



UK audience attitudes to the broadcast media

A summary of findings

Research Document

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Contents

Section		Page
1	Background	2
2	Methodology	3
3	Summary of findings	4

Section 1

Background

This document provides a summary of findings from Ofcom's Annual Media Tracker survey. The research explores UK adults' attitudes and opinions towards television and radio broadcasting, and related areas such as news consumption and privacy.

The Media Tracker was commissioned in its current form in 2008, but some of the questions and topics have been monitored on an annual basis since the early 90s, when the Independent Television Commission, one of Ofcom's predecessor bodies, ran the survey. Some of the pre-2008 results are reported here in the interest of making the information publicly available in one place. However, comparisons over time should be made with caution, due to methodological changes over the period.

The Media Tracker research provides a valuable source of information on consumers' attitudes, and helps inform Ofcom's work on broadcasting standards. Under the Communications Act 2003, Ofcom has a duty to draw up, and from time to time revise, a Code for television and radio services covering programme standards, including the protection of under-eighteens, the application of generally accepted standards to provide adequate protection from the inclusion of harmful or offensive material, sponsorship, product placement in television programmes, and fairness and privacy. This is known as the Broadcasting Code ('the Code') and came into effect in July 2005.

Ofcom recognises that generally accepted standards are subject to change over time and should be underpinned by consumer research. Ofcom's Media Tracker is one of a range of consumer research sources which Ofcom draws on in undertaking its duties in relation to standards on television and radio.

Section 2

Methodology

Fieldwork for the Media Tracker study was conducted for Ofcom by the research agency BDRC Continental. It employed face-to-face interviews conducted in respondents' homes. The questionnaire was conducted in two waves (April and October) to counter seasonality issues. Over both halves of the fieldwork, a sample of 1,830 adults aged 16+ was interviewed and then weighted to be representative of the UK. The data presented here are based on the weighted sample.

Time series data

Some of the data in the report were collected before 2005 and were published in the ITC *The Public's View* survey. Please see http://www.ofcom.org.uk/static/archive/itc/uploads/The_Publics_View_2002.pdf for further details on the content, results and methodology.

In 2005 this survey became Ofcom's Residential Tracker, which in 2008 split into two separate surveys – the Technology Tracker and the Media Tracker. Key changes in the methodology between the 2005 and 2008 surveys include switching from continuous research to two dip-stick waves, and moving from computer-assisted personal interview (CAPI) to paper-assisted personal interview (PAPI).

Where relevant, we have made some broad high-level comparisons between the 2005 and 2012 data. However, these comparisons must be treated with caution as variances in the results may be due in part to changes in the methodology, and not necessarily indicate a shift in consumer attitudes.

The pre-2005 data are presented in this chart pack in the interest of providing all the available data in a single place. Due to methodological changes, please view these trends as indicative only.

In the summary report below, we have highlighted recent significant changes (since either 2010 or 2011). Where there has been a significant difference since 2010 (but not since 2011) we have not necessarily included the 2011 figure in the text. All data points can be found in the accompanying slide pack.

Section 3

Summary of findings

This section provides a summary of the findings set out in Annex 1

Annex 1 provides a chart pack analysis of questions asked

<http://stakeholders.ofcom.org.uk/binaries/research/tv-research/uk-audience-attitudes.pdf>

Quality of TV programmes (see Annex 1: Slides 4 to 10)

Attitudes towards the quality of TV programmes show a shift in opinion since 2005.

- When asked whether TV programmes had improved, stayed the same or worsened in the past 12 months, over half (55%) of UK adults said that they had 'stayed the same' This is a rise from 47% in 2005¹. The proportion saying programmes had 'got worse' fell from 40% in 2005, to under a third (31%) in 2012. And the proportion saying TV programmes had improved remained relatively steady, at just over one in ten (13% in 2012 compared to 10% in 2005).
- Older respondents were more likely to feel that programmes had got worse (41% among those aged 55-64 and 41% among the over-65s), while the younger respondents (16-34 and 35-54 year olds) were more likely to feel they had improved (15% for each age group).
- Among those who thought programmes were getting worse, the top two reasons given were 'more repeats' (68%, up from 60% in 2010) and 'lack of variety' (51%), while the top two reasons for programmes getting better were 'wider range of programmes' (52%, up from 47% in 2010) and 'improved quality' (39%).

Levels of offence on TV (see Annex 1: Slides 11 to 21)

Less than a fifth of UK adults say they have been offended by something on TV in the previous 12 months – a similar proportion to the previous year.

- Almost a fifth (18%) of respondents said they had been offended by something on TV in the previous 12 months – a similar proportion to the 2011 results.
- Older respondents were more likely than younger people to say they had been offended (27% of over-65s compared to 13% among 16-34s).
- As in the two previous years, among those offended, language (47%), violence (33%) and sexual content (32%) were the most common causes of offence. But among those offended, fewer people (10%) said they were offended by nakedness than in 2010 (14%) and 2011 (16%).
- Among those who had been offended, four in ten (39%) agreed with the statement 'such things should only be shown when viewers are likely to expect them' (e.g. after a clear warning), followed by 36% who agreed that 'others should be allowed to see these things', whereas 20% thought that 'it should not have been shown'.

¹ Comparisons with data prior to 2008 should be seen as indicative only as there have been a number of methodological changes in the survey's sample, timing and question order since then, which may mean that changes in the data may not be due to attitudinal changes alone.

- The main reaction on seeing something that caused offence was to switch channel (50%). Almost a quarter (22%) said they switched off, 15% continued watching the programme and 15% discussed it with others.
- Audiences today are less likely than in 2008 to switch off when they see something that offends them (32% in 2008 vs 22% in 2012) and more likely to continue watching (5% in 2008 vs 15% in 2012).

Attitudes towards sex, violence, swearing and harmful content on TV (see Annex 1: Slides 22 to 36)

Opinions about the amount of sex, violence and offensive language on TV look to have shifted since 2005; with the proportion saying the amount is 'about right' having steadily increased for each type of content, while the proportion stating 'too much' has declined.

- The majority of respondents felt that current levels of sex (67%), violence (56%) and swearing (56%) on TV are 'about right'. One in four (24%) felt there was 'too much' sex and just over two in five felt there was 'too much' violence (39%) and swearing (39%). This compares to 36% of adults saying there was 'too much' sex on TV in 2005, with 56% for violence and 55% for swearing.
- Older respondents were more likely than younger respondents to think levels were 'about right' for each type of content.
- Sixteen per cent of respondents said they had seen something on TV in the past 12 months that they thought was harmful, either to themselves, to other adults or children; a similar proportion as in 2011.

Protection of children and the TV watershed (see Annex 1: Slides 37 to 44)

Audiences today are more likely than in 2005 to think the 9pm watershed is at about the right time

- Half (50%) of respondents felt it was the responsibility of both broadcasters and parents to make sure that children do not see unsuitable programmes. Just under half (45%) felt it was 'mainly parents' responsibility and 4% 'mainly broadcasters'.
- Parents were more likely than those without childcare responsibility to feel it was the responsibility of 'both broadcasters and parents' to ensure that children do not see unsuitable programmes (53% vs 48%), and less likely to say 'mainly parents' (42% vs 46%).
- Most (96%) were aware that broadcasters are required to show television programmes that are not suitable for children only after a certain time in the evening.
- Audience today were more likely to think the 9pm watershed was at about the right time, with three-quarters (75%) of respondents saying so. This compares to 64% in 2005².

² See footnote 2

Attitudes towards TV advertising, sponsorship, product placement and promotions (see Annex 1: Slides 45 to 47)

Awareness of some forms of non-traditional advertising has grown each year since 2010.

- Awareness of programme sponsorship has grown each year since 2010; from 79% to 84% in 2012 and from 71% to 77% for channel promotions. While awareness of programme promotions (trailers) has not changed year on year, it is higher than 2010 levels (86% vs 90% in 2012).
- Product placement in films and international programmes (such as US drama series) has been allowed on UK television for many years. Since 28 February 2011 TV programmes made for UK audiences have been permitted to contain product placement as long as they comply with [Ofcom's rules](#)³. In line with this there has been a significant increase in awareness of product placement, from 39% in 2010 to 50% in 2012.
- Attitudes towards the amount of advertising on the main channels are broadly split. Almost half (46%) stated that present levels of advertising on the five main TV channels 'don't bother me but I would not want any more'; two in five (40%) agreed there was 'already more than I am really happy with'.
- Among those who had multichannel TV, 42% stated that the amount of ad breaks on the other commercial channels 'doesn't bother me but I would not want any more' and 43% agreed 'there is already more than I am really happy with'.
- Among those who were aware of programme sponsorship, 55% stated that present levels 'don't bother me but I would not want any more', with 9% stating 'a little more would not bother me' and 22% saying 'there is already more than I am really happy with'.

News – sources used and attitudes towards impartiality (see Annex 1: Slides 48 to 61)

Television remains the main source of news, with younger respondents more likely to rely on the internet. A smaller proportion of respondents than in 2010 rated TV and radio as being impartial.

- For all respondents TV was the main source of news about what is going on in the UK and around the world (72%), followed by newspapers (7%) and the internet (10%). Older respondents were more likely to say TV is their main source of UK/world news (83% of those aged 65+ compared to 65% of 16-34s).
- Those aged 16-34 were the group most likely to say the internet was their main source of UK and world news (18%).
- TV was also the main source of news about 'what is going on in the local area' (50%), followed by newspapers (15%, a decrease from 23% in 2008) and radio (9%).
- Respondents in Scotland and Northern Ireland (69%) were more likely than those in Wales (62%) to say that TV was their main source for their nation's news. Almost a

³ For more information see <http://consumers.ofcom.org.uk/2011/02/product-placement-on-tv/>

fifth (16%) of respondents in Wales said that their main source was the internet (compared to 9% in Northern Ireland and 2% in Scotland).

- The vast majority of respondents thought it was important for each news source to be impartial (93% for TV, 88% for radio, 86% for newspapers and about three-quarters for different types of web content).
- Over half (56%) felt that TV was an impartial news source, with the BBC most likely to be seen as impartial. Radio was seen as the second most impartial news medium (49%), followed by broadcasters' websites (28%), newspapers (23%), newspapers' websites (19%) and other websites (15%).
- TV and radio have both seen declines in respondents' rating of impartiality, compared to 2010 (from 66% to 56% for TV and from 57% to 49% for radio). This could be related to some diminution of trust in the media following the past year's events.

Radio (see Annex 1: Slides 62 to 69)

Commercial radio listeners were more likely than BBC radio listeners to say that they relied on the radio for coverage of local news.

- Seventy-six per cent of respondents said they listened to the radio either every day or several times a week, with around half listening every day.
- Levels of offence related to radio were very low; among those who listen to the radio, 2% said they had personally heard something on the radio that they found offensive in the last 12 months.
- Radio listeners were asked to rate the extent to which they personally relied on BBC/commercial radio stations for coverage of certain local issues and events, with a score of 1 being 'completely rely on' and 5 'do not rely on at all'. Looking at the top two ratings, commercial radio listeners were more likely than BBC radio listeners to say that they relied on the radio for coverage of local news (25% vs 35%), travel/weather (29% vs 38%), information about events/the community (17% vs 27%), and emergencies such as snow and floods (26% vs 34%).
- Almost three in five (57%) of respondents felt that present levels of advertising and programme sponsorship on commercial radio stations 'don't bother me but I would not want any more'. Just over a quarter (26%) felt 'there is already more than I am really happy with' and 6% stated 'a little more would not bother me'.

Attitudes towards privacy (see Annex 1: Slides 70 to 72)

Newspapers were seen as the medium that is most intrusive into the lives of people in the public eye and the general public.

- When asked about their attitudes towards privacy on television, just under half of respondents (49%) agreed with the statement that 'broadcasters should not be able to show programmes that scrutinise the lives of celebrities and politicians without their consent', with a third (31%) saying they should and 17% neither agreeing nor disagreeing.

- Seventeen per cent agreed with the statement: 'TV broadcasters should be free to show programmes that scrutinise the lives of general members of the public without them giving consent'; while 65% disagreed, and 15% neither agreed nor disagreed.
- Newspapers were seen as the medium that is most intrusive into the lives of people in the public eye (48%) and the general public (50%), followed by TV (23% and 24% respectively) and magazines (20% and 11% respectively).

Regulation (see Annex 1: Slides 73 to 85)

Opinions that the amount of regulation for the internet is too little have increased since 2010.

- The majority of respondents (88%) thought TV programmes were regulated – an increase from 85% in 2010. Three in four (74%) felt that current levels of TV regulation were 'about right'.
- Four in ten (40%) thought the internet was regulated. Almost half (47%) felt that current levels of internet regulation were 'too little', (increasing to 54% among parents), 23% said 'about right' and 28% said they didn't know whether it was about right or not. Since 2010 the proportion of respondents who said they 'did not know' has declined (from 38%).
- Since 2010 opinions that the amount of regulation for the internet is too little have increased from 41% in 2010 to almost half (47%) of UK adults in 2012. This rises to more than half (53%) among parents.
- Almost three-quarters (73%) of respondents were aware that it is possible to watch/download programmes online. Awareness declined with age (81% of 16-34s vs 53% of 65+) and parents' awareness was higher than among those not responsible for children (80% vs 70%).
- Among those aware that it is possible to watch/download programmes online, 55% thought that the content was regulated and 10% thought that it was not. Awareness was higher among 16-34s (57%, compared to 50% of over-65s).

Take-up and use of technology, TV (see Annex 1: Slides 86 to 111)

Over half of viewers⁴ who use TV 'on demand' services say they watch them when there is nothing to watch on 'normal TV'.

- Around three in ten respondents said that they used TV video-on-demand services (from Virgin on Demand, Sky Anytime or BT Vision +). The top three reasons for use were: because they 'missed the programme/file when on TV' (76%), 'use it when there is nothing on 'normal' TV to watch' (54%) and 'wanted to watch programme/film at a time that suits me' (46%).
- A third (35%) of internet users said they used the internet to watch TV programmes online or download from TV broadcasters' websites, and a third (36%) said they watched TV clips online or downloaded from other websites.

⁴ This figure doesn't include viewing on games consoles connected to the TV set or smart TV OTT watching. The question is specific to Sky, Virgin, BT Vision+ and TalkTalk.

- Fifty-nine per cent of respondents who said they watched TV/films/video clips via the internet said they did so at least several times a week, rising to 67% of 16-34s.
- Among those who used online catch-up services, the top three reasons for use were 'missed the programme/file when on TV' (62%), 'want to watch programme/film at a time that suits me' (43%) and in third position: 'use it when there is nothing on 'normal TV to watch' (32%). Compared to 2011, there has been an increase in the proportion saying they use catch-up services as a convenience (from 34% in 2011 to 43% in 2012).
- TV remains the most-used medium, with 97% of respondents saying they watched it at least several times a week (87% said 'every day'). Just over three-quarters (76%) said they used the radio at least several times a week, 77% said they used the internet, 59% audio-visual media via the internet (i.e. TV programmes/films/video clips) and 47% non-live TV (i.e. time-shifted content on a TV set).
- Many respondents said they used other media while watching TV. The most popular activity was using their mobile, with seven in ten (70%) saying they did this while watching the TV on a TV set (41% said 'every day'). More than half (54%) said they used the internet at the same time.