

**QUALITATIVE RESEARCH TO
INFORM THE PREPARATION
OF THE BBC REVIEW 2004**

Report
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Prepared for:

COI Communications
Hercules Road
London SE1 7DU

On behalf of:

Department for Culture, Media and Sport
2-4 Cockspur Street
London SW1Y 5DH

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Contacts at Cragg Ross Dawson: Tim Porter,
Catherine Woolcott

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ANNEX

A. MANAGEMENT SUMMARY

1. **Introduction**

Qualitative research was commissioned to inform BBC review, alongside a deliberative study and quantitative research.

34 focus groups and 12 individual interviews were conducted with members of the public, including people from ethnic minorities, across a range of ages, social classes, regions, frequency of watching TV and access to different channels.

Fieldwork was conducted 26th January – 8th March 2004.

2. **The context**

TV dominated broadcasting consumption for most of these people: typically they had a closer relationship with TV than radio and felt more involved with TV programmes and personalities than those on radio.

Many members of the public, especially those over twenty, felt that there had been a significant change in TV over the last decade, following the introduction of satellite, cable, and now digital TV. Choice and variety of channel and programme type had mushroomed, though not necessarily with a concurrent increase in quality. The five main terrestrial channels and multi-channel TV were still perceived as separate entities, but it was clear that the boundaries are beginning to blur, especially with access to the main terrestrial channels via digital and cable platforms.

BBC1 and ITV were the most widely watched channels. The other main terrestrial channels were also salient but appeared to have narrower audiences; all had followers and all had key programmes which attracted interest and attention. Among multi-channel users certain core channels stood out – Sky Sports, Sky Movies, Discovery and news and music channels.

The radio landscape was more fragmented; there were enthusiastic followers of a number of stations, national and local. Most respondents listened to a very limited repertoire of stations and had little awareness of

or interest in other stations. Of the national stations, the most salient were Radio 1, Radio 2, Radio 4, Radio Five Live, Talk Sport and Classic FM. Many people, particularly outside the South East and in the devolved administrations, preferred local stations, some commercial and some BBC.

3. **Overall perceptions of the BBC**

Unconsidered perceptions of the BBC ranged from almost unqualified support to dissatisfaction with its output and resentment of the licence fee. In between, there was broad acceptance of the BBC and its output among the majority. Those who were most supportive tended to be ABC1 social class, over 35, lighter viewers with access to the five main terrestrial channels only; people who were more critical were typically C2DE social class, under 50, heavier viewers and with multi-channel access.

It was apparent that whereas other broadcasters are assessed mainly on their output, attitudes towards the BBC as a whole are moulded by a number of important image factors, especially its heritage, its non-commercial status and the licence fee.

The BBC's output was largely judged on the basis of perceptions of BBC1 and, among a vocal minority, BBC2 and Radio 4; the remainder of its output either was taken for granted or was not known. When informed about the full range of its channels and programmes, some respondents expressed more favourable views, and began to regard the licence fee as better value.

4. **The BBC's Public Sector Broadcasting role**

Few members of the public had a clear conception of what Public Service Broadcasting is, and did not regard the BBC's PSB remit as a significant feature of its identity and make-up. With prompting the component parts of the PSB remit were often recognised in the BBC's output, but were not often seen as expressing the BBC's identity fully.

BBC loyalists tended to see the essence of PSB as not having advertising, and not being committed to maximising audiences. This fitted well with

the way they saw the BBC and with things they valued about the BBC. People who resented the BBC tended to feel that PSB equated to a bias against sport and 'entertainment', and to there being little they want to watch; they saw echoes of this in the BBC's output and in its stance towards broadcasting.

5. **BBC identity and values**

Irrespective of attitudes towards the BBC, most members of the public had a similar perception of its identity and values. The BBC was personified as a man in his 50s, suited, comfortably off, conventional, conservative and reserved, who appeared friendly but was powerful and sometimes domineering. These characteristics made BBC seem like 'one of us' to its keenest followers, but for many people meant it was remote and out of touch.

Most other broadcasters (especially C4, C5 and Sky) were perceived as younger, less restrained, livelier, more fun, more open and more accessible than the BBC; but at the same time less dependable, less reliable, and less concerned with getting things right.

The most consistently expressed values attaching to the BBC were: *British* – which engendered feelings of pride, especially in England; *traditional* – which had both positive and negative connotations; *quality* – in terms of production values and content; *impartial and independent* – especially in news and current affairs; *establishment* – which could mean strong morals and ethics or elitist and remote; *mass appeal* – in relation to BBC1; and not *cutting edge* in content, though leading the way in technology.

6. **Perceptions of the BBC's output**

When explored and prompted, the BBC's output was generally considered at least adequate and at best outstanding. It was believed to offer something for most people (especially TV) and to appeal both to large audiences and minority interests.

BBC1 dominated perceptions of the TV output. At best it was associated with quality, professionalism, taste and decency, trustworthiness,

accuracy, truth and intelligence. Its range of programmes was thought to meet a wide spectrum of interests. News, current affairs, documentaries, quality drama, comedy and sport were considered its strengths. The less enthusiastic viewers, especially heavy TV viewers with multi channel access, and many C2DEs, complained that BBC1 offered little for them except *Eastenders*, was stale and needed refreshing.

BBC2 attracted a minority who said they appreciated its arts, culture and comedy output, and willingness to break new ground, but was seen as remote and not for me by some.

BBC4 had a small number of converts who saw it as similar to BBC2. **BBC3** was unknown to most but enjoyed by a few. **CBeebies** and **CBBC** were very well regarded by parents and appreciated for offering high quality children's programmes. **News24** was liked by a few newshounds and admired for its BBC news values. **BBC Parliament** was apparently very little watched in this sample.

Radio 1 was popular among young people, appreciated for music and activities, but was regarded as apart from the BBC and sometimes not known to be a BBC station. **Radio 2** had a more diverse audience in this sample but keen listeners among middle age groups. **Radio 3** was liked for its unerring dedication to high quality presentation of classical music. **Radio 4** had a small but devoted audience among these members of the public; they regarded it as outstanding. **Radio 5 Live** was well liked by some sports fans and younger newshounds.

Awareness of BBC **digital radio stations** was very low – lower than that of digital TV channels. The BBC **Asian Network** was well liked by some Asian people and appreciated for its dedication to Asian interests, though was apparently being out-performed by Club Asia.

Some BBC **local radio stations** attracted support in certain areas, particularly from over 30s – Radio Newcastle, Radio Ulster, Radio Foyle, Radio Wales, Radio Cymru.

BBCi was not familiar as a label and there was little sense of an all-encompassing digital service. The BBC website was used by an

enthusiastic minority and was considered especially impressive for its news service, the regional sites and its educational output (Bite Size).

Education programming on the BBC was praised where known, but not generally salient. Specialist resources such as videos were used in schools and appreciated by teachers and teenagers. More familiar was its role as a general educator through its factual programming, the quantity and quality of which was often thought to differentiate the BBC from other broadcasters.

Opinion of the **BBC news service** reflected views of the BBC as a whole. Among BBC loyalists the news output was highly respected and considered impressively comprehensive, reliably accurate and impartial, and appreciated for the range of its coverage. Those who were less well disposed felt it was no better than its competitors, and believed that ITN was more accessible and Sky News more high tech.

The findings of the Hutton Report appeared to have had little impact on trust in the accuracy and impartiality of BBC news.

Perceptions of the **BBC's regional coverage** varied widely. In the **English regions** there was general praise for the BBC's regional and local news coverage, and a sense of inclusion. In **Scotland** and **Northern Ireland** many members of the public had more negative impressions of the English-based media generally, and complained about stereotyping and the absence of their interests and issues in mainstream coverage, both in news and entertainment. Attitudes in **Wales** were typically more positive: many felt that the BBC catered well for Welsh interests.

The **BBC's output for ethnic minority audiences** also attracted criticism. Again there were complaints about all mainstream media for their claimed negative portrayal of people from ethnic minorities, but the BBC was singled out. Though there were some favourable comments, many young black people and young male Muslims of Asian origin complained about stereotyping, negative role models and, among Muslims, an anti-Muslim bias and unfavourable view of the third world as a whole.

7. The licence fee

The licence fee had a major influence on perceptions of the BBC and informed much of what people feel and say about the BBC, though few members of the sample fully understood how it works and what it funds.

Attitudes towards it reflect general feelings about the BBC generally. Some felt it is good value and well worth paying for the benefit of TV and radio with no advertising, particularly given the breadth and quality of the BBC's output. A majority accepted it but expressed concerns and caveats about it. Another minority objected strongly to the licence fee, particularly the fact that they do not have any choice about whether they receive and watch BBC or not, and therefore do not have the choice not to pay the fee.

The main perceived **advantage** of the licence fee was the absence of commercial pressures on BBC. At the superficial level this meant lack of advertising during and between programmes. Some who considered the issue more fully believed that the licence fee also enabled the BBC to maintain its independence and the quality and range of its programmes

The key **disadvantage** apart from the issue of payment was the link the licence fee is believed to create between the BBC and government (whichever government is in power). It was often seen as another centralised tax which is not ring-fenced and which is regressive; and some imagined it meant a political bias towards the government, or some more subtle influence.

When alternative sources of funding were considered, **advertising** was rejected by many, both BBC fans and some who did not approve of the licence fee, on the grounds that it would diminish the viewing experience and mean the loss of the BBC's distinctiveness. Many others, especially heavy TV watchers and multi-channel users, said they would be happy for the BBC to take advertising and saw no risk of the BBC losing its values or quality.

Subscription was probably the preferred alternative for those who objected to paying the licence fee. It addressed the complaint that the public has no choice about paying, but there was little understanding that

a PSB broadcaster should be able to reach everybody, and that subscription would prevent this.

Programme sponsorship was seen by BBC loyalists as more palatable than advertising if alternative funding had to be found, because it would be less intrusive. Against this there were expectations that commercial pressure to maximise ratings would result in mass-market programmes.

Government funding through **central taxation** was considered fairer than the licence fee because the better off would pay more than low earners, but prompted concerns about greater government influence and resistance to 'yet more tax'.

8. **BBC's commercial activities**

The BBC's commercial enterprises were generally accepted and occasionally applauded – it was seen as sensible for the BBC to maximise the return from its investment in programmes. Those who were better disposed to the BBC assumed earnings were ploughed back into making programmes; others believed the money was appropriated by government or possibly creamed off by corrupt 'people at the top'.

9. **Accountability, regulation and governance**

Accountability was not regarded as a major issue, though its ramifications were rarely thought through or considered fully. The general feeling was that the BBC should be responsive to its viewers' and listeners' concerns. Few felt the BBC is directly accountable to them or expected responses to any complaints they might have, but this did not seem to trouble them.

There was little awareness or understanding of how the BBC is regulated, nor of the role of the governors. Most members of the public simply seemed to believe that somehow the BBC's output is scrutinised and controlled to ensure that it meets basic standards of taste and decency, and that it delivers what is required to get its licence fee funding.

Many respondents said they wanted to know more about how the BBC is regulated and wanted greater transparency in relation to accountability,

particularly about the role of the governors. In reality it seemed likely that this demand was probably overstated: given that accountability was not regarded as an important aspect of the BBC, and that people apparently had little interest in how it is regulated, it may well have been that respondents exaggerated their appetite for greater accountability and transparency in response to prompting in the research situation.

B. CONCLUSIONS

Overall

1. The BBC is regarded as a national institution and as such attracts loyalty and disapproval in almost equal measure: everyone feels they are entitled to make comment on it.
2. Whereas other broadcasters are assessed mainly on their output, attitudes towards the BBC are moulded by image factors. Among the image factors that in the eyes of the general public differentiate the BBC are beliefs that...
 - the BBC is not just a commercial organisation pursuing its own ends but is supposed to serve the public, or the public interest and so transcends 'commercialism'
 - the BBC is run by people who (feel entitled to) make judgements about what is 'good' and do not simply rely on what is popular
 - we have to pay for the BBC even if we do not like its output and would be happy to do without it; this is unreasonable
 - there is an elitism and arrogance attaching to an organisation that thinks it knows better than 'the market'

The BBC's Public Service Broadcasting role

3. This research suggests that the public as a whole does not have a clear conception of what Public Service Broadcasting is and are guided in their views by what they think about other issues.
4. BBC loyalists tend to see the essence of PSB as not having advertising, and not being committed to maximising its audience – almost a reflection of its non commercial status
5. People who resent the BBC have a more negative take on PSB and think they recognise in it a bias against sport and 'entertainment', and there being nothing they want to watch

BBC output

6. The sorts of issue outlined above tend to overlay and obscure opinion on the service that the BBC provides.
7. When explored and prompted, the BBC's output is generally considered at least adequate and at best outstanding. It offers something for most people (especially TV) and appeals to large audiences and minority interests
8. Other elements of its output are less salient but in our view are important both in their content and their expression of intent to cater for all, e.g. Radio 4, Radio 1, the BBCi website.
9. There are concerns in the devolved administrations and among ethnic minorities that it does not cater for or represent them as they wish, and that if any broadcaster should do this, it is the BBC.
10. In its tone and style of delivery the BBC comes across to some sectors of the public as less accessible than other broadcasters; it has a formality and soberness about it that does not engage them.
11. Among those who are more supportive of the BBC there are concerns that it is increasingly inclined to promote itself via programme trailers, and publicising its other services. They see this as diminishing the viewing/listening experience and as an unfortunate sign that the BBC is beginning to ape commercial broadcasters.

The licence fee

12. Feelings about the licence fee affect opinion about virtually every aspect of the BBC; it attracts strong views, positive and negative, rational and emotional, though these are probably as much an expression of feelings about the BBC's role as they are beliefs about how it should be funded.
13. The minority who feel strongly that the licence fee should stay see it as a system that appears to work and, perhaps more importantly, as a means of retaining the BBC's status as a publicly funded, non-commercial broadcaster for and paid for by the people.

14. Those who feel (equally strongly) that the licence fee should go focus on the fact that it seems unfair because no one has the choice not to receive the BBC. Underlying this is an implicit rejection of publicly funded broadcasting, which these people feel interferes with what is otherwise a simple, transparent system of choosing what you want and paying for it.
15. The overall impression, taking into account the many who grumble about the licence fee but do not see any viable alternative, is of general acceptance of the licence fee by default.
16. On the basis of this sample of responses, none of the other funding options stands out as an obvious alternative. Subscription attracts most interest and is the preferred solution among those most critical of the licence fee, but is regarded as unworkable by many, especially BBC loyalists.

Accountability and regulation

17. Given the apparently low salience of governance, accountability and regulation, there is no strong case for publicising aspects of these, but there is probably value in making them more transparent to those who are interested.
18. Even if it were not widely accessed, the availability of information about how the BBC is governed and regulated would probably be appreciated. This would appease those who say they want to know more and give a signal to others that the BBC really is open and accountable.
19. In particular there may be interest in:
 - the governors – who they are and how they are chosen
 - the governors' role and its balance between managing and regulating the BBC
 - financial issues, particularly the way money is raised from commercial activities and how it is used

The future

20. Taking into account perceptions of the most significant components of the BBC's public face and output, issues which in our view seem most deserving of consideration in relation to the BBC's future are:
- how the value of public service broadcasting is communicated, and the BBC's role in meeting this remit
 - how the licence fee is described and expressed as the source of BBC funding
 - the inclusivity of its output, especially in relation to devolved administrations and ethnic minorities
 - how its digital output is used, particularly the possibility of segmentation of its content by channel or station

C. RESEARCH BACKGROUND AND OBJECTIVES

The BBC is established by Royal Charter and financed by a licence fee. Each Charter tends to last for about ten years and is reviewed near the end of its lifespan. The current Charter will come to an end in 2006 and is to be reviewed in 2004. The Department for Culture, Media and Sport (DCMS) is responsible for the upcoming Review.

Since the last Review a number of major developments have taken place in the broadcast world, particularly in relation to TV. There has been a proliferation of channels via satellite and digital technology, interactive TV is growing and links to the internet are now in place. There have also been substantial changes to the BBC's offer. The underlying outcome for the general public is ever-increasing choice in what they watch and listen to, and how they watch and listen.

The government is committed to maintaining the BBC's independence but is keen that it should remain in step with public needs and expectations. There will be a public consultation exercise in 2004 to help inform the next Review and subsequent Green Paper. The consultation will consider:

- the BBC's value as a public-service broadcaster
- how it can adapt to changes in technology and culture
- the quality of its services
- whether it should run commercial services
- how it is paid for
- the organisation and management of the BBC
- the governance, regulation and constitution of the BBC
- its accountability to the public and parliament

Qualitative research was commissioned as a component of the public consultation.

Specific objectives of the qualitative research were to explore the following:

- perceptions of what the BBC should deliver as a public-service broadcaster
- attitudes towards the BBC's output across all the media in which it operates, specifically its output that is distinct from other broadcasters and whether that distinctiveness is worth what we pay for it
- awareness and appreciation of the range and quality of BBC services, both overall and individually
- the public's views on the licence fee
- feelings about the role the BBC plays in public life, particularly in relation to...
 - its image, both in the UK and abroad
 - the distinctiveness of its role
 - the range of communities it serves
 - its commercial services
- perceptions of the balance of BBC programming in relation to national, regional and local issues
- views on how the BBC should be regulated and made accountable

In addition the research briefly explored patterns of media consumption to help place respondents' views of the BBC in context. The following areas were examined:

- TV viewing and radio listening behaviour – when watched/listened, for how long, channels/stations used and preferred

- awareness and perceptions of other channels and stations, both as broadcasters and as entities and brands
- comparison between other channels/stations and media organisations and the BBC
- feelings about advertising on television, as a point of comparison with other channels
- feelings about the BBC's online service, both in itself and as a component part of the BBC's offering and character

The research did not set out to be prescriptive about any future offering from, or strategic direction of, the BBC. Instead, it sought to explore the views of a cross-section of the public to generate a comprehensive picture of current perceptions and feelings. Respondents were, however, asked for their views on the BBC's future to look at expectations and boundaries for the organisation. Areas for exploration were:

- the content, scope and nature of BBC programming in the future, and expectations of changes from where it is now
- the future role of its different channels and stations, and access to these
- the growth of digital TV (and radio) and the BBC's role in providing for and taking advantage of this

D. RESEARCH METHODOLOGY AND SAMPLE

1. **Overview of the research**

This study comprised a total of 34 group discussions and 12 depth interviews with members of the public and sub-groups across the UK.

The core of the study was 30 group discussions with adults, each lasting in the region of two hours. Four of these sessions were conducted with respondents from ethnic minority backgrounds. All groups contained a mix of terrestrial-only and Sky viewers, and there was good representation of Freeview and cable viewers across the sample.

There were several other smaller components of the sample. Four group discussions lasting 90 minutes were conducted with 12-15 year olds. Twelve one-hour individual depth interviews were conducted with people with disabilities (three), people involved in lifelong learning (three) and primary and secondary school teachers (six).

2. **Topic guide and stimulus material**

A copy of the topic guide and a list of the stimulus material used in the groups and interviews are appended to this report.

In terms of topic coverage, respondents were taken through the issues in approximately the order in which they are covered here, with occasional variations and detours according to individual preferences, and/or a focus on subjects of concern to minority sectors of the sample.

The stimulus material was used to prompt people on certain issues (but only after their unprompted views had been explored) and to help them express their views and feelings on particular topics.

3. **Notes on the sample**

Age

The sample focussed on adults (16+) and incorporated five age/lifestage segments for this audience, as follows.

16-20 single, no children
 21-30 single/partnered, no children, not living with parents
 31-45 partnered, children under 16 at home
 46-60 partnered, with or without children at home
 61-75 empty nesters

The under-16s were split into two age bands, as follows:

12-13, living at home with parents/family
 14-15, living at home with parents/family

Social class

Social class was determined by occupation of head of household. The sample was divided between socio-economic groups AB, C1 and C2DE. Fieldwork was distributed roughly equally between these three groups.

Gender

There was a broadly even representation of men and women in the sample. Among those aged 16 and over, groups were mixed sex. The exception to this were the groups with Asian people (see below). The groups with 12-15 year olds were also segmented by gender.

Employment status

Among those of working age there was a mix of people in employment, non-working partners of people in employment and those who were unemployed and claiming benefit. Those on low incomes (unemployed people as well as low-paid workers) were represented. In each of the C2DE groups among people of working age, there were two respondents on Jobseekers Allowance and/or Income Support. In each of the C2DE groups with 61-75 year olds, there were at least four respondents who were receiving the state pension but had no other form of income.

Ethnic minorities

Four groups were convened with people from ethnic minorities: two with respondents from African/African-Caribbean backgrounds and two with

respondents from Asian backgrounds. In the remainder of the sample ethnicity was allowed to fall naturally.

Disabled people

Although people with disabilities were not excluded from the groups, we thought it sensible to include a small number of individual depth interviews with this sector. Three interviews were conducted.

Lifelong learning

Given the BBC's educational output we included three individual interviews with adults past the normal education age who were currently engaged on courses. As with disabled people, this sector was not excluded from the groups, but we felt it should also be addressed individually to explore any particular viewpoints.

Geographical areas and locality

The research was conducted in seven broad areas – London/South East, the South West, the Midlands, the North of England, South Wales, Scotland and Northern Ireland. The research included urban and rural locations. Overall, approximately one fifth of the general public fieldwork took place in rural areas; the remainder was in urban areas.

More specific locations were:

- London/South East: Balham (South West London), Purley (Surrey)
- South West: Wells (Somerset)
- Midlands: Wolverhampton and Sutton Coldfield (Birmingham)
- North of England: Newcastle-upon-Tyne and Otley (Leeds)
- South Wales: Bridgend (Cardiff) and Kidwelly (Carmarthenshire)
- Scotland: Glasgow and Edinburgh
- Northern Ireland: Newcastle (County Down) and Derry

Welsh speakers

Since part of the BBC's regional output is aimed at Welsh speakers, they were included in our sample. Two of the groups in Wales took place with people who can and do speak Welsh. We did not moderate groups in Welsh, but respondents were asked at the recruitment stage if they were happy for the group to be conducted in English.

Gaelic speakers were not included in the sample because it was felt that there are too few to recruit easily to research groups; and because there is not a dedicated Gaelic language TV channel.

Television viewing behaviour

The adult sample was split by approximate number of hours of TV watched every day. There were three segments, labelled light, medium and heavy viewers.

Light viewers watched no more than one hour a day, but at least five hours a week. Medium viewers watched between one and three hours a day. Heavy viewers watched at least three hours a day. The sample was divided roughly equally between these levels of viewing.

Channels accessed and used

Everyone in the sample had a TV at home which they watched. All respondents also watched BBC1 or BBC2 for at least half an hour each week. There was a mix in all groups of those with access to the five main terrestrial channels only and those with multi-channel access. There was also representation of Freeview and cable TV across the sample.

Radio listening

In all adult groups at least two respondents listened to the radio for half an hour a day or more and at least one listened to a BBC national station.

Internet access

At least two respondents per group and at least half the disabled and lifelong learning samples had internet access at home.

Attitudes to the BBC

A range of views about BBC programmes and the licence fee was represented both across the sample as a whole and within each group discussion. Respondents were asked which of 10 statements best described how they felt about BBC TV; these statements are appended.

E. DETAILED FINDINGS

1. **Relationship with broadcast media**

1.1 Television

Across the sample, respondents' perceptions and experience of broadcasting were dominated by television. The large majority also listened to the radio, and for a minority radio was more salient and more emotionally important than TV. But in most cases television played a more significant role in respondents' daily lives and was the object of greater affection and regard.

For many, the relationship with television was close and important. Watching television was responsible for a significant proportion of respondents' leisure time, both among heavy viewers and also some lighter viewers who led busy lives but still watched TV when they could. As well as providing entertainment for the individual, television was valued for the opportunity it gave for shared experience, whether with partners, family or friends. It was also evident that channels and programmes had an emotional importance and acted as markers of self-identity.

Although television was important to everyone in this sample, the nature of their relationship with TV varied, often according to the amount watched. Lighter viewers tended to be a little more discerning about what they chose to watch, sticking to programmes they knew and liked or scanning the schedules for something worth watching. Having less time available for watching television, or choosing to limit their viewing, they wanted to spend this time watching something they would really enjoy, and tended to be demanding in their standards. These viewers often valued specific programmes highly and made sure they never missed them; for example soap operas for women and sport or comedy for men, along with news programmes and drama serials.

Heavier viewers, especially those with access to multi-channel television, were more likely to use TV as a backdrop to their daily lives. The 'main' television set in the living room or kitchen was reportedly often switched

on for most of the day, whether or not anyone in the household was actively watching it.

At certain periods in the day, these people would be more likely to watch parts of programmes or flick through channels than to dedicate themselves to watching an entire programme, and were perhaps less concerned with quality. However, they tended to be more demanding of certain types of programming, for example soaps or dramas, or of certain slots in the day, typically the evening, when they would dedicate more time and attention to the television. Given that they spent a good deal of time watching television, heavier viewers were often more sensitive to repeated content, whether the reshowing of 'old' programmes or repeated airing of new content in several time-slots.

1.2 Radio

For most respondents, their relationship with radio was much less personal than with TV. It was notable that radio was rarely mentioned without prompting in the context of 'broadcasting', and, when it was raised by the moderator, respondents tended to discuss their preferences briefly and then move on. Radio tended to be talked about in functional terms, as a substitute for watching television when this was not possible or practical: in the car, in the kitchen, while getting up in the morning.

Preferences with regard to radio stations tended to be relatively fixed, with most reporting a very small repertoire of one or two stations. Listening 'occasions' also tended to be restricted to certain time slots or programmes. Unlike with television, there was very little evidence of people flicking through stations to find something to listen to, or of looking at schedules to identify particular programmes they wanted to watch. Instead, habit seemed to be the most important factor determining choice.

Radio stations were also less likely to generate a close emotional relationship than television channels, and tended to be described in quite rational terms. Similarly, there was much less tendency to be critical of radio stations; people were less demanding in terms of content than with television, and less likely to feel resentful if their preferred station

broadcast a programme or a piece of music they did not enjoy. In most cases, opinions about BBC radio stations contributed little to overall perceptions of the organisation.

There were some exceptions to this trend, particularly among the older and ABC1 sections of the sample. These sectors tended to be regular listeners of Radio 3 or 4 who remained fiercely loyal to these stations and set very high standards in terms of output. They felt a strong emotional affinity with their preferred station and could talk eloquently about its personality and values. Perceptions of Radio 4, in particular, were important for these respondents in informing overall views of the BBC.

1.3 The internet

Perceptions of the BBC's internet service will be discussed later in this report (section F below). It is worth noting at this point, however, that websites were not thought to constitute a part of 'broadcasting', either with or without prompting from the moderator. Some of these respondents were not using the internet at all. Others used the internet in a very different way from television and radio, and saw it as performing a different function. Whereas television and radio were regarded as passive entertainment, using the internet was seen as a more active pursuit, typically for specific purposes.

It is also worth noting, however, that the division between television and internet was beginning to be blurred by the availability of interactive services via 'the red button'. Although most were not using these, or were using them only very occasionally and in a limited way, most were aware of the existence of this rather grey area.

2. **Variations in the sample**

2.1 Delivery technology

The research sample comprised a mix of television delivery technologies: the five main terrestrial channels only (four for those without C5 reception); and those with mult-channel access, including satellite and digital satellite; cable and digital cable; and Freeview. There was also

some cross-over in the case of viewers with access to the five main terrestrial channels only who had once subscribed to multi-channel television but had cancelled their subscription because they had not used the service enough to justify the cost.

“I gave it up a year ago and I don’t miss it as it was all repeats.”

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

2.1.1 *The five main terrestrial channels only*

Those with access to the five main terrestrial channels only tended to bracket cable and satellite television together, often referring to all multi-channel TV as ‘Sky’. Most had little detailed awareness of the differences in content between the two technologies, unless they had once subscribed to multi-channel TV themselves.

The majority had made a conscious decision not to subscribe to multi-channel television, and some regarded themselves as unusual on account of this choice – they were the exception among people they knew. Reasons cited for not subscribing to multi-channel television tended to revolve around perceptions of cost and quality. Some considered the cost of subscriptions too high in absolute terms, while others thought the cost was not justified either by the amount of time they spent watching television, or by the quality of the programmes available. Even those who were critical of the quality of the five main terrestrial channels in content tended to believe that programmes on Sky and cable were worse.

Among some of those who had decided against multi-channel television on principle, there was a perception of satellite and cable as the preserve of lower social classes (C2DEs) and undiscerning viewers who watched a lot of television. Lighter and more ABC1 respondents in particular were keen that they should avoid attracting these negative associations themselves.

Is there a typical Sky viewer?

“Couch potato.”

Group 25: C1, 46-60, light TV watchers, Scotland

A small minority of those with access to the five main terrestrial channels only rejected multi-channel television because of concerns that it was dominated by media moguls.

2.1.2 *Multi-channel viewers*

There was little apparent difference in viewing habits and attitudes between satellite and cable viewers. Both categories included some of the heaviest viewers in the sample, although there were also plenty of viewers among those with access to the main terrestrial channels only who watched a great deal of television, and multi-channel viewers who watched relatively little.

For many multi-channel viewers, the main perceived benefit of multi-channel television was the choice and variety available. This was particularly true among heavier viewers who spent a lot of time flicking between channels to find something to watch. For these people, having multi-channel access meant that there was 'always something on'. In recent years, this element of choice also extended to different ways of watching the same programme, particularly in the context of sport.

"Their [Sky Sport's] coverage, they've got so many different camera angles. With digital TV you can press the red button and listen to two supporters commentating, or watch a player profile. There's that many options you can choose from."

Group 25: C1, 46-60, light TV watchers, Scotland

"The good thing about it is there is probably always something on that you would watch. If you just tune onto normal TV you flick through all the channels and it's all crap, but on Sky there is probably something somewhere you can go and watch."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

Others with multi-channel access, typically the lighter viewers, were dismissive of the quality of programmes available on satellite and cable channels. Some attributed their reasons for having multi-channel TV to another family member: a husband wanting access to the sports channels, children wanting MTV. In these circumstances, subscribing to multi-channel television was regarded almost as a distress purchase.

A minority, particularly in the devolved administrations, reported that subscribing to cable was only to access some of the main terrestrial channels, namely Channel 4 and Channel 5.

2.2 Children and young people

As with adults, television tended to dominate young people's perceptions of broadcasting, although most also listened to music radio on local or national stations.

All but a minority of the younger sample claimed that they were able to watch broadly whatever they wanted on television. Many had TV sets in their bedrooms, or could watch another set somewhere else in the house, and reported little parental influence over their viewing habits.

"If there is something on that my brother and sister are watching and I want to watch something else, then I will go up to my mum and dad's room and watch what I want to."

Group 31: ABC1, 12-13, male, medium TV watchers, South West

Others did not have the luxury of their own television set, and tended either to watch the same programmes as other members of the family, or to watch at different times of day.

In terms of the type of content preferred, certain programmes were popular across the spectrum of young people interviewed, from 12 to 20. These tended to be soap operas, particularly *EastEnders*; comedies such as *The Simpsons*; and reality TV shows such as *I'm a Celebrity*, *Get Me Out of Here!*. Otherwise, the repertoire enjoyed by the youngest viewers, aged 12 to 13, represented a cross-over from children's to adult television. While some continued to watch children's programmes and cartoons on CBBC and the Disney Channel, others had progressed to more adult-oriented films, comedy and drama.

Older teenagers enjoyed comedy, particularly *The Office* and American comedies such as *The Fresh Prince of Bel-Air* and *Friends*, along with general entertainment programmes such as *Footballers' Wives*.

Music television channels were popular with everyone in this sample who could access them, both for the music itself and also for programmes such

as *Jackass*. These channels provided a default viewing choice when there was nothing else to watch. Music radio was also popular, particularly among the older teenagers in the sample. Many listened to Radio 1 or to local music stations: Capital, Heart, Metro and Beacon were all mentioned.

The three groups of AB 16-20 respondents were a little more discerning than other teenagers in the sample. They were dismissive of much of the television content available to them, and claimed to gravitate towards better quality programmes such as the higher class comedies and more serious news or comment programmes such as *Newsnight* and *Taking Care*.

The tendency among young people was to think in terms of television programmes rather than channels, though most tended to stick to a fairly fixed channel repertoire. Favourite channels among older teenagers included Channel 4 and E4, which were regarded as more youth-oriented than their competitors. MTV, Five, Living TV and Sky One were also popular. ITV tended to be less popular among older and more ABC1 teenagers, who regarded it as mainstream and middle-aged.

The youngest respondents were more likely to watch BBC and ITV than others; some were still watching TV with their parents, who reportedly preferred these channels, and had not yet formed their own tastes and moved on to 'older' channels such as Channel 4.

"BBC is by far the best out of the five."

Group 31: ABC1, 12-13, male, medium TV watchers, South West

Respondents who had made this transition were more likely to dismiss the BBC channels as geared towards younger children, with nothing appropriate for their own age group.

"BBC is for younger children. When you come home from school there is nothing much for us."

Group 33: C2DE, 12-13, female, medium TV watchers, Scotland

"It is good for the children but not for our age group."

Group 1: AB, 16-20, light TV watchers, London/SE

Otherwise, young people's views of the BBC largely reflected those of the adult sample (see below section E), although attitudes appeared less deeply held. Some older teenagers had a reasonable grasp of the reasons for and implications of the BBC's funding arrangements, but most had only a hazy understanding of the BBC's not-for-profit status. For the majority, the only significant manifestation of the BBC's difference from other channels was the lack of advertising, which was generally welcomed.

"I don't mind them, but when they go on a lot... There is too much on Channel 5."

"It ruins your programme. You are just getting into it and then an advert comes on and ruins it."

Group 31: ABC1, 12-13, male, medium TV watchers, South West

"The adverts are rubbish, you know, 'Buy this and it will make you look better', stuff like that."

"I hate it when you are watching a movie and the news comes on halfway through. Then you have to go to bed and you miss the end."

Group 33: C2DE, 12-13, female, medium TV watchers, Scotland

2.3 People with disabilities

Television consumption and preferences among the three respondents with disabilities were broadly similar to the general public sample. All three respondents were heavy television viewers, particularly those with more debilitating conditions. These respondents were also more likely than others to regard television as a basic need in their daily lives. Due to the difficulty of getting out of the house, their lives would have felt emptier without the entertainment provided by television.

One liked to watch medical programmes in addition to more general output, and attributed this interest in part to his condition. He felt that more of this type of specific programming was available on Sky than on the BBC channels.

"I can't honestly say there are any medical programmes or anything like that [on the BBC], you have to roam through the gallery of Sky to find programmes like that."

Depth 2: 31-45, male, disabled, Midlands

Otherwise, the attitudes of people with disabilities were broadly in line with those of other heavy television viewers.

3. **The broadcast landscape – TV**

3.1 Overall picture

The general impression across the sample was that television programming, and the public's viewing habits, have undergone a huge change over the past 10 years or so. The main change, or catalyst for change, was thought to have been the continuing expansion of satellite and cable television, and now the introduction of digital television, which have exploded the marketplace and resulted in a proliferation of channels.

To a large extent, the five main terrestrial channels and multi-channel television were perceived as separate entities. Most still regarded the main five terrestrial channels as clearly differentiated from the hundreds of others, whether by nature, provenance or delivery technology. There were signs, however, that the conceptual boundaries were beginning to blur. In part, this was because the penetration of multi-channel television had increased, so that it was now seen as almost the norm to have satellite or cable, and to watch the main terrestrial channels via this medium. Perceptions had also been shifted by the entry of the main terrestrial broadcasters into the digital realm, with the launch of ITV2, ITN News, E4, and the new BBC digital channels.

The increasing fragmentation and commercialisation of the television marketplace was thought by some to have contributed to or at least mirrored a perceived fragmentation of social cohesion. Although many welcomed the increased choice provided by the proliferation of channels, others thought that this, along with the rise in the number of television sets in a typical house, had contributed to an increase in the amount of time spent watching television. As well as spending more time watching TV, there was also a sense that some people, particularly the young, were now watching television more promiscuously: attention spans were shorter and viewers were watching small portions of programmes rather than entire shows, flicking through channels in search of instant entertainment.

A few lamented that ‘event TV’ was essentially a thing of the past. While there were still a few programmes that attracted large audiences and became the subject of discussion and debate, this happened increasingly rarely. Rather than acting to bring people together as a family or as a nation, watching television was thought to have become an increasingly solitary activity.

Within this landscape, the stature of any single channel or broadcaster, including the BBC, had been necessarily diminished. Individual channels could no longer command large audiences, except on rare occasions; viewers watched a wider range of channels and felt less affinity for each one; and the same or similar programmes were shown or repeated on a variety of channels. The result was that viewers were not always aware of which channel they were watching at any given time.

“Sometimes I don’t even know which channel I am watching.”

Group 22: AB, 21-30, light TV watchers, Scotland

At the same time, many respondents also perceived a general decline in the quality of UK television output, including that of the BBC. Some, typically those with access only to the five main terrestrial channels, lighter multi-channel viewers and BBC loyalists, blamed this on the proliferation and commercialisation of channels. They tended to perceive the cable and satellite channels as showing the worst quality programming, particularly the multitude of channels outside the ‘core’ Sky brands.

“I think the terrestrial TV channels are good but some of the cable channels are a bit rubbishy.”

“So many channels are just filled up with American garbage.”

Group 22: AB, 21-30, light TV watchers, Scotland

“Chances are that if I am watching something meaningful, if you like, it will be on terrestrial TV.”

Group 22: AB, 21-30, light TV watchers, Scotland

However, the same respondents also often lamented declining standards on terrestrial television, blaming this partly on perceived aping of the satellite and cable channels. One of the most common complaints was of a significant increase in the number and frequency of repeats. New programmes were repeated soon after they had originally been shown,

while nostalgia for old favourites such as *Only Fools and Horses* and other comedy classics appeared to be being eroded by over-exposure.

"[It's got] to the point where I'm not actually watching regular TV because it just seems to be repetitive, Holidays From Hell, all just reality things that you get a bit sick of."

Group 13: AB, 31-45, light TV watchers, Northern England

"I think it's gone more towards this reality cheap TV. Less towards drama, which is expensive, which might be the reason you don't get as much of it. And if it is on it's repeats, endless repeats of Frost."

Group 13: AB, 31-45, light TV watchers, Northern England

Another complaint was that the quality of new programmes had declined over the past few years. Older respondents in particular harked back to popular programmes from the past, particularly in the fields of comedy and drama, lamenting that 'they don't make them like they used to'. There was a perception that the 'great' BBC triumphs of the past would not be commissioned now, or would not be made to the same quality.

"They are not like they used to be...I like things like the Forsythe Saga, but they don't do things like that any more."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

"The quality isn't as good as it used to be, certainly the presenters and the appeal that they have. It's not like the old days."

Group 13: AB, 31-45, light TV watchers, Northern England

Similarly, the main terrestrial channels were thought to be losing their identity in the face of proliferation. Channel 4 was sometimes thought to have lost its way (see section 3.3 below); BBC2, while still praised by many for its cultural and comedy output, was thought by others to have made way for gardening and house make-over programmes. Overall, it was not uncommon for respondents to believe that the schedules these days consisted of a few jewels surrounded by cheap, unimaginative dross.

That said, many respondents still found much to enjoy on terrestrial television. Depending on their tastes, viewers could still find high quality and entertaining soap operas, reality television, dramas, comedies, news and documentaries. Home grown successes such as *The Office*, *The*

Blue Planet and *Pop Idol* were cherished, while some American imports were also much-loved.

Heavier viewers with access to multi-channel television were more likely to praise the quality and range of programmes available to them through satellite and cable TV, compared with the main terrestrial channel offering. For many of these viewers, having access only to the five main terrestrial channels was now unthinkable. Satellite and cable had opened up a whole new world of channels and infinitely expanded the viewing choice. For these viewers, one of the key benefits of multi-channel television was that, in spite of some poorer programmes, there was always something to watch, somewhere.

“If you have just got the five channels then it is not so good.”
“You can always fall back on the music channels. If you’ve got cable then within about half an hour, there will be something on.”

Group 23: AB, 16-20, medium TV watchers, Scotland

“Usually there’s something better on Sky isn’t there, always something good on Sky One.”

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

Multi-channel loyalists also tended to prefer the style and tone of satellite and cable channels compared with terrestrial television. They were regarded as more glossy, more high-tech, more full-on than the five main terrestrial channels – they took more risks, felt less bound by out-of-date concerns about taste and decency, and were more responsive to what their viewers wanted.

“I think that the television should be more like Sky.”

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

Overall, many still thought that the standard of British television provision was broadly acceptable, whether because of home-grown programming or through the provision of American imports. In particular, most thought that British television probably compared favourably with TV overseas, and reflected relatively well on the country as a whole. However, there was a pervading sense that the quality of UK television is in definite and perhaps irreversible decline.

3.2 Most salient channels and broadcasters

Although respondents in this sample collectively watched a huge variety of channels on an occasional basis, the core repertoire of favourite and most-watched channels remained relatively small. Of the terrestrial-analogue channels, BBC1 and ITV were far and away the most salient channels for the majority of the sample. For many with access only to the five main terrestrial channels, particularly those in their 30s and above, these were the default channels, the most likely to be showing something of interest.

Usage of BBC2, Channel 4 and Five was a little more patchy, but each had key programmes that ensured the majority watched them on occasion. Five was rarely cited as a default channel, but BBC2 and Channel 4 were popular among more ABC1 and younger audiences respectively, and were sometimes the favourite channels for these viewers.

The core channel repertoire for viewers with access to multi-channel television was more disparate. The channels apparently watched most often included:

- Sky Sports (all variants)

What do you associate Sky with?

"I got it because of the sport. Golf is on Sky as well. I like cricket, and that's on Sky."

Group 25: C1, 46-60, light TV watchers, Scotland

- Sky Movies (all variants)
- documentary channels, mainly the Discovery group and history channels
- news channels, mainly Sky News, CNN, ITN news and BBC News 24

"I don't have it but the friends of mine that do...have Sky for the sport."

Anything else?

"The news is excellent on Sky."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

- entertainment channels, mainly Sky One, E4, Living TV
- music channels, among younger people, especially MTV

3.3 Characterisation of main channels and broadcasters

3.3.1 *BBC (overall views)*

Detailed views of the BBC are given in section E below. In summary, the BBC was regarded as the original broadcaster, particularly by older people who had grown up with it throughout their lives. It was regarded as the national broadcaster and was strongly associated with Britain and Britishness, particularly compared with Sky. It was seen as the public channel, whether this carried overtones of public service broadcasting or signified a freedom from advertising and commercial interests.

Perceptions of the BBC as a whole were heavily dominated by BBC1, since for many people this was their only significant interface with the BBC.

“You always think of the BBC as channel 1 and you forget the rest of the channels.”

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

The historic image of the BBC was also hugely important in shaping perceptions. At best, the BBC was characterised by high quality, mass appeal television, still a cut above the other broadcasters. At worst, it was regarded as largely redundant, having been overtaken and outclassed by Sky.

3.3.2 *ITV*

Overall, ITV was regarded as a mainstream, popular channel broadcasting a variety of family-oriented programming aimed at a mid-market audience. Many regarded it as the commercial equivalent of the BBC, and its output was often directly compared with that of BBC1. Both were thought to carry a similar range and type of programming.

“[Channels] one and three are pretty much the same, with soaps and things.”

Group 33: C2DE, 12-13, female, medium TV watchers, Scotland

"The news is easier to understand on ITV. It has regional news and it is a more friendlier atmosphere."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

What about ITV?

"It is a family channel"

"Not a risk taker"

"Everyone will tune into ITV"

"You wouldn't get a shock on ITV"

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

Many in the C2DE sample regarded ITV as the main terrestrial channel for them. It was thought to screen a greater variety of mainstream family entertainment than BBC1, and its tone and style was considered more accessible and informal.

"I like the dramas, they do good dramas, like Midsomer Murders and the things with Robson Green."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

Some respondents felt that the quality of ITV programmes, particularly in the field of drama, had now overtaken that of the BBC. For some, high quality dramas such as *Prime Suspect* would once have been associated with the BBC, but were now more often to be found on ITV.

What do you associate with ITV?

"A lot of good dramas."

Group 22: AB, 21-30, light TV watchers, Scotland

"I think they [the BBC] need to do more drama because there have been quite a few good dramas on ITV. I was sure I was watching BBC and then the advert comes on!"

Group 13: AB, 31-45, light TV watchers, Northern England

Others, particularly BBC fans and those in the more ABC1 audience, claimed that they rarely or never watched ITV. They considered it too C2DE for their tastes, essentially a cheaper and trashier version of BBC1.

"That [picture-sort image] there is ITV. Cheap and nasty."

Group 25: C1, 46-60, light TV watchers, Scotland

"ITV is trashy, kind of rubbishy stuff...I think it's really appealing to the masses, like tabloid television. Whereas I think BBC1 is more serious and BBC2 is even more serious."

Depth 9: primary school teacher, Northern England

"If you look closely you can see the joins!"

Group 1: AB, 16-20, light TV watchers, London/SE

3.3.3 Channel 4

Opinions of Channel 4 tended to polarise depending on whether respondents were regular viewers of the channel. Among occasional or non-viewers, Channel 4 was regarded as having lost its way somewhat. Although some of its programmes were generally thought to be worth watching, it had little sense of an overall or consistent personality. Instead, it tended to be associated with specific television categories or programmes: *Big Brother*, American comedy (*Friends*, *Frasier*); old films in the afternoon; high quality news at 7pm. Those who were not regular watchers of Channel 4 found it difficult to characterise a typical viewer.

"I don't think I've ever heard anybody saying 'I watch Channel 4'. I think it's specifically for a certain kind of programme."

Group 25: C1, 46-60, light TV watchers, Scotland

Regular watchers of Channel 4 tended to be aged between mid-teens and late 20s. Many respondents within this age bracket regarded Channel 4 as more youth-oriented than the other main terrestrial channels, and more likely to show programmes they wanted to watch. They considered it young in style and feel, urban and slightly edgy, and able to fill the gap between teenaged and 'middle-aged' audiences.

*"There is normally something easy to watch on Channel 4."
"It has probably changed since Friends came on to Channel 4, as when I was growing up it was aimed at the older generation."
"It never used to be that good, but now I think it is a lot more visible that it used to be."*

Group 22: AB, 21-30, light TV watchers, Scotland

Historically, Channel 4 was regarded as the channel most inclined to show daring, innovative programmes and take risks. To some extent this was still thought to be true, and could be regarded as a positive or a negative quality depending on taste.

"They touch subjects that other channels would be afraid to. There's different ones on. There was one....about sex change, do you remember that?"

Group 29: C1, 21-30, light TV watchers, Northern Ireland

What about Channel 4?*"Outrageous"**"They are a brave channel"**"Up to date."**"They take risks."*

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

More conservative viewers tended to associate it with minority programming and unconventional content.

"I think if you're gay you need to watch Channel 4."

Group 25: C1, 46-60, light TV watchers, Scotland

Others felt that this reputation for screening content that other channels would not was less deserved now than in the past. There was a feeling among some that Channel 4 was becoming more mainstream, and its identity less certain.

"Channel 4 has some good things but it also has some rubbishy things as well. So it's in between ITV and BBC on the scale."

Depth 9: primary school teacher, Northern England

Others complained that Channel 4 was starting to go C2DE and become more like Five. Whereas once its more daring content had been interesting and thought-provoking, these days its output was trashy and voyeuristic.

3.3.4 Channel Five

If anything, Five was thought to be moving in the opposite direction to Channel 4, and becoming more ABC1 and respectable.

For some, Channel Five was still strongly associated with soft pornography and low-budget entertainment.

"[Five] is just cheap and tacky...It has its moments, but overall it is quite low-budget."

Group 22: AB, 21-30, light TV watchers, Scotland

"Films and programmes like Britain's Worst Driver. It is very poor. A lot of programmes with Steve Penk in. It is very low budget."

Group 1: AB, 16-20, light TV watchers, London/SE

But many others had increasing respect for its range of high quality films and documentaries. In contrast with its soft porn image, a few praised the Five practice of providing an age rating and content warning before films, where appropriate. Although some of its entertainment programmes were still considered low budget and poor quality, others, such as *CSI: Crime Scene Investigation*, were often praised. Some appreciated its modern, casual style, epitomised by its news programmes, which were more reminiscent of Sky than of others of the main terrestrial channels.

"I am watching more channel 5 now. I think it's changed in the past year. It used to be a bit of a trashy channel, but now they seem to have some decent documentaries on, and films."

Group 13: AB, 31-45, light TV watchers, Northern England

3.3.5 Sky

As a broadcaster, Sky was appreciated by viewers for its huge range of channels and programmes. It was thought by loyalists to provide something for everyone, taking into account both its own channels and the others it carried. As a brand, Sky was regarded as very un-British compared with the five main terrestrial channels, particularly BBC and ITV. Even the UK-focused news shown on the Sky News channel had an international or American feel, manifested in its high-tech, glossy appearance and its quick-cut feel.

Regular users were primarily impressed with Sky's access to sport, and its ability to show the new film releases before other broadcasters, but its range of entertainment channels was also welcomed. Viewers generally regarded Sky as a high quality broadcaster, particularly with regard to its 'own-brand' channels – those with the name 'Sky' in the title, or channels closely associated with Sky such as Discovery. Some Asian respondents greatly appreciated the access to Asian channels, particularly Prime TV.

Non-users tended to characterise Sky as low-quality, in the sense of the intelligence and interest of its content rather than its production values, over-commercialised and too American in style. As noted, there were a few objections to Sky on the grounds that multi-channel TV is dominated by media moguls.

4. The broadcast landscape – radio

Eliciting perceptions of the radio landscape was a more difficult task. Various factors prevented respondents from taking an overall view: the large number of stations available; the fact that the great majority of stations are local; and the tendency of most people to listen to a very limited repertoire of stations, without trying others. Moreover, radio stations tended to be seen as weak expressions of broadcasters' identity compared with television channels, with the result that a station's provenance might not always be known, even to its listeners.

"I know it is BBC Radio 1, but it is more geared towards young people and it's very light-hearted and jovial. So I don't associate it with the BBC."

Depth 12: secondary school teacher, Northern Ireland

On the whole, respondents appeared to expect much less from radio than from television, with the result that they were less critical of radio output. Although the majority appeared broadly satisfied with the radio stations available to them, this was essentially difficult to judge because so few respondents expressed strong opinions either way.

Of the national radio stations, the most salient were BBC Radio 1, 2, 4 and Five Live, Talk Sport and Classic FM, with a few listening to Virgin. Local stations were often preferred, however, particularly outside the South East of England and in the devolved administrations, where the national stations were less popular. In Northern Ireland, the key local stations were Radio Ulster and Radio Belfast, along with Q102 and Downtown. In Wales, popular stations included BBC Wales, Radio Cymru and some local commercial stations. In Scotland, very few respondents were listening to national stations, and the most salient local stations were Forth, Clyde and Real Radio. A few were listening to BBC Radio Scotland, but this was often considered a little staid and old-fashioned. One or two had relatives in the Highlands who listened to Radio Nan Gaidheal, but this was irrelevant for respondents themselves, only one of whom spoke Gaelic.

Asian people in the south east of England enthused about Club Asia, described as a recently launched station offering a mix of music and talk

shows discussing Asian issues. This was sometimes mistakenly believed to be a BBC station. One or two were also listening to the BBC Asian network.

“You get the world wide news on there as well as the local news and on top of that you get news from back home as to what is going on there.”

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

5. Overall perceptions of the BBC

5.1 General points

5.1.1 *Ways in which it is judged*

The image of the BBC was entrenched in respondents' minds, and appeared to be only slowly influenced by actual programming content. Overall views of the BBC often seemed to be based on outdated perceptions of its output and could be challenged by reference to its current schedules. This tendency to take an outdated view of the BBC had both a positive and negative effect on perceptions. Positively, it was still associated with popular programmes from its past, and respondents ascribed values to the corporation based on how it used to do things; for example, making sure that radio presenters were formally dressed. Less positively, respondents were liable to ignore recent moves by the BBC to modernise its image and its output. One or two more perceptive people realised that their views of the BBC were perhaps outdated.

"When you're asked what you think of it you do immediately think 'quality', but you wonder where you're getting these views from. They're very old views."

Group 13: AB, 31-45, light TV watchers, Northern England

Perceptions of the BBC were also influenced by its status as the first broadcaster in the UK. Again, this could have both a positive or a negative effect, depending on whether people valued the corporation for the more traditional elements of its image and reputation.

In terms of output, the BBC as a whole was largely judged on the basis of perceptions of BBC1. For a vocal minority of respondents, BBC2 and Radio 4 were also important in formulating views of the BBC's image and values. Other elements of the BBC's output were generally either taken for granted or were not known.

At its most basic, knowledge of the BBC extended as far as BBC1, BBC2, and one or more of the radio stations. Some respondents were also aware of the digital television channels, although few had a detailed knowledge of their output. Only a minority expressed any familiarity with

the digital radio stations, and some seemed unaware of their existence. When the range of the BBC's offer was described, it was greater than almost all had known or expected. The BBC as a whole was typically regarded as impressively broad, and in some cases this helped make the licence fee appear better value for money.

Among adults, perceptions of the BBC were also heavily influenced by opinions of the licence fee. This was regarded as an inescapable component of the BBC's identity, and as such informed a great deal of what was said in the course of group discussions (see section 15 below).

Respondents' understanding of the BBC's structure and status was patchy at best. Many were unsure of the corporation's precise status, and most had little interest in knowing more. When pressed, most guessed either that the BBC was a public corporation, independent of government, or that it functioned as the government's broadcasting arm. Others assumed that the BBC was at least partly owned and controlled by shareholders.

5.1.2 *Spectrum of views*

Unconsidered perceptions of the BBC covered a broad spectrum of views. At one extreme, BBC loyalists declared almost unqualified support for the BBC and felt determined that it should stay as it is.

What kind of values do you think the BBC holds dear?

"Professionalism...Being correct on what they are reporting...Solid...Trustworthy...Good factual documentaries...Realism...Cater for a wide range...Try and appeal to everyone."

Group 22: AB, 21-30, light TV watchers, Scotland

At the other end of the spectrum were people who claimed never or rarely to watch the BBC, who were dissatisfied with its output and/or who resented the licence fee. These respondents demanded either a change in BBC's output to better reflect their tastes, or a different method of funding. In between these two poles, the majority were broadly accepting of the BBC as it is, but most were inclined to criticise aspects of its output and to show interest in an alternative method of funding.

At best, the BBC was believed to offer a unique combination of high quality output and breadth of appeal. Views of this nature were found

mainly among the middle classes (BC1s), lighter viewers and those with access to the five main terrestrial channels only. For these respondents, the BBC's closest competitors were thought to be ITV and Sky; but ITV was considered inferior in terms of overall quality, values and image; and Sky, while offering a broad range of channels, was thought to achieve neither high quality nor a genuinely broad reach.

For BBC loyalists, the corporation had both rational and emotional appeals. Rationally, the BBC channels and stations were thought to offer consistently good programmes across a range of categories and topics. Production values were considered high, and the BBC was felt to maintain a certain professionalism compared with other channels.

"There's the news for people who want to be informed. They have soaps for younger and older people. They have documentaries. They do cater for a range of audiences. They offer balanced views and maintain high standards..."

Depth 12: secondary school teacher, Northern Ireland

On a more emotional level, the BBC was viewed as a welcome haven from commercialism and a reflection of all the good things about British society.

"Making good quality programmes without funding from private companies or advertising."

Group 22: AB, 21-30, light TV watchers, Scotland

At worst, and typically among heavy viewers, multi-channel loyalists and more C2DE respondents, opinions of the BBC were unremittingly negative. Output was criticised for being unimaginative and boring, and certainly no better than that available elsewhere, with *EastEnders* the only genuinely superior programme. These respondents tended to feel alienated by what they saw as the boring, elitist, narrow and patronising stance of the BBC, and strongly resented having to support it. Others again, especially teenagers and younger adults, did not feel seriously dissatisfied with the BBC or want to criticise it, but believed its image and output to be too safe and conventional to appeal to them.

"There seems to be this mystique that foreigners may have about the BBC, that it was this fine, upstanding, British... But it's not, it's a bloody dinosaur."

Group 13: AB, 31-45, light TV watchers, Northern England

5.2 BBC values

5.2.1 *BBC as a public service broadcaster*

When asked for their views on public service broadcasting, and whether or not it was worthwhile, most respondents accepted that it was a good thing if one or more of the major broadcasters was given a public service remit.

"I think it's good that any broadcaster does have some kind of mission statement like that."

Group 13: AB, 31-45, light TV watchers, Northern England

However, 'public service broadcasting' was not familiar as a term or concept, and was not brought up by respondents without prompting. Even once raised, the BBC's success or otherwise in meeting its public service broadcasting remit was not a significant factor in assessing the corporation as a whole. Other factors such as the licence fee and the perceived quality of the BBC's output were much more important in gauging its standing.

Even among BBC loyalists, the BBC's role as a public service broadcaster was less important and less characteristic of the corporation than its role as a non-commercial broadcaster. The qualities that respondents valued in the BBC as a non-commercial broadcaster often overlapped with what could be claimed as the benefits of a public service broadcaster; but respondents did not necessarily see it this way.

Understanding of the term 'public service broadcaster', and expectations of what this might involve, were thought through by some respondents once the issue had been raised, but were often very limited. At best, it was assumed that public service broadcasting would mean commitment to the following:

- a wide range of types of programme, including educational material
- inclusiveness and balance in relation to minorities, backgrounds, viewpoints

"[Religious programming] is part of our culture, so it should be there. If you've got an Asian network, they should have a Christian network too."

Group 25: C1, 46-60, light TV watchers, Scotland

- regional coverage
- quality of programming – not too low-brow

There was also a feeling, not always articulated clearly, that a public service broadcaster should not promote programmes but should let them attract audiences without publicising their content.

The BBC was generally thought to meet most of these commitments, and to be unique in doing this. Respondents could think of no other channel that met all these requirements with the same breadth and depth as the BBC. For most, the impression was that the BBC's public service broadcasting was focused on its television output. BBC1 and BBC2 seemed actively to meet the public service broadcasting remit almost on their own, while the other channels and radio stations enhanced this status. Once discussion had been prompted, many respondents appeared to be impressed by the breadth of the public service broadcasting remit, and by the belief that the BBC is meeting it successfully.

Detractors tended either to disagree with the principle of having public service broadcasting, or to challenge the BBC's success in meeting this remit. Those in the first camp thought that television should be run on a purely commercial basis and governed by market forces, believing that the public's appetite for television would ensure that commercial output met everyone's needs. The latter group argued that if public service broadcasting meant providing something for everyone, then the BBC had failed in its remit, since it did not broadcast enough to interest them personally.

5.2.2 *How is the BBC characterised?*

Irrespective of opinion about its output, the BBC's image tended to be described in similar terms across the sample. Throughout, those most

loyal to the BBC described its values in a positive light, while detractors described the same qualities as unattractive traits.

For most, the image of the BBC was dominated by a sense of solidity, substance, formality and a liking of convention, underpinned by clearly defined values and adherence to firm beliefs about broadcasting. For many, both supporters and detractors, the BBC was unquestionably an establishment figure and, as such, significantly different from other broadcasters.

When likened to an individual, the BBC was characterised in a fairly consistent fashion. The ascribed personality was very definitely a man, probably aged in his 50s or a little younger, wearing a suit or other smart clothes, well groomed and comfortably off.

*"I am looking for a man with a tie. He is too trendy."
"He is too young and good looking, more Channel 4."*

Group 23: AB, 16-20, medium TV watchers, Scotland

"I always think BBC is run by people who always wear suits, 50 plus. They'll employ somebody who might be able to tell them what people want, and those people will tell the 50 plusses whatever they want to hear..."

Group 13: AB, 31-45, light TV watchers, Northern England

In terms of his outlook, 'BBC man' was thought to be conventional, conservative and resistant to change.

*"A bit stuffy."
"Professional."
"Bank manager-ish."
"Cold."*

Group 13: AB, 31-45, light TV watchers, Northern England

He would generally support the status quo, but was not completely old-fashioned; loyalists in particular thought he would have at least a veneer of trendiness and modernity.

"Funnily enough the one I think about is the one that's just gone, Dyke. Because he's a bit older but he's a little bit funky as well. He's broadminded."

Group 13: AB, 31-45, light TV watchers, Northern England

In terms of status, he was seen as a benign dictator figure, perhaps a kindly headmaster or bank manager. Although friendly and warm in appearance, and fair-minded, he was powerful and would ultimately get his way.

"I would say the bear because it is big and powerful but gives you the impression it is cuddly."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

"We chose the [pictures of] big cats as we think that the BBC likes to think of themselves as the King of the Jungle. A long established station. Fighting back against the newer stations."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

In terms of nationality he was undoubtedly British, and, for those living in the devolved administrations, probably English. In line with his national character type he was considered reserved, correct and polite, and, for detractors, rather stuffy, po-faced and perhaps a little inhibited. He would be unwilling to let down his guard or get carried away, although he might try to give the impression of doing so. In terms of social status, he was a suburbanite, neither rich nor poor, but just on the upper side of middle class.

"Just a middle class, average kind of guy, middle England."

"Mumsy, quite middle class."

Group 1: AB, 16-20, light TV watchers, London/SE

All these characteristics could be interpreted by respondents as either positive or negative. For loyalists, they made the BBC seem to be 'one of us', while for others they made the corporation appear remote and out of touch. In contrast, most other broadcasters, particularly Channel 4, Five and Sky, were perceived as younger, less restrained, and livelier. Although they were less dependable than the BBC, they were also seen as more fun, more open and more accessible.

"ITV and Channel 4 I see as being more friendly, but maybe it is because they are more light-hearted."

Group 22: AB, 21-30, light TV watchers, Scotland

5.2.3 BBC values

As with the BBC's personality, respondents in the adult sample were broadly in agreement on what values the BBC holds dear. However,

these values were not always to the fore, and BBC fans and BC1 respondents were typically more expressive than C2DEs. The perceived values of the BBC as an organisation were bound up with respondents' perceptions of the programmes it broadcasts, but, as noted previously, these tended to be outdated and did not always reflect current programming. The following prompted descriptors stood out as values which either do or do not apply strongly to the BBC.

British

Although the BBC's Britishness was often taken for granted, it was undeniable and important to supporters of the BBC. They regarded the BBC as one of the few distinctively and unquestionably British things that could be admired around the world, and which projected a positive image of the UK. Its Britishness also helped to differentiate the BBC from its satellite and cable competitors.

"The BBC is linked to the country and it has this real tradition of being unbiased, just of being a very strong corporation."

Depth 9: primary school teacher, Northern England

"I think everyone in the world talks about the BBC. In America, they buy up all the old BBC programmes; the quality is completely different."

Group 25: C1, 46-60, light TV watchers, Scotland

"They have set a standard that other countries have copied. I have been to Australia and you can see that programmes have been copied. They have ABC like the BBC."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

Perceptions of the BBC's Britishness were partly based on the corporation's reputation in a general sense, going back decades, and partly on respondents' hazy understanding of the World Service, which was believed to be used and admired around the world. The BBC's reputation for upholding Britishness abroad was enhanced by awareness that BBC programmes are exported to other countries. Respondents in the devolved administrations, particularly Scotland and, for different reasons, Northern Ireland, were less likely to cite Britishness as an essential quality of the BBC, and took less pride in the corporation's assumed reputation.

Traditional

Traditionalism was widely agreed as a core value of the BBC, and this again could be regarded in a positive or negative light. Loyalists considered the BBC traditional in that it upholds established and positive values associated with days gone by.

For detractors, the BBC was traditional in the sense of out-dated, old-fashioned and out of touch. For some younger respondents, the BBC was traditional in the sense of uncool. It portrayed an old-fashioned and unappealing vision of childhood and youth, typified by some of its programming.

*"Blue Peter's gone more educational now."
 "They had a party just because it was the dog's birthday."
 "I hate it when they take you back to Victorian times."
 "When they did the Quest, it was just sad."*

Group 33: C2DE, 12-13, female, medium TV watchers, Scotland

Quality

BBC loyalists expressed a strong sense of the BBC as a broadcaster of high quality programmes compared with its competitors. In this context, quality could refer to various aspects of the BBC's output: to its presentation and production values, in terms of sets, direction, camera work.

Anything else that sets the BBC apart?

*"I think generally speaking it's the professionalism of the BBC
 They're always well presented, there's not a lot of cock ups and
 things."*

Group 25: C1, 46-60, light TV watchers, Scotland

This also applied to its people, who were regarded as high profile professionals, the best available, and to the nature of its content, which supporters described as intelligent, informed and mid to high brow.

*"The standards of presenting, and anything they do, seems to be
 very professional compared to the other channels."*

Group 25: C1, 46-60, light TV watchers, Scotland

*"If you were comparing it to a newspaper, it would be more like a
 broadsheet."*

Group 23: AB, 16-20, medium TV watchers, Scotland

Certainly, for these respondents, quality meant avoiding the lowest common denominator television broadcast by the other channels.

“They do have lots of debates, although I suppose these happen on ITV as well, but programmes like Jonathan [David] Dimbleby on a Sunday make me think the BBC is a lot more serious and a lot more geared towards information.”

Depth 12: secondary school teacher, Northern Ireland

“As I have got older, what I listen to now reflects that. It is a bit heavier, as I need to know what is going on. I listen to Radio 4 more and also listen to the BBC news a lot more.”

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

Even detractors tended to agree about the quality of the BBC, certainly in terms of presentation and production values, although some thought that other channels performed as well or better. However, those opposed to the BBC tended to disagree that the BBC offered quality content, defining quality as the kind of programme they would want to watch.

Impartial and independent

The overall impression was that the BBC is independent and impartial, and that it prioritises these qualities in its news and current affairs broadcasting.

“They don’t hide things and they tell people the truth about things.”

Group 22: AB, 21-30, light TV watchers, Scotland

“I think people tend to believe what they see on BBC... We’re paying for it so you assume it is totally impartial. Giving you the news with no slant to it... You can’t please all the people all the time, but I think they generally get it right.”

Group 25: C1, 46-60, light TV watchers, Scotland

“People might say it is a bit boring, but I don’t think that is true at all. I think what you get from the BBC is the best, when you compare with CNN, it is so impartial and you can rely on what they say. Their spectrum is so wide and there is nothing they don’t do, and they do a great job of it.”

Group 23: AB, 16-20, medium TV watchers, Scotland

There were caveats about the BBC’s independence, however, even among loyalists. Some believed the BBC to be independent, but not impartial; that is, they felt it to be independent of influence from

government or other parties, but governed by its own agenda. In evidence, one or two cited the Robert Kilroy-Silk incident as an example of the BBC setting its own moral standards, rather than adhering to either government or public opinion. Respondents' opinions of the BBC's perceived agenda depended on their own stance: some found it too liberal, others too conservative.

"They've got their own view and they stick to it. They see things from their angle, never look at it from other people's angles."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

A handful of people had changed their views in the wake of the Hutton Report. Prior to the report, some had regarded the BBC as a government tool but were now uncertain as to where its loyalties lay. Others had previously considered the BBC completely independent but now felt that its integrity had been diminished.

"It is hard to tell with all you hear and read in the media, but it really should be non-political and non-biased, and that doesn't seem to be the case at the moment."

"In the past, if you heard it on the BBC or you watched it on the BBC, you said to yourself 'That is the facts'. Now I have doubts about it and that worries me."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

"I think the fact that it's publicly funded, you'd always assume that any news you would watch is totally impartial. But I think I'm maybe slightly changing my mind after the Hutton Report."

Group 25: C1, 46-60, light TV watchers, Scotland

It was not uncommon for people to regard the BBC as the tool of whichever government happens to be in power at the time.

"Does the government not have a lot to do with the running of the BBC? Do they not decide what's shown on BBC?"

"They've got a say in what the BBC broadcasts. I think that's another thing that comes to mind about the BBC: you're getting propaganda from the government."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

Part of the establishment

The BBC was invariably seen as very much a part of the establishment, and this again had both positive and negative connotations. For BBC detractors, the corporation's association with the establishment made it

seem remote, inaccessible and out of tune with public views. It was assumed to be a tool of the people in power, whether that be the government, or the white, middle class male establishment more generally.

"It's like the government run the TV. Everything is all proper."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

"I perceive them as just trying to conform with what the government want and what the typical British people should be watching, according to the government."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

Conversely, BBC loyalists tended to equate the establishment with the public domain. Being part of the establishment meant that the BBC was not driven by commercial imperatives, and was governed by a sense of morals and ethics that would be impossible for a privately-owned broadcaster. As part of the establishment the BBC was also regarded as having aspirations and ambitions to influence national life, an aim that was lauded by loyalists and resented by others who wanted to dictate to their television broadcasters, rather than vice versa.

Cutting edge

As an organisation, the BBC was rarely seen as cutting edge, even among its biggest fans. Indeed, it was usually regarded as the opposite of cutting edge: safe, conventional and risk-averse. The BBC's output was generally seen as a reflection of this conventional image, its programmes rooted firmly in the mainstream of British broadcasting. Overall, BBC programming was thought to avoid the extremes, guaranteeing reliably safe, comfortable family viewing.

"I think the BBC gives me a warm feeling. It's very familiar, it doesn't change a great deal. It's like an old blanket. Sort of dog eared. A comforter."

Group 13: AB, 31-45, light TV watchers, Northern England

For many this sense of reliability and conventionality was a positive aspect of the BBC. Others took a more negative view, arguing that the BBC's guaranteed income led it to be complacent and lazy, and gave it no incentive to attract audiences by making cutting edge or innovative

programming. Some respondents, typically the elderly, conservative, and parents of young children, appreciated this perceived caution, but others wanted the BBC to take more risks and display less inhibition.

Conversely, some felt that the BBC's freedom from commercial influence and any need to attract advertising meant that it could be more innovative and daring in its output than other channels, especially in the areas of drama and entertainment. Programmes such as *The Office* were seen by some as examples of the BBC taking risks that would be impossible for a commercial broadcaster.

"I think they do take risks, like the League of Gentlemen. They took a massive risk with that and it paid off. You would never have thought the BBC would have produced anything like that, even 10 years ago."

Group 13: AB, 31-45, light TV watchers, Northern England

The one area where the BBC was universally agreed to achieve cutting edge status was that of wildlife programmes. The corporation was thought to hold an unbroken record of outstanding nature programmes stretching back to the earliest days of David Attenborough, and recent series such as *The Blue Planet* and *The Life of Mammals* had cemented its reputation for cutting edge filming techniques.

"That Walking with Dinosaurs, the way they computer-generated all the stuff was good. But apart from that I don't see them as cutting edge. Like Channel 4, all the comedies where they're not afraid to talk about sex and stuff, I'd say that's more cutting edge."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

Mass appeal

The BBC's output was generally considered to have mass appeal, even by the less well disposed. This description was most readily applied to BBC1, which was widely believed to offer something for almost everyone, although multi-channel and ITV loyalists thought that better versions of the same types of programme could be found on other channels. There was also a feeling that the breadth of the BBC's offer in terms of the range of TV channels, radio stations and other services, meant that the BBC as an

organisation had mass appeal. This was particularly true once respondents had been shown a diagram detailing the BBC's total output.

Any particular target audience for the BBC?

"Appeals to everyone."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

Educational

Awareness of dedicated educational output was low among the majority who were not students or teachers, but, as discussed below, many felt the BBC played an important role as an educator nonetheless. The breadth, quality and number of hours of factual programming it produced (covering subjects from current affairs to wildlife) was generally thought to be greater than that of any other broadcaster. The majority were appreciative of much of this programming, although they tended to see it as 'interesting' rather than 'educational' in any literal sense; for some, however, the BBC's factual output could reinforce impressions of it being elitist, inaccessible and out of touch with other broadcasters.

It's always been there

Most considered this to be true, but it again cut both ways. For BBC supporters, the corporation was the original broadcaster and therefore the best. It was the most experienced and most expert, and would always be a step ahead of other broadcasters. For detractors, the BBC's longevity made it outdated, dull, and lacking in impact on modern broadcasting.

Other descriptors

In addition to these core qualities, the BBC was also regarded positively as homely, family-focused, warm and dependable. Negatively, detractors regarded it as toffee-nosed, posh, conservative, formal, exclusive and self-righteous. This last adjective was important for detractors; it signified the BBC's perceived tendency to claim the moral high-ground and to seek to impose its values on the public at large.

"I think you associate it [BBC] with posh accents."

Group 22: AB, 21-30, light TV watchers, Scotland

"They are elitist in a way, and they think they are untouchable. I think they are almost too complacent because they have such a good reputation."

Group 23: AB, 16-20, medium TV watchers, Scotland

"I would say [pictures of] strong animals because the BBC see themselves as being politically correct with high morals. There is a strong force behind it."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

It is also worth noting that some felt the BBC was beginning to change its image, and had recently become more modern and laid-back than of late. This perhaps supports the idea that perceptions of the BBC appear to take some time to respond to changes in its output.

Modern?

"It never used to be, but it is now."

Group 31: ABC1, 12-13, male, medium TV watchers, South West

"Maybe they're a bit more relaxed than they were."

"I think they've lost their plummy accents."

Group 25: C1, 46-60, light TV watchers, Scotland

"Their news as well, is different. If you listen to the news in the afternoon they use slang words. If they're talking about a smoking issue it's '1 in 5 young people now smoke fags', as opposed to 'cigarettes'. I think that's to try and please young people and make them tune in more."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

This was usually regarded as a welcome change, where noted, but some complained that BBC was beginning to ape commercial television, and Sky in particular, with its increasingly glossy style and constant promotion of upcoming programmes.

"I feel they tried to mess around with their news and whatnot, to try and compete with the likes of Sky, to start walking around the studio like Sky do. But because it feels like it's the second time round that someone is doing it, they're like poor copycats."

Group 13: AB, 31-45, light TV watchers, Northern England

6. BBC programming and output – television

6.1 BBC1

Most respondents seemed to think about the different broadcasters in terms of the channels they offered. Discussion about BBC TV programming and output led almost invariably to a discussion about the programming and output of BBC1. There was some interest in BBC2 and the digital channels, but these appeared to be far less prominent in public perceptions than BBC1.

“When you talk about the BBC, you always think of BBC1 first, and then BBC2.”

Group 22: AB, 21-30, light TV watchers, Scotland

It was interesting to note that initial reactions – even among the staunchest supporters of the BBC – tended to be critical of the standard of the TV output.

“I’d say the BBC [is the main broadcaster in this country]. And it’s the one I would have respected up until a while ago. My husband and I were talking about it and at one point the Americans respected us because they thought we had a better system in as much as things weren’t as bad but in the last 10 years we’ve tried to copy them so badly that they can just laugh at us now. Our standards have slipped so appallingly.”

Depth 7: primary school teacher, London/SE

As discussion developed, more considered opinions were often markedly more positive. Among the most favourably disposed, BBC1 was considered the pre-eminent TV channel. Its output was characterised by high production values and professionalism. Programmes seemed to be carefully and thoughtfully constructed.

“I think it’s quality, what they produce. Everything they do. Their news coverage is unbeatable, their sport is on another planet.”

Group 13: AB, 31-45, light TV watchers, Northern England

“The standards of presenting, and anything they do, seem to be very professional compared to the other channels.”

Group 25: C1, 46-60, light TV watchers, Scotland

Particular strengths were identified as news, especially major events, current affairs, including politics, documentaries, quality drama and comedy, and sport.

"It's a good service. It's the best of the lot. Presentation wise, if sports programmes are on and ITV and BBC are doing it I will invariably go to BBC."

Group 11: C1, 61-75, medium TV watchers, Northern England

The standard of news was particularly praised. The BBC was generally trusted to deliver information accurately and truthfully, without putting a spin on it, and there was a gravity and intelligence not found in other broadcasters' outputs.

"I watch the news in the morning and at night and they are very professional compared to ITV and that. Their appearance is a lot better. Presentation is better."

Group 11: C1, 61-75, medium TV watchers, Northern England

Some took comfort in the values of taste and decency which the channel seemed to embrace. BBC1 programmes could be watched in mixed company without fear of embarrassment.

"If I am watching something with, say, my granddaughter, I'm never really bothered about watching something on BBC because normally they hold hands and the shades go down and that's enough. But if it's channel 5 or 3, they're away up the stairs and I go 'Put the kettle on' and leave the room, because I find it quite embarrassing. They go too far."

Group 25: C1, 46-60, light TV watchers, Scotland

It was commonly noted that BBC1 sought to provide a range of programmes to meet a wide spectrum of interests. Supporters thought this channel alone offered sufficient variety to suit all tastes.

"I think they [BBC] have a good mix. Most things for most people...and they're usually well produced."

Group 25: C1, 46-60, light TV watchers, Scotland

Some of those who were broadly supportive of the BBC expressed a degree of disappointment at the loss of some sports and pointed to a perceived decline in the standard of drama and comedy.

"I think it is a shame that they have to buy the rights [to sporting events]...In my job we really want to see kids going out and playing sport and I don't think it is right that people have to go to the pub to watch sport."

Depth 7: primary school teacher, London/SE

"I would like more exciting programmes. Drama and films. On a Friday night there is absolutely nothing on."

Depth 2: 31-45, male, disabled, Midlands

"There are not as many comedy shows as there used to be...The programmes they do do are first class though."

"They have Only Fools and Horses on a Saturday night which is quite poor to have something that is so old on a Saturday night...I do love that programme though."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

Many were more critical, in particular heavy TV viewers with multi channel access, and C2DEs, who often said they rarely watched BBC1. It is likely that many were watching it more than they were prepared to admit in the research situation. These people claimed there was nothing distinctive about BBC1's output. Some complained that, with the exception of *EastEnders*, there was nothing for them to watch.

"I don't really get time to watch a lot to be honest, the only thing I really watch is EastEnders."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

"I think they spend a lot of time on politics on BBC...They don't have enough films on."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

Others felt BBC TV, and especially BBC1, had lost ground in areas where previously it was prominent, particularly drama and comedy.

"I'd certainly try to get more drama and more quality programmes made, more things that people can enjoy."

Depth 1: 16-30, female, disabled, London/SE

"They seem to be frightened to take a chance. Say the likes of comedy, if it's a modern comedian, your Channel 4 and 5 will jump at it, with the likes of Reeves and Mortimer, when they came out. Jerry Sadowitz. You see Reeves and Mortimer on BBC now but I daresay we've still to see Jerry Sadowitz on BBC. They're frightened to take a chance in case they lose viewers."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

'Too many repeats' was also a criticism levelled at the BBC in general. Funding by licence fee seemed to mean that repeats on BBC were viewed all the more critically.

"I agree there are lots of repeats, and with the amount of money that we pay in licence fee, it shouldn't be repeats."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

It was not uncommon for there to be discussions about the BBC having patchy coverage of mainstream sport because it had failed to compete with Sky in particular and ITV.

"If you want sport you want Sky. You associate it straightaway."

Group 11: C1, 61-75, medium TV watchers, Northern England

"Back to the sports coverage on BBC...I think that's why they've lost such a lot of sports coverage... because they have to pay more."

"The BBC have slipped up."

"A lot of money goes out to clubs to play football at certain times. Even 5.30 on a Saturday night, Sky dictates when you play."

Group 25: C1, 46-60, light TV watchers, Scotland

Some young people felt strongly that the channel did not provide much for them (see section 8 below for more detail on this).

Overall, its critics thought BBC1 had gone stale and was in need of refreshment and rejuvenation.

"Everything is changing, and they need to make people understand that they are still here and still producing quality programmes."

Group 22: AB, 21-30, light TV watchers, Scotland

"They need some fresh talent, they need some fresh ideas. They shouldn't just keep repeating the comedies all the time."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

6.2 BBC2

A minority of this sample said they watched BBC2 regularly. They appreciated it for its coverage of the arts, natural history and comedy. Its willingness to break new ground was also cited.

"There has been a marvellous programme that I have been watching and I am a bit disappointed that it has finished, in fact it was on BBC2, it was called Big Cat Diaries."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

"BBC2 on the whole is what I like, they do sort of sensible programmes."

Group 20: AB, 46-60, medium TV watchers, South Wales

"You get some good programmes on BBC2...BBC2 is always worth watching."

Group 11: C1, 61-75, medium TV watchers, Northern England

For some BBC2 typified the BBC. It could be perceived as offering high quality programming, dedicated to positive values. Alternatively, it could be seen as high-brow, remote, or out of touch.

"You get more intellectual programmes on 2."

"More documentaries on 2...more natural stuff...gardening stuff on 2."

Group 1: AB, 16-20, light TV watchers, London/SE

"They don't play normal things for everyday folk...it's more upper crust. BBC2 is all the arty things."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

And some struggled to categorise the channel: its apparently eclectic programming defied easy classification.

"BBC2 is a strange channel, sometimes interesting. They have strange programmes about things."

Group 25: C1, 46-60, light TV watchers, Scotland

What about BBC2?

"Interesting...The Simpsons...The Fresh Prince of Bel Air."

"Kind of studenty. It has loads of documentaries but also it's really educational. I mean they must have about 5 documentaries on every day."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

"There is a lot of political stuff shown on BBC2."

"A lot of comedy shown on BBC2 as well."

"They had a great programme on last night, Sea of Souls about twins which was good... I expected that to be on ITV or Channel 4 so it was a pleasant change."

Group 22: AB, 21-30, light TV watchers, Scotland

6.3 BBC digital channels

General views

Those in the sample who had access to digital channels (BBC3, BBC4, Cbeebies, CBBC, BBC News 24, BBC Parliament) were positive about the BBC's offerings in this area. They appreciated having additional choice and noted that both sound and picture quality were superior to analogue transmission.

As a viewing platform, Freeview seemed to be considered relatively new. Although most were aware of it and had a basic understanding of what it was, very few associated it with the BBC. There was little in-depth understanding of what channels were offered, whether a subscription was needed (and how much it cost), or who was running it.

On the other hand, users of Freeview tended to think that they had made a smart, discerning choice. They had access to the 'higher quality' digital channels (BBC4 etc) at a reasonable cost, and without having to buy into Sky, or put a dish on the outside their house.

"I didn't want Sky because it was Rupert Murdoch and I don't believe having somebody who can influence government, television, what's in the news I can't have one person being a mogul for everything."

Depth 1: 16-30, female, disabled, London/SE

However, some who did not have access to multi-channel broadcasting resented the BBC offering digital channels. They felt that the licence fee was being used to fund them, but they were not (as yet at least) available to all licence-payers. More specifically the promotion of the BBC's digital channels on terrestrial television rankled. Such respondents argued that airtime should not be used to promote channels which they did not – or in some cases could not – have.

Views of BBC digital channels

Most in this sample were not aware of **BBC3** at all, or had no clear understanding of what it sought to offer. There was some comment that

the channel name was also unhelpful in communicating content or intentions.

"I have never heard of them [BBC3 and BBC4]. There is nowhere that tells you what they are about."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

The few respondents who had experienced BBC3 tended to react positively to it. It was appreciated both for its repeats of *EastEnders* and for its apparent commitment to new comedy and drama, most notably *Little Britain*. The transfer of such hits to terrestrial television were seen by this segment as evidence of its success. Indeed, some reported they thought of it as a more experimental channel where programmes could be trialled before smaller audiences prior to broader exposure.

"It has Little Britain on it which is coming to BBC1 I think. It is like a testing ground I think."

Group 1: AB, 16-20, light TV watchers, London/SE

"They have dramas that are not on BBC1 and 2, they had another episode of Spooks on BBC3. It was really good."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

The apparent prominence of comedy in the channel offering led some to think BBC3 was aiming for a niche viewing audience.

"I think BBC3 is younger again or going for a younger spectrum of society than BBC1 or 2. They have programmes like Little Britain and Vic and Bob. They also do that EastEnders Revealed thing."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

Awareness of **BBC4** was similarly low. Where it was known, however, it was thought to share many of its values with BBC2 and Radio 4. It enjoyed a small number of converts who valued its strong focus on culture and felt that the output was of a high standard.

"BBC4 I watch more and more. I think there are some very good programmes on that. There are some very good art programmes and I enjoyed the Book debate, where they had one person talking about one book and they have a jury."

Depth 8: secondary school teacher, Midlands

CBeebies and **CBBC** were both very well regarded by parents. They were described as good quality, entertaining but educational programming for children, all in a safe, commercial-free environment.

“My kids have just found CBBC at the beginning of the week with a David Beckham football skills thing...the children love it, they were rolling around yesterday; something was really entertaining them.”

Depth 1: 16-30, female, disabled, London/SE

BBC News 24 was well liked by a few current affairs enthusiasts who admired it for its BBC news values and considered it thorough, open and probably accurate. It was also valued for its breaking news and digestible bulletins.

“It is like BBC1 late at night.”

“They also have lots of interviews”.

“I would sooner watch that over CNN.”

Group 23: AB, 16-20, medium TV watchers, Scotland

“If there was a 9/11 type incident it would break into the programme with News 24 right away.”

Group 13: AB, 31-45, light TV watchers, Northern England

“I think News 24 is good because you can just flick it on for an update.”

Group 8: C1, 16-20, medium TV watchers, Midlands

Some actively preferred BBC News 24 to Sky News. This segment thought the style and content of the BBC offering was more formal and ABC1.

“I always get the impression that the BBC are more sophisticated than the Sky news: BBC is like a broadsheet paper.”

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

Some Sky users, however, preferred Sky News. They thought Sky News was somehow more impressive, more truly global, though they could not point to specific aspects of its programming to substantiate these perceptions.

“Sky can dedicate quality coverage because they've got a dedicated 24 hour news channel. I know BBC have News 24...but it has shocking viewing figures, the lowest figures, I believe.”

Group 13: AB, 31-45, light TV watchers, Northern England

*"I don't think it's as good as Sky but it's nearly there."
"It's more localised."*

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

And there were others with no particular allegiance to a news channel, preferring to flit between programmes to check on different types of reporting and a range of perspectives.

"I think, I'm not sure really, I just watch whatever, I flick, I like to get different views on it so if there's something breaking on BBC and I watch Sky news and see what they say ... I won't watch just BBC News 24 and stay on that, I would flick over and see what they say, like ... CNN and then Fox and ... other news channels."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

BBC Parliament was known to a few but was apparently very rarely watched in this sample. There was little evidence to suggest it helped engage people in the political process or added significantly to their understanding of it.

"The Parliament bit may as well be on CBeebies for the way they act sometimes."

Depth 2: 31-45, male, disabled, Midlands

7. **BBC programming and output – radio**

7.1 General views

As noted, radio tended to contribute less to overall impressions of the BBC than television. There were several reasons for this: television was generally higher profile and more dominant in people's lives, while radio appeared more recessive. Most people were spending much less time listening to radio than they were watching television; the experience of listening to radio was not always as involving or engaging as watching television. Some of those who listened to BBC radio stations did not consistently identify them with the BBC.

There was an exception to most of the above in the case of Radio 4. It was clearly very important to some, was strongly identified with the BBC and was highly engaging for its followers.

7.2 National BBC stations

Those who listened to the national BBC radio stations were largely very complimentary about them. **Radio 1** was popular with younger people, who appreciated its variety of music and activities such as presence at festivals, though they regarded it as an entity apart from the BBC, and not at all typical of its overall output.

"I think Radio 1 is all right."

"Radio 1 Xtra is more R& B and is more for our age group."

Group 1: AB, 16-20, light TV watchers, London/SE

"I do listen to Radio 1 because it has something to offer everyone. Like Monday night it's got late night, it's got a rock show. Tuesdays it's got like dance DJs and stuff. It's got different tastes, it's not just one particular type of music."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

Radio 2 had a more diverse audience, ranging from Terry Wogan loyalists to blues fans. The keenest listeners were those in the middle age groups. There was some scattered evidence of migration to Radio 2 from Radio 1

"I listen to Radio 2, Steve Wright. That's my chosen radio channel. I don't like Radio 1, I can't stand Sarah Cox. I'm glad she's gone to some tiny station."

Depth 1: 16-30, female, disabled, London/SE

"I went to school listening to Terry Wogan in the morning and I am sending my children off to school listening to Terry Wogan in the morning and I find that bizarre. It is a wonderful programme and it is also interactive programme as there are people out there poised on their computers to send in emails about the most trivial things that have happened in the day or on the programme and they are very interactive with the people, like Jeremy Vine and quizzes and Steve Wright."

Group 5: C1, 46-60, medium TV watchers, South West

Radio 3 was appreciated by some for its unstinting dedication to high quality presentation of classical music. It was considered significantly more high-brow than Classic FM, perhaps too much so for some.

Radio 4 had a small but devoted audience in this sample, who regarded it as outstanding in its news output, coverage of culture and science, and its general all-pervading sense of intelligence. The presenters were

considered high-quality and the range of programming diverse and thought-provoking.

"I listen to the Today programme until John Humphrys gets too annoying. I almost shed a tear when the last presenter died and I miss him. I have heard a programme early on a Sunday morning called Understood which is a unique programme. I love Radio 4 and discovered it when I left college and I was in digs and I couldn't afford a television. I listened to the first airing of Hitchhiker's Guide to the Galaxy back in the late 70s when it first came on."

Group 5: C1, 46-60, medium TV watchers, South West

Radio Five Live was well liked by some sports fans who enjoyed the mix of live coverage, phone-ins and commentary.

"If we are travelling at the weekends with the family then I listen to...Radio Five Live, anything that is picking up a football or tennis match. Sport is the thing that dominates our family."

Group 5: C1, 46-60, medium TV watchers, South West

It was also popular with younger news enthusiasts, who thought it livelier and more involving than other BBC news broadcasts.

7.3 BBC digital radio stations

Awareness of BBC digital radio stations was very low across the sample. It was lower than that of digital TV channels, though given the relative salience of these media, this was not surprising.

BBC Asian Network was well regarded among some Asian people and was appreciated for its dedication to Asian interests.

"I listen to the BBC Asian Network... that's a good channel. It reminds [people] of home. They get information about home as well what's going on and what the changes are etc."

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

In one group, however, there was a strong feeling that Club Asia was more appealing than the BBC Asian Network (though some listeners wrongly attributed Club Asia to the BBC).

"I listen to Club Asia, it is a radio station and it is brand new and I listen to it whilst I am getting ready for work."

"It is Asian music and hip hop as well and the mixes as well between Eastern and Western music. Anything that you hear on Kiss FM in the morning you would hear on Club Asia but with Asian beat on there."

"You get the worldwide news on there as well as the local news and on top of that you get news from back home as to what is going on there...It is a BBC channel."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

What about the BBC Asian Network?

"I don't know."

"I haven't heard of it."

"It isn't something that I have heard of."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

There was patchy and vague awareness of **BBC7** and very low awareness of **BBC6**. Where known, however, views of BBC7 were generally favourable. One or two had found the station by chance and very much enjoyed the content.

"I will tell you what I discovered recently is BBC7 where they have the old comedy programmes, it really is very good. I enjoyed listening to old Steptoe & Son."

Depth 8: secondary school teacher, Midlands

"I also listen to Radio 7 which is repeats and classic serials and dramas and it is a bit like Radio 4 used to be like."

Group 5: C1, 46-60, medium TV watchers, South West

7.4 BBC Local radio stations

Some BBC local radio stations attracted support in certain areas, particularly from the over 30s. Radio Newcastle, Radio Ulster, Radio Foyle, Radio Wales and Radio Cymru were singled out for praise.

What about BBC Radio Newcastle?

"It's fine...the local current affairs is quite good."

Group 13: AB, 31-45, light TV watchers, Northern England

"I listen to...Radio Ulster, Belfast."

"Radio Ulster does a show on Thursday night that's very good. Well it's dance music."

Group 26: AB, 16-20, light TV watchers, Northern Ireland

"[I listen to] BBC Wales and things like that...you can flick through BBC and you can pick up something that you'd enjoy on the radio, whichever channel it is, you always pick up something that's worth listening to."

Group 20: AB, 46-60, medium TV watchers, South Wales

Younger respondents tended to be more critical of local BBC stations. There was a feeling these were not for them and that they were somehow much less engaging and involving than the local commercial stations.

"I have heard of Radio Ulster although I wouldn't listen to it."

Why wouldn't you listen to Radio Ulster?

"It's just not my cup of tea. It's for older people, I think... I wouldn't listen to Radio Foyle either. I just think the two of them are geared towards older people. I don't like the kind of music they play. I just find them boring."

Depth 12: secondary school teacher, Northern Ireland

7.5 BBC World Service

Awareness of the BBC World Service was high and it was referred to across the sample. It was used by a scattering of BBC fans, particularly news enthusiasts and those who found themselves awake in the early hours. It was strongly associated with the BBC and, to its supporters, represented the essence of core BBC values: accuracy, integrity and impartiality. There was a view that it was respected worldwide and, as such, deserved to be a source of national pride.

"I think, like in Iraq, interviewing Iraqis, they'll say 'We listen to BBC on the long wave', and that makes me feel that's good. And that has gone on for 50 years. The whole world tunes into the World Service."

Group 11: C1, 61-75, medium TV watchers, Northern England

8. **BBCi**

The term BBCi was not widely known: there was little sense that this was an umbrella term for a range of BBC internet and interactive services. There was, however, some awareness and use of the BBC website by an enthusiastic minority who tended to refer to it as BBC Online.

The BBC website was particularly liked for the news services, the regional sites and the educational output. It was also valued for allowing users to

follow up on favourite TV and radio programmes. It was considered to be well designed, informative and detailed.

“Just to have a look at the news, when we go onto the computer that [BBCi] comes up as our home page and I just tend to look to see if there is anything that interests me. My husband loves news and he is obsessed with weather.”

Depth 8: secondary school teacher, Midlands

“I think it is very good.”

“You get a lot of TV stories on there, which is very interesting.”

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

A few teenagers in the sample were using the BBC site to download music from Radio 1 and appreciated being able to do this.

Parents and one teacher felt the BBC provenance meant that the content of the site was suitable for children to browse without them worrying about unsavoury links or content.

“That’s such a great website. I use it a lot in school, I use it for practically everything. You get such super things through it. And it’s all perfectly safe for the kids.”

“It’s excellent and it’s safe. I use it for history programmes, and my husband was looking for the World War things and used it for that.”

Group 25: C1, 46-60, light TV watchers, Scotland

The BBC interactive TV service was not widely known; the impression was its potential was as yet not fully appreciated, and that it held little interest for some people.

9. BBC News (TV and radio)

Among BBC fans, the news output was very highly respected. It was considered impressively comprehensive, reliably accurate and impartial.

“I’m biased, maybe it’s just that the presenters seem to be more honest, I think I trust it but I can’t give my reasons why but I get a gut feeling. Because they are the BBC I should be trusting them and they shouldn’t be lying to me.”

Depth 1: 16-30, female, disabled, London/SE

The range of news coverage was also appreciated: the mix of long and short bulletins, straight news and discussion, daily events and ongoing current affairs, national, international and regional coverage. Supporters

felt that the balance of BBC news was just right and that it felt somehow more intimate – but still relevant – than news broadcast elsewhere.

“They are talking to me. You look at Sky and they are standing there and they have got the big screens behind them it is almost like it is aimed at other people around the world. The BBC feels like it is coming to you and it is happening in your country so it is personal.”

Depth 2: 31-45, male, disabled, Midlands

In comparison with other news channels the BBC was believed to take a more balanced and more serious approach. It was sometimes described as being broadsheet rather than tabloid in feel.

“I think the news is clean cut. They are all smart. Some of them on the Sky channels look as though they have just turned themselves out of bed. On our news it always seems quite efficient and smart.”

Depth 2: 31-45, male, disabled, Midlands

“I find ITV a bit more glib and perhaps they take up issues that I am not particularly interested in. They are more like the Daily Mail.”

Depth 7: primary school teacher, London/SE

Less positively, there were some signs of disappointment with BBC current affairs coverage among BBC loyalists who felt it was being given less time and thinner coverage than had been the case in the past.

“I think they always seem to be that step behind the likes of Sky, with their current affairs programmes.”

Group 13: AB, 31-45, light TV watchers, Northern England

Those who were less well disposed saw the BBC news as no better than its competitors. They felt that ITN offered a more relaxed, less formal format and was generally more accessible. Trevor McDonald was singled out and was viewed with affection.

“I think Trevor MacDonald is my all time favourite newscaster.”

Depth 1: 16-30, female, disabled, London/SE

Sky News supporters felt it was more high tech in feel, offered better global coverage and was generally younger in style. Its worldwide reach led some to imagine it might be more independent and was probably independent of government.

“Sky get straight in there and they show it how it is. As far as they were concerned it was news that was happening [war with Iraq] and needed to be beamed.”

Depth 2: 31-45, male, disabled, Midlands

Both Channel Five and Channel 4 also received some praise for news coverage, the former because it offered quick hourly news updates and the latter because it provided a good deal of depth.

“If I am at home at say 7 and I want something really snappy I might turn Channel 5 on because that is literally 5 minute news on the hour. I quite like Channel 4 news, I find it much more in depth and they take different issues. There might be something about the Third World or something like that and I find that quite interesting and I like their style of broadcasting, it is still quite formal but I like the way they interview people, it seems more of a discussion rather than a grilling.”

Depth 7: primary school teacher, London/SE

Among some people from ethnic minorities BBC news attracted some criticism for what they saw as its anti-Muslim bias and negative coverage of third world issues. These are spelled out in section 12 below.

As noted, a few in the sample reported they had been somewhat disillusioned by the findings of the Hutton Report. For this minority, their trust in the accuracy and impartiality of BBC news had taken a knock.

“[It’s] bad at the moment. The Hutton enquiry. I think they’ve been trying to beef things up to make them seem more sexy.”

Group 13: AB, 31-45, light TV watchers, Northern England

On the other hand, many BBC loyalists believed the findings of the Hutton Report had backfired on the government and that the BBC had been treated unfairly. Some felt inclined to defend the BBC in the face of criticism.

“Especially with all this recent Hutton enquiry. They have stuck to their opinion which I think is an honourable thing to do.”

Group 23: AB, 16-20, medium TV watchers, Scotland

How did the BBC come out of that [Hutton Inquiry]?

“It is bad because two have resigned haven’t they. I don’t think that was necessary if you saw all the people backing them but it is like anything, it is almost like there is a public demand that there has to be a head to be chopped and unfortunately in the eyes of that report the BBC was to blame.”

Depth 2: 31-45, male, disabled, Midlands

Many others – probably the majority – seemed to have only minimal awareness and a superficial understanding of the Hutton and Kelly affair. The report had not markedly changed their views and had had little or no impact on the BBC’s standing.

“I think the Hutton enquiry has gone on and on, and whilst it was all very sad I think perhaps it has just escalated too much and got a bit out of control.”

Group 15: C2DE, 46-60, heavy TV watchers, Northern England

10. **BBC regional coverage**

10.1 England

Perceptions of the BBC varied widely between English regions and devolved administrations. In the English regions there was general praise for BBC’s regional and local news coverage, and a sense of inclusion in BBC output on both TV and radio. There was no feeling of being dominated by stories focused on London and the South East; and no perception that specific aspects of local interest were being neglected.

10.2 Scotland

In Scotland, however, views were generally less favourable. While there were some scattered positive comparisons made between the depth of BBC regional coverage and that offered by Channel 4, others felt the BBC coverage of Scottish issues was thin.

“You don’t get much Scottish news on Channel 4, so I will watch the BBC news.”

Group 22: AB, 21-30, light TV watchers, Scotland

Typically, respondents were negative about English-based media generally, rather than the BBC specifically, although the BBC was sometimes singled out. While some appreciated the depth of regional news programmes, many wanted Scotland and Scottish topics more centre-stage rather than being given separate coverage. While respondents valued the focus on Scotland provided by programmes such as the Scottish edition of *Newsnight*, they simultaneously resented the fact that Scottish issues were not judged sufficiently important to be covered in national broadcasts.

"I always think that the BBC don't realise Scotland and Wales are part of the UK. They don't really seem to include them... You don't hear anything that goes on in the Scottish Parliament."

Group 23: AB, 16-20, medium TV watchers, Scotland

*"I prefer the ITV regional news as it is more well covered."
"Scotland is not well covered by the BBC regional programmes."*

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

There were also comments that details of broadcasting – the way Scotland was referred to, for example, or the choice of presenters – might be given more thought.

"Sometimes when they give you the weather forecast, and they say it's going to be bad in the north, you have to stop and think: are we talking about the north of Britain or about Newcastle? Quite often there is a difference, and you get the real weather forecast when you get the Scottish news."

Group 25: C1, 46-60, light TV watchers, Scotland

"It's ruling out the likes of the Irish, Scots and Welsh. Every programme nearly, it's English people that's on it. You very rarely see Scottish people in the national BBC news."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

It seemed that respondents were commenting less on the overall quality of BBC output and were complaining more about the lack of focus on Scotland and Scottish issues.

"I don't think there's enough Scottish things happening, like series and quizzes and stuff. Probably more money is being elsewhere rather than in Scotland."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

Many felt that, where Scottish characters did appear in national drama or comedy programmes, they were often stereotyped as miserly, drunk, or violent.

"They do a kind of stereotype of Scottish people as well, the BBC. Look at that EastEnders, the baddy is always a Scottish guy. Little Mo's boyfriend."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

Programmes produced specifically for Scottish television were not necessarily viewed more favourably. Budgets and production values were thought to be lower than for national television, and problems with authenticity persisted.

“Like River City, they're in the pubs and they're going ‘Aye right, nae bother’. But you go into some of the pubs down the town and the barmaid is English and this wee hard guy is meant to be Scottish but their accent just stinks. I don't think enough money is spent in Scotland to create more dramas.”

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

Some were also critical of BBC radio stations, feeling that some local and national commercial stations did a better job of catering to Scottish tastes. Fewer respondents listened to BBC radio stations in Scotland than in the other devolved administrations, and this may have been a quirk of the recruitment process. But BBC Radio Scotland was generally seen as old-fashioned and staid, even among older respondents, while Radio Nan Gaidheal was considered irrelevant for the large majority of the Scottish population.

“The national ones [radio stations] do tend to be more focused on England as opposed to Scotland.”

Group 22: AB, 21-30, light TV watchers, Scotland

“I don't know if you ever listen to Radio Five Live, they do a lot of talks and a lot of sports stuff, but it's just all English sport. Whereas Talk Sport is all over Britain, not just centred in England.”

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

10.3 Northern Ireland

Views in Northern Ireland were sometimes also negative, but less strongly so than in Scotland. Across the board in Northern Ireland, the BBC tended to be characterised as an English institution, concentrating on mainland British issues, but this did not attract the same level of criticism as in Scotland. Many appreciated the broad outlook and feel of the BBC and their concern was more about whether Northern Ireland was being represented to the rest of the country, than about whether their particular local needs and interests were being catered for.

There was a widespread desire for more representation of Northern Irish people and places in mainstream programming.

*"Maybe if they did something like Shameless but set over here."
 "Like Cold Feet, a programme ITV had, James Nesbitt was in that and he is from here. There's no actors or actresses from Northern Ireland on BBC, I don't think."*

Group 26: AB, 16-20, light TV watchers, Northern Ireland

While *Give My Head Peace*, for example, was appreciated for its Northern Ireland focus, there was some dislike of what was seen as its stereotyping of Northern Irish people. A few also complained that in past coverage of Northern Ireland there had been an undue focus on troubles and sectarian strife.

More positively, the news coverage was generally praised, though it was thought less local in feel than UTV by some, especially those outside the Belfast area.

*"It gives the impression that ITV is based in the context of Northern Ireland. BBC is more English."
 "You'd rather have someone with a Northern Irish accent talking about Northern Ireland than an English person talking about Northern Ireland."
 "The BBC is more the English channel."*

Group 26: AB, 16-20, light TV watchers, Northern Ireland

Closer to Belfast though, and perhaps more among Protestants than Catholics, there were signs of welcome for the BBC's strong links into British news coverage.

*"We don't want local news all the time."
 "It is actually irritating, the local news."
 "We like information about England because a lot of us have travelled across to Scotland, Wales and England, you know."*

Group 30: C1, 46-60, medium TV watchers, Northern Ireland

Some young people were listening to local commercial radio stations, but Radio 1 was the most widely listened to radio station among teenagers and those in their 20s. It was appreciated, in comparison to local stations, for its broad outlook and the chance to hear about people's lives across the UK.

"I prefer Radio 1 to Q102. It's the way it's presented and the BBC just has a wider audience. It's broadcast throughout the UK and there's listeners phoning in from all different parts of the UK. Q102 is very limited, just people from here, and it's just a local channel. When you listen to Radio 1 you get a broader idea of what's happening throughout the UK."

Depth 12: secondary school teacher, Northern Ireland

As noted in section 2 above, both Radio Ulster and Radio Foyle were well regarded by middle age groups for offering a good mix of serious and light content covering both regional and national issues.

"Radio, I'd listen to Downtown or local radio because of news or debates or anything like that on there..."

"Jerry Anderson has a programme on Radio Foyle."

"He's a local man isn't he."

"It's for two hours and he only plays about three songs. He's very good actually you know, they're very modern."

Group 27: C2DE, 31-45, medium TV watchers, Northern Ireland

These stations were however too middle-aged and parochial for younger listeners and not everyone was aware that these were BBC stations. Many were also watching RTE if they were able to receive it, and enjoyed having the choice of alternative channels, especially for their film offering.

10.4 Wales

The views of respondents in Wales were typically more positive than those expressed in Scotland and Northern Ireland. There was a general feeling that BBC was doing a good job of catering for Welsh issues. BBC Wales, BBC2W, Radio Wales, Radio Cymru and S4C were all thought to give good coverage of Wales.

What do you think of the regional services here? You get BBC Wales?

"I think it is very good...It is based in Cardiff."

"It is more laidback on the regional news. I think ITV are a bit more stiff upper lip."

Group 19: AB, 21-30, light TV watchers, South Wales

"On the national news they have all those computers and a four storey building in the background where you can see everyone hard at work. In the regional they have a background of Wales and it makes you feel more at home."

Group 19: AB, 21-30, light TV watchers, South Wales

Welsh language programming was very much appreciated by Welsh speakers, both on television (S4C) and radio (Radio Cymru). The fact that the BBC produced high-quality Welsh-interest programmes in both languages was seen as an example of its commitment to Welsh issues. Some respondents listened or watched mainly to keep their Welsh alive, as they did not speak it as much as they would have liked. Others who spoke the language more regularly tended to regard S4C and Radio Cymru as repertoire stations in their own right, and as the equals of Radio Wales and BBC2W in terms of quality and breadth of content.

One or two Welsh speakers did complain that the dialect used tended to be that of North Wales. Although they admitted that this was a purer form of Welsh than their southern dialect, it was sometimes hard for them to understand, especially when spoken quickly. This was a minor complaint, however; most Welsh speakers were very happy with their provision.

Some non-Welsh speakers took a less positive view of Welsh-language programming. They were unaffected by Radio Cymru, but some resented the imposition of S4C, which took the place of Channel 4 at certain times of day and altered the scheduling of Channel 4 programmes at others. Most of these respondents had overcome this by switching to Freeview or multi-channel television, through which they could receive Channel 4 as normal; their preference was clearly for more mainstream programming.

Those who had the option to avoid Welsh-language programming tended to approve of its being available for those who wanted it.

What about the Welsh-language stuff?

"Yeah, some people will want to see it. It's good that it's there."

Group 16: C1, 16-20, light TV watchers, South Wales

"The BBC have made some attempts, haven't they? There was a couple of different soaps or comedies that have been on...I'm not aware that HTV has done anything from that point of view."

Group 17: C1, 31-45, medium TV watchers, South Wales

The BBC's regional news coverage was well regarded in Wales, although some respondents perceived a tendency to treat Wales as a single entity rather than a group of localities. Bulletins on HTV (the Welsh regional ITV

broadcaster) were thought to be more localised and therefore of greater interest.

“I think that HTV actually does more detailed Welsh news. It seems to be more local.”

Group 16: C1, 16-20, light TV watchers, South Wales

Both channels were thought to prioritise English news over Welsh issues on the national bulletins, no matter how important the latter were.

“There could be a big story on the Welsh news, you know, a big murder or something like that, and it won’t be on the national.”

Group 17: C1, 31-45, medium TV watchers, South Wales

Some respondents felt that North Wales was much better represented in national programming on the BBC than the south; most thought that the overall representation of Wales in the BBC’s national scheduling was low but satisfactory or understandable.

“When they mention Wales in a programme it’s always North Wales, never South Wales.”

Group 17: C1, 31-45, medium TV watchers, South Wales

“I think it should only be on an equal footing, like any other channel.”

“They’re going to concentrate on England because of the population.”

Group 17: C1, 31-45, medium TV watchers, South Wales

As an aside, some believed that viewers and listeners in North Wales were likely to be less favourably disposed to the BBC. It was not possible to substantiate this belief as all fieldwork took place in South Wales.

11. **BBC educational output**

There was low awareness and low salience of the BBC’s educational output. Where it was known, however, it received some praise. The Learning Zone was known and used by some lifelong learners and Open University was mentioned occasionally.

Teachers were impressed by BBC Education resources, particularly videos and training courses, apparently designed for teachers to make best use of BBC resources. One teacher was an enthusiastic user of the BBC website in class.

"If I am doing a project with the children, I would let them use that as a website and they've got BBC Bite Size which is a revision aid for older children."

Depth 7: primary school teacher, London/SE

"I see them as doing that [providing educational output], not in terms of the television but in terms of their education packs and their web site...for teachers, it's known to be a good site. Look on the BBC site for whatever you're doing and you'll find something."

Depth 9: primary school teacher, Northern England

"There's not the same amount of BBC schools programmes, they used to be a good source of educational programmes for children. They don't tend to do as many now. The afternoon tends to be taken up with Gaelic programmes."

Group 25: C1, 46-60, light TV watchers, Scotland

Among teenagers in the sample the BBC had a strong association with learning. Many watched BBC videos at school and some used the BBC website to find out general information or search for subject-specific material.

"Occasionally, it is quite good for history homework."

"I would only go on it for a school topic."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

BBC Bite Size was also generally well regarded, particularly by 14-15 year olds. For a minority of teenagers it was an important source of learning and help with revision. A-level students tended to see it as a little patronising and young in style for them.

"For school I have used it...When I was revising for Sats I did."

"You type in BBC and it comes up Education and then Bite Size and so you access what you want."

Group 31: ABC1, 12-13, male, medium TV watchers, South West

For some, the BBC was also thought to have a more general role as an educator, through its coverage of news and current affairs, social issues, politics, documentaries, wildlife and nature programming. In this sense, it was thought to be distinctive from other channels; none was thought to rival the BBC as an educator.

"If you want something a bit more educational then you go to BBC1 and 2."

Group 23: AB, 16-20, medium TV watchers, Scotland

12. BBC output for minority audiences

The balance of BBC output for minority audiences was not an issue for the majority of this sample. There was a widespread general acceptance among the white British sample that there was, and should be, programming for ethnic minorities and people with disabilities.

Those from ethnic minorities, perhaps especially the younger respondents, tended to be critical of the media and broadcasters in general for their coverage and portrayal of people from ethnic minorities. Many believed that the depiction of people from ethnic minorities, especially in drama and comedy, could be good, but very often was poor.

Within this, there were some positive perceptions of the BBC. Where it was known and used, the BBC Asian Network was well regarded.

“I think we have quite a lot, the Asian Network. You will always be able to find Asian music.”

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

This group of Asian women felt well catered for generally, but worried that others from different cultures were less well served.

“I think they have forgotten about everyone else. The African people and the eastern European people they have hardly anything if anything at all.”

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

There was some appreciation of the presence of black and Asian people in entertainment programming and news presenting, for example Ian Wright. One or two wondered whether the BBC was perhaps less biased against Muslims than other channels, although others strongly argued the opposite (see below).

Young male Muslims and young black people tended to be more critical. They complained of stereotyping and negative role models, particularly in comedy and drama. They felt that sensitive, accurate portrayals of people from minority ethnic groups were rare and, as a consequence, that many opted out of mainstream broadcasting.

"I think a lot of Asian families, they subscribe to Asian channels and they tend to watch Asian channels, as opposed to soaps at prime television viewing."

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

Some felt there was a marked absence of black and Asian people in mainstream roles and positions. Some young Muslims in one session perceived an anti-Muslim bias.

"I believe that they're biased against Muslims because they're Jewish channels."

"They're Jewish owned channels so basically that's what everybody seems to say anyway and I've noticed myself as well, that they're biased against Muslims so if it's for the news, I would rather watch something that's not biased which is ITV."

"Channel 4 as well."

"I think ... the news teams as well, the reporters, I don't think they have any Muslims to be honest."

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

This group felt BBC coverage of Muslim affairs was inferior to that offered by Channel 4 or Sky, giving as an example the lack of BBC representation at the Haj.

"Channel 4 definitely...also show from a Muslim's point of view as well, you have documentaries, whereas with the BBC, I've never noticed that to be honest."

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

There was a feeling that the BBC did little to present a positive image of Asians and Muslims and so did not address anti-Muslim feeling in the UK.

There was also a view expressed that the BBC was inclined to present an unfavourable view of the third world generally, not just Muslim countries; that it sought to reinforce stereotypes rather than try to shed light on what were often complex situations.

"I believe that BBC tends to portray documentaries which highlight the negative issues within the third world countries...whenever they show documentaries ... they pick up the very bad...but they don't tend to show the sophisticated and modern society of India, Pakistan, Bangladesh or whatever subcontinent they're talking."

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

13. Teenagers' views of the BBC

13.1 Attitudes to content

The BBC was as top of mind for teenagers as for adults, but there appeared to be some differences in both usage and perceptions.

BC1s and those with access to the five main terrestrial channels only, especially younger, were typically positive about the BBC. They enjoyed the range of TV programming and tended to feel that the BBC output was superior to other broadcasters', including for news coverage. They used BBC Education resources at school; some were using BBCi and BBC Bite Size (see sections 3 and 6 above). They were often well informed about the Hutton Report and tended to be defensive of the BBC.

"It was obviously the Government's fault I reckon."

"I reckon that it was the Government's fault."

"So do I."

"He [Greg Dyke] shouldn't have had to resign."

"The Hutton enquiry was fixed."

Group 31: ABC1, 12-13, male, medium TV watchers, South West

"I think it was a Government whitewash."

"I think that Lord Hutton was in the pocket of the Government."

"The Government are so secret and they never tell you everything."

"I don't think that Greg Dyke should have lost his job over it."

Group 1: AB, 16-20, light TV watchers, London/SE

On the other hand, C2DEs and multi-channel users were generally less favourable. They associated the BBC strongly with its children's digital channels, CBeebies and CBBC. They felt that ITV provided better local news coverage and more accessible news than the BBC. They felt the BBC offered less variety than ITV and Channel 4, especially in terms of drama and comedy programming.

"BBC 2 is for older people."

"I love Hollyoaks...ER and Big Brother."

Group 1: AB, 16-20, light TV watchers, London/SE

It was noticeable that those in the 16-20 age band could feel left out. They felt the BBC was too old or too young for them. Whilst it served their

parents and younger siblings well, it seemed to have little to offer for those of their age.

"I think they cater for young people and old people and there is nothing in the middle."

"It is good for young kids and you get your gardening programmes."

"There are a lot of house programmes as well."

"There is nothing in the middle...whether they think we are not about as much I don't know."

Group 1: AB, 16-20, light TV watchers, London/SE

Some teenagers said they preferred ITV to BBC because it was more risqué and had more sex-based content. Others thought that where some channels had numerous appealing programmes, the BBC had only a few items which appealed.

"There is stuff for all ages on ITV. Comedies, dramas, children's programmes, news...stuff that all people want to watch."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

"E4 has better stuff in the evenings."

"Sky One has 24 on which is great."

"I like Sky One and MTV as it has documentaries on as well as music."

Group 1: AB, 16-20, light TV watchers, London/SE

More positively, Radio 1 was well-liked, but although it was associated with the BBC it was only loosely so: it tended to be seen as a separate entity from the BBC generally.

13.2 Perceptions of BBC values

Teenagers' perceptions of BBC values were generally less sophisticated than among adults, but views were broadly similar. The BBC tended to be perceived as serious, conservative, high quality, family-oriented, concerned for taste and decency.

"Good, educational."

"Newsnight and stuff like that."

Group 33: C2DE, 12-13, female, medium TV watchers, Scotland

“Upper market. I would say it was posher than ITV and channel Five. It has more documentaries and stuff.”

“I think that is the image they go for because if something happened in the news you would watch something sensible that talks about serious things all the time.”

Group 8: C1, 16-20, medium TV watchers, Midlands

13.3 Awareness of funding

Awareness and understanding of BBC funding was patchy, but increased steeply with age and socio-economic class. That is, there was limited understanding among 12-13s, but some ABC1s and 16-20s were quite well informed.

“There was a big report in the Telegraph today about licensing, and saying that they want to change it to be subscription.”

Group 1: AB, 16-20, light TV watchers, London/SE

All were aware that the BBC did not carry advertising, and this was widely applauded. Many – perhaps surprisingly given their age and the increasing prevalence of advertising – chose to take an anti-advertising stance. Whilst most could cite favourite advertisements which they found enjoyable, many resented the interruption in programming caused by advertising, particularly when it halted films.

“It ruins your programme. You are just getting into it and then an advert comes on and ruins it...It is all right if they are funny but most of them aren’t.”

“I don’t mind ads so much with comedies as there isn’t really a story line that the ad breaks up...I think adverts can make the story line in a film hard to follow.”

Group 31: ABC1, 12-13, male, medium TV watchers, South West

Some – a smaller number – objected to commercialisation in principle and were concerned about the knock-on effects for the BBC should it choose to accept advertising or sponsorship.

14. Perceptions of the BBC's commercial activities

Involvement in commercial activities was not often at the top of respondents' minds when they were asked about their perceptions of the BBC, but it was quickly acknowledged when prompted and explained. The assumption tended to be that these activities consisted of the sale of DVDs and videos of old BBC programmes and direct spin-offs in the form of magazines and books. Syndication to other broadcasters was less commonly mentioned.

These activities were generally accepted and sometimes applauded; most saw it as sensible for the BBC to maximise the return from its investments in programmes.

"As long as the product is good in the first place I have no problem with them bringing in more revenue to re-invest."

Depth 1: 16-30, female, disabled, London/SE

"It's just a way of raising money to make better programmes."

Group 8: C1, 16-20, medium TV watchers, Midlands

"It keeps the licence fee down. Otherwise they'd have to ask for more money, if they want to make these programmes."

Group 13: AB, 31-45, light TV watchers, Northern England

Views on what happens to the revenue generated in this way, however, varied according to feelings about the BBC as a whole. Those who were well disposed assumed that the income is ploughed back into programming and has a direct benefit on programme quality. Others believed that it is appropriated by government or possibly creamed off by others.

"If you make a good programme the least you can do is put it round the world and make some money from it. There's nothing wrong with that. I assume it gets ploughed back into the programming."

Group 13: AB, 31-45, light TV watchers, Northern England

“They sell so many tapes and have BBC shops, so they must be profit-making.”

Where do you think that money goes?

“Back into the BBC to make programmes.”

“I reckon some of the [actors’] salaries...are ludicrous.”

“They are competing with the other channels to get the quality of actors.”

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

A few respondents seemed to revise their positive opinions about the value they were getting from the licence fee in the knowledge that this was not the only source of income for the BBC. Most however appreciated that commercial activities accounted for only a small proportion of revenue, and did not begrudge the BBC this.

After discussion, many said they would like greater transparency of income and profit, although this was clearly not an issue which exercised them in daily life.

15. The licence fee

15.1 Understanding of the licence fee

As noted, the existence of the licence fee was a major influence on perceptions of the BBC. Opinions about how appropriate and fair this system of funding is were varied and often strong, with some praising it for what it allowed the BBC to achieve and others complaining about the lack of choice and inequality it involved. These opinions were often inflamed by misapprehensions (predominantly held by those with more negative views) about the TV licence's purpose and status.

Many respondents did not fully understand what the licence fee funds, how it operates, or how much it costs the viewer. The incorrect beliefs they had come to regarding these points could impact strongly on their perceptions of the licence fee's value and effectiveness (see below). After discussion and clarification of these points, a number seemed to change their perceptions, usually for the better.

"I think you probably are getting very good value for money with the licence fee. I've probably been converted on that side of it."

Group 13: AB, 31-45, light TV watchers, Northern England

Almost all respondents knew that the licence fee funds the BBC alone, although a few believed that the other broadcasters benefit from it as well.

"It [the licence fee] is a bargain, £2 a week for the channels that we get."

"You are not just paying for the BBC, you are paying for ITV as well."

Group 22: AB, 21-30, light TV watchers, Scotland

There was less certainty about which elements of the BBC offering receive this funding, however. Some did not appreciate that it involved services other than BBC1 and BBC2. This misconception tended to be caused by a lack of awareness and use of BBC services other than terrestrial television, or an assumption that BBC radio was funded separately. Others assumed that they were paying for the World Service as well as domestic broadcasting.

“I don’t think it’s value for money. I think it’s about £100 a year. I mean, you’re only paying for BBC1, so I don’t think it’s worth the money.”

Depth 12: secondary school teacher, Northern Ireland

“I know about the licence fee but I don’t know what happens to the money.”

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

“I don’t think I should be paying money to fund the World Service.”

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

There was also some confusion about how the licence fee operates. Some thought that the BBC is funded directly by the government, and that the licence fee is essentially a centralised tax collected to cover the cost of this funding. This belief could affect views on the licence fee’s ability to isolate the BBC from government influence, and make other funding mechanisms seem more palatable by comparison.

“I think it [the licence fee] goes to the government and they fund the BBC.”

Group 19: AB, 21-30, light TV watchers, South Wales

The financial cost to the licence payer was also uncertain. Beliefs about the level of the fee ranged from under £100 to over £130 a year, and many were unaware that the licence is free to those over 75 years old. Few had a clear idea of how much the fee increases each year, although most assumed that it does rise annually. Some thought that it increased in line with inflation; others felt that it was getting more expensive in real terms.

Inflation-linked rises were seen as reasonable by many, but a large number resented any rise. Some of these respondents felt that programme quality has dropped over the past decade despite previous rises. Others did not use or have access to digital or other optional services, and believed that their extra licence payments were funding these.

15.2 Perceptions of the licence fee’s value

To the majority of respondents, the most salient of the BBC’s services was national terrestrial television, especially BBC1. Their opinions about the

value for money offered by the licence fee therefore depended heavily on their valuations of BBC1 and BBC2, and their awareness and use of other services, such as digital television, radio, BBCi and regional broadcasting.

15.2.1 *Positive opinions*

A minority saw the licence fee as very good value. Significantly, these respondents tended to view it as a monthly or weekly payment (they may have been paying by direct debit, or simply seeing it this way to relate it to similar payments): £2 a week or £10 a month compared to Sky's £40 a month.

"It's about £10 a month, that's about four drinks."

"I mean, Sky is about £40 a month."

"There's some difference between £40 a month and £10 a month."

Group 25: C1, 46-60, light TV watchers, Scotland

"It's about 40 quid a month for Sky, but I would grudge paying £116 when that bill comes in."

"I don't mind at all. It seems quite good value for money, and I pay direct debit so I don't even notice it."

Group 13: AB, 31-45, light TV watchers, Northern England

They felt that the fee was well worth paying for the two aspects of BBC broadcasting that many people appreciated the most: the lack of advertising and the breadth and quality of programming. They also tended to use and appreciate services other than BBC1 and BBC2 (especially radio) more than most, and understood that the licence fee funded these as well.

"I think it is cheap, the BBC is cheap, when you take in the radio as well."

Group 13: AB, 31-45, light TV watchers, Northern England

"You have to pay for good programmes. You have to put the money in to continue the quality or you'll get the dross that's put out on some other channels."

Group 25: C1, 46-60, light TV watchers, Scotland

Overall, it did not seem that these respondents used the BBC's services to a significantly greater extent than others in the sample – they did not necessarily watch BBC1 and BBC2 for longer than anyone else, for example. Their valuation of the BBC was based on quality, not quantity,

and they were happy to pay the licence fee to receive the amount and type of broadcasting that they did.

15.2.2 *Ambivalent opinions*

The majority of this sample seemed to accept the licence fee but, on questioning, expressed caveats to their acceptance and concerns about the system, particularly to do with what they saw as its unfairness. In general, it seemed that most of these respondents had not given the matter significant thought before the research: this was not an issue that concerned them in daily life.

This sector also tended to value the BBC's output and to use some of its services beyond terrestrial television. But their impressions of the BBC were more likely to be influenced by opinions about BBC1 alone, and many did not see a big difference in the quality of programmes and programming between this channel and ITV.

"I think the only thing that differentiates the BBC from the other channels is the lack of adverts."

"The quality of the programmes is very similar to the other channels."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

After discussion of the extent of the BBC's offer, some were surprised at the number of services funded by the licence fee; this led some to re-evaluate their opinions about its value. But they also tended to feel that these extra services – especially digital television – should be freely accessible to everyone (a number of respondents seemed to resent the one-off payment for the set-top box needed to receive Freeview).

"You have to pay separately for it, and you pay the licence on top, which I don't think is right. If you pay the licence you should get all the programmes across the board."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

Also among this sector were some who thought that the fee should be lower because of the money the BBC makes from its commercial activities. But, again, this was not an issue they had given much thought to before the research; many were unaware that the BBC generates income in this way at all.

15.2.3 Negative opinions

A second minority strongly objected to the licence fee, and their views often emerged early on in the research. These respondents were typically least well informed about the range of services that the BBC offered and which they were paying for; after discussion of these, some were mollified slightly but others were inflamed further in their opinions.

“I would be very interested to know how much they have spent on BBC4, where the majority of us don’t get it and see where our licence fee is going.”

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

Many said that although they might watch a number of hours of television a week, they rarely used BBC services because they preferred the choice of programming on other channels (typically ITV and some Sky channels). When they considered the types of programme that they did like to watch (typically soap operas, dramas and sitcoms), they often saw little difference in quality between public- and private-funded television, and could not see why they should pay directly for one kind and not the other.

“I just begrudge paying money to fund the BBC when I don’t have to pay to fund ITV.”

Depth 12: secondary school teacher, Northern Ireland

They were also unlikely to listen to BBC radio stations, generally preferring commercial national and local stations. Their valuation of the BBC was based on the fact that they used it little and thought that what they did consume was not necessarily superior to equivalent programmes from commercial broadcasters.

This judgement of the BBC’s value was usually accompanied by resentment of the fact that the licence fee is obligatory. Many of these people subscribed to Sky or cable, and were happy to pay for these channels because they wanted what was on offer and had chosen to so. Likewise, they felt that they should be able to choose not to receive BBC services if they did not want them, and be allowed not to pay the licence fee.

“If you choose not to watch the BBC then why should you have to pay for your television licence.”

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

“The thing is, why are we forced to pay for the BBC?”

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

“There’s a law that you’ve got to pay your TV licence. In fact, they’re forcing it on you. They’re not giving you a choice whether you want to buy this or not. I don’t think it’s worth the money we pay for it.”

“If you had the choice to pay for it then you wouldn’t have it, because you’d go with Sky and just leave out the BBC altogether.”

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

“Even if you don’t watch the BBC channels, you still have to pay the licence fee as you still have a television.”

“You might not even watch it but you still have to pay.”

Group 22: AB, 21-30, light TV watchers, Scotland

The simple contrast of choice that these subscribing respondents made between satellite/cable and BBC services was exacerbated by the fact that they were paying the licence fee in addition to their other subscriptions. Those who received satellite or cable tended to see BBC1 and BBC2 as part of their channel package; many thought it unreasonable that they should have pay twice for channels they did not watch much in the first place.

“If you pay for Sky, you get BBC on Sky.”

Group 29: C1, 21-30, light TV watchers, Northern Ireland

“I think you should be given an option that if you want Sky and you don’t want to pay your TV licence then those channels could be blocked. Then you have the choice as to whether you want the BBC.”

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

Awareness of the extent of the BBC’s offering was another source of resentment of the licence fee. Some who did not have access to digital television or radio knew that their fees were funding services from which they did not benefit.

“I am annoyed that I am paying for things that I can’t get but other people can. I am paying for them to get services that I can’t.”

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

“You pay a TV licence to watch BBC...but there are programmes that can only be seen on BBC3. What is the point of paying for a licence then?”

Group 26: AB, 16-20, light TV watchers, Northern Ireland

Those who were initially unaware of how much of the BBC they were ‘missing out on’ were generally surprised when they found out in the research. Some felt that the licence fee provided more value than they had first thought, but most saw the extra services as further evidence of their money being spent on programming they could not receive or did not want.

Among those who were least well disposed to the licence fee were some who felt not just resentment but suspicion. They believed that the sums of money collected were so large that someone must be making money out of the fee and the BBC – either the government or ‘the bosses’.

15.3 Perceived advantages and disadvantages of the licence fee

15.3.1 *Advantages*

The main perceived advantage of the licence fee system was that it allowed the BBC to operate in the absence of commercial pressures. Only those with the most negative opinions of the licence fee did not appreciate this benefit at some level.

Most recognised it at a superficial level as the lack of advertising. They saw this as a ‘cosmetic’ advantage that the BBC had over commercial broadcasters, without considering more fundamental effects it might have on programming. Most did not like having their programmes interrupted by advertising (or indeed their films interrupted by the news).

“There is something different about BBC. The fact that it doesn’t have the adverts does seem to make it different from the rest of them.”

Group 26: AB, 16-20, light TV watchers, Northern Ireland

In this context, many complained about the amount of advertising on other UK channels and stations, and some mentioned US television, where there was said to be almost as much advertising as programming.

"I have seen it in America. They have too many adverts."

Group 8: C1, 16-20, medium TV watchers, Midlands

When asked which aspect (if any) of the BBC made it a better broadcaster than its competitors, respondents often answered 'the lack of advertising'. This fact alone seemed to be enough to justify the licence fee to many.

"The best thing about BBC is no adverts. If I had to pay, say, 50% more on my TV licence to get quality programmes I'd be much happier doing that and then I could get rid of the Sky."

Depth 1: 16-30, female, disabled, London/SE

"I would actually pay that money not to have the commercials."

Group 13: AB, 31-45, light TV watchers, Northern England

Only a minority considered the effects of freedom from commercial pressures more fully than this. They tended to be the most appreciative of the BBC's output, and the most in favour of the licence fee as a method of funding. There was a belief that the absence of commercial pressures helped the BBC to stay 'independent', although understanding of this varied, with some feeling that the influence of government outweighed the potential influence of business.

"I see the BBC as being more independent than the other ones as it doesn't have advertising."

Group 22: AB, 21-30, light TV watchers, Scotland

A number also felt that it helped to keep the quality of programmes high and the range of programming wide. Again, there was uncertainty about why this might be the case – some were making a comparison with what they saw as the inferior quality of commercial broadcasters. These thoughts were revisited and clarified somewhat when the effects of alternative funding sources were considered.

Other advantages of the licence fee system were mentioned by those who thought carefully about the issue. Public-service broadcasting commitments (such as niche and minority-interest programming) were imagined to be easier to meet under a system which provided an overall income rather than funding linked to the success of individual programmes.

"I think it would turn into more of a competition [if the licence fee were abandoned] and it would affect quality... They wouldn't show such a wide range of things, they wouldn't show the stuff for niche markets because they wouldn't attract enough people."

Group 23: AB, 16-20, medium TV watchers, Scotland

"I think it's good that any broadcaster does have some kind of mission statement [PSB commitments] like that."

"That actually makes me change my view slightly about having the point of the licence."

"When I came here I was dead against the licence fee but now you've reminded me of my public duty, for public service broadcasting."

Group 13: AB, 31-45, light TV watchers, Northern England

Some also felt that a degree of external control over income was good for the quality of the BBC's output. They believed that the corporation received its income on the condition that all profits were ploughed into programming, unlike commercial broadcasters who were expected to turn in a profit for shareholders.

"There's no shareholders to get dividends or anything."

Group 13: AB, 31-45, light TV watchers, Northern England

"They are in it to make better programmes than to make money I think."

Group 31: ABC1, 12-13, male, medium TV watchers, South West

15.3.2 Disadvantages

Aside from those with extreme views about the principle of the licence fee, the main perceived disadvantage of the system was the link it created between the BBC and the government (any government, not the current administration). As noted, the misconceptions about the way in which the licence fee system operates seemed to have caused many respondents to believe that the BBC was beholden to the government of the day because the latter had great control over its funding. But many of those who understood that the licence fee is separate from central taxation and is hypothecated also imagined that the government was able to exert some influence over the BBC through its funding.

"They wouldn't be able to exist if they were not with the government."

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

Most knew (or guessed) that the government is able to set the licence fee at any rate, and many supposed that this gives it political influence by allowing it to threaten to reduce the BBC's income if the latter does not toe the party line.

"I think there is an influence.. I think they let them have their autonomy but they reel them in every now and again. Like, 'We still hold the purse strings here'."

Group 13: AB, 31-45, light TV watchers, Northern England

"All I know is the government regulate the licence fee or something, there's some involvement I know, but I don't know what it is exactly."

Group 14: C1, 21-30, medium TV watchers, Asian male, Northern England

This belief was generally moderate, but it was widespread and could be held strongly. A small but vocal minority seemed to believe that the BBC is 'run by the government', and that it is less politically impartial than ITV or Sky, who were thought only to be under commercial influences. The licence system was not the only factor in this belief (the appointment of governors was another), but it did suggest a direct link between the two, in which the control seemed to lie with the government.

"I suppose they are independent to a certain extent, but they are linked to the government because of their funding. They must get their funding from the government...I suppose they do have a slight bias, perhaps, to the party in power."

Depth 9: primary school teacher, Northern England

A further disadvantage in the eyes of many (especially those who were less well off) was that the licence fee was seen as a regressive tax: wealthy viewers pay the same fee as those on low incomes. The same point could be made about subscriptions to satellite and cable services but, as subscribers made clear, the important issue here was choice.

This problem was compounded by the fact that, as a rule, those on low incomes were less likely to value the BBC highly, more likely to pay for satellite or cable television, and more likely to want to be able to choose whether or not to receive and pay for the BBC's services.

16. **Alternative sources of funding**

The implications of a change in the source of funding for the BBC had rarely been entertained before the research, even by the strongest opponents of the licence fee. After discussion of the options described below, some more considered positions emerged, but most respondents were unable to think beyond surface issues such as the irritation with television advertising mentioned above. Fuller consideration of the alternatives was most common among BBC (and licence fee) loyalists; unsurprisingly, they tended to concentrate on the alternatives' negative implications and to emerge even more firmly in favour of the licence fee.

16.1 Advertising

The majority (including many who were ambivalent about, or opposed to, the licence fee) rejected the use of advertising by the BBC. Most of these based their arguments on the cosmetic points noted above: commercial breaks are irritating; and the absence of advertising is what makes the BBC distinctive.

“Do we really want to associate something like the BBC with a crap advert like a pot noodle?”

Depth 1: 16-30, female, disabled, London/SE

“I think that would change the feeling and atmosphere of the BBC. That’s the main difference when you’re watching it, that there aren’t any adverts on BBC.”

Depth 9: primary school teacher, Northern England

Only a vocal minority – mostly BBC and licence-fee fans – anticipated more fundamental implications. This sector imagined that reliance on advertising for income would force the BBC to chase ratings in the way that they perceived the commercial channels as doing. They tended to place great value on the programmes which fulfilled the BBC’s public-service broadcasting commitments, and to see these areas as ones in which the programming on commercial channels was inferior. Their fear was that a move to advertising would endanger the aspects of the BBC’s output that they valued the most.

What these people said they appreciated was the quality (the intelligence of the writing and direction, and of the target audience), range (the number of formats used and the level of experimentation and risk) and integrity of programming (impartial news coverage and general freedom from commercial influence) that PSB commitments required and, as they saw it, an unprotected source of income enabled.

"I think it is because we don't have adverts. And they won't be producing tat to produce rating wars to try and get more money through advertising...I think the fee is the right way."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

In their view, advertising, which was imagined to link income more closely to the ratings achieved by individual programmes, would create pressures to produce only profitable and financially 'safe' programming. They imagined that this would lead to output aimed at mass-market rather than high-brow or niche audiences, the commissioning of low-risk series rather than expensive, less reliable one-offs, and the use of proven formats rather than more experimental ideas.

"Not being beholden to advertisers I guess they can take more risks with drama, comedy. I'm not sure The Office would have been made by ITV."

Group 13: AB, 31-45, light TV watchers, Northern England

To counter this, a number said that they would be happy for the BBC to take on advertising instead of the licence fee. These tended to be among the heavier watchers of commercial and multi-channel television, who were well used to advertising and accepted it as part of the television experience.

"I know ITV is funded by ads, which means there are a lot more adverts, but that doesn't actually bother me. I don't mind adverts and I think sometimes they can actually be useful."

Depth 12: secondary school teacher, Northern Ireland

In general, it seemed that their views were informed by an adverse reaction to the licence fee and an advocacy of something with which they were familiar, rather than a full consideration of the implications that worried others. They saw little risk of the BBC losing the qualities mentioned above (and did not tend to value these so highly anyway), and

were less aware of, or concerned about preserving, the differences between the BBC and commercial broadcasters.

“More people would prefer adverts than having to pay.”

Group 8: C1, 16-20, medium TV watchers, Midlands

16.2 Subscription

This was probably the most widely preferred alternative for those who objected to the licence fee. It addressed the common complaint that the public has no choice about paying the licence fee, whether or not the BBC’s services are used or appreciated. Many respondents already subscribed to satellite or cable services, and almost all others were aware of how this works; most could easily see a parallel where the customer only pays for what they want to receive.

“I think that we should pay a subscription if you want to watch the BBC.”

Group 4: C1, 21-30, light TV watchers, Asian female, London/SE

Some also argued that subscription would be easier to police than the current fee collection system.

“I am sure they spend a lot chasing people who have not paid the licence but if it was a subscription they wouldn’t have to.”

Group 19: AB, 21-30, light TV watchers, South Wales

Once again, however, the majority of those who advocated subscription did not seem to consider the implications fully; they tended to assume that the rate would be similar to the licence fee and that the BBC would attract a large number of subscribers and be able to function as normal.

“I think if there was a system where you could subscribe to the BBC, that would be better. You could give people the option; most people would pay for it.”

Group 23: AB, 16-20, medium TV watchers, Scotland

Those who argued against subscription (including some who initially supported it, but changed their minds on further consideration) recognised that take-up might be variable and lower than expected, rates might therefore have to be higher than the licence fee, and the BBC’s income might also be lower overall, with implications for programming quality.

“I think if you opt out of charging people full stop and then because of the choice out there only 5 million people in the UK decide to register with the BBC, how are they going to be able to fund anything at all?”

Depth 1: 16-30, female, disabled, London/SE

They also imagined that subscription would create the same pressure to maximise ratings as advertising (although probably less closely linked to individual programmes), with similar results.

Only a few, even among those who objected to subscription for other reasons, argued that a public-service broadcaster should be able to reach everyone at some point, and that subscription would by definition prevent this.

16.3 Programme sponsorship

Some respondents who objected to advertising at the cosmetic level found programme sponsorship a more palatable alternative, as it was expected to be less intrusive. Others felt that sponsorship on commercial channels was increasing (Jacob’s Creek for *Friends* and Five’s film sponsorship slots were mentioned), and that it was becoming irritating to see the same vignettes repeatedly.

“Another insidious thing has cropped up and that’s ‘sponsored by’. Not only do you have to wade through all the commercials, then there’s another commercial, ‘sponsored by’, before the programme starts.”

Group 13: AB, 31-45, light TV watchers, Northern England

Those who argued against advertising because they felt it would create pressure to maximise ratings tended to believe that the same would be true with sponsorship. Experimental and financially ‘unsafe’ programmes were thought especially unlikely to earn their place in the schedules.

“I don’t think they would be able to do half the programmes they actually do. They probably set up a huge budget and they would need a lot of sponsorship to do it. You have to wait two or three years while they make the programme.”

Group 19: AB, 21-30, light TV watchers, South Wales

Some felt that the influence of a company on the programme it was sponsoring could be even greater and more direct than that of a company

buying advertising time. The possibility that the sponsor could influence the content of a programme was raised; in this context, sponsorship was thought more acceptable if applied to long-running series, such as soap operas, than one-off programmes, as they were imagined to be less vulnerable.

16.4 Government funding through central taxation

Most respondents thought that taxation would be a fairer way of funding the BBC than the licence fee as it is less regressive: low earners would effectively pay less than those on higher incomes. Nevertheless on consideration it was rarely regarded as a welcome alternative.

"I think taxation would be good for pensioners who sometimes struggle to pay their licence fee. And for people on social security."

Group 13: AB, 31-45, light TV watchers, Northern England

Some assumed that this would not involve a commensurate rise in general taxation; others were resistant to the idea of more tax, or 'a tax on watching the telly'.

Views on the implications of this option tended to depend largely on opinions about the BBC's current influences and independence. Some thought a more direct reliance on the government for funding than is currently the case would lead to greater political influence and control.

"I think they would lose their impartiality, and you might see, as a change in government came along, a change in slant. I don't want to see that."

Group 25: C1, 46-60, light TV watchers, Scotland

Others believed that the BBC's political views and programming are already steered by government, and that direct funding would therefore be more appropriate.

"The government should fund it, they get enough taxes. It's government run is it not?"

Depth 12: secondary school teacher, Northern Ireland

In either case, direct funding seemed likely to increase complaints or regrets about government control over the BBC.

There was also some scepticism that the government would give the BBC what it needed to function as it currently does. Direct funding was expected to be less transparent than the licence fee, and some were suspicious that the BBC's income would be reduced without the public being made aware.

Overall, funding through taxation was not a popular option. Though it was thought theoretically fairer, it had unwelcome implications for those who valued the BBC in its current form, and it did not address the objection of others to public money being spent on a service which they did not use.

17. **Governance and regulation**

Few respondents had much knowledge or understanding of how and by whom the BBC is regulated, but there was a general belief that its output is scrutinised and controlled by someone. Awareness of any external body with this role was limited: some assumed or had heard that there is a watchdog to regulate the output of all broadcasters (although Ofcom was rarely familiar); others thought that the BBC would somehow be handled separately.

"There must be people who do control it but I don't know who they are. When you talk about the Director General I don't know how much control he has really."

Depth 8: secondary school teacher, Midlands

Regulation of the BBC was imagined to be similar to, but perhaps more stringent than, that of other broadcasters. Maintaining basic standards such as balanced output, taste and decency, and equal treatment of ethnic minorities was expected; meeting public-service broadcasting commitments was also sometimes mentioned.

There was vague awareness of the Board of Governors (largely, it seemed, from coverage of the Hutton inquiry), but the impression tended to be that their role is to manage, rather than regulate, the BBC. Perhaps because of this, most respondents assumed that they were appointed and employed by the BBC itself.

Being told that the Board of Governors is appointed by the Crown, not the BBC, and is in part a regulatory body, could reinforce impressions of the BBC being conservative, conventional and separate from other broadcasters, and strengthen suspicions about governmental influence and control. Many said that they wanted more transparency about the identities and role of the governors, although this was likely to have been overstated in the research situation.

“So the government appoint the governors. You have got to really trust the government haven’t you, it is hard to know because you don’t know how the people are chosen and how they vary.”

Depth 8: secondary school teacher, Midlands

“The government appoint the top guy so they’re going to have some influence in it.”

Group 13: AB, 31-45, light TV watchers, Northern England

“It seems like it’s more the government and the royals having influence, more than the people.”

Group 26: AB, 16-20, light TV watchers, Northern Ireland

Some more informed respondents felt that the governors should not have this dual role of management and regulation. They thought it would be better to have a separate, preferably external, body or organisation whose sole role was the regulation of the BBC. Arguments for this, however, were not often clear or reasoned – most simply felt that it would be appropriate to isolate these two functions.

“I think they should split it...If you split it you will have a side that will oppose if they think it is wrong.”

Group 19: AB, 21-30, light TV watchers, South Wales

18. **Accountability**

The accountability of the BBC was not a major issue for these respondents, and was never mentioned unprompted; it did not seem to be regarded as a problem or source of dissatisfaction. On prompting, many said that the BBC should be accountable to the public, and that it should be responsive to public opinion and taste.

After discussion, a number of respondents felt that the degree to which the public has some retrospective influence over programming should be

greater for the BBC than other broadcasters. This was largely because its funding is public, not private, but it also seemed to be due to a feeling that the BBC is 'part of the establishment' and therefore has a greater responsibility to the society which it serves.

In reality, however, most thought that the BBC is not substantially different from other broadcasters in this respect. Few felt that the BBC was directly accountable to them, or that they could individually take issue with any aspect of its programming.

"The directors probably have the final say. The public should have the say but I don't think they do, really."

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

"I have never heard of them [regional councils]."

"How do you get to hear of them?"

"They should listen to the public as much as possible."

Group 24: C2DE, 61-75, heavy TV watchers, Scotland

On reflection, some respondents decided that the BBC and Channel 4 are more open to public criticism than other broadcasters (this was partly confirmed or suggested by the discovery that Channel 4 is also accountable to the public), but the means for redress were thought to be marginal at best.

Two visible channels for complaint were mentioned occasionally: Points of View (although many were unsure whether this programme was still running); and on-air apologies in the event of mistakes or upheld complaints.

"The BBC have their own standards commission as well. You sometimes hear someone who has complained about a news report and it's either upheld or dismissed."

Group 25: C1, 46-60, light TV watchers, Scotland

Otherwise, the BBC was generally thought too remote and bureaucratic to expect any direct access should a member of the public wish to complain about, or comment on, its output.

"I wrote a letter and I never heard back."

Group 32: C2DE, 14-15, female, heavy TV watchers, Northern England

“They’re accountable to the public, but when do they ever ask us what we would like to see on it. They don’t ask any questions. I suppose you can write them a letter or email them, but you can imagine where that would go.”

Group 21: C2DE, 31-45, heavy TV watchers, Scotland

Ironically, the licence fee, which suggested to most that the BBC should be accountable to the public, could add to this sense of remoteness from criticism. Some respondents assumed that the BBC’s performance at this detailed level (rather than the more ‘strategic’ levels discussed above) would not affect its income from the licence fee, and that, unlike commercial broadcasters, it had no financial incentive to react to audience demands.

ANNEX

Attitudes to the BBC

Respondents were asked which of the following statements best described how they felt about BBC TV:

- A "I always prefer to watch BBC1 to other channels" ()
- B "I first look at what's on BBC1 – there is usually something good on" ()
- C "I usually check the other channels first but expect something good on BBC1 at times" ()
- D "I wouldn't expect anything good on BBC1 – I look at the other channels first" ()
- E "I rarely consider BBC1 – it does not show my kind of programmes" ()

In each group, two or three respondents agreed with statements A or B, two or three with statement C, and two or three with D or E.

In relation to the TV licence fee, respondents were asked what kind of value for money they thought it represented, as described below.

- F Very good value ()
- G Fairly good value ()
- H Not very good value ()
- J Poor value ()
- K Very poor value ()

Two or three respondents in each group agreed with statements F or G, two or three with statement H, and two or three with J or K.

Sample in summary

The following sample was achieved. An asterisk denotes rural locations; the remainder of fieldwork took place in urban areas. A *W* indicates Welsh speakers.

Groups with adults

London/South East

- G1: AB 16-20 light TV watchers
- G2: C2DE 31-45 medium TV watchers, African/African-Caribbean
- G3: C2DE 61-75 heavy TV watchers
- G4: C1 21-30 light TV watchers, Asian female

South West

- G5: C1 46-60 medium TV watchers*

Midlands

- G6: AB 31-45 heavy TV watchers*
- G7: C2DE 21-30 light TV watchers, African/African-Caribbean
- G8: C1 16-20 medium TV watchers
- G9: C2DE 46-60 heavy TV watchers
- G10: AB 61-75 light TV watchers

Northern England

- G11: C1 61-75 medium TV watchers
- G12: C2DE 16-20 heavy TV watchers
- G13: AB 31-45 light TV watchers
- G14: C1 21-30 medium TV watchers, Asian male
- G15: C2DE 46-60 heavy TV watchers*

South Wales

- G16: C1 16-20 light TV watchers
- G17: C1 31-45 medium TV watchers*
- G18: C2DE 61-75 heavy TV watchers *W*
- G19: AB 21-30 light TV watchers
- G20: AB 46-60 medium TV watchers *W*

Scotland

- G21: C2DE 31-45 heavy TV watchers*
- G22: AB 21-30 light TV watchers
- G23: AB 16-20 medium TV watchers
- G24: C2DE 61-75 heavy TV watchers
- G25: C1 46-60 light TV watchers

Northern Ireland

- G26: AB 16-20 light TV watchers
- G27: C2DE 31-45 medium TV watchers
- G28: C2DE 61-75 heavy TV watchers
- G29: C1 21-30 light TV watchers
- G30: C1 46-60 medium TV watchers*

4 groups with young people

- G31: ABC1 12-13 male medium TV watchers South West
- G32: C2DE 14-15 female heavy TV watchers Northern England*
- G33: C2DE 12-13 female medium TV watchers Scotland
- G34: ABC1 14-15 male light TV watchers South Wales

3 individual interviews with people with disabilities

- D1: 16-30 female London/SE
- D2: 31-45 male Midlands
- D3: 46-75 male Scotland*

3 individual interviews with people involved in lifelong learning

- D4: 21-30 female Northern England
- D5: 31-45 male South Wales*
- D6: 46-75 female Northern Ireland

6 individual interviews with teachers

- D7: primary school teacher London/SE
- D8: secondary school teacher Midlands
- D9: primary school teacher Northern England
- D10: secondary school teacher S Wales

D11: primary school teacher Scotland

D12: secondary school teacher Northern Ireland

Fieldwork was conducted between 26th January and 8th March 2004.

The researchers were Tim Porter, Catherine Woolcott, Alison Percy, Arnold Cragg, Ben Toombs and Cheryl Taylor.