of the corporation on commercial radio – as many agreed (31%) as disagreed (32%) with this statement – *“As the BBC has national, regional and local radio stations it is very hard for commercial providers to get many listeners”*. There were age differences here, with 42% of under-25s agreeing compared with only 29% of the over-25s. Among over-35s, significantly more disagreed than agreed with the statement. The social grade differences were much as seen elsewhere in the research, with much more disagreement among ABs (46%) than any other group (29% C1C2DE).

6 Licence fee and value for money

6.1 Quantitative polling

Views were quite polarised when people were asked to rate the value for money of the current licence fee, with 14% thinking it was very good value and the same percentage taking completely the opposite view. However, across the entire sample, significantly more people said the fee was good value than bad value (45% v 32%). In section 7, the report looks at wider future funding models.

Chart 4: Value for money of the BBC licence fee



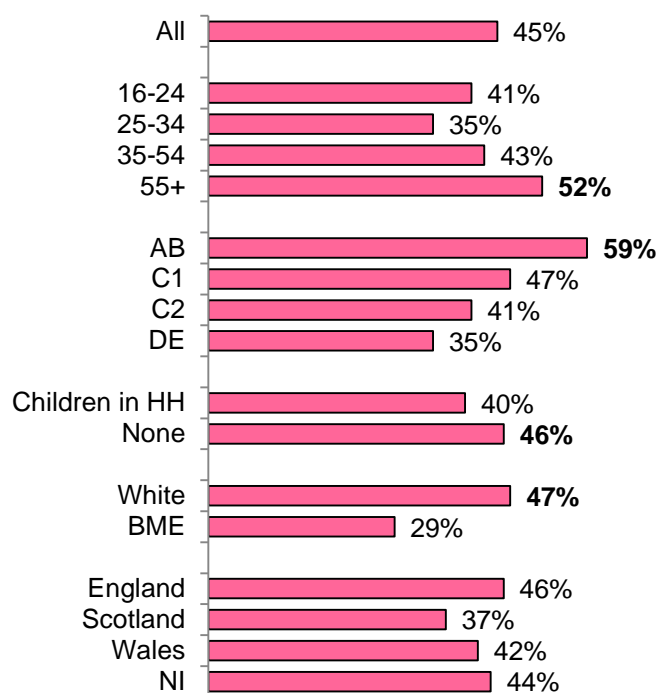
Q6. The BBC licence fee costs £145.50 a year – the equivalent of £12.13 per month. Thinking about this and the services the BBC offers, in particular TV channels, radio, online services and website, do you think that the BBC offers good for bad value for money?

Base: All respondents (2093)

Those aged 25-54 were more likely to consider the licence fee to be bad value (37%, although slightly more of this age band rated it as being good value, 40%). The over-55s both gave more positive reactions, perhaps because this group will include people who don't actually pay the entire licence fee because it is free in the case of the over-75s. The association with social grade was more predictable as the figure considering the fee to be good value for money dropped steadily from a high of 59% among ABs to only 35% among DEs.

The licence was seen as being good rather than bad value in all parts of the UK, bar Scotland (where 3% more said it was bad value). Ethnic minorities also had a net negative score with more people saying the fee value was bad (8% higher than gave it a good rating). Free-to-air TV users were more positive about the fee (good value being 20% higher than bad) but even those with paid-for television were more likely to say it was good rather than bad value. Heavy BBC consumers, people making use of the iPlayer, the website and multiple platforms were especially likely (60% and higher) to consider the fee to be good value.

Chart 5: Demographic differences by those thinking the BBC licence fee offers good (very good and fairly good) value for money



Q6. The BBC licence fee costs £145.50 a year – the equivalent of £12.13 per month. Thinking about this and the services the BBC offers, in particular TV channels, radio, online services and website, do you think that the BBC offers good for bad value for money?

Base: Male (1024); female (1069); 16-24 (307); 25-34 (325); 35-54 (568); 55+ (893); AB (349); C1(568); C2 (404); DE (772); children in HH (550); no children in HH (1543); White (1843); BME (242); England (1739); Scotland (183); Wales (105); Northern Ireland (66)

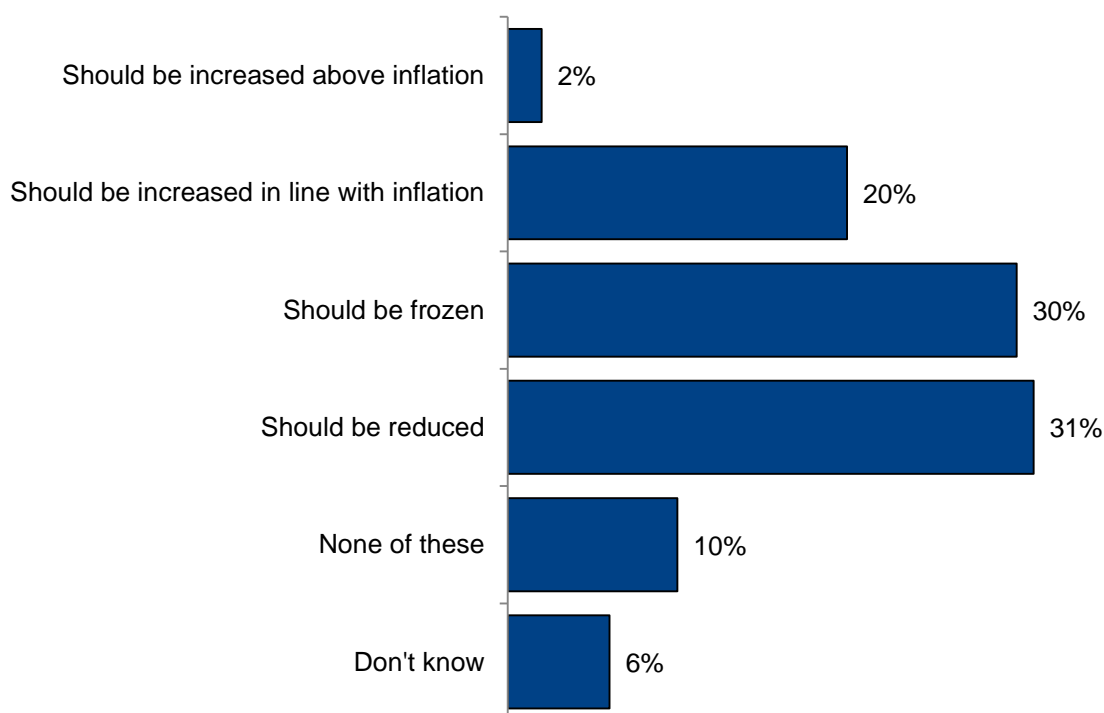
Please note: **bold** indicates a statistically significant difference

The level of recognition that the current fee offers value for money did not, however, simply translate into widespread support for the licence payment staying at its current level (in real terms). Respondents were presented with a range of options for the future of the fee, following the already-announced freeze to 2017:

- It should be increased above inflation (growing to about £170 per year in 2023) to give the BBC more money to spend
- It should be increased in line with inflation (to about £158 in 2023), so that the BBC always has about the same amount of money to spend
- It should be frozen at £145.50 for seven years, so after inflation the BBC has somewhat less money to spend.
- It should be reduced (to about £134 in 2023), so the BBC has much less money to spend

Only 2% backed the above-inflation increase, while rather more (20%) favoured a rise in line with inflation to maintain current BBC income. However, greater numbers opted for either freezing the fee for seven years (30%) or actually cutting the cost over that period (31%). Just 6% were unable to give an opinion at this question. These results are very similar to other survey findings (Sunday Times 2015 ²) but with fewer people now backing an inflationary increase, perhaps reflecting the current extended period of near zero price rises.

Chart 6: How the BBC licence fee should change over the next 7 years



Q7. As indicated, the BBC is funded via the licence fee which costs £145.50 a year – the equivalent of £12.13 per month. It will stay frozen at this rate until 2017. Thinking about the five years after this, which of the following statements is closest to your own view?

Base: All respondents (2093)

There were many demographic and other differences in attitudes at this question:

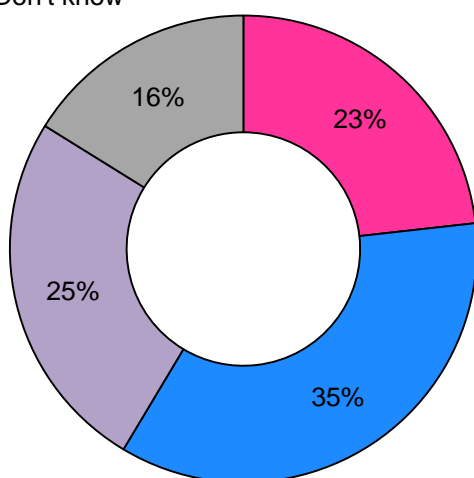
- Women (64%) were more likely than men (58%) to want to see the fee frozen or actually cut
- 25-34 year olds were keenest on a real cut (41%)
- Over-55s were more likely than other age-bands to support the fee being at least increased with inflation (27%)
- Backing for a cut in the licence fee grew steadily from only 18% of ABs through to 38% of C2DEs
- As many as 36% of ABs opted for the fee to be at least maintained via inflation, compared with only 12% of DEs
- Minority ethnic groups were more likely than white respondents to support a real cut in the licence fee (44% v 30%)
- Users of the iPlayer and website and heavier/multi-platform BBC consumers were most in favour of maintaining or even increasing the real level of the licence fee

Views were also quite consistent across the UK, other than more people in Scotland saying 'None of these' (16% compared to 9% in England). There were however, no differences in views about the licence fee between those who have only free-to-air TV and people with paid-for television

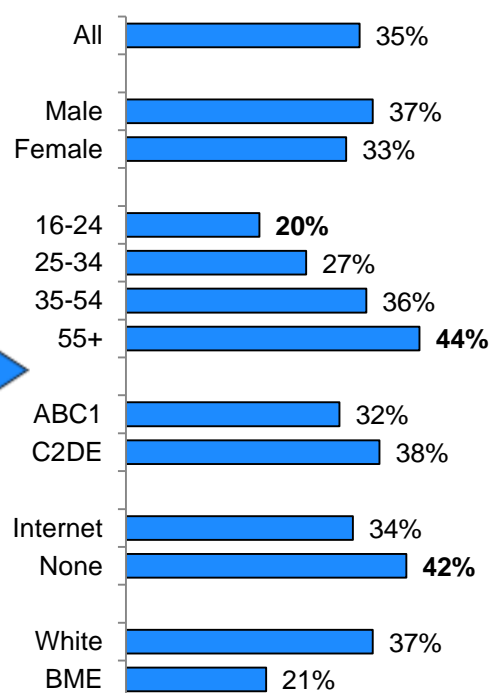
Still in the context of the licence fee, the sample was asked whether the BBC was efficient or inefficient in how it spends its income. A large minority didn't express a strong view either way, opting to say it was neither efficient nor inefficient (25%) or saying they really don't know enough to answer (16%). Among those who gave a definite opinion, rather more described the BBC's spending of the fee as inefficient (35%) rather than efficient (23%). The questionnaire did not collect comparable data about other large organisations.

Chart 7: Efficiency of BBC licence fee fund spending

- The BBC is efficient in how it spends its money
- The BBC is not efficient in how it spends its money
- Neither
- Don't know



■ All thinking the BBC spends money inefficiently



Q11. People have differing views around whether the BBC spends its licence fee funding efficiently. Which of the following statements comes closest to your view?

Base: All respondents (2093); male (1024); female (1069); 16-24 (307); 25-34 (325); 35-54 (568); 55+ (893); ABC1 (917); C2DE (1176); children in HH (550); no children in HH (1543); internet access (1742); no internet access (351); white (1843); BME (242)

Please note: **bold** indicates a statistically significant difference

Only among the under-25s and ethnic minorities were there more who rated the corporation as efficient rather than inefficient in this respect (although this was also more predictably the case for those who support the BBC's recent expansion, iPlayer/multi-platform users and heavy consumers of BBC services). All other age groups and all social grades (especially DEs), the different nations and regions all leaned towards rating the BBC's use of the licence fee funding as being inefficient. Gender differences were minor, with slightly more men than women rating the BBC as inefficient in this respect.

6.2 Qualitative research

Across the qualitative research views regarding funding and value for money of the BBC were driven by the following three factors:

Whether the BBC provides content that is personally relevant and appealing and cannot be accessed elsewhere

Perceived value of the range of services provided by the BBC

Attitudes towards the BBC playing a wider cultural, societal or public service role and views on funding this

These factors strongly overlap and are intertwined, making peoples' views about value for money of the BBC and how it should be funded complex and often polarized.

Overall, there was some debate about whether the diversity of BBC services and content was required.

Those more positive towards the BBC maintaining diversity of provision were those who personally used the BBC on a frequent basis and felt it was important for the BBC to provide a range of services even if they personally did not use all of the services provided. Some of these participants noted that people in their household enjoyed different genres and therefore could see the value in the BBC providing a range of content.

"It offers such a wide variety. It meets all the needs for myself and my family and is good value for money."

45+ years, BC1, Birkenhead

Others thought more broadly in terms of the general population across the UK. These participants noted that the population is diverse and therefore felt that the BBC should also be diverse in its provision. These participants were open to the idea that their licence fee funded services that they did and did not use.

“Those [services] are important to everybody because somebody who lives 200 miles away, they might have a different choice.”

45+ years, C2DE, Birmingham

“I personally don’t use these services [Asian network] but I think it’s important for a multi-cultural society.”

18-24 years, C2DE, male, Aberystwyth

These views were particularly strong amongst those who valued native language services and felt that the BBC was a core and important provider of these.

“As a nation, as a country, it’s important that we have that [native language services]. Especially in the North, they still teach that in schools.”

45+ years, C2DE, Glasgow

Participants positive towards the diversity of BBC provision were less concerned about audience figures for different services, and tended to place more emphasis on ensuring that different content be made available to the general public, especially where they felt that this type of content would not be available via free services.

“I don’t know about the viewing figures for BBC4 but it’s nice to have an area for slightly different programming to appear.”

25-45 years, BC1, Exeter

“Their [BBC] level of factual programmes and a lot of the other language and other cultural and foreign language films...I think that’s really important just to have that accessible on mainstream TV.”

25-45 years, BC1, Exeter

These participants did not feel that services should be cut because they felt that everything that was provided appealed and played a role for someone in society. These participants tended to be more open about continuing to pay for the BBC at the current licence fee level. A couple of participants noted that they would be willing to pay more to maintain diverse BBC provision.

“I use it a lot so I think for what it is, it’s a really good service...and does numerous things. It covers like all topics that people want to cover. So I’m more than happy for what I pay already, I would pay more, personally.”

25-45 years, BC1, Exeter

Those more negative towards the BBC maintaining diversity of provision were less interested in funding services that they did not or were not interested in using.

“Why should I have to pay for a Welsh channel when I wouldn’t understand it?”

45+ years, BC1, Birkenhead

These participants were often keen to see a reduction in the licence fee cost, and felt that reduction in services was a key way to achieve this.

“They’re being funded by the taxpayer so it would be cheaper for us if they didn’t do all this different stuff.”

18-24, BC1, Belfast

Some participants simply felt that they could personally access the type of content they used the BBC for from other broadcasters and therefore did not feel that it was important for the BBC to provide these.

“Everything the BBC provides, other people provide.”

25-45 years, C2DE, Birkenhead

These participants were also most likely to query the value for money in provided services that they envisaged only a small number of people would want to access.

“The Proms... why do they want to go to the effort of putting it on television screens for a small minority of people with the cost that might be involved?”

45+ years, BC1, Birkenhead

Those most negative towards the diversity of BBC provision were most likely to suggest a subscription model for the BBC. This is further discussed later in this chapter in section 6.2.1.

Across the research some participants queried whether services or content could be cut to deliver a reduced licence fee and improved value for money. Some simply felt that the BBC should review audience figures and cut services on this basis.

“I say continue with the fee but then maybe look if you can knock the price down and get rid of some channels.”

25-45 years, C2DE, Birkenhead

Debate within the groups led some participants to suggest that specific services or genres could be cut. This included the suggestion that the red button could be cut. This suggestion was based on most participants noting that they did not use the red button function and therefore wondering if it was needed.

“I don’t even know what that red button thing is.”

18-24, C2DE, Female, Exeter

"[Red button]...there's nothing you can get on it you can't get online...it's very slow and it stops."

25-45 years, C2DE, Belfast

"I've got the red button but I never use it. I'm a bit technophobic, I'm always going to use it then I think...it won't go back to where I was."

45+ years, C2DE, Glasgow

As discussed in section 12, religion as a genre was also considered an area where cuts could be made, with participants feeling that this type of content could be accessed elsewhere by those seeking it.

"If you're religious you're going to find it somewhere else."

25-45 years, C2DE, Belfast

There were mixed views regarding whether BBC Parliament was needed. Most participants reflected that they did not watch the BBC Parliament channel and wondered whether news coverage on other BBC channels was adequate in this regard.

"If it's worthwhile watching, it's covered in the news."

25-45 years, C2DE, Belfast

Across the research there were also mixed views regarding whether the BBC provides a public service. When thinking about public service, many spontaneously thought about the BBC's provision of news, education and information.

"To me, the BBC is a public service so it more informative than to provide entertainment."

25-45 years, BC1, London

As discussed in section 11.4.1, participants cited mixed views regarding how well they felt the BBC provided news and information. Here again, views were diverse. Some felt that this element of BBC provision was key and therefore felt it was good value for money.

"The BBC is our eye on the world in a way that other broadcasters aren't."

25-45 years, BC1, Exeter

However, some felt that this type of content could be found elsewhere and therefore questioned whether aligning the BBC with public service provision was still relevant and reflected good value for money.

.....
"It's evolved. It might have been in the thirties and the forties and whenever they invented tellies and stuff like that, but I mean not any more. I mean because you've got that many different, you know, sources of information. Say the news is well made, but I can get it from somewhere else."

25-45 years, C2DE, Birkenhead
.....

Participants did not spontaneously consider BBC coverage of cultural and annual events. However, when prompted to consider these there were mixed views. Some felt that these types of events were less important to modern society and questioned whether they needed to be provided.

.....
"The Queens' speech at Christmas. Since my nan and grandad died I haven't watched it. It's evolved you know. Peoples' views and habits are changing."

25-45 years, C2DE, Birkenhead
.....

Others simply felt that other broadcasters would take these on if the BBC did not cover them. However, others felt that the BBC was good at covering these, and should continue to do so as a core activity.

.....
"I think if they are going to continue getting a licence fee then they should stick with what they are good at...state funerals, Remembrance Sunday and stuff like that. ..stick with programmes like that and stay with making good quality documentaries and try and get away from ...cheap fillers that they can just throw in and churn out and I don't want to watch."

25-45 years, C2DE, Birkenhead
.....

Some events provoked an emotive response such as coverage of Remembrance Sunday: The Cenotaph which prompted some participants who had been previously negative about funding for the BBC to reflect that they felt it important for the BBC to exist for these types of broadcasting.

.....
"I've been negative but I do like the BBC. I mean I know I sort of bang on about the money side of it but they do make some good content and it is an institution. They can't get rid of it."

25-45 years, C2DE, Birkenhead
.....

However, these participants tended to conclude that the current licence fee funding model was out of date.

6.2.1 The licence fee

Across the qualitative research views regarding the value for money of the current licence fee were polarized. Some views focused on the cost of the licence fee. Some felt that the current level was “about right” and were content to continue paying at this level.

“I just thought it’s not overly expensive but it’s enough to cover things if you know what I mean.”

25-45 years, BC1, Exeter

“I wouldn’t pay more [licence fee] but I wouldn’t want to miss what I do get out of it.”

25-45 years, BC1, Exeter

As detailed earlier in this chapter a couple of participants noted that they would be willing to pay extra to maintain diversity of BBC provision although it should be noted that this was very much a minority view.

However, others felt they should pay less based on the fact that they accessed only a few BBC services.

“Out of all of the channels that the BBC throw at you, there are probably only about four that I would probably look at so I would probably want to pay less.”

45+ years, C2DE, Birmingham

This was a particularly strong opinion amongst those who felt they could access similar services elsewhere. These participants felt that they had choice over where to access content, and felt that this choice should be extended to BBC services and content.

“If there’s nothing else yes, it is worth the licence fee but there is something else.”

45+ years, BC1, Birkenhead

Other negative comments concerned the principle of funding a variety of services that may not be used or personally relevant.

“I think it’s immoral to force people to pay for something they don’t really use.”

25-45 years, C2DE, Belfast

“I think people generally object to being forced to pay for something you don’t necessarily use.”

45+ years, BC1, Birkenhead

Some participants spontaneously suggested that there should be reduced licence fee or no licence fee for older people and were therefore positive towards this aspect of the current licence fee.

"I don't think people over a certain age should be paying for it."

25-45 years, C2DE, Birkenhead

However, others felt that age was no indicator of ability to pay, and suggested that some kind of means testing would better determine those who should receive support with the licence fee.

"I think there are a lot of people who can possibly still afford to pay at seventy five. And so therefore I think the criteria should change."

45+ years, BC1, Birkenhead

Further views regarding reductions in fee were voiced when discussing the universal household levy in section 7.2.

7 Future funding options

7.1 Options for future funding – quantitative polling

Five possible options were presented to respondents, including variations on the existing licence fee as well as the more radical options of a universal household levy and part-subscription models. Some of these were necessarily quite complicated to explain and could not be condensed into a couple of simple sentences. Therefore it was not practical to present people (straight away) with all five choices at the same time and expect them to be able to make a single choice of their preferred option.

The survey used a two-stage approach beginning with each option being assessed on a good/bad scale (with rotation used to avoid order effects). Only after this were respondents presented with a summary of the five choices and asked to pick their one preferred funding option. The full text descriptions are shown below and were read out to the sample (who also had a printed copy of the wording in front of them).

The licence fee as now – set at about the same level and paid in the same way (by those who watch or record live television but also by those who only watch ‘catch up’ services via BBC iPlayer).

The same licence fee as now for most people but a lower or no charge for those on the lowest incomes. Currently most households have to pay the full fee – other than blind people and over 75s – regardless of their financial situation. Reductions or exemptions would be extended to those on the lowest incomes, meaning the fee would be reduced, or even not paid at all. This option would mean a lower income for BBC.

A universal household levy – rather than having a TV licence, ALL households would have to pay this levy. Currently, a TV licence is only required if you watch or record live television, but the fees go to fund other services, such as radio and the BBC website which some people use without paying the licence fee. A universal levy would mean the 99% of the population who use the BBC would pay as would the 1% of people who do not use the BBC at all. As more people would pay the levy, the cost might be lower than the current TV licence and there also would be reductions or exemptions for the over-75s and those on low incomes.

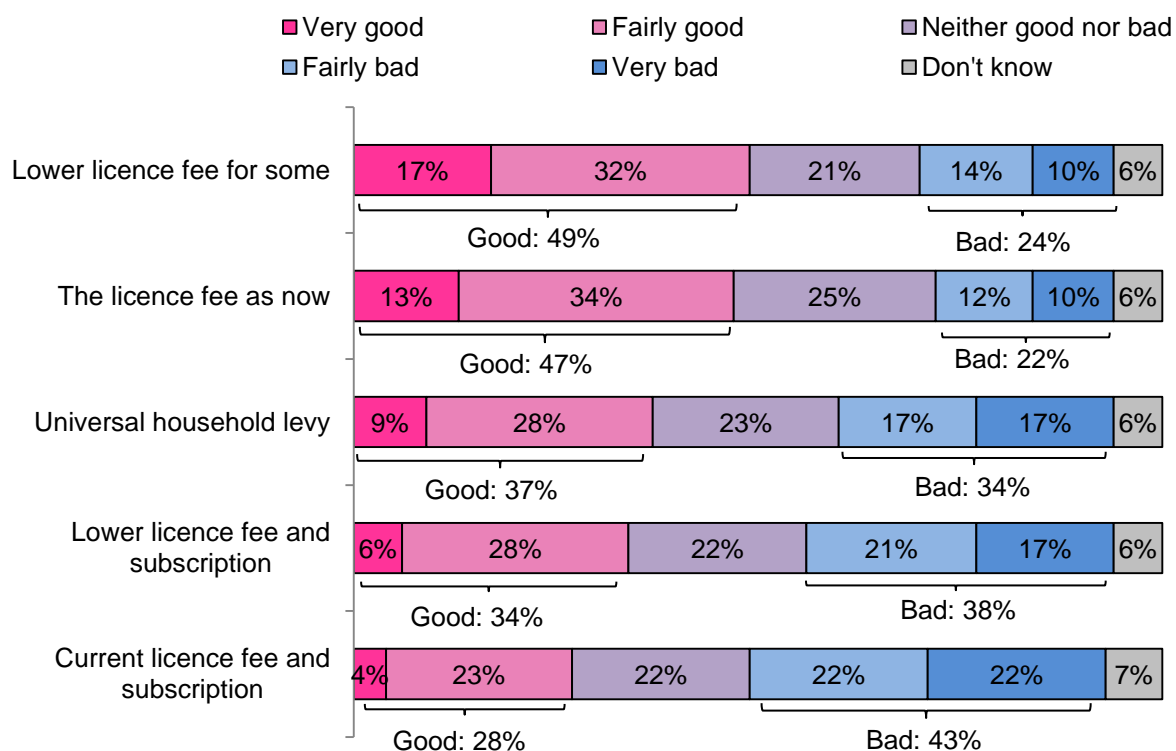
A mixture of a lower licence fee and subscription – people would pay a lower licence fee, with exemptions for the over-75s, to get access to BBC ‘core’ content which would include all radio, news and educational programming but less entertainment, drama and sport than provided now. To access full BBC content (such as more drama, entertainment and sport) you would need to pay an additional subscription. This means that the total price subscribers choose to pay (for the core licence fee plus their optional subscription) could be a bit more than the current licence fee, depending on what someone wants to access. As the BBC’s income would depend on this subscription level, it might not be as financially stable as it is now.

A mixture of the current licence fee and subscription – this would mean that the licence fee would remain at £145.50 a year, with exemptions for over-75s, and with the BBC offering what it does now. For additional, premium services (e.g. extra sport coverage, extra BBC Proms coverage, or other content that people might want to access), you would need to pay a small subscription. This would give more content for those who want it, but not change the current BBC offering for those who just want to pay the TV licence. As the BBC’s income would depend on this subscription level, it might not be as financially stable as it is now.

Under both stages of questioning, there was notably more support for models based around the licence fee than for the levy or subscription. Almost half (47%) rated the current licence fee (with the iPlayer loophole closed) as being a very or fairly good way of funding the BBC in the future and slightly more (49%) gave the same rating to a licence fee with more exemptions and reductions for those on lowest incomes.

The universal household levy had less backing, with about as many giving it a positive rating (37%) as expressed a negative view. A lower licence fee with optional subscription top-up also split opinion quite evenly (with 34% in favour). However, the idea of maintaining the current licence fee with a subscription to access new content (i.e. beyond that available now) had only modest backing (27%) with far more people (44%) rating it as a bad way of funding the corporation.

Chart 11: Public opinion of possible BBC funding options



Q2. Currently, the BBC is funded via the licence fee which costs £145.50 a year – the equivalent of £12.13 a month. There are a number of ways in which people might pay for the BBC in the future. For each of them, please tell me if you think it would be a good or bad way of funding the BBC.

Base: All respondents (2119)

Views about each of the options did vary by demographic group but interestingly there were no consistent differences by current TV platform.

Lower licence fee for some/exemptions (49% good, 24% bad)

- The groups most in favour were 16-24s (58% good) and DEs (53%)
- Those more likely to be against this option included people aged 35+ (27% bad) and the C1C2 social grades (27%)

Licence fee as now (47% good, 22% bad)

- The strongest support came from over-55s (55% good) and ABC1s (50%)
- Those less in favour were men (25% bad), people aged 35-54 (26%), DEs (27%) and ethnic minorities (29%).

Universal household levy (37% good, 34% bad)

- The relatively most enthusiastic groups were men (39% good) and notably social grade AB (46%).
- The proportion saying this was a bad way to fund the BBC was quite consistent across demographic groups

Mixture of lower licence and subscription (34% good, 38% bad)

- Backing was relatively high among men (37% good) and the under-55s (37%)
- The greatest objections were recorded among over-55s (46% bad) and those in Wales (50%)

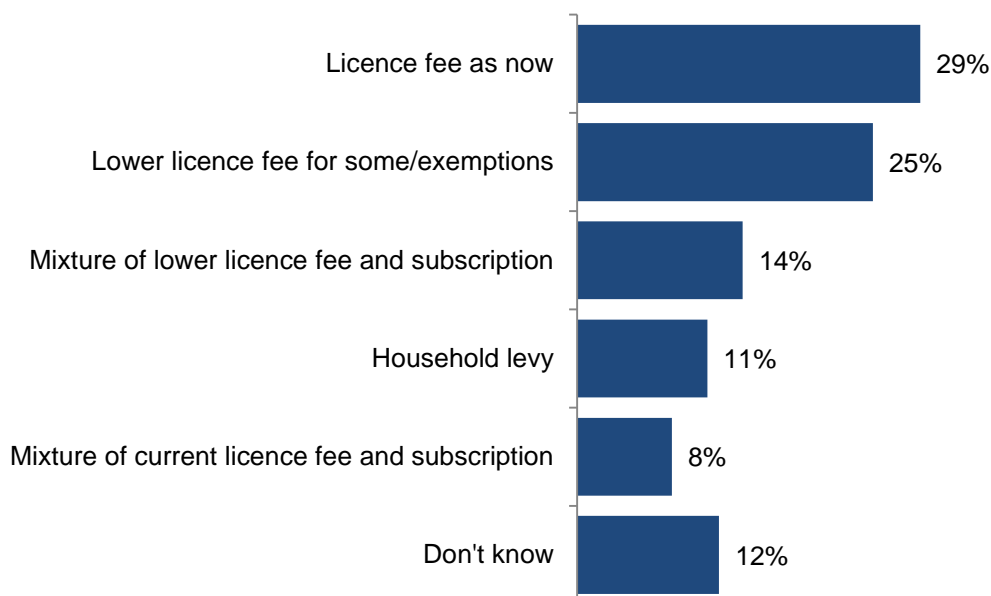
Mixture of current licence fee and subscription to get new services (28% good, 43% bad)

- This was seen more positively by under-25s (34% good) and social grade AB (34%)
- The most negative group was the over-25s (45% bad)

The second stage of questioning about the funding options followed on from the rating of each of the five choices presented in the survey. A short summary of each option was shown to respondents who were asked to pick one of them for the future funding of the BBC. Having already seen and heard the detailed descriptions, only 12% were unable to make a choice.

As with the ratings, the highest level of support was recorded for the continuation of the licence fee either as now (29%) or with more reductions and exemptions (25%). Far fewer people preferred any role for subscriptions, with 14% supporting a lower fee with a top-up for full access and 8% the current fee with an extra payment for additional content. Only 11% backed the universal household levy, lower than the proportion giving the mixture of lower licence fee and subscription the highest rating (14%), despite the household levy having higher favourability scores than the latter (37% v 34% - see Chart 11).

Chart 12: Highest rated funding option



Q3. If you had to choose just one of these funding options, which would you prefer to be used for the future funding of the BBC?

Base: All respondents (2119)

Where there were demographic differences, they reflected what is described above for the rating questions:

- The over-55s were most in favour of the licence fee more or less as it is now (38%)
- 16-24s liked the lower licence fee for some (31%)
- ABC1s were keener on the current licence fee (32%)
- DEs and minority ethnic groups tended to favour the licence fee with more reductions and exemptions (33% and 32% respectively)
- Those with paid-for television were only slightly more in favour of the subscription options than anyone else – most of this group backed the licence fee options. Free-to-air viewers often supported the current licence fee arrangement (36%)

7.2 Options for future funding – qualitative

7.2.1 Alternative funding suggestions

Across the qualitative research some participants felt that the licence fee worked well as a funding model, and felt that this process should continue.

.....
“It [licence fee] has worked so well for so many years so why change it now?”

45+ years, C2DE, Birmingham
.....

A few participants suggested that if continued, something should be put in place to ensure that only those who paid the licence fee could actually access BBC services.

.....
“If they actually did it so that it was a BBC licence, so you couldn’t watch BBC unless you paid the licence, you would get less moaning.”

45+ years, C2DE, Birmingham
.....

However, a number of alternative funding models were generated by participants. These were sometimes suggested as additional ways to generate funds for the BBC, and sometimes as alternatives to the licence fee.

Those in favour of alternative funding models were often dismayed by how much licence fee money was spent on collecting the licence fee and tackling licence fee evasion. This was not considered a good use of public money.

Advertising

Some participants felt that the BBC should have adverts to remove the need for public funding.

.....
“One hundred million [pounds] to chase people who don’t want to pay. It seems like a waste of money that you can put adverts in then you are not spending one hundred million chasing it. You can spend it on content.”

25-45 years, C2DE, Birkenhead
.....

Whilst adverts were largely disliked, participants noted that they now often recorded television programmes enabling them to skip through the adverts. This made advertising on the BBC less of a concern.

.....
“You can tape it and fast forward through the adverts like I do.”

25-45 years, C2DE, Birkenhead
.....

However, other participants strongly felt that the BBC should not have advertising.

Selling content and programme formats

Some participants were aware that the BBC already sold content and formats overseas and envisaged that this was lucrative. They felt that this could continue and be strengthened as a funding route for the BBC.

“I think it seems to make sense to plough money into good ideas and then to try and sell them. That seems to work. Keep doing that. Make good programmes.”

25-45 years, BC1, Exeter

Subscription

When thinking about funding the BBC, participants spontaneously thought about the way in which other broadcasters are funded, particularly noting that many broadcasters used a subscription framework.

Many participants felt that subscription models offered choice, which was something that some felt was missing from the current licence fee model.

“People are having a choice as to whether they pay for these other channels...I think the system [licence fee] is outdated.”

45+ years, BC1, Birkenhead

Some felt that the BBC should adopt a subscription model, enabling people to choose which services they wanted to access and pay accordingly. These participants envisaged a ‘package’ approach where you could choose which specific BBC services or genres you wanted.

“I probably only want iPlayer but with an option to read BBC news and weather. Like a little portal into that. And I’d probably want to pay like eight or nine pounds a month.”

25-45 years, BC1, Exeter

“You might not use the radio and internet and so on. This is why I personally think it should be going in with these packages and stuff and you can pick and choose rather than being forced to pay a hundred and fifty pounds.”

45+ years, BC1, Birkenhead

A couple of participants envisaged that they would opt out of accessing BBC services entirely.

“If there was a choice and they said we don’t have the BBC and we don’t have to pay that, then I probably wouldn’t pay it and just not watch it.”

25-45 years, C2DE, Birkenhead

However, others, when they began to think about subscription services they paid for reflected that the licence fee was good value for money because it covered such a broad spectrum of services and content.

.....
 "I thought about the other things I'm subscribing to. Like Netflix and Spotify...I suppose they're all dedicated services to different parts of things the BBC does as a whole."

25-45 years, BC1, Exeter

7.2.2 Part subscription

Participants in the qualitative research were provided with the following information regarding part subscription. Participants were shown a brief explanation of the funding model for discussion.

- The licence fee continues as now to fund all the existing BBC services.
- People can then choose to pay an additional subscription for extra services. For example:
 - Watching other Proms music events that are not broadcast on main channels
 - Watching other sports matches that are not broadcast on main channels

Views regarding the idea of part subscription were mixed across the research. Some participants simply rejected the idea, noting that they felt the way the funding was currently structured worked, and were concerned that part subscription would lead to a fragmented BBC and ultimately, a reduction in BBC services. Some of these participants felt that part subscription went against what they considered to be a key principle of the BBC; providing a range of services for different audiences.

.....
 "It would spoil the BBC's reputation having to pay extra for services."

45+ years, BC1, Aberystwyth

A few younger participants noted that they had seen other services decline in quality since the introduction of charging for certain services – such as YouTube . They were concerned that part subscription would similarly result in a reduction in quality for the BBC.

Some were concerned that part subscription would be 'the thin end of the wedge' and what could begin as small scale for certain services could become something much more extensive with more content eventually moved to part subscription.

.....
 "You would be amazed by how many programmes would suddenly come into the pay per view."

45+ years, C2DE, Birmingham

Others inferred from the idea of part subscription that the BBC was looking for ways to generate additional income. This often framed how they felt about part subscription. Those open to the idea that the BBC might be looking for additional funding routes were generally open to this idea although not all felt that it would work or that they personally would use it. Those less open to the BBC looking for additional funding routes tended to push back against the idea and tended to voice the opinion that all services provided should be provided as part of the licence fee.

“They just want more money.”

45+ years, BC1, Birkenhead

However, it should be noted that even those who in principle were against the idea of the BBC finding additional funding routes expressed mixed views about whether they felt they personally would be likely to use it if it did exist.

As discussed earlier in section 6.2.1, some participants spontaneously raised the idea of moving the BBC to a subscription model. Whilst some had been positive about this idea, there was some degree of push back on the idea of part subscription because it would involve paying an additional cost, over and above that of the licence fee. Overall, participants tended to agree that the idea of part subscription would be more palatable if it went hand-in-hand with a reduced licence fee.

“Well, if they halve the prices of a licence fee...then ask us to pay for certain stuff.”

25-45 years, C2DE, Birkenhead

It was also agreed that any subscription services should be costed to be competitive, and ideally cheaper than those offered by other broadcasters.

Participants discussed a range of services in terms of whether they would be appropriate for part subscription.

Sports was often spontaneously mentioned as a potential genre for part subscription. This was largely driven by experiences of paying for sports channels and events via other subscription services. Views tended to be polarized. Some participants reflected that the number and variety of sports events covered by the BBC on television had significantly reduced over time. However, because sports events had been provided previously, without part subscription, some felt that it was not appropriate to pay an additional fee to access additional coverage in the future.

Others felt that sporting coverage could be attractive, if comparable to existing sports subscription services such as Sky.

“I suppose if they did put some of the sporting channels on then they could charge it at a cheaper rate than Sky, I think I would entertain it and do away with Sky.”

45+ years, C2DE, Birmingham

Comparability to existing services was crucial, and participants agreed that people would be unlikely to pay part subscription for sporting coverage across a range of different broadcasters; the BBC would need to provide something ‘special’ to attract their attention.

“A lot of people are paying extra anyway like Sky for sports you know. You are not going to pay the BBC as well.”

45+ years, BC1, Birkenhead

“If it was the top sports events I probably would. You know, when people pay for the pay per view boxing and stuff like I mean if it was a decent boxing match or a footie match and I could go well, I’ll pay the extra tenner to watch that.”

25-45 years, C2DE, Birkenhead

Overall, one-off sports events were felt to have a better fit for part subscription.

“The World Cup final or something like that . The heavyweight boxing or something like that. I mean I would probably prefer to pay for that. But I’m not paying extra for a service I should get with the licence fee.”

25-45 years, C2DE, Birkenhead

However, there was a lot of discussion and scepticism about whether the BBC would really be able to afford large events without the financial backing and advertising revenue that other broadcasters such as Sky had access to.

Participants often struggled to think about other events or content that would be suited to part subscription. Some suggested films often commenting that the films usually shown on the BBC were old and repeated.

“Films...because you get your standard films but you don’t get your exclusive new films which have just been released. That tends to be on your Netflix and your Amazon Prime...BBC have films but they tend to have been out for a few years.”

25-45 years, BC1, Exeter

“If they had films that were coming out a bit quicker you might do.”

25-45 years, C2DE, Birkenhead

A couple of participants further mentioned that the BBC could consider part subscription for series purchased from other broadcasters. Examples given included the types of series created by broadcasters such as HBO that were popular and typically shown on broadcaster channels such as Sky Atlantic.

“Exclusive series which the BBC could buy.”

25-45 years, BC1, Exeter

However, there was some debate about whether series should be part subscription or whether the provision of series was something that should be expected from the BBC, as part of the licence fee. Some participants reflected that these types of series were expensive to buy, and that they understood if the BBC would charge a fee to access these as this additional funding would probably enable them to purchase the content in the first place. However, many simply felt that if the BBC wanted to show these types of programmes then they should assign required money from existing funds. These participants noted that if the BBC did not show this programme, you would still be able to see it on another channel if you were keen to do so.

Music was another content area that generated some debate. Some simply were not interested in accessing music via the BBC and therefore were not interested in this idea. Others did express interest in accessing music but when thinking about the provision of content such as the Proms or Glastonbury, queries about how part subscription would work began to emerge.

A couple of participants queried whether the part subscription fee would be directly linked to the cost of providing the additional content. Some then wondered whether part subscription for more niche content would work and whether the BBC would need to guarantee a certain amount to be raised by part subscription before they could provide the content.

“If you wanted the Proms. If only one hundred and fifty thousand people signed up for it would they still do it?”

25-45 years, BC1, Exeter

7.2.3 Universal household levy

Participants in the qualitative research were provided with the following information regarding the universal household levy. Participants were initially shown a brief explanation of the funding model for discussion.

- All households would automatically be charged a fee, rather than having to actively take out, or renew a TV licence.
- This would cover all services – TV, radio, online and on-demand. It would not be attached to having a TV as is the case with the current licence fee.
- Currently everyone pays the same amount for a TV licence but a household levy could mean that some people pay less. For example, people on the lowest incomes could pay less.

Once they had given their spontaneous views and comments participants were shown potential benefits and drawbacks of the funding model for consideration, as shown below.

Potential positives

- Reflects modern use of the BBC – the current license fee focuses on TV but people use access BBC services on radio and online too.
- Reflects how license fee money is used – the current license fee focuses on TV but funds are used to finance TV, radio and online services.
- Removes the need to spend time and money identifying licence fee evaders.
- Will increase the number of people paying which could allow for a reduction in the fee per person, or provide more money to spend on BBC content.
- Removes any confusion and concerns around fairness about who should and should not pay the license fee (e.g. those who only use BBC services on iplayer/ not live still access BBC content, but do not need to pay the license fee).
- The BBC provides cultural and educational programmes/ content – even if not everyone uses these, they help people who do use them stay in touch with their heritage or become more informed on a range of topics.

Potential negatives

- All households will pay for BBC services, regardless of whether they use them. Although recent data shows that around 97% of people use BBC services.
- Could be unpopular amongst those who only access BBC services via iplayer/ do not watch or listen to anything live.
- Concessions will need to be considered to ensure the fee is affordable for different groups in society.
- May be costly to put in place.

From the term ‘universal household levy’ participants assumed that all households would be required to pay a set amount of money although there were some queries regarding whether this would be based on number of people in the household or number of devices in the household. Other queries were about what the cost would be per household, and how it would be collected.

Once provided with information about the universal household levy there were mixed views and positive and negative views were typically cited across and within mini-group sessions.

Positive comments focused on the potential for the levy to save money and ultimately reduce the cost to each household. This view was greatly influenced by information regarding the amount of money spent on identifying licence fee evaders.

“The wastage is scandalous, so a universal fee may work well.”

45+ years, BC1, Aberystwyth

Some simply felt that the levy would be no different to the current licence fee.

“I don’t understand what is the difference. Because in a sense you are required to pay it now.”

25-45 years, C2DE, Birkenhead

Negative views often focused on the perception that the levy removed choice from individuals. Whilst participants reflected that most people did use BBC services in some format, they felt uncomfortable with the idea that there was currently choice, and that the levy would remove this. This was often more of a moral stance rather than based on the fact that participants across the groups did not want to use BBC services. However, once faced with the idea that choice would be removed, a few began to question whether they really did want to access BBC services.

.....
"If you put that system in you're making them have to pay towards a TV licence which otherwise they would go without. So you are taking their choice away from them."

25-45 years, C2DE, Birkenhead
.....

There was also scepticism about whether the levy could really deliver cost savings. Some felt that the additional bureaucracy required to implement the levy would cancel out any savings.

.....
"I think it would cost too much to do that."

45+ years, C2DE, Glasgow
.....

Others did not agree that it would sufficiently decrease the number of people evading payment.

.....
"People who are going to pay, pay. People who don't want to pay, don't pay."

25-45 years, C2DE, Birkenhead
.....

Some compared the levy to Council Tax, and noted that people evaded Council Tax and envisaged that the levy would be no different in this regard.

.....
"What I don't understand about that is that they're saying there would be no evaders. The Council Tax? The Poll Tax? There was certainly evaders of that."

45+ years, C2DE, Glasgow

"They're spending one hundred million pounds now to collect it. They'll still be spending one hundred million trying to collect it off the other system [universal household levy]."

25-45 years, C2DE, Birkenhead
.....

Some felt that even if the levy did result in more money being collected, they were unlikely to see a reduction in how much they paid. These participants expressed cynicism that any saving would be passed on to levy payers and expected that the BBC would choose to keep this money.

.....
"It won't go down. They will just get more money."

25-45 years, C2DE, Birkenhead
.....

The idea that there could be a reduction in cost for some groups in society, for example, those on the lowest incomes, was also met with negative reactions. Those who disliked this idea felt that it was unfair.

.....
"Why should I pay more because I've got a half decent job?"

25-45 years, C2DE, Birkenhead
.....

Overall, for many, the idea of the levy was only considered palatable if it resulted in a reduction in the amount of money each household pays.

"[If] it went down because more people had to pay. That's good."

25-45 years, C2DE, Birkenhead

This then led these participants to think about the cost of providing services and how this related to part subscription. For example, for events such as the Proms and Glastonbury, participants envisaged that part subscription would be in place for additional concerts or stages. However, as the BBC would already be at the venue filming for mainstream coverage of these events, they wondered whether part subscription would really be necessary to finance additional coverage.

"They're already going to have to be there"

25-45 years, BC1, Exeter

This led to a couple of participants reflecting that if the intention of part subscription was to fund additional content, it could be speculative and risky, as the BBC could not be sure of how many people would take up the opportunity.

When further considering how part subscription could work in practice, a couple of participants agreed that the idea would work well alongside technology used by the BBC.

"If I was on the BBC website and it said, if you want to see more content it's available on this app. Go and download it. Depending if it was like a one-off content or continual extra content. I think it would be something that I would easily go and click on."

25-45 years, BC1, Exeter

However, some noted that part subscription did not reflect the way in which people can often stream and find content online. A couple noted that rather than pay it would probably be possible to find the content online in some other way.

"You can get them wherever you want...you can stream it all anyway, football matches."

45+ years, BC1, Birkenhead

"If the BBC wanted to charge me another £2 to watch an episode of Planet Earth I'd find another way to watch it!"

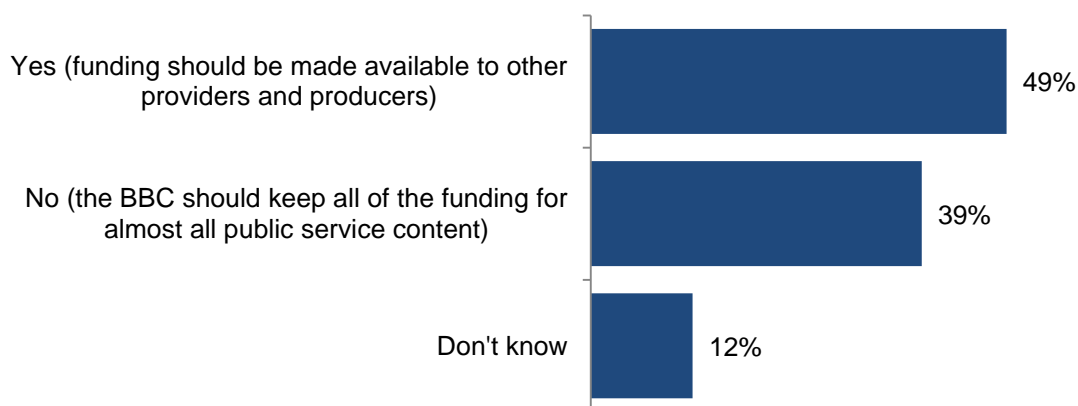
18-24 years, C2DE, Male, Aberystwyth

8 Contestable funding

8.1 Quantitative polling

Almost exactly a half of those interviewed (49%) thought that more of the licence fee should be made available to other free-to-air broadcasters and independent producers to make public service content to be shown on the BBC or elsewhere. A large minority (39%) felt that the BBC should keep all of the fee for funding for public service content (defined here as including news, current affairs, local TV, minority language services, children’s and younger people’s programmes, religious broadcasts of worship or documentaries, arts, music and the World Service – the same list was used at the ring-fencing questions reported in section 9, chart 15)

Chart 13: Should BBC funding be made available to other providers/producers?



Q4. £3.7 billion is raised through the licence fee each year – currently almost all of this is spent on the BBC’s own radio and TV programmes and services, including public service content. Should more of this money be made available to other free-to-air broadcasters and independent producers to commission and make public service content? This might be shown on the BBC or on other networks.

Base: All respondents (2119)

There were no differences by gender, ethnicity, nation or social grade but support for contestable funding dropped steadily with age from as many as 60% of the under-25s to only 40% of the over-55s.

8.2 Qualitative research

When provided with a description regarding contestable funding, participants raised a range of queries regarding how it would work in practice. This included:

- Who will make decisions regarding who receives the funding?
- Will those making these decisions reflect the diverse UK society (e.g. age, ethnicity, income)?
- How will these decisions be made?
- Who will be the other broadcasters bidding for the funding?
- How transparent will the process be?
- Will other broadcasters be commissioned to make the content using BBC facilities?
- Will the content made by other broadcasters be shown on the BBC?

A couple of participants reflected that the BBC already chooses to commission and purchase programmes from other broadcasters (e.g. purchasing series from other countries) and therefore wondered how contestable funding would be any different.

Overall reaction to the concept was mixed. Negative reactions strongly focused on concerns regarding the impact on quality. This was largely framed by the existing view that the BBC provides high quality services and that contestable funding would ‘dilute’ this.

“It’s taking away from the BBC as being the big picture because they’re letting Sky or STV make a programme and then it’s on the BBC, so it’s not really about the BBC anymore.”

45+ years, C2DE, Glasgow

“Maybe somebody else wouldn’t do it so good.”

25-45 years, C2DE, Birkenhead

“It’s like Kelloggs cornflakes and then having a box of Aldi cornflakes...as soon as the milk hits the cornflakes they go soggy...I think it [quality] would dip. You could have a great idea and STV make it, and put it on the BBC and you’d go ‘that’s a bit naff’.”

45+ years, C2DE, Glasgow

Further concerns were expressed when participants reflected that a competitive process may emphasise cost as a deciding factor, with the cheapest option being chosen regardless of quality.

“Sometimes you don’t get the best for the cheapest price do you? You know you’d have to pay a little bit extra to get the better quality. I mean competitive doesn’t always mean the best.”

25-45 years, C2DE, Birkenhead

The suggestion that the introduction of contestable funding could impact on the financial stability of the BBC was met with mixed reaction. Whilst some agreed that this could be the case, others expressed scepticism that the BBC required current levels of funding to maintain current services. Here participants often mentioned concerns regarding salaries and expenses for BBC staff, and wasting licence fee money.

"I don't think they will be less financially stable. I mean they could probably afford to cut the licence fee now and still be able to operate on the same level."

25-45 years, C2DE, Birkenhead

Some participants had no strong feeling towards the idea of contestable funding. These participants typically focused on the provision of good programmes that they personally found appealing and wanted to watch. They were less concerned about how the content was funded or who was responsible for making it.

More positive comments regarding contestable funding focused on the potential for new ideas.

"You might get some fresh ideas."

25-45 years, C2DE, Birkenhead

There was also positivity towards providing opportunity for new film makers to produce content. This mitigated concerns that the competitive process would be amongst established and 'expected' broadcasters and therefore unlikely to generate anything very different when compared to the BBC.

"If the BBC gave a certain percentage to newer film makers who haven't really got a chance I mean you might get better programme, different programmes."

25-45 years, C2DE, Birkenhead

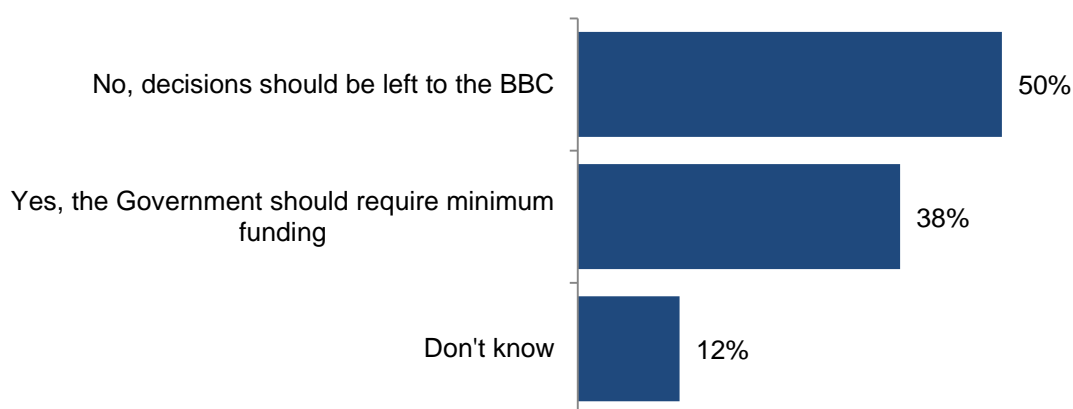
This view was particularly noted by younger Black African and Caribbean males. They felt that contestable funding provided an opportunity to involve young Black men in developing and creating content for their own cohort.

9 Government ring fencing

9.1 Quantitative polling

Although half of the sample agreed that more funding should be shared for creating public service content, exactly the same fraction felt that decisions about resourcing the BBC's own public service broadcasting should be made by the corporation rather than be influenced by a government requirement for minimum funding.

Chart 14: Should funding decisions be left to the BBC?



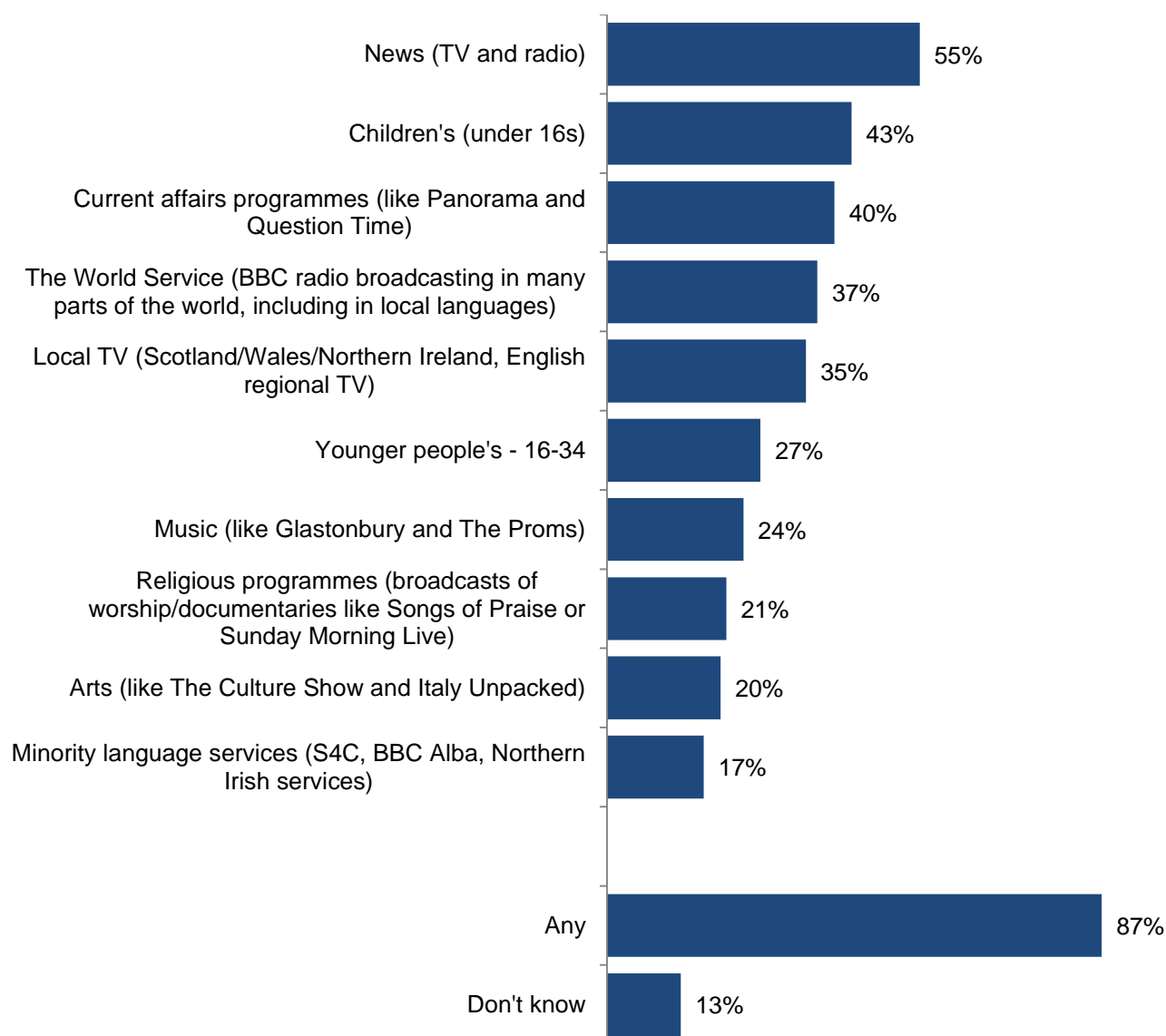
Q5. Should the Government require the BBC to guarantee a minimum level of funding for any of these types of public service broadcasting or should these decisions be left to the BBC?

Base: All respondents (2119)

There were no significant differences by sex, age or nation but support for the BBC making these decisions was higher among ABC1s (54%) than among C2DEs (45%). Only among ethnic minorities did more people actually favour a government requirement (47%) over the BBC deciding what to do (37%).

Among only those who supported a government requirement for public service broadcasting, a small minority (13%) were unable to say what should be protected but much larger numbers wanted to see minimum funding for News (55%), children's programming (43%), current affairs (40%), the World Service (37%) and local TV (35%).

Chart 15: Support for protection of types of public service broadcasting



Q6. Please read out any that you think should be protected [funding at a minimum level]?

Base: All respondents who think the Government should require the BBC to protect the funding of any public service broadcasting (803)

9.2 Qualitative research

Some participants struggled with the concept of government ring fencing and overall there were mixed views. Positive views were most likely to come from those who reflected that it was important for the BBC to ensure services for different groups in society. These participants often focused on the provision of native language services.

“There are people out in different parts of the country that require these programmes or different language programmes like the Welsh or whatever. We can’t just think of ourselves. If that money is ring-fenced for them then you can’t just say ‘you can’t have it because I don’t like it’.”

45+ years, C2DE, Birmingham

Participants in Wales were aware of the input the BBC had to S4C and greatly valued this channel. With this in mind they were positive towards ring fencing.

“Culturally, they’re [S4C services] of huge value.”

18-24, C2DE, Male, Aberystwyth

Participants in Northern Ireland noted that ring fencing money for one nation seemed to lack fairness and expected that if put in place for one nation, it should be put in place for all.

Participants struggled to identify which services or genres they felt should receive ring fenced funding. This was largely because many participants simply did not agree with the idea of ring fencing. However, there were some general views that the World Service was important to provide and therefore funds could be ring fenced for its’ provision. This was voiced particularly by those who valued tuning in to the World Service when on holiday. The World Service was also considered important for people from other countries living in the UK and for those from the UK living overseas such as members of the armed forces. A couple of participants noted that news coverage was also something that should be a core service provided by the BBC and therefore should be ring fenced.

“You want to know what’s going on in the country...so I think the national services is always something we should be providing...even if it wasn’t on television, radio [and] online...in one format of communication.”

24-45 years, BC1, Exeter

Negative views were often voiced by participants who did not feel that they would personally benefit from the types of services typically ring fenced.

“You are not going to benefit from those things.”

45+ years, BC1, Birkenhead

Others raised concerns about ring fencing for free licences for those aged over 75 years. This was met with some debate, and participants had recently seen coverage of this in the news.

“Today on the news they were on about asking people of 75 to give up their free licences and pay the money. You have got a concession and then all of a sudden...all they want to do is dictate.”

45+ years, C2DE, Birmingham

“Free for over 75 – I am not saying they should have to pay but in that case why does a single parent who has no money have to pay?”

45+ years, BC1, Birkenhead

Some participants felt uneasy that ring fencing removed choice regarding the use of funds from the BBC. Some of these participants felt that funding decisions should be determined by audience/ use figures and therefore felt that the BBC was well placed to make these decisions. Others were concerned that ring fencing lacked flexibility and therefore, if too little or too much money was set aside for certain services, there would be no opportunity to amend these.

“It may be they’re putting it in the wrong place”

25-45 years, BC1, Exeter

These participants felt that if put in place, ring fencing should be regularly reviewed.

However, the strongest degree of negativity towards ring fencing was regarding the role of the government in putting these in place. Some felt that this idea was “outdated” and referred to a time when perhaps the government had played a greater role in the set-up and running of the BBC. Others simply disliked the idea that the government had a say.

“The government are poking their nose in...it should be allowed. We pay our money. it is like going into a shop and the government saying you can only spend ‘x’ on that.”

45+ years, C2DE, Birmingham

These participants often felt that the BBC should decide how money was spent.

“They [the BBC] should have the freedom to choose what they want.”

45+ years, BC1, Birkenhead

A couple of participants who were most negative about government playing a role in funding decisions voiced concerns that this extended to the government playing an editorial role in the content delivered by the BBC.

“The BBC World Service...so the government have a say on what they transmit to the rest of the world.”

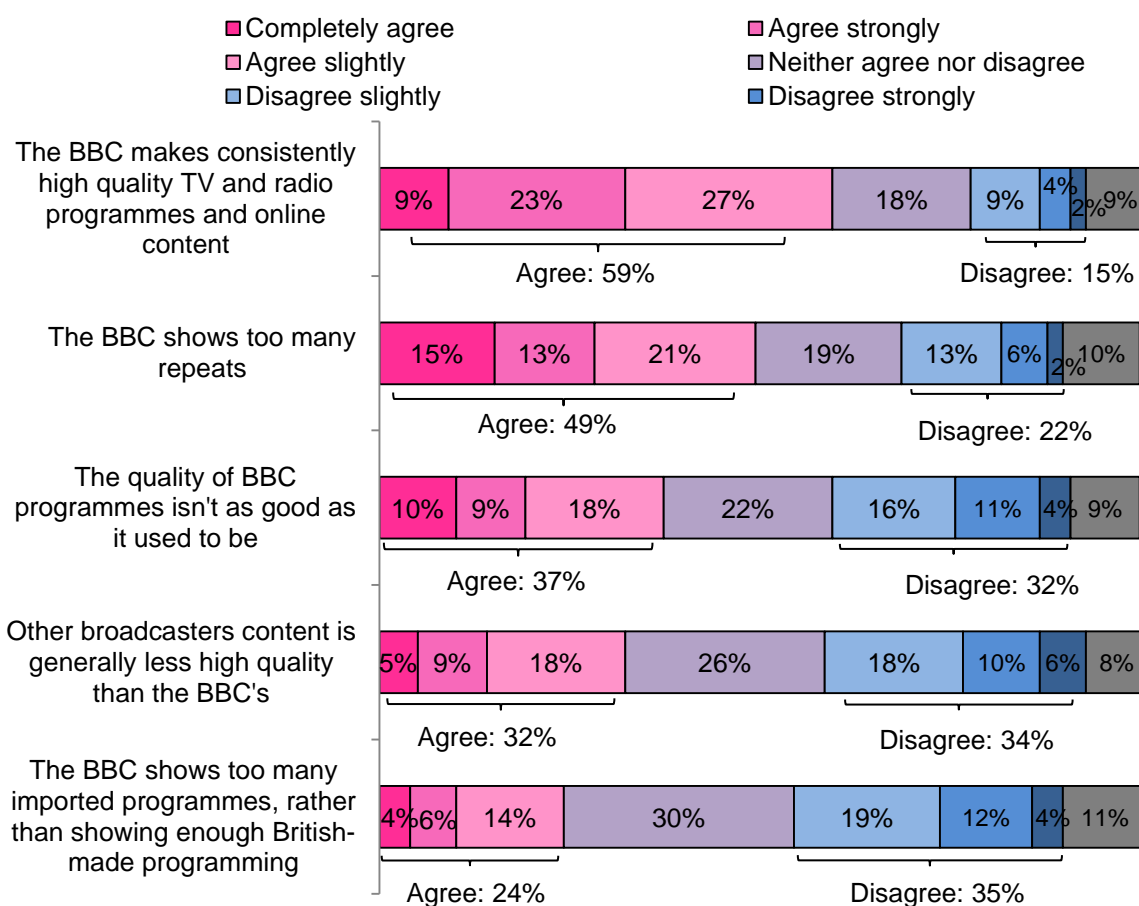
45+ years, BC1, Birkenhead

10 Quality and distinctiveness

10.1 Quantitative polling

A range of attitude statements in relation to **quality** were put to survey respondents and they were asked to agree or disagree using a 7 point scale, with the results shown in Chart 16.

Chart 16: Quality issues



Q8. Thinking about the quality of BBC content, please indicate how much you agree or disagree with the following statements.

Base: All respondents (2093)

There was general agreement that *“the BBC makes consistently high quality TV and radio programmes and online content”* – 59% agreed to some extent while only 15% expressed some level of disagreement. This result is largely in line with other polling in this area (e.g. BBC Trust 2015¹), although the level of agreement is somewhat lower here, perhaps because of the use of the word “consistently”.

Reflecting differences noted elsewhere in this report, those most likely to agree that the BBC makes consistently high quality content were younger (64% among under-25s) and more middle class (66% for ABC1s). However, agreement was much stronger than disagreement among all demographic groups including those from minority ethnic backgrounds – the same applied to all nations and regions of the UK. There were no differences by TV platform, whether paid-for or free-to-air and even among those who think the licence fee represents bad value for money, more agreed than disagreed about the good quality of BBC programmes.

However, despite the recognition of the quality of BBC outputs, it is not necessarily the case that people rated it ahead of other broadcasters in this respect – there was an almost even split in agreement (32%) and disagreement (34%) with the statement that *“Other broadcasters’ content is generally less high quality than the BBC’s”*.

Among the age-bands, only the over-55s were more likely to agree than disagree (40% v 34%), although ethnic minority groups also split slightly in favour of agreement. Those most likely to disagree at this question (i.e. thinking that other broadcasters’ content is generally of higher quality than the BBC’s) were the 35-54s (38%), C2s (40%) and people living in Scotland (43%). People in favour of the BBC losing channels (47%) and those who see the licence fee as being bad value for money (49%) were also likely to disagree.

Opinions were also quite polarised when presented with the statement that *“The quality of BBC programmes isn’t as good as it used to be”*, with over a third agreeing (37%) and only slightly fewer disagreeing (32%).

The most critical groups were the over-55s (51% agreeing), those in DE households (43%), people living in Scotland (45%) and especially those who want to scale back the BBC (54%). Those least supportive of this idea were the under-35s (23% agreeing).

Views were clearer cut that *“the BBC shows too many repeats”*, with 49% agreeing to some extent and 22% disagreeing.

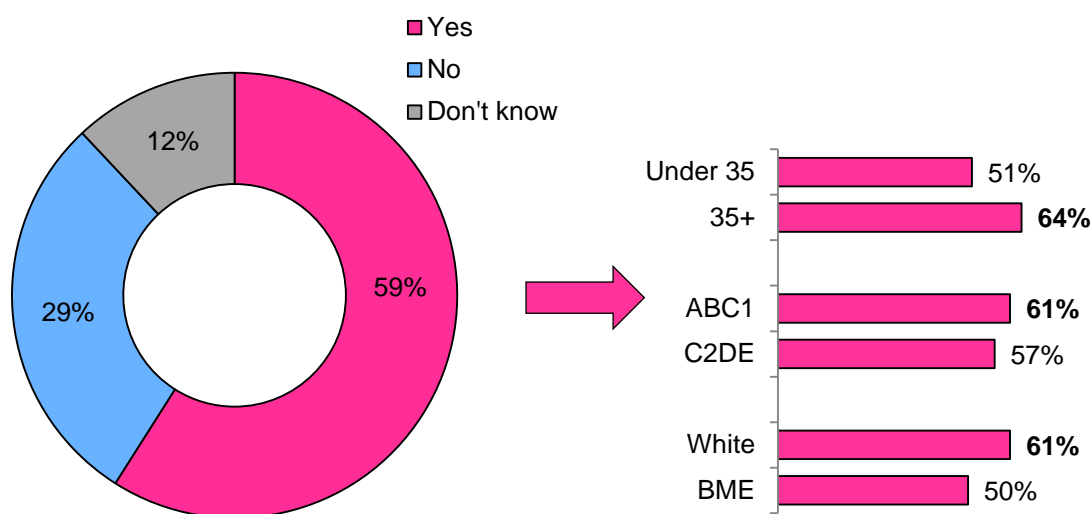
Once more, the over-55s were strikingly in agreement (67%), as were DEs (57%) and those without children at home (53%). There is of course a considerable overlap between these three demographic groups. People living in Scotland (58%) and Wales (61%) were also more likely to agree there are too many repeats than those living in England (47%).

There was rather more support for the BBC when asked to respond to the idea that *“The BBC shows too many imported programmes rather than showing enough British made programming”* – only 24% agreed to some extent while 35% disagreed – many had no firm views.

The most critical groups, in response to this statement, were again the over-55s (35% agreeing) and the DE social grade (32%), along with those who have no internet access (41%). Those disagreeing with the statement (i.e. supporting the BBC’s balance between domestic and imported programmes) were male (38%), younger (41% of under-25s) and in the AB social grades (43%), along with the heaviest users of BBC services (e.g. 54% of users of all three platforms).

A clear majority of those polled (59%) said that the balance of the BBC’s overall content should be **distinctive** because it is publicly funded (in the sense that it should be different to that from other broadcasters). This view was most strongly held among the over-35s (64%) but had majority backing from all age groups. Support for this idea was strongest among the AB social grades (67%) but was well over 50% across the spectrum. Views were quite consistent across the UK and support was notably high among those who used all three BBC platforms (68%). There was no significant variation by favourability towards the corporation – distinctiveness is something that most people simply expect from the BBC.

Chart 17: Distinctiveness of BBC content



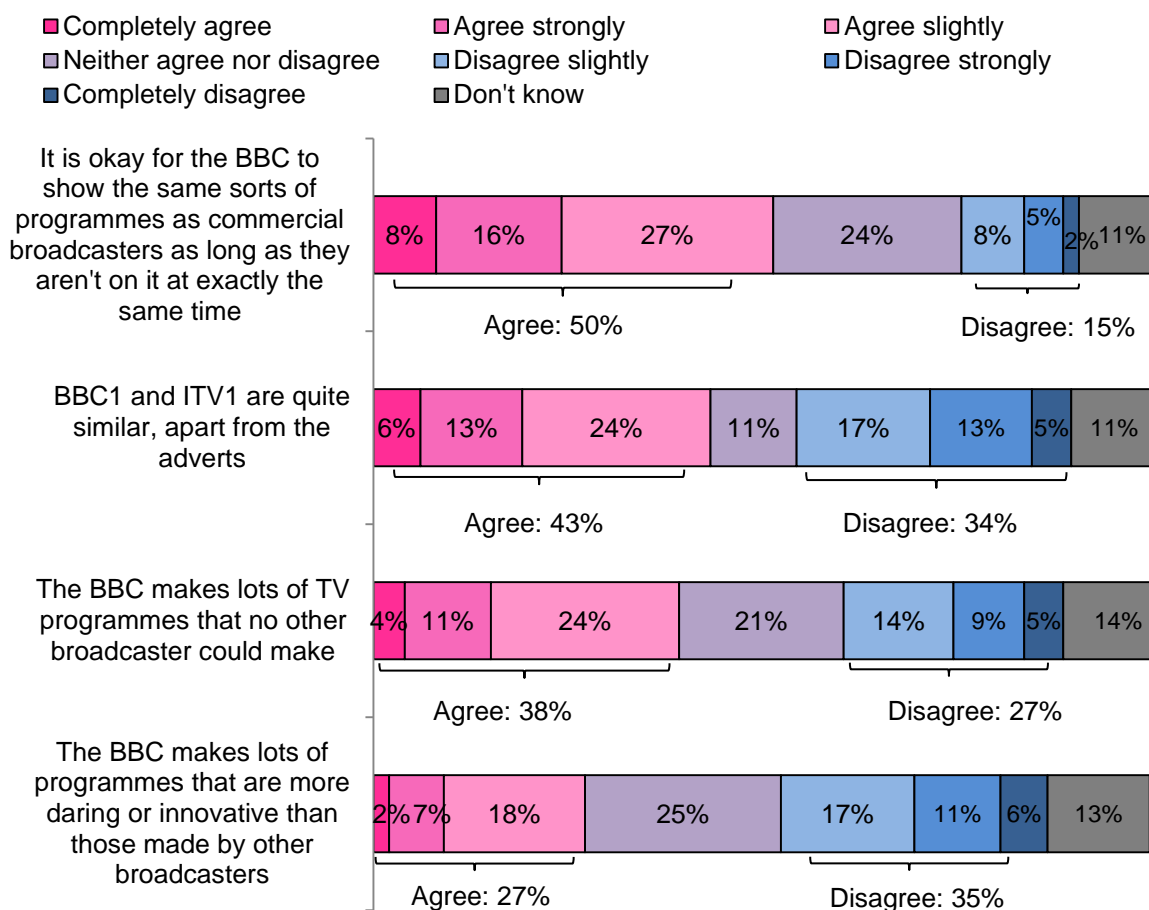
Q9. Do you think the balance of the BBC’s overall content should be distinctive because it is publicly funded? By that, I mean being different to that from other broadcasters

Base: All respondents (2093); under 35s (632); 35+ (1461); ABC1 (917); C2DE (1176); white (1843); BME (242)

Please note: **bold** indicates a statistically significant difference

To investigate attitudes to distinctiveness in more detail, a number of attitude statements were put to respondents using a 7-point agree/disagree scale.

Chart 18: Distinctiveness of the BBC – TV content



Q10. Thinking about whether the BBC's content is distinctive compared to that from other broadcasters, please indicate how much you agree or disagree with the following statements ...

Base: All respondents (2093)

There was little disagreement (15%) with the statement that “It is okay for the BBC to show the same sorts of programmes as commercial broadcasters as long as they aren't on at exactly the same time”. Exactly half of the sample agreed, with the balance undecided. There were no significant differences by the key demographic groups, other than over-55s being most in agreement (57%) or by TV platform, weight of BBC usage or favourability towards the BBC.

More people (43%) agreed that “BBC1 and ITV1 are quite similar, apart from the adverts” than disagreed (34%) and this view was held most strongly by the over-55s (47%) and those in social grade DE (49%). In contrast, more of those in social grade AB felt that BBC1 was different (48% disagreeing) as did those who use all three BBC platforms (62% disagreeing).

More people agreed (38%) than disagreed (27%) that “*The BBC makes lots of TV programmes that no other broadcaster would make*” although a significant minority put themselves at the mid-point of the scale or were unable to give an answer. This finding might reflect recognition of the BBC’s public service remit.

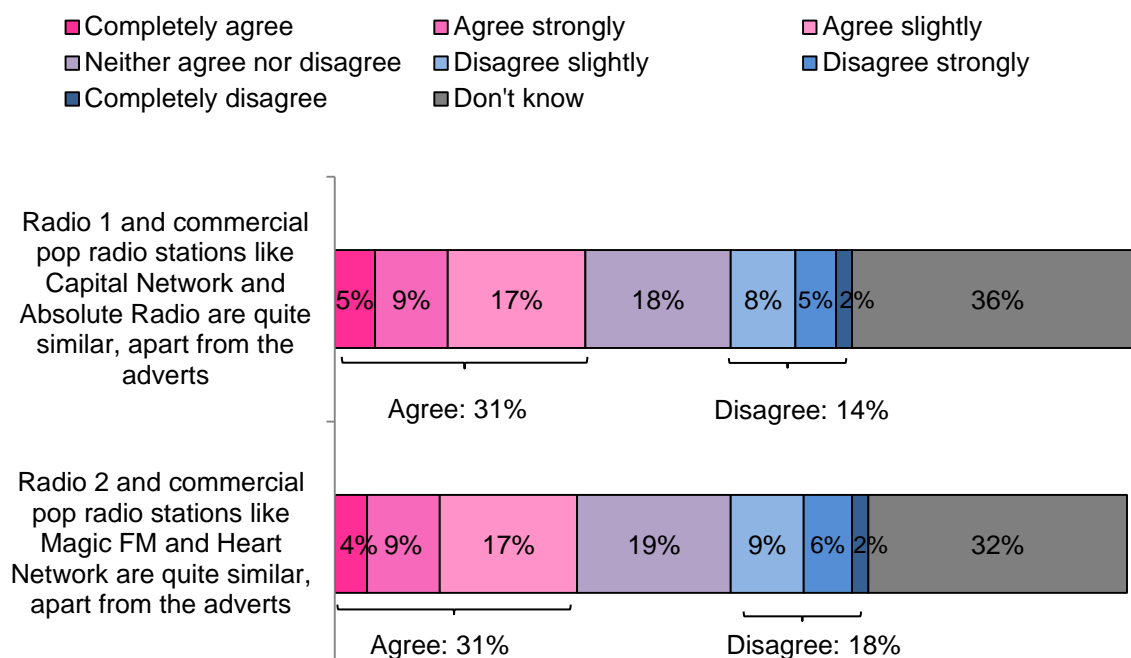
Agreement was higher among men than women (42% v 36%) and the over-55s agreed rather more than younger respondents (45% v 35%). There were again clear social grade differences, with ABs agreeing that the BBC makes the sorts of programmes that others wouldn’t make (48% compared with 37% of C1, C2 and DEs).

Views in Scotland and Wales contrasted with opinion in England, with more people actually disagreeing than agreeing (a net rating of -7 and -3, respectively compared with +15 in England). Interestingly, those accessing larger numbers of channels via any form of paid-for television were less positive than people receiving only free-to-air television, with a net positive rating of 8% compared to 18%.

Following the same theme but with a more specific focus, respondents were asked to agree or disagree that “*The BBC makes lots of programmes that are more daring or innovative than those made by other broadcasters*”. Here views were almost the reverse of those shown immediately above, with 27% agreeing and 35% disagreeing. There were no differences by gender but over-35s were notably less happy with the BBC performance in this respect than younger people (39% disagreement compared with only 27%). Although social grade AB has been shown to be generally supportive of the BBC and its content, they were the group most likely to disagree at this statement (41% compared with 33% among C1/C2/DE respondents). However, those living in Scotland and Wales were again critical of the BBC in this respect and were far more likely than English respondents to disagree (43%, and 46% respectively, compared with 33%).

Two statements were also used to assess views about the distinctiveness of the BBC’s radio content.

Chart 19: Distinctiveness of the BBC – radio content



Q10. Thinking about whether the BBC's content is distinctive compared to that from other broadcasters, please indicate how much you agree or disagree with the following statements ...

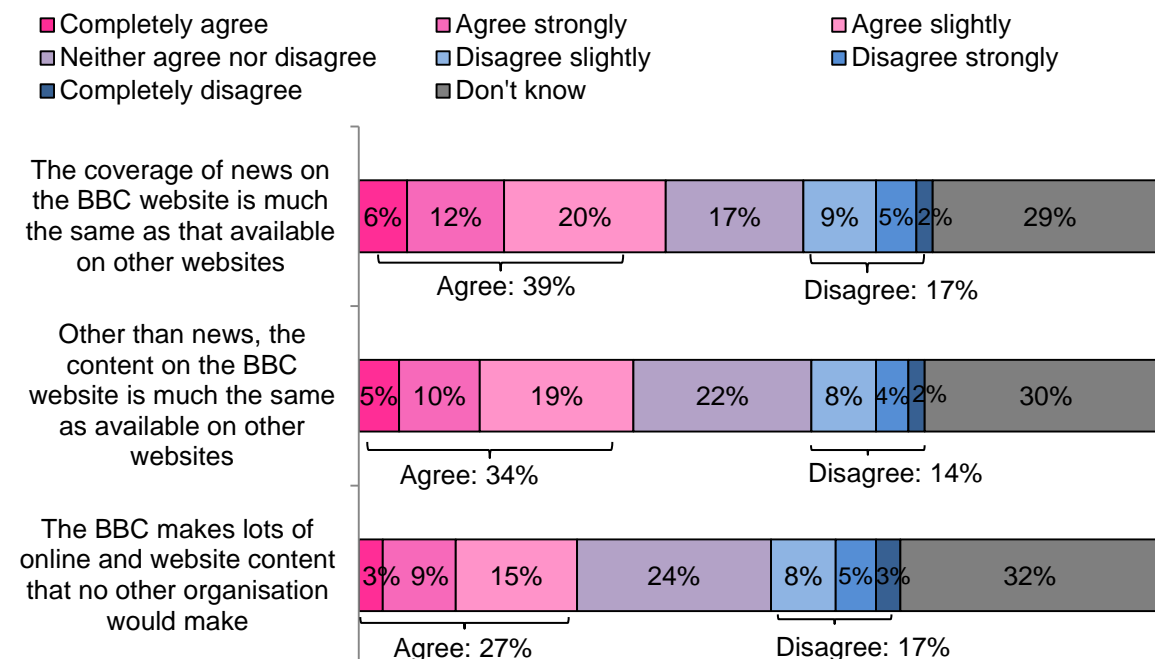
Base: All respondents (2093)

As noted above, there was some agreement that BBC1 and ITV are quite similar and this was more marked for the first radio comparison (*"Radio 1 and commercial pop radio stations like Capital Network and Absolute Radio are quite similar, apart from the adverts"*). Inevitably, many people (especially the over-55s) were unable to give a firm opinion at this particular question but actual responses split quite clearly in favour, with 31% agreeing and 14% disagreeing. Support for the statement was most marked among the core Radio 1 demographic of the under-25s (42% agreement). Even among the heaviest BBC radio users, there was more agreement (32%) than disagreement (20%).

The second radio comparison (*"Radio 2 and commercial pop radio stations like Magic FM and Heart Network are quite similar, apart from the adverts"*) generated very similar results, with 31% agreeing and 18% disagreeing. Support for this statement was relatively high among the under-35s and the DE social grade (all 34%) and those who have paid-for TV (35%). Only among the heaviest BBC radio listeners did more people disagree than agree about Radio 2 being much the same as its commercial rivals.

Coverage of distinctiveness also included the BBC website, taking in news and other content. Necessarily, some people could not give an informed opinion about these issues, primarily as light or non-users of the internet. However, among the rest of the sample there was widespread agreement that the content of the BBC site was not much different to that available elsewhere.

Chart 20: Distinctiveness of the BBC – online content



Q10. Thinking about whether the BBC’s content is distinctive compared to that from other broadcasters, please indicate how much you agree or disagree with the following statements ...

Base: All respondents (2093)

A total of 39% agreed to some extent that the “Coverage of news on the BBC website is much the same as that available on other websites” while 17% disagreed with the statement. Differences by age and social grade were associated with varying levels of internet access. Users of paid-for-TV were especially likely to hold this view (44%) while the BBC’s online users split 49% to 28% in favour of agreeing that the coverage is much the same as found elsewhere.

The same kind of distribution was found in response to the statement “Other than news, the content on the BBC website is much the same as available on other websites”, with 34% agreement and 14% disagreement. Although agreement was quite consistent by sex, age and social grade (after allowing for internet access), the level of disagreement was higher among ABC1s (at 19%) and also among iPlayer and wider website users (at 24%). Only among multi-platform BBC users did more people disagree than agree with this statement.

Many people had no firm view on whether “The BBC makes lots of online and website content that no other organisation would make” but more agreed (27%) than disagreed with this statement (17%). There was little variation in response by gender, age, social grade, nations/regions or ethnicity but those with satellite television (often packaged with broadband) were more likely than most to disagree (21%) than people with free-to-air channels (13%). iPlayer users and viewers accessing all three BBC platforms were especially positive about the BBC’s online content (41% and 56% agreement, respectively).

10.2 Qualitative research

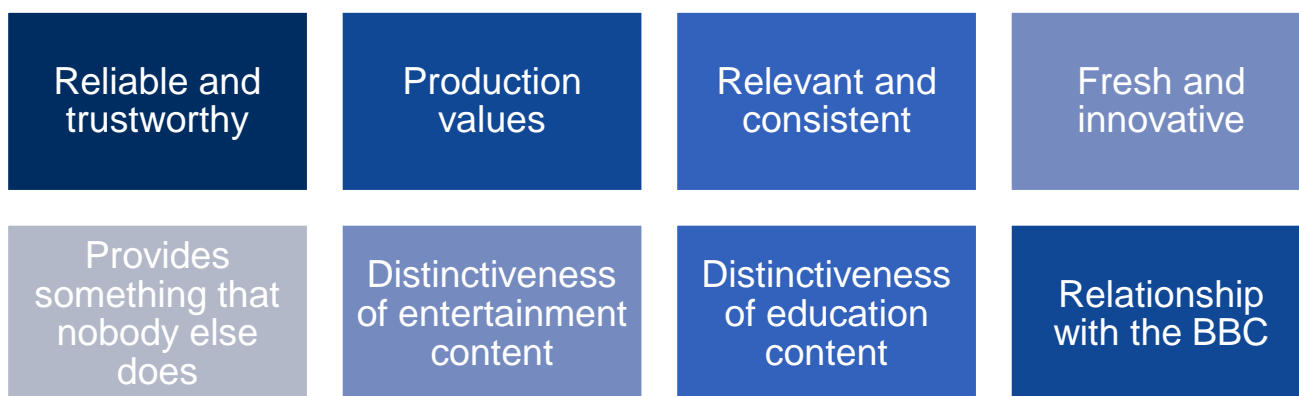
Across the qualitative research, quality meant different things to different people. It was agreed that the BBC should be high quality because it is publicly funded.

“It should be good quality if we’re paying £145 a year!”

45+ years, BC1, Aberystwyth

Overall it was clear that **quality** and **distinctiveness** were closely interlinked by participants. Factors that determined quality of BBC provision were also those that made the BBC distinctive.

The following aspects of BBC programming, content and provision were noted as playing a role in the both the quality and distinctiveness of the BBC:



10.2.1 Reliable and trustworthy

Some participants simply felt that the BBC had a reputation for providing high quality content and services.

“You take it for granted that it’s going to be good.”

45+ years, BC1, Birkenhead

“I think it’s the reputation of the BBC is why you go back. You know it’s trustworthy.”

18-24, C2DE, Female, Exeter

“It’s the BMW or Mercedes of broadcasting. Others have difficulty in matching its quality.”

45+ years, BC1, Aberystwyth

“I think they are the market leaders and everyone else just followed.”

45+ years, C2DE, Birmingham

This meant that some felt confident, and trusted that they would get high quality outputs from the BBC.

“Reliability...you know what you are getting. You can trust in what they are going to produce and you are just familiar with what the BBC offers.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

“You can trust the BBC. I sit my girls down in front of CBeebies or CBBC...you can pretty much rely on the content.”

25-45 years, BC1, Exeter

“I trust Bitesize because it’s BBC.”

25-45 years, C2DE, Belfast

This was often reinforced by the fact that the BBC had been in existence for a long time.

“They make a lot of things that are iconic. Like Dr Who has been going for so long and it has to be high quality for people to keep watching it for so many years.”

18-24, C2DE, Female, Exeter

When discussing the quality of the BBC, ‘reliable’ and ‘trustworthy’ were terms that were frequently mentioned, often in relation to news coverage, factual content and current affairs. Participants felt that they could trust that this type of content would be high quality and therefore the BBC was often their first port of call when seeking these types of services. These participants felt that the BBC carried out good and thorough research into key issues, and presented them well.

“When Michael Jackson died, the first thing I did was switch straight to BBC1 because I knew that I would get the information that I wanted.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

“For documentaries and factual stuff I would go to the BBC whereas the other channels are slightly more entertainment.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

Many noted that the reliability and trustworthiness of content for this type of programming made the BBC stand out as distinctive when compared to other broadcasters.

“For their factual and their reliability, that is where they stand out from everyone else.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

“If I saw a programme on Ancient Greece on ITV I might not have so much trust in it or rate it so highly...maybe that’s the people that present it or people that research it but I’ve got maybe a good preconception of what I will get from a programme on BBC.”

25-45 years, BC1, Exeter

Some did question whether news coverage from the BBC was biased. Those that did feel coverage was biased were less sure of the trustworthy nature of the BBC and felt that the BBC stood out as distinctive in a negative way because of this.

“Channel 4 gives you different perspectives whereas the BBC shows you what they want you to see. You get an all rounded view on a topic, which you don’t at BBC.”

25-45 years, BC1, London

“[Channel 4]...They show you something and instead of telling you how you should feel about something they leave it very open so you can make your own conclusions.”

25-45 years, BC1, London

These participants tended to talk about other factors when talking about the quality of the BBC (e.g. production values). However, some did not agree with this, and felt that the BBC was less biased when compared to other broadcasters; these participants tended to be cite the trustworthiness of the BBC as a key aspect of the BBC’s quality and distinctiveness.

“It is dependable. For news coverage and things like that, it will get most of the story. They don’t have a hidden agenda such as Fox News.”

45+ years, C2DE, Birmingham

10.2.2 Production values

Production values were often top of mind when people thought about the quality and distinctiveness of BBC services and content. Participants mentioned good quality acting, presenters, camera work, costumes, picture quality and assumed that the BBC used the latest technology in filming and creating content.

“I think its also good the way the programme’s laid out and the technology behind it.”

25-45 years, BC1, Exeter

“The actors and actresses they have.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

“The way that something is presented.”

25-45 years, C2DE, Birkenhead

The fact that the BBC attracted famous and respected presenters and actors, made the BBC distinctive for some, especially when they were unlikely to come across these people on other broadcaster services.

“David Attenborough has never appeared on anything other than the BBC...extraordinary. And he has global reach. Everybody knows who that man is.”

25-45 years, BC1, Exeter

“More recognisable faces on the BBC as well.”

25-45 years, C2DE, Birkenhead

Nature documentaries (e.g. David Attenborough documentaries) and drama (e.g. War and Peace) were cited as good examples of high quality programmes from the BBC.

“If you’ve ever watched one of those Attenborough programmes in HD, you feel like you’re there.”

45+ years, C2DE, Glasgow

“The nature documentaries are brilliant. You can’t fault them and a lot of the dramas are really good.”

25-45 years, C2DE, Birkenhead

Some participants felt that the same dramas and documentaries if provided by other broadcasters would lack the quality provided by the BBC, and therefore the quality of these was felt to be a distinctive element of the BBC.

“It may be that other commercial TV wouldn’t take on these things because they’re expensive to produce maybe. And if they did they wouldn’t be as good.”

25-45 years, BC1, Exeter

Storylines and content for entertainment based programming was considered to be lower quality by some; participants agreed that these types of programmes – especially comedy content – could be improved. Views regarding entertainment content are further discussed in section 10.2.

It should be noted that production values were not always important to participants and whilst they reflected that they indicated high quality, they did not always feel that this was a personal priority. This was particularly the case amongst younger participants, who were more focused on finding something entertaining, or accessing latest episodes of programmes before they were shown on UK television.

“I would literally watch anything as long as it was entertaining.”

18-24, C2DE, Female, Exeter

“If you watch catch-up on YouTube the quality is poor. It’s like someone recorded it. You have to see that series so it doesn’t even matter.”

18-24, C2DE, Female, Exeter

Other participants reflected that even where they felt the quality of BBC productions was good, the BBC did not always provide services that were personally interesting; these participants felt that the BBC lacked quality with regards to providing content that is appealing and of interest.

”I would say they do make high quality. Whether their programmes are interesting or not, they are high quality.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

Finally, a few participants queried whether content shown on the BBC was always created by the BBC. Some reflected that the BBC bought series (e.g. The Bridge) which could cloud the issue of whether the BBC directly generates and creates good quality production content. Some participants noted that the BBC still made the decision to purchase the series and therefore was safeguarding the quality of content shown. However, some felt that it demonstrated that high quality programming could be purchased and shown by other broadcasters, calling into question whether high quality production was really distinct to the BBC.

“In fact a lot of dramas I have watched on the BBC aren’t made by the BBC anyway, they are brought in, made by independent production companies. So if they weren’t on the BBC they’d be somewhere else.”

45+ years, BC1, Birkenhead

10.2.3 Relevant and consistent

Whether a broadcaster provided relevant content was considered an important factor when assessing quality. Providing relevant content, that was appealing and aimed at the required audience and reflected modern UK society was equated to being a good quality provider.

“It’s got to interest people.”

25-45 years, C2DE, Birkenhead

Views regarding whether the BBC provided relevant content were mixed. Many participants reflected that the BBC is funded by the public and therefore felt that good quality provision was aligned with variety and breadth of content.

“I think they have got a responsibility to have a diverse range of services that they offer. They raise their money from fee-paying so they have a responsibility then to try and cover everybody that pays their fee.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

It was agreed that whilst services should be diverse to reflect modern society, they should also consistently hold good production values.

“I think it’s about being consistent with different things.”

25-45 years, BC1, Exeter

“There is a bigger range [of programmes] and the programmes are really well made.”

45+ years, C2DE, Birmingham

The variety and range of content provided by the BBC was considered distinctive by some especially when compared to channels that felt more niche in their offering.

“[The BBC] has different subjects, different genres of what they put on which is quite nice I guess. It’s obviously varied. You can get sick of MTV. And the different genres you know fit someone in my family that will enjoy it.”

18-24, C2DE, Female, Exeter

However, some felt that diverse content could also be obtained from other channels with mentions of Netflix and Amazon Prime. These participants were less convinced that the diversity of BBC content made the BBC distinctive.

“You’ve got the variety [on Netflix] and you can binge watch it if you want.”

25-45 years, C2DE, Birkenhead

Relevance of BBC content was also considered an important indicator of quality, and determined by whether the content was considered personally appealing. Some participants did feel that the BBC provided content that they found appealing and felt was aimed at them.

“It gives you a lot of what you want to see as well. In all different types of things.”

25-45 years, BC1, Exeter

However, others felt that the BBC lacked content aimed at themselves. This is fully discussed in chapter 7.

Some participants felt that the BBC had spread its focus too widely and this had negatively impacted on quality. These participants felt that the BBC could provide fewer services.

“If you look at how many channels and stations they are churning out I think the quality has gone down to quantity. They need to concentrate a little bit more on certain specialist areas. Maybe they could focus on a few channels and make it good, fresh.”

25-45 years, BC1, London

These participants felt that the broad coverage resulted in repeated programme formats and the use of the same presenters. For these participants, the BBC lacked freshness and innovation.

10.2.4 Fresh and innovative

Providing fresh and innovative services and content was considered something that could set a broadcaster apart. Being fresh and innovative was also a way in which a broadcaster could demonstrate that it is a quality broadcaster, thinking about ways to engage with and provide relevant content to its' audience. Not all participants felt that the BBC was good at doing this.

Some did feel that the BBC did cover content in documentaries and investigative programmes that felt fresh and new.

"They bring to our notice things we're not aware of."

45+ years, BC1, Aberystwyth

However, when considering the services and content provided by the BBC, many felt that it stood out as lacking freshness and innovation. These views typically came from the younger participants who felt that the BBC tended to "play it safe" when it came to comedy programmes and the topics covered in documentaries.

"I feel like with BBC they're never going to...push the boundaries, like controversial...reality channels are popular because you know, it's shocking, it's entertaining...but that probably wouldn't come out of the BBC."

18-24, C2DE, Female, Exeter

Many of these participants felt that the BBC lacked daring, innovative and fresh content when compared to other broadcasters – particularly, Channel 4.

"Channel 4 kind of goes outside the boundaries and it is a little bit daring."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

"The BBC's never really been kind of edgy in comedy where Channel 4 is."

25-45 years, BC1, Exeter

However, many of these participants queried whether they would want the BBC to take controversial choices. Some simply felt that this would not "fit" with the BBC image and some reflected that they were happy to seek more controversial and shocking content from other broadcasters.

"You wouldn't want to ruin the BBC, like the perfect sort of image it has, BBC One."

18-24, C2DE, Female, Exeter

When other participants commented on lack of freshness from the BBC, they were thinking about new programmes or formats. Some participants felt that the BBC tended to repeat programmes or formats.

“A lot of programmes are just revamped...Antiques Roadshow, Homes under the Hammer.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

However, this was something that was felt to be an issue across providers, and a few participants noted that repetition of programme formats was more noticeable in day time television.

When thinking about fresh and innovative services, participants were more positive towards the BBC's use of technology and felt that they were fresh and innovative in this respect. Some felt that the good usability of the iPlayer platform stood out compared to other broadcaster platforms. Many felt that iPlayer, BBC apps and interactive elements to programmes such as Coast and Planet Earth were good, and indicated high quality use of technology. However, some felt that the BBC could go further, with some noting that Channel 4's use of social media to debate key current issues not only demonstrated a positive and distinctive use of technology, but also broadened the opinions captured and reported on by the broadcaster.

Channel 4 news is interactive – have tweets, invite you to discuss topical issues and debates which allows you to see the different perspectives.

25-45 years, BC1, London

10.2.5 Provides something that nobody else does

Views regarding whether the BBC provides something that nobody else does were mixed. Some participants simply felt that the BBC did not provide anything that they could not access via an alternative broadcaster.

“I could probably quite happily live without the BBC or any broadcast channel. It's all there [on Netflix], all the old TV series are there. All the new ones are there.”

45+ years, BC1, Birkenhead

“If I could opt out of it I'd definitely opt out. There's lots of other channels that offer similar shows.”

25-45 years, C2DE, Belfast

However some participants, particularly those who were generally more positive about the BBC, tended to feel that even if other broadcasters did provide similar content, the quality of BBC production set the BBC apart. These participants felt that the quality of content provided by the BBC meant that they did provide something that nobody else did.

“I think you can get it elsewhere but again it is about choices...I don't know if you are going to get the same quality with some of the other channels because they do not have the same ethos.”

45+ years, BC1, Birkenhead

“It's not really unique – nothing they can do doesn't happen elsewhere. You can find news, drama, comedy elsewhere but the BBC generally offers a better quality service.”

45+ years, BC1, Aberystwyth

When comparing providers, a couple of participants cited examples, noting that they felt that the quality of BBC's Sherlock had been greater than ITV's Jekyll and Hyde and that similarly, the quality of BBC's Match of the day was greater than the ITV equivalent The Premiership. These participants did feel that other broadcasters could cover similar genres, but without the quality provided by the BBC.

Most participants did not spontaneously consider annual events that were covered by the BBC such as the Remembrance Sunday: The Cenotaph, music events such as Glastonbury and The Proms and State weddings and funerals. However, when they reflected on these most felt that they were important and there were mixed views on whether other broadcasters would provide these. Some simply felt that other broadcasters would not want to dedicate air time to these types of events.

“ITV wouldn't cover The Proms. I don't think there's a broadcaster out there that would cover classical music every night for six weeks...no one would do it.”

25-45 years, BC1, Exeter

Some also felt that it would be inappropriate to have adverts during these types of events.

“Remembrance Sunday...states funerals and stuff like that is important. I'm not sure whether other TV providers would be able to focus time because you are not going to be half way through Remembrance Sunday and suddenly an advert comes on.”

25-45 years, C2DE, Birkenhead

Some participants in Northern Ireland felt that other broadcasters would be unlikely to cover events such as the 12th July Parade because it was a contentious issue. However, others felt that there were some events that other broadcasters would be keen to 'bid for', citing the Channel 4 coverage of the Paralympics as a positive example of other broadcasters getting involved in these types of events.

“There is a bidding war. We are thinking, well the BBC covers the election now if you want to watch it. But that is because they have always covered it and no one else has ever done it. So if they did not do it, someone else [would]...it is a bidding war.”

45+ years, BC1, Birkenhead

Some participants also queried whether other broadcasters would provide services at a local level, with most thinking about the provision of local news and weather. Some felt that this would be unlikely to happen, noting that other broadcasters they currently used did not offer this.

“Local news, I mean that is tailored for the North West whereas with Sky it’s just worldwide.”

25-45 years, C2DE, Birkenhead

“I don’t think a commercial operator could do the local services. I don’t think they’d want to.”

25-45 years, BC1, Exeter

However, others felt that they were able to get local news and weather from other sources, with many noting ITV local news and commercial local radio stations.

“You could get local news from other places like newspapers and other radio stations.”

45+ years, C2DE, Birmingham

Those in Scotland, Wales and Northern Ireland, felt that BBC provision for native language services was essential. They reflected that there were no other major providers of this, and therefore felt that this was unique to the BBC, and crucial to continue providing.

10.2.6 Distinctiveness of entertainment content

When thinking about entertainment, participants tended to talk about a range of genres including comedy, sport, children’s, factual and drama. Views regarding whether the BBC created and showed distinctive content across these genres were mixed.

Overall, entertainment was considered important for the BBC and other broadcasters to provide. Participants reflected that this was a core use of broadcaster services.

“When you’ve been to work all day you just want to sit down and relax and enjoy something don’t you?”

It would be depressing if it was just news...stuff that’s going on in the world.”

25-45 years, BC1, Exeter

Participants reflected that there were many channels offering entertaining content and that preferences and perceived distinctiveness in this regard was driven by personal preference. What some people found personally appealing and therefore positively distinctive, was different to others.

Thinking specifically about television, participants often compared BBC programmes and content to other broadcaster channels. Views were mixed. Some participants felt that the serious and formal tone of the BBC extended into their entertainment content, which meant that when it came to good 'light entertainment' many felt that ITV stood out as a good provider, leaving the BBC lacking.

"I think it's a particular level of entertainment. If I really want to veg out I probably wouldn't choose these [BBC] programmes because they do required a certain amount of concentration. That not to say I don't enjoy them when I'm really in the mood...but I think they are a higher category."

25-45 years, BC1, Exeter

This professional and formal tone of the BBC was distinctive to participants, and whilst not always their preference, something that they recognized as being a distinguishing feature of the BBC. When thinking about 'light entertainment' it was noted by many that the BBC did not provide what was described as "trash television" including reality or celebrity focused programmes.

"You get more reality stuff on ITV like trashy TV."

25-45 years, C2DE, Birkenhead

However, whilst other channels including ITV, E4, MTV and Channel 5 were considered more distinctive for this type of content, many felt that this was not a route they felt appropriate for the BBC to follow.

"The BBC are professional, they don't want to go down that line...Celebrity Big Brother...I know they do Strictly Come Dancing...it's not cheap and nasty...I think if [the BBC] go down the reality [route] it would bring the whole network [downmarket]."

45+ years, C2DE, Glasgow

Views from younger participants regarding reality television and the BBC are further explored in section 11.1.

Whilst some participants preferred the more "formal" tone of the BBC, others preferred the "lighter tone" from channels such as ITV. These participants felt that ITV provided better entertainment programmes, attracting presenters with a more "fun" tone such as Ant and Dec.

"ITV is a bit more laid back...it is a bit more in tune with people I think."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

"BBC is bland and doesn't have the choice. I get it elsewhere where it is more entertainment."

45+ years, C2DE, Asian, Bradford

"It is more fun and feels like a party. It is more relaxing."

25-45 years, BC1, London

Overall, when thinking about sport, participants agreed that the diversity and number of sporting events covered by the BBC had significantly reduced over time. Most felt that this was due to the competitive nature of sports events, and that Sky budgets could not be rivalled by the BBC.

“With Sky Sports.. that show live football...I don’t think the BBC would have the budget to compete.”

18-24, BC1, Belfast

“They [BBC] can’t compete with the money I don’t think. I mean Sky throws billions into the football and that is why there is no football really on BBC anymore.”

25-45 years, C2DE, Birkenhead

However, many felt that when sporting events were covered by the BBC, the quality of these made the coverage distinctive. This was in particular reference to the presenters for these events. Radio 5 Live was often mentioned as a quality service which again, for those interested in sports radio coverage, stood out positively when compared to other radio stations.

When thinking about distinctiveness in radio content, participants noted that aside from advertising, many radio stations were similar. This was particularly the case for music stations, where participants were often driven by playlists rather than because they felt a certain radio station was better than another. However, participants did note that it was typically presenters of radio shows that would determine whether you would be likely to re-visit the station. Younger participants felt that Radio 1 presenters were typically good quality, young and aimed at them.

“I think with Radio One you tune in to get to know the presenters. You come back for them.”

18-24, C2DE, Female, Exeter

“They’ve have bigger names don’t they – DJs.”

25-45 years, C2DE, Birkenhead

For some, the presenters made the radio station distinctive. Radio 1 was also considered distinctive by some for the live performances (e.g. the Live Lounge), coverage of breakthrough artists and celebrities it attracted.

[Radio 1 has] always got live performances and breakthrough artists.”

18-24, BC1, Belfast

“BBC Live Lounge...that’s really good because no other radio station does that.”

18-24, C2DE, Female, Exeter

“Radio 1 seems to have a lot more happening than Heart. You would have your interviews and you would have the odd pop star. Famous people would appear on there.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

It should be noted that few participants across the research listened to other stations such as Radio 2, Radio 4, Radio 4 extra and the Asian Network. Those that did listen to these stations similarly felt that the quality of the presenters and guests was a key draw for these channels. However, overall, participants felt unable to discuss the distinctiveness of these stations.

Whilst not current, some older participants felt that archived BBC content was also distinctive.

.....
 "I'd like to access their archives...the BBC have made a lot of quality stuff in the past that I would like to revisit."

45+ years, BC1, Birkenhead

10.2.7 Distinctiveness of education/ information content

Participants tended to think about news, current affairs, documentaries and children's content when they thought about education and information provision from the BBC.

Overall, many participants felt that the BBC had a formal and serious tone when delivering this type of content. This was considered to be positively distinctive when compared to other broadcasters such as ITV. Morning news coverage television programmes were often cited as an example.

.....
 "I think a lot of the other channels seem gimmicky. If you switch over to watch the news on STV in the morning."

45+ years, C2DE, Glasgow

"Daybreak I think is more celebrity stuff whereas the BBC News is more proper news."

25-45 years, C2DE, Birkenhead

"[ITV] they don't really do many factual, knowledgeable documentaries whereas the BBC do."

18-24, C2DE, Female, Exeter

These participants tended to prefer the BBC's tone and it matched their expectations that the BBC is an educational broadcaster and distinctive for this reason.

.....
 "They were the first education channel as well and they have carried that on."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

However, other participants found the BBC tone less accessible when compared to other providers. For these participants, the BBC was distinctive in a negative way; distinctive as being serious, less accessible and less appealing.

.....
 "On BBC they are stiff, wearing tweed jackets and all look very serious. You don't want to see grey and brown suits in the morning."

45+ years, C2DE, Asian, Bradford

“I just think that the BBC is always really knowledgeable stuff...like even with their gameshows...I feel like you’ve got to be quite clever to watch it.”

18-24, C2DE, Female, Exeter

When reflecting on the diversity of information and educational content, some participants felt that the BBC performed well in this respect. This views was most often cited by those who were generally positive towards to the BBC.

“It’s pretty impressive, they do a good breakdown of international news.”

18-24 years, C2DE, male, Aberystwyth

However, others felt that the BBC was distinctive in its lack of daring and thought provoking content, especially when compared to broadcasters such as Channel 4.

“Channel 4 will deal with topics that BBC would never touch because they would be too scared. Channel 4 are pushing boundaries which is what people want. People want a debate at home.”

25-45 years, BC1, London

Finally, whilst BBC documentaries were often cited as distinctive content due to the quality of production values, some participants did note that the BBC was not alone in providing documentaries; those aware of a broader range of channels and broadcasters were sometimes less convinced that the BBC provided something distinctive and different.

“I’d say the documentaries are good but you’ve got about ten or fifteen documentary channels on sky.”

25-45 years, C2DE, Birkenhead

10.2.8 Relationship with the BBC

For some participants, the distinctiveness of the BBC was based on personal familiarity with the brand and services. Regardless of whether participants felt that services and content were appealing or high quality, some felt that the BBC stood out as distinctive because it “has always been there.”

“Iconic...it’s what the British people know best, it’s a peoples’ channel.”

45+ years, C2DE, Glasgow

“It is longevity. It has always been there. It is reliable.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

11 Representation of groups in society

11.1 Young people

Young people included in the qualitative research were aged 18-24 years.

Overall, young people did not feel that the BBC was aimed at their age group. They felt that content was aimed at children and older people but that there was very limited content for young adults and older teenagers.

“You almost need like a teen channel. You’ve got the kids, they’ve got the adults.”

18-24, C2DE, Female, Exeter

“There’s [programmes for] a child, a toddler, then it jumps straight to old people. Where’s the [stuff] in between?”

18-24 years, BC1C2, Female, Asian, Glasgow

A couple mentioned BBC3 becoming an online service¹ as indicative of this, as BBC3 was often seen by participants as the ‘younger’ BBC channel.

“I think they’re aiming at an older group...proven the point by the way they’re taking BBC3 off the TV which would have been aimed more at younger age group”

18-24 years, BC1, Male, Belfast

“The modern shows that are for young people are tucked away online – they are not on the mainstream.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

Others noted that content aimed at younger people was often shown late at night, which further suggested that programming for young people was not prioritised by the BBC.

Strength of feeling regarding the provision of content for younger people was mixed across the research. Some younger people felt that the BBC was simply happy to focus on older viewers.

“They’d rather upset us than the older generations.”

18-24 years, BC1, Male, Belfast

These participants often felt that the BBC should be doing more to engage people their age, making the BBC more rounded in the audiences it served.

¹ The qualitative research took place before BBC3 became an online only channel.

.....
"There are obviously loads of other channels but if they want to target our age group then yes, it's important that they change something."

18-24, C2DE, Female, Exeter
.....

However, some reflected that it probably was not possible for the BBC to meet the needs of everyone.

.....
"Not everything can be aimed at everyone. Not everything can be aimed at one specific type of person."

18-24, C2DE, Female, Exeter
.....

Some did not feel that this was problematic as there were many other channels offering content that they found appealing.

When considering the types of content that they preferred to watch, younger participants noted that the BBC was not their first port of call. Most did not use BBC television very often.

.....
"It offers quite a lot, but not for me as a person."

18-24 years, BC1, Male, Belfast

"I wouldn't miss the BBC if it wasn't there. They don't give me what I want."

18-24 years, BC1, Female, Bradford

"If there were no other channels, quite often I'd struggle to find something I'd want to watch on BBC."

18-24, C2DE, Female, Exeter
.....

Many associated the BBC with the news, and a serious and formal tone, which meant that they did not think of the BBC as providing entertainment content for their age group.

.....
"When you say BBC I think news all the time."

18-24, C2DE, Female, Exeter
.....

In particular, participants noted that they liked watching comedy programmes and reality television, and felt that the BBC was not good at aiming this type of content at their age group..

.....
"If you wanted to watch a comedy you wouldn't go on BBC."

18-24, C2DE, Female, Exeter

"[There is] nothing like Geordie Shore."

18-24, C2DE, Female, Exeter
.....

Male participants noted that much of the reality content on the BBC (e.g. Don't Tell the Bride and The Great British Bake Off) were aimed at females.

Younger participants noted that they tended to watch channels such as Channel 4, E4, Netflix, MTV, E!, Comedy Central, Channel 5 and ITV for reality and comedy content. There was some debate about whether participants felt that it would be appropriate for the BBC to provide this type of content. Whilst participants recognised that it would be more likely to attract them to watch BBC channels, they were not sure if it was a good fit for the BBC. Some felt that this type of content simply would not fit with the more serious and formal tone of the BBC. In particular, the BBC was often felt to be family friendly and something that they could watch with parents, whilst other channels they watched were often more explicit. Participants did not feel that this type of content would be suited to the BBC and many noted that they were happy to go elsewhere to find this type of content.

"There are so many other places that provide that trash. I don't think that the BBC should feel that it needs to go to [reality TV type programming] because you've got Netflix, Sky, Amazon, there's no shortage of reality TV."

18-24 years, BC1C2, Female, Asian, Glasgow

"I always want the BBC to kind of stay the same. Like we have got everything else where there's so much more choice that you know, the BBC suits the older generation. They enjoy it. We've got our entertainment elsewhere."

18-24, C2DE, Female, Exeter

These views were echoed across other age groups included in the research and discussed in section 10.2.6.

Further comments regarding the suitability of BBC content for younger groups focused on how fresh and daring participants felt the BBC was. Participants felt that other broadcasters tended to be more "daring" and in comparison, the BBC were often "safe" and "politically correct". This was particularly noted in relation to documentaries. Whilst participants recognised that the BBC did provide documentaries, they felt that other broadcasters were often more open in showing and exploring controversial topics from around the world which they personally found more engaging.

"Stacey Dooley on BBC 3 is good but she is more for 16 year olds to get interested in issues rather than for adults. Channel 4 is for adults and their programmes are from all over the world including war zones."

18-24 years, C2DE, Male, Black African/ Caribbean, London

"Channel 4, that side of factual is more kind of controversial and gripping and relevant to our age."

18-24, C2DE, Female, Exeter

Participants simply felt that the BBC would be unlikely to tackle taboo issues.

The age of presenters also emerged as important to younger participants with many noting that they preferred programmes where presenters were their age/ young as it felt more personally relevant.

.....
"It's nice when it's relatable."

18-24, C2DE, Female, Exeter
.....

Whilst participants found it easy to identify younger presenters on other television channels (e.g. Laura Whitman and Holly Willoughby on ITV), they often struggled to think of any on the BBC.

.....
"On the BBC I can't think of any quite young presenters."

18-24, C2DE, Female, Exeter
.....

This view was echoed across other age groups, who also noted that the BBC often had older presenters.

.....
One thing that is wrong with the BBC is they keep the older people on and even when they are older than old they keep them on., They dig them up and put them on a chair and dust them off...where are the youngsters? We want some younger faces."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

BBC Radio 1 was considered to be better at providing younger presenters and this was often a reason for popularity of Radio 1 across the younger participants in the research.

However, some noted that it wasn't always about the age of the presenter but also in the way in which content was delivered. For example, a couple felt that Sky sports was more modern in its approach because it provided statistics and broader information during their coverage.

.....
"BBC has got a lot of sports. It is just the way they are delivering. It looks like an old man doing sports. Sky Sports look modern."

18-24 years, C2DE, Male, Black African/ Caribbean, London
.....

Some noted that content from other broadcasters could also feel more natural and less scripted which made it feel more modern and fresh.

Wider engagement activities via social media were also noted. Participants liked that the BBC did provide this to some extent including the ability to watch Radio 1 recordings on YouTube. However, some mentioned that they followed younger presenters or celebrities from reality shows on social media, and felt that they did this less for people featured on the BBC.

However, overall participants were positive towards the technology used by the BBC, and the choice of platforms for accessing BBC content. Many felt that the BBC was good at this.

.....
"We are the digital age...this gives you more choice. We don't want to be tied down to watching TV."

18-24 years, BC1, Female, Bradford
.....

BBC iPlayer was often considered to be better than the online services provided by other broadcasters noting that other services included adverts and frequently froze. Participants were also positive towards BBC Apps and used these to keep up to date with the latest news.

.....
"They've got the BBC News app...I think it's really good for that [technology] actually."

18-24, C2DE, Female, Exeter
.....

With this in mind, many participants agreed that it was important that the BBC invest to ensure that they keep up to date with technology. Whilst this was considered important by younger people who often noted that they used online platforms to access much of the content they were interested in, this view was echoed in other groups across the research.

.....
"The BBC can't afford to ignore being kind of at the cutting edge of communication because that's what they are. They're a communication service really."

25-45 years, BC1, Exeter
.....

11.2 Ethnic minority groups

11.2.1 Views from Black African and Caribbean participants

Views regarding BBC provision of services and content for Black African and Caribbean audiences were mixed, but overall it was agreed that the BBC could be better at this. Some felt that the BBC did offer a good range of services which they used.

.....
"For me it offers definitely a lot of what I need. I think the variety is quite good."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

However, many felt that there simply was not enough provided for Black African and Caribbean audiences.

.....
"I personally think that we are forgotten and I think that is terrible."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

Participants agreed that other British broadcasters also needed to be better at providing services but felt that the BBC should lead the way and had a responsibility to make these improvements.

.....
"The BBC are missing a trick I think because I think they are widely seen as the prime broadcaster and therefore they have got a greater responsibility to do these things, to represent Black people, to represent women etc. "

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

.....
"They should be at the forefront of trying to change things like this...I don't see a Black presenter on any main show."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

Whilst sometimes positive in general towards the BBC, many felt that the content and services provided were aimed at White middle-class people.

.....
"They provide an excellent range of services. They just need to be a lot more representation in the services that they provide. Just reflect the British people which is not a 35 to 60 year old white person."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

This view was often driven by the perceived lack of Black people represented on the BBC.

.....
"I would like to see more Black oriented programmes. I would like to see a little bit more of Black actors and actresses."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

Some participants felt that other broadcasters were better at this type of inclusion such as Channel 4 who was considered to be more diverse and often better at providing content on global cultures and world issues.

.....
"If they [Channel 4] have a comedy programme it will be a bit more diverse and you are more than likely to see a Black person."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

Participants also reflected that there were few Black presenters on the BBC and a couple noted that current Black presenters tended to be lighter skinned. There were some positive comments regarding the type of content presented by Reggie Yates, but participants felt that there were not enough of these types of programmes and that they did not always cover issues that felt personally relevant.

.....
"There is only one that I know of which is Reggie Yates. He is a light skinned Black man. He talks about stuff like racism and how you feel about your body being a man and stuff like that, which were really really good."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

BBC content was frequently cited as lacking in relevance for Black people. Some did note that services such as Radio 1xtra had taken a step in the right direction.

.....
"I think 1xtra is the first attempt that they have actually tried to do something that is not aimed at their ordinary crowds. I wouldn't say they have got that right but they have made a step towards getting it right."

.....
25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

However, others felt the BBC's representation of Black people failed to reflect modern society and the real world.

.....
"The BBC haven't moved with the times."
.....

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

"I don't see a massive change in how Black people are represented on the BBC."

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

Some felt that the BBC represented Black people in a tokenistic way such as the inclusion of one Black family in Eastenders which was set in a location they anticipated would in reality be much more diverse.

.....
"Eastenders. It is London, it is going to be full of Black people but there are no Black people in there. So it is not representative of real life."
.....

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

Participants also felt that representation of Black people and families on the BBC did not portray real day-to-day life.

.....
"It would be nice to see a true representation of a Black family on the BBC channels."
.....

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

There were also views that the BBC's portrayal of Black people reinforced negative stereotypes in television programmes. Even where participants felt that the BBC had made a step in the right direction, they noted that these stereotypes still existed. For example, some talked about the BBC programme Luther as a good example of including Black actors, but felt that the title character still portrayed negative and stereotypical traits.

.....
"Luther is the only one that has broken out of the typecasting however there is still the connotation...he is not like a professional cop...there might be a little swagger, he is sinister, that is the image."
.....

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

Some felt that stereotyping extended to news coverage.

.....
"When I used to be at home with my kids, whenever we were watching the TV we would say 'look how they have showed the Black man'. There would be such and such and then all of a sudden a Black man will pop up if there is something negative. Crime in the area and then boom."
.....

25-45 years, BC1C2, Black African/ Caribbean, Birmingham
.....

“There is a general all round bias when the BBC reports on Black issues in the news.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

For this reason, younger participants often noted that they also used other sources to keep up to date with the news including Al Jazeera.

Younger participants also talked about a number of services that they felt better represented Black people, reality and culture. They noted that much of these were provided by American broadcasters.

“American shows are more real. BBC can never do that. It is completely out of date.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

“I watch more American shows because there are not enough British shows that are relevant to me. I go online or watch American stuff because it is stuff I enjoy.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

Some mentioned YouTube channels and programmes including Smokeys Barbers and Black Entertainment Television. They felt that these were good at tackling relevant issues and providing a more rounded view of different cultures.

“BET has got everything. It is Black and it appeals to us because we can identify with it. Certain things you see on that channel you can see it happening in your living room.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

However, overall, participants felt that the BBC and other broadcasters did not provide content aimed at British Black people.

“BET is American and they don’t speak to me because I am British. I am English African.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

“The BBC is aimed at me because I class myself to be British even though I am British Caribbean so it talks to me from a British point of view. However, it doesn’t talk to me from a Black point of view.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

Overall, participants felt that decision making regarding BBC services and content were made from a White perspective.

“I think it is done from a White perspective and not from the Black perspective.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

Younger participants felt that more should be done to improve the diversity of those making these types of decisions, and to involve more diverse people in programmes and production teams. Some

further suggested that opportunities should be made to diverse young people to make programmes that are relevant.

11.2.2 Views from Asian participants

Views regarding the BBC were mixed amongst Asian participants in the qualitative research.

There was some debate regarding whether the BBC needs to provide Asian specific content given the range of Asian specific channels (e.g. Zee TV) available.

“Leave the BBC as it is. Why do you want to have Asian programmes. These days there are so many Asian channels, so why do you want the BBC to provide it?”

45+ years, C2DE, Asian, Bradford

However, participants reflected that even though specific Asian content may not be required on the BBC, improvements were needed in terms of representation of Asian people.

When thinking about the representation of Asian people some felt that the BBC was better than other broadcasters at including Asian presenters. However, others felt that this was not the case and that the inclusion of Asian people was not diverse enough. Some felt that Asian presenters typically sounded ‘middle class’ therefore suggesting lack of diverse inclusion.

“There is a certain type of person that will get these roles.”

45+ years, C2DE, Asian, Bradford

Younger participants further felt that there was lack of representation of mixed race people on the BBC.

Some felt that even where Asian people were represented on the BBC, the content was not personally relevant.

“I think there are more minority ethnic people that are visible on the BBC but in terms of content, they don’t necessarily represent issues facing the British Asian community.”

45+ years, C2DE, Asian, Bradford

These participants felt that Channel 4 was better at doing this.

“Channel 4 is more representative of the communities of UK in terms of issues, content and presenters.”

45+ years, C2DE, Asian, Bradford

Younger participants specifically noted that they did not see much cultural diversity in BBC content noting a lack of coverage of topics such as Ramadan, Diwali, the history of the British in India and Asian culture reflected in cooking programmes.

Representation of Asian culture in BBC programmes was something that Asian women included in the research felt particularly strongly about. They criticized the way in which the BBC portrayed the Asian families in Eastenders, feeling that this was not a realistic portrayal.

.....
 "It's not very well thought out or researched."

18-24 years, BC1C2, Female, Asian, Glasgow

This raised concerns that this type of portrayal could give the wrong picture of the Asian community to a wider audience and reinforce certain stereotypes.

Other programmes such as Good Gracious Me and Citizen Khan also generated much debate. Many felt that the latter in particular promoted an outdated view of the British Asian community.

.....
 "I loved Goodness Gracious Me, It was satirical in a way that it was clever. You could laugh at yourself in that. But Citizen Khan is so out of date and silly. It is rubbish and it is embarrassing...humour has come a long way since and this doesn't reflect it."

45+ years, C2DE, Asian, Bradford

Younger females in particular felt that these types of programmes represented women in out-of-touch and stereotypical ways.

.....
 "A lot of things are perceived from the generation before when they relied on a guy or they weren't allowed to work or they were more housebound...it's not like that anymore."

18-24 years, BC1C2, Female, Asian, Glasgow

Representation of Asian people in the news was also mentioned by participants. Some felt that news reporting was "honest and fair". However, others felt that the BBC's portrayal of Asian people in the news was biased.

.....
 "I don't need to be treated in a certain way because I am from an ethnic minority background. I just feel that it is not fair reporting. Firstly it is stale and then they report current issues it is biased."

45+ years, C2DE, Asian, Bradford

A couple of participants raised this concern specifically in relation to coverage of faith groups in BBC reporting.

.....
 "They always portray the Palestinian as terrorists and the Israelis as the victim. The language they use is very biased and misleading. On the news it is very clear where their loyalty lies. ITV and Channel 4 are less likely to have such a clear bias."

45+ years, C2DE, Asian, Bradford

11.3 Native language speakers

Views regarding native language services tended to be focused on two aspects of service provision:

1. The amount and frequency of native language services provided. Amount and frequency of services was most pertinent for Ulster-Scots and Irish language speakers. Both of these groups felt that there were limited services in their language and whilst they were keen to see these, they currently felt that there was little provision to comment on.
2. The content of native language services. Content of services was most pertinent for Gaelic and Welsh speakers. These groups discussed a number of services and therefore their focus was often on the relevance and quality of the content of these.

11.3.1 Ulster-Scots speakers

Ulster Scots speaking participants reflected that there were few services provided in their language by the BBC. Positive views regarding BBC Radio Ulster were often with reference to keeping up to date with local news. Presenters for this type of content were liked.

Aside from BBC Radio Ulster, participants struggled to identify where else they could access Ulster-Scots language content. One participant mentioned a magazine style programme on UTV.

Overall, participants felt that more Ulster-Scots content should be available and felt that the BBC could play a role in providing this. Suggestions included dramas in Ulster-Scots, or factual programmes similar to The One Show.

.....
 "I would love to see something like The One Show where they had a couple of presenters who spoke in Ulster Scots who could relate to the viewers."

Ulster-Scots speaker, Northern Ireland

Participants compared the provision of Ulster-Scots programming to that provided by the BBC for other languages. They aspired to this type of provision for Ulster-Scots and felt that the BBC should provide services for all native languages.

.....
 "When you see the Scottish channels on they are very Scottish, it's the same with Irish. I watch a programme once on TG4 and it was all Irish and it was lovely. I would love to see something like that done for Ulster Scots."

Ulster-Scots speaker, Northern Ireland

11.3.2 Irish speakers

Irish speaking participants similarly struggled to identify where they could access Irish language services. Again, some mentioned BBC Radio Ulster but felt that coverage of Irish language content was limited and poorly promoted.

.....
 "I think there is some on BBC Radio Ulster, they haven't been advertised very well. The services are erratic, there's not a comprehensive service of them."

Irish speaker, Northern Ireland

One participant was particularly positive about the online Irish content.

.....
"The website is quite good for Irish language content. There are stories and learning facilities and news. It's well presented, you could easily spend 30 minutes browsing through the stuff out of curiosity. I would get it up on my phone and just have a look."

Irish speaker, Northern Ireland
.....

Again, participants compared the services for Irish language to those that they were aware of for other languages. This resulted some in concluding that BBC services provided in Irish language were lacking.

.....
"I don't think they're that good. I don't think they're [as] extensive as how Scottish Gaelic is provided for in Scotland. "

Irish speaker, Northern Ireland
.....

Participants noted that they were keen for television programmes in Irish.

.....
"The BBC doesn't have a lot of programmes provided in Irish...I don't think there are any programmes on television at all [in Irish]."

Irish speaker, Northern Ireland
.....

They felt that this type of provision was important to support children in learning the language. They also more broadly felt that this type of provision was important in supporting Irish culture. Participants again strongly felt that the BBC should provide services for all native languages.

11.3.3 Gaelic speakers

Gaelic speaking participants felt that the BBC was the core provider of Gaelic services, and struggled to identify other providers. One participant mentioned seeing the occasional local newspaper column in Gaelic but could not recall anything else.

Participants were positive towards the provision of Gaelic services and felt that it was very important for the BBC to provide these. One participant specifically noted the good content provided online.

.....
"I get the online content , I can see what's happening news wise. I'm very pleased with the Gaelic side. It's also good for learning Gaelic."

Gaelic speaker, Scotland
.....

However, participants generally felt that the content of BBC ALBA and Radio nan Gàidheal could be improved to make the content more relevant.

.....
"I would hate to see it go, don't get me wrong. I think it's a very valuable service, but I think it could do with...a bit more focus on something a bit more relevant."

Gaelic speaker, Scotland
.....

Some noted that much of the content on BBC ALBA was repeated.

.....
"I think it is good but we do watch it a lot and see a lot of repeats [BBC ALBA] but at least we are getting some Gaelic content."

Gaelic speaker, Scotland

"The only thing I find disappointing is that with the Gaelic on BBC ALBA during the day they just have repetitive news – it's just print and that's it, there's no actual programmes as such."

Gaelic speaker, Scotland

.....
Whilst positive towards the football coverage, participants felt that much of the content on both BBC ALBA and Radio nan Gàidheal was traditional and from a bygone era. They felt that this could be broadened to reflect modern Scotland.

.....
"They do a lot of really good stuff but I don't feel that it's really current for me. If feel like if somebody watches that, they'll feel that we live in a bygone era."

Gaelic speaker, Scotland

"I seldom turn on BBC ALBA or listen to Radio nan Gàidheal and there's not a ceilidh or something going on, and I don't think it's particularly representative of what a lot of Gaelic speakers of my generation are doing or looking for."

Gaelic speaker, Scotland

.....
Participants felt that content could be made more current and relevant including tackling modern day issues.

.....
"Living in a particular rural area and the issues it involves, some people are quite ignorant of the fact that somebody in [location]...may have very different issues with parenting, and all these things. And teenagers...there's drug related problems and all these things...I think as highlanders as a whole, especially my generation, tend to turn a blind eye to that, the social problems...there's this idealistic, romantic view being portrayed...and I think that tends to come through a lot in the kind of programmes that are being produced – it's all about the glorious past!"

Gaelic speaker, Scotland

.....
Participants also felt that there could be more content linking to what the local Gaelic speaking community were doing today.

.....
"It's very interesting, because it's a small community and...[it's often someone] you know who's going to be speaking...I think if they covered more of things like the arts – because we've got a very rich culture that is more today, it can be quite contemporary rather than just traditional...I don't think that gets enough emphasis."

Gaelic speaker, Scotland

They reflected that there was a Gaelic language resurgence so further suggested that more content should be tailored towards younger people.

“I would expect to see a bit more...aimed towards youth as well.”

Gaelic speaker, Scotland

Whilst positive towards the BBC provision of Gaelic language services, participants felt that more could be provided. Some suggested that Gaelic language programmes could be developed including dramas and current affairs programmes, and these could be shown in English elsewhere to showcase the local area.

“I think they do a very good job in even having what they have, but I think it could be improved on...showing the rest of the country that there’s a lot of good, innovative, progressive things going on in the highlands...”

Gaelic speaker, Scotland

11.3.4 Welsh speakers

Welsh speaking participants were very positive towards the provision of Welsh language services and felt that the BBC provision of these was essential.

“Accessing Welsh language services is an entitlement for people – if Welsh is your first language and you pay a licence fee then you should have the choice of being able to access programmes in your own language. This also applies to other languages across the UK.”

Welsh speaker, Wales

Participants recognised that Welsh language services funded by the BBC included both BBC services and S4C services. Participants valued the range of genres provided via these in Welsh language.

“Without the BBC the choice available would be far more limited.”

Welsh speaker, Wales

Radio Cymru was considered to be high quality with good presenters and diverse content. Taro'r Post and coverage of sports events (e.g. Welsh rugby) were specifically mentioned as good and the latter was noted as something that could not be accessed elsewhere.

“BBC Radio Cymru presenters are good – they communicate clearly. News coverage is high quality.”

Welsh speaker, Wales

Television programmes such as Pawb a'i Farn (S4C) was also considered good quality. The programme Hinterland (BBC One Wales) was also cited as a good example of how Welsh language content had improved over recent years. They felt that this echoed and supported the wider promotion of Welsh language in Wales and noted that media coverage was a core element of promoting and supporting Welsh language.

“Efforts have been made by government and public bodies to support the use of the Welsh language – clearly having these services through the medium of Welsh is crucial to support this, as the media is such an important part of all of our lives.”

Welsh speaker, Wales

The BBC provision of Welsh language services was considered vitally important by participants. Some reflected that it supported the use of Welsh language as a key part of Welsh culture and identity.

“The availability of TV and radio services supports the use of the Welsh language and helps the language to be a mainstream part of society.”

Welsh speaker, Wales

“It’s important in terms of cultural diversity as well as national identity.”

Welsh speaker, Wales

Others felt that BBC coverage of cultural events such as the National Eisteddfod and the Royal Welsh show would not be provided if not covered by the BBC, and that these were important in ensuring people unable to attend could still access these.

Finally, in line with views from Gaelic speakers in Scotland, Welsh speaking participants felt that Welsh content made in Wales could be broadcast in English to other parts of the UK to promote the local area.

“Programmes about Wales can help raise awareness in other parts of the UK about our history and culture and can also make you feel proud.”

Welsh speaker, Wales

11.4 Nations / regions

When participants thought about nation and region specific content, they tended to think about three things:

1. BBC provision of local news coverage.
2. Representation of nations and regions on the BBC.
3. Local specific programmes shown on the BBC (Wales, Scotland and Northern Ireland)

11.4.1 BBC provision of local news coverage

Participants across the qualitative research agreed that it is important to provide both national and local news however not all participants currently used the BBC to access this.

Those who did use BBC television and radio services to access local news were largely positive about this provision.

“There is BBC West Midlands. That is a good one as well in the morning for weather reports or school reports, if anywhere is closed because that gives local traffic news as well.”

45+ years, C2DE, Birmingham

Participants in Northern Ireland were positive towards the BBC coverage of local politics and sports.

However, participants were also positive towards the provision of local news on other television channels and radio stations with many mentioning ITV. In Scotland, STV was preferred by some as it was more regionalized.

Some simply noted that as long as they were able to access local news, they were not concerned where this came from.

“As long as it’s [local news] covered an you can get it then it doesn’t really bother me [where you get it].”

25-45 years, C2DE, Birkenhead

Further views regarding the role of the BBC in providing news coverage is discussed in section 10.2.7.

11.4.2 Representation of nations and regions on the BBC

There were mixed views regarding whether nations and regions felt well represented on the BBC. A couple of participants in England noted that regional accents were not often heard on the BBC.

“It’s the Queen’s English basically. You don’t get the regional accents as much.”

25-45 years, BC1, Exeter

However, most comments came from Wales, Scotland and Northern Ireland.

Participants in Wales largely felt that Wales was well represented on the BBC.

“We’re generally well represented, I can’t criticise them.”

45+ years, BC1, Aberystwyth

Programmes known to be filmed and made in Wales including *Hinterland* and *Doctor Who* were frequently mentioned as good examples. However, some felt that more historical dramas could be included to increase engagement in and awareness of Welsh history. Suggestions included dramas based on the Rebecca Riots or Lloyd George.

A couple of participants in Wales commented that they were pleased to see coverage of the Welsh Assembly on BBC Parliament, but noted that this was only shown late at night.

Participants in Scotland were less positive and felt that more could be done to represent Scotland and Scottish people on the BBC. This included suggestions for more content based on Scottish literature and more programmes based in Scotland or including Scottish actors.

“I don’t think it is that well represented...you don’t get any period dramas based on books [Scottish writers] they’re all English authors, for instance...the chats shows, every programme seems to be predominately English, you don’t get many Scottish presenters.”

Gaelic speaker, Scotland

“I think as a whole they should be covering everything that is British, not just English, and that’s Scottish and Irish... we get very little of that. I suppose there’s a bit more Welsh creeping into different comedy programmes...there seems to be a bit of an imbalance really, it seems as those British is seen as English rather than England Scotland Ireland and Wales.”

Gaelic speaker, Scotland

Participants in Northern Ireland also agreed that it was important to have good representation of their nation on BBC television.

“I think it’s really important to have stuff from Northern Ireland on TV.”

25-45 years, C2DE, Belfast

Finally, a couple of participants noted that the Radio 1 Roadshow enabled BBC services to visit different areas of the UK and engage different communities.

“They went to Skegness. it is a little bit of fun. It gets people in the community out and about.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

11.4.3 Local specific programmes shown on the BBC (Wales, Scotland and Northern Ireland)

Some participants also talked about BBC programmes that were shown in their nation or region. In Wales, participants were very positive towards BBC Wales which they felt had a strong brand. Programmes such as X-Ray received positive comments. Participants were aware of and some used BBC Welsh language services and felt that these were essential to keep the Welsh language alive.

Local BBC programmes in Scotland (e.g. River City, Chewing the Fat and Still Game) were liked because they provided something local, but when compared to other BBC content were considered by some to be poor quality.

In Northern Ireland some participants felt that BBC Radio Ulster focused too much of political discussion and current affairs. Younger participants in particular did not find this appealing.

“It’s something my granny would listen to more than I would.”

18-24 years, BC1, Male, Belfast

A couple of participants in Northern Ireland further commented that sometimes ITV provided more relevant content for a rural area, as they covered agricultural issues.

12 Genre Mix

12.1 Qualitative research

Participants often felt that the diversity and range of content and formats provided by the BBC was what made it distinctive. Many expected to see the BBC to be diverse in its provision to reflect the diversity of modern society who provided funding.

“They’ve got a little bit of everything haven’t they.”

25-45 years, C2DE, Birkenhead

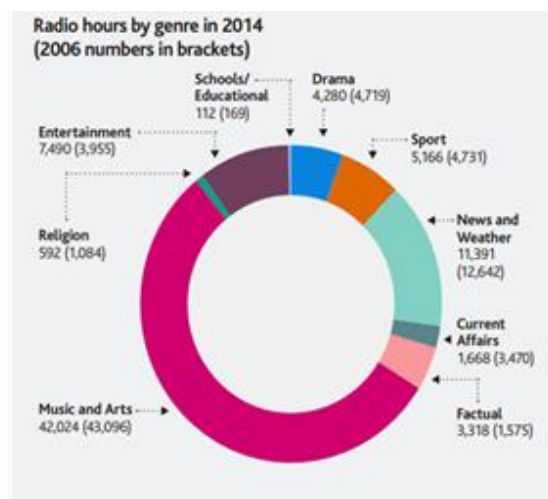
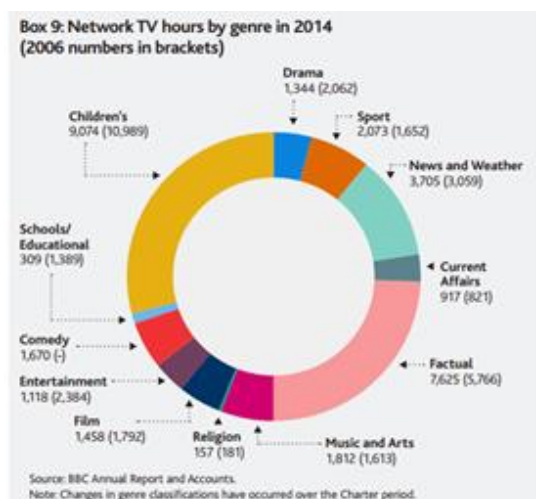
“I think you have got more choice with the BBC channels.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

“I personally think it gives everybody an option.”

45+ years, C2DE, Birmingham

Participants were provided with information about the genre mix for both television and radio content across the BBC, using the infographic below.



When reviewing the television genre mix many participants expressed surprise at the amount of children’s programming. Many had not expected this to be so high, although reflected that CBeebies and CBBC are individual channels and this itself could be driving the high number of hours dedicated to this genre. Most participants felt that the provision of children’s programming was important and therefore, were not concerned that a large proportion of air time was dedicated to this genre.

“You can’t deny that a lot of CBeebies did make your childhood and you know it’s all kind of like it’s education when you’re having fun, so you can’t knock it.”

18-24, C2DE, Female, Exeter

The proportion of hours covering the genre of schools and education was considered small for both television and radio. However, participants struggled to recall what this actually included. Some queried whether radio coverage of this was really necessary since it was already so small.

Participants were not surprised to see the amount of news and weather and factual coverage on television and radio as this was often what they associated the BBC with, and expected them to provide.

“It is something that the BBC have always done and to go away from that would diversify from how it started, because it has always been culture and education based.

45+ years, C2DE, Birmingham

Some had anticipated that current affairs would be a larger proportion for both television and radio because they often saw this alongside news and factual as something that the BBC is known for providing.

“It’s quite surprising that current affairs is low for BBC.”

18-24, C2DE, Female, Exeter

A few participants felt that there should be more current affairs coverage particularly on television.

“I would like to see a bit more current affairs because I am into current affairs so I would like to see a bit more such as Question Time.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

When looking specifically at radio genre mix, participants were not surprised to see that a large proportion of air time was dedicated to music. Most expected this to be the case, and felt that the genre mix in this respect was right.

“When you are listening to the radio I think the main thing you are looking to listen to is music isn’t it.”

25-45 years, C2DE, Birkenhead

When looking specifically at television genre mix participants were initially surprised regarding the small proportion of comedy, drama, entertainment, film and sports coverage as these were things that they typically sought to access on television. However, they also noted that this reflected their views regarding BBC provision of these genres.

The small proportion of hours shown for sport was in line with expectations and reinforced the perception that most major sporting events tended to be covered by commercial broadcasters,

particularly Sky. Whilst many wanted more sports coverage on the BBC, specifically noting that they felt that coverage was high quality when on the BBC, most felt resigned to the fact that this was unlikely to happen. Most were sceptical about whether this would actually be possible given the amount of funding required to acquire sporting rights.

“I’m sick of terrestrial channels losing sports...it has all gone onto Sky now.”

25-45 years, C2DE, Birkenhead

Views regarding films were similar with many noting that the BBC usually showed older and repeated films, tending not to show those recently released. Some noted that they tended to go to other channels to find films suitable for weekend and evening family viewing, and others purchased movie bundles or paid for access to individual films through providers such as Sky and Virgin. Some felt that the BBC could improve the quality of the films they showed rather than increase the amount of air time dedicated to films.

“People who have just got a basic Freeview box, it would be nice for them to have films seeing as they are paying for a TV licence.”

25-45 years, C2DE, Birkenhead

Whilst initially surprised about the small proportion of entertainment and comedy shown, participants concluded that this reflected their broader views regarding these genres; that there was not enough entertainment or comedy that they found personally appealing on the BBC. Views regarding the perceived quality of entertainment and comedy were therefore strongly linked with views regarding how much air time these genres received.

“Entertainment is quite low, which is what we’ve all been saying.”

18-24, C2DE, Female, Exeter

Some participants felt that the BBC should provide more entertainment but noted that it would be difficult to decide exactly what type of entertainment as different people would prefer different things.

“I would say a bit more entertainment but then again it’s down to everyone’s preference isn’t it, what they like to watch, because everybody is going to be different aren’t they depending on what they are interested in.”

25-45 years, C2DE, Birkenhead

This often reinforced views that the BBC should provide a good variety of content across genres to reflect the diversity of the general public.

“I think the BBC offers a wide range, and I think they should stick to what they’re doing...because everybody’s got different tastes...they can offer a wide range, I think they should stick with what they’re doing right.”

45+ years, C2DE, Glasgow

Many however agreed that more comedy content could be provided and noted this as one genre that was limited in terms of coverage and quality. Some felt that more comedy on the BBC would balance out the perceived serious nature of the BBC and more broadly provide escapism from the ‘real world’.

“More comedy...everything is too serious.”

25-45 years, C2DE, Birkenhead

But others simply felt that the BBC did not provide enough comedy.

“I think there could be more comedy because I don’t think there is enough comedy.”

25-45 years, BC1C2, Black African/ Caribbean, Birmingham

These participants often noted that comedy shown on the BBC largely felt out of date, and was not personally appealing. Whilst mentioned across all age groups, this view was particularly strong amongst younger groups and some ethnic minority participants.

“It would be interesting if they had comedians more suited to us. BBC has middle aged comedians joking about things for their age and talking about their kids. but it is not funny for people our age. We don’t have kids and it is a bit odd.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

Further views regarding this are detailed in sections 6.1 and 6.2.

Older participants also felt that the BBC ‘missed the mark’ on what they felt to be “British humour” which they felt was previously well delivered in archived programmes such as Dad’s Army and Only Fools and Horses.

Religion was often a genre that caused some debate. Many participants felt that faith-based religious content should not be provided by the BBC. Some simply felt that very few people were interested in accessing this type of content and if they were interested, they could access it elsewhere.

“If you are talking our age then no one is interested in any religion stuff on TV...there is no interest.”

18-24 years, C2DE, Male, Black African/ Caribbean, London

Some further felt that if faith-based content was provided for one faith, it should equally be provided for all faiths followed in the UK, and with this in mind, these participants wondered whether it was feasible to include faith-based content.

“The UK is such a diverse place and I’m guessing they don’t cover every religion in the world so why would they do that is such a diverse country.”

18-24, BC1, Belfast

Some participants suggested that if religious content was to be provided by the BBC it should focus on educational and informative programmes aimed at increasing awareness and understanding of different religions.

However, some felt that religious content should be cut from the BBC, feeling that it lacked relevance if not fully inclusive, and was perceived to have very low viewing figures.

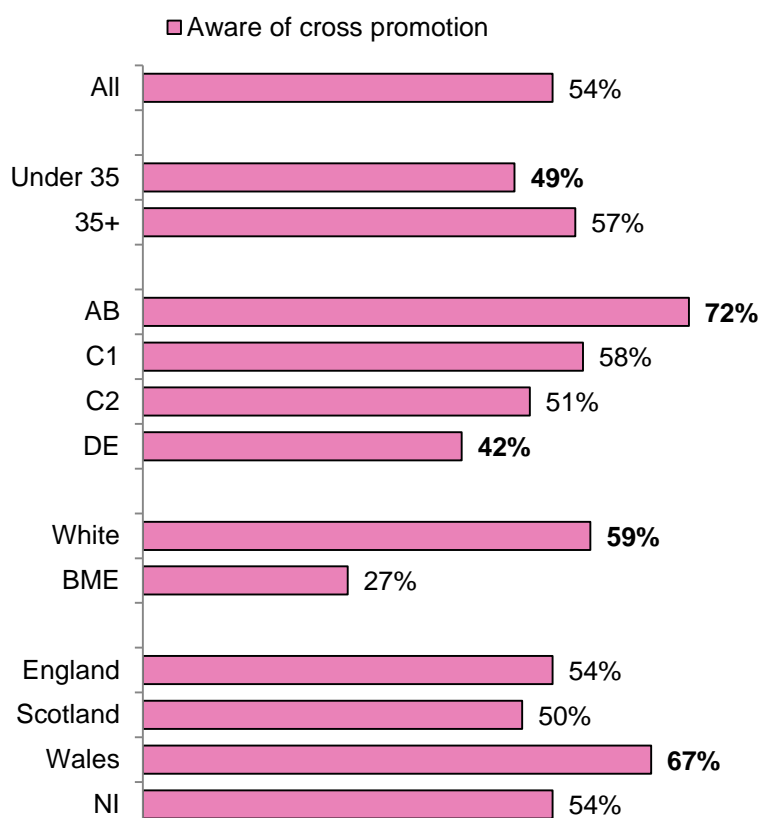
13 Cross-promotion

13.1 Quantitative polling

A series of questions was asked to establish views about the way in which the BBC does cross-promotion of its services, specifically promoting radio via television and vice versa. There was considerable awareness of this taking place – just over half of the sample (54%) said that they had seen or heard this on the BBC.

Awareness of cross-promotion was strikingly higher among the AB social grade (72%) than among the other groups (declining steadily to 42% among DEs) – this also reflects the higher level of BBC ‘consumption’ among the professional classes. The figure was also high in Wales (67%) and among the over-35s (57%) but was much lower among ethnic minorities (27%) than the white sample (59%).

Chart 21: Demographic group awareness of BBC cross promotion



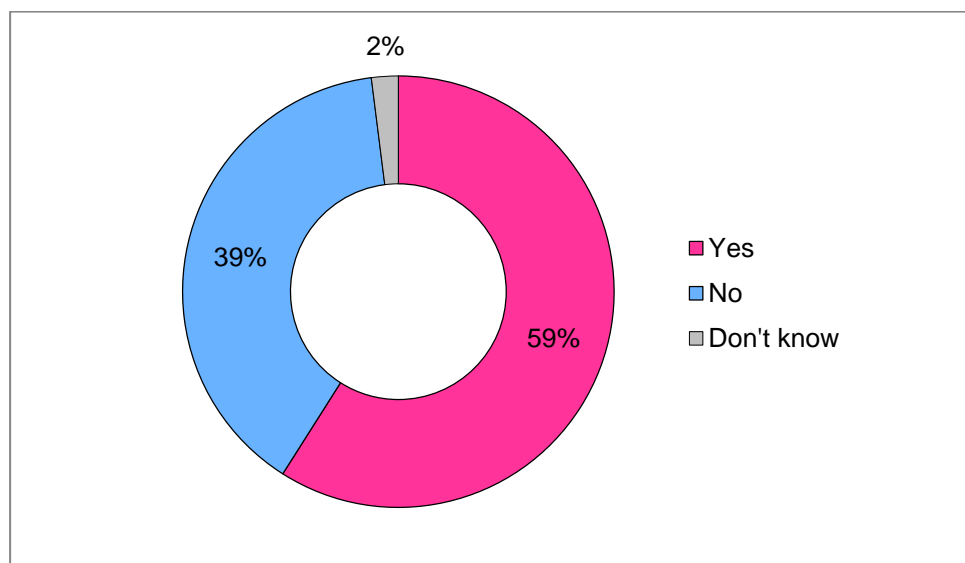
Q8. The BBC sometimes promote their television programmes on BBC radio and their radio programmes on BBC television – so for example you may hear information about a new BBC1 drama series on Radio 2, or you may see a promotion for Radio 1’s breakfast show between programmes on BBC1. This is known as ‘cross promotion’. Have you seen or heard any of this kind of cross promotion on the BBC?

Base: All respondents (2,119); under 35s (648); 35+ (1471); AB (363); C1 (572); C2 (422); DE (762); white (1836); BME (269); England (1775); Scotland (180); Wales (104); NI (60)

Please note: **bold** indicates a statistically significant difference

Over half (59%) of those aware of cross-promotion said that at some point they had chosen to watch or listen to a BBC programme as result of hearing about it in this way. Across the entire sample, this represents 32% of those interviewed.

Chart 22: Watching or listening because of cross-promotion



Q9. Have you ever chosen to watch or listen to another BBC programme as a result of any cross-promotion?

Base: All aware of cross-promotion (1,155)

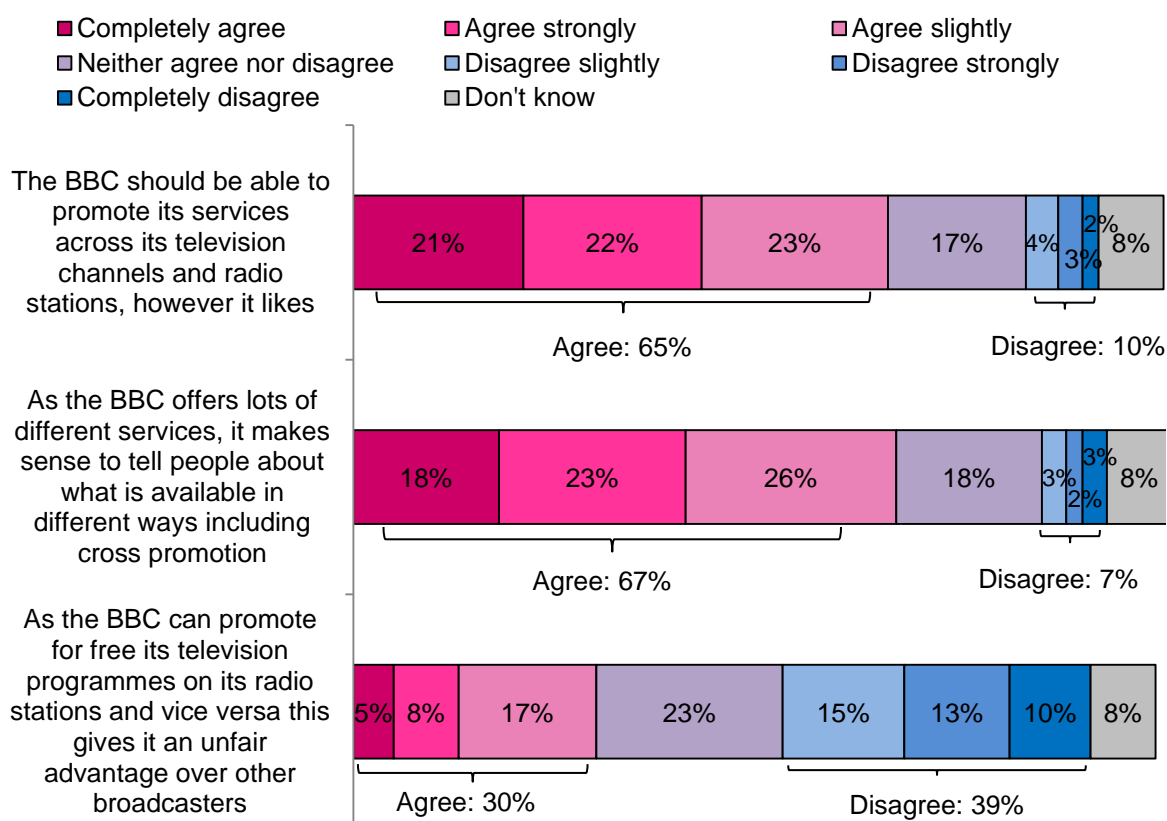
A number of statements were included in an attitude battery and again respondents were asked to say to what extent they agreed or disagreed with each one. Three of the six questions were put to the entire sample with the others necessarily asked only of those who were aware of cross-promotion on the BBC. In general, views were quite supportive of the BBC’s use of this kind of activity.

There was clear agreement among the overall sample (65%) that the BBC should be able to promote its services across its television channels and radio stations however it likes. The highest level of support for this position once again came from the ABC1 social grades (71%) and the lowest figure was found among ethnic minorities (56%, although few of them actually disagreed with the statement). There were no other significant differences in the demographic analysis.

Almost the same proportion (67%) agreed that as the BBC offers lots of different services, it makes sense to tell people about what is available in different ways. Agreement was yet again especially high among the AB social grade (78%).

Towards a third (30%) agreed that the BBC has an unfair advantage over other broadcasters because it can do free promotion of its radio via television and vice versa, although rather more (39%) disagreed. Those in the DE social grade and respondents from ethnic minority backgrounds were the only demographic groups that had more people agreeing than disagreeing. Highest disagreement came from ABC1s (46%).

Chart 23: Opinion on the BBC using cross promotion



Q10. Still thinking about cross promotion, please indicate how much you agree or disagree with the following statements.

Base: All respondents (2119)

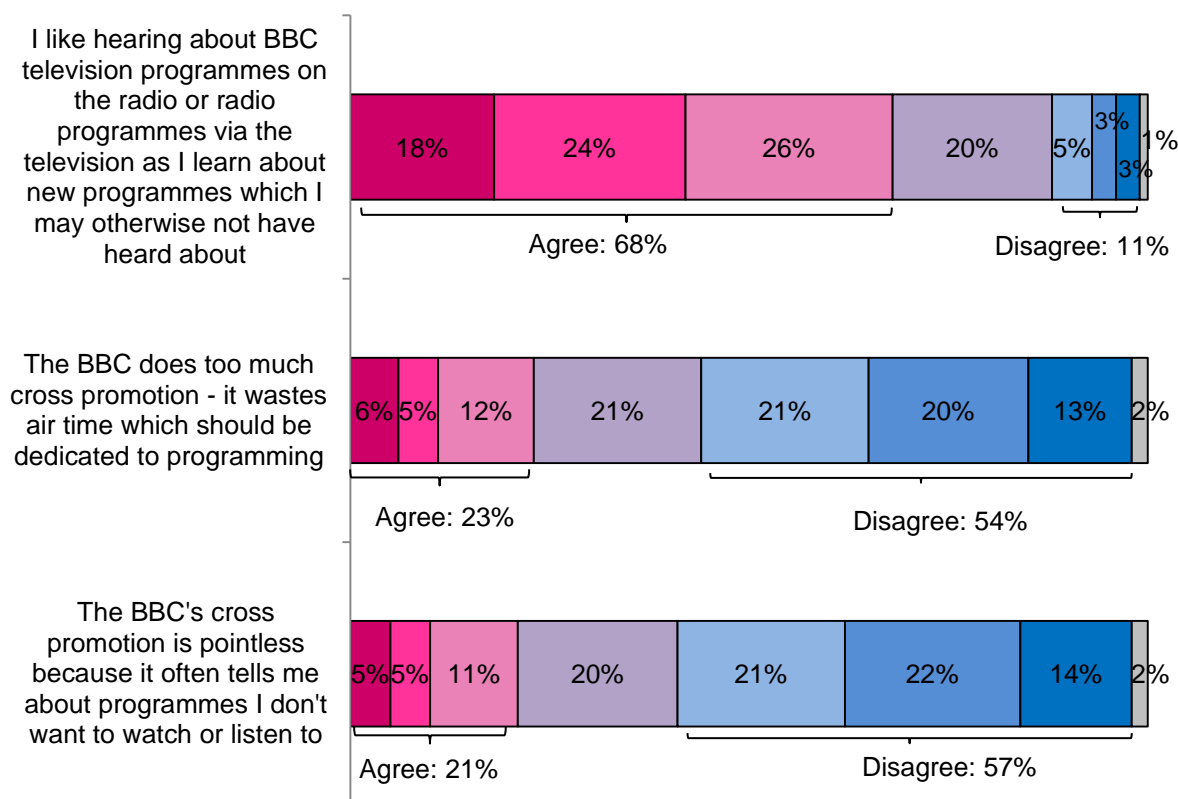
Views were generally quite positive among those who had actually seen or heard cross-promotion on the BBC. Two-thirds of this group (68%) agreed that they liked to hear about BBC programmes in this way while only about one-in-ten (11%) disagreed. Agreement was highest in the ABC1 social grades and lower (but still quite strong) among C2DEs.

Only about a quarter (23%) of those questioned thought that the BBC does too much cross-promotion – time that should be used for programming. Just over half (54%) of those who were aware of this happening on the BBC disagreed with the statement (notably those in the AB social grade).

Similarly, just 21% agreed that the cross-promotion is pointless because it tells you about programmes you don't want to watch or listen to, while over half (57%) disagreed. Once more, support for cross-promotion was notably stronger among ABs than DEs but in no demographic group was there more agreeing than disagreeing.

Chart 24: Opinion on the BBC using cross promotion (among those who are aware of it)

- Completely agree
- Agree strongly
- Agree slightly
- Neither agree nor disagree
- Disagree slightly
- Disagree strongly
- Completely disagree
- Don't know



Q10. Still thinking about cross promotion, please indicate how much you agree or disagree with the following statements.

Base: All respondents aware of cross promotion (1,155)

14 End Notes

14.1 Other survey findings referred to in the report

¹ BBC Trust (November 2015) Response to the Department for Culture, Media and Sport's Charter Review consultation. Technical Annex A: Purposes, Values and Scope
http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/about/how_we_govern/charter_review/annex_a.pdf

² YouGov / Sunday Times (June 2015)
https://d25d2506sfb94s.cloudfront.net/cumulus_uploads/document/7gudda13sb/YG-Archive-Sunday-Times-results-280615.pdf

14.2 Definitions of social grades

Social grade is a classification system based on occupation. It was developed for use on the National Readership Survey (NRS) and for over 50 years NRS has been the research industry's source of social grade data. The classifications are as follows:

Grade	Occupation
A	Higher managerial, administrative and professional
B	Intermediate managerial, administrative and professional
C1	Supervisory, clerical and junior managerial, administrative and professional
C2	Skilled manual workers
D	Semi-skilled and unskilled manual workers<
E	State pensioners, casual and lowest grade workers, unemployed with state benefits only

The interview includes questions about the occupation of the Chief Income Earner (CIE) to establish social grade. Questions include not just what the CIE's job is, but details such as their qualifications and the number of people they are responsible for. Income is not part of the social grade classification. However there is a strong correlation between income and social grade.