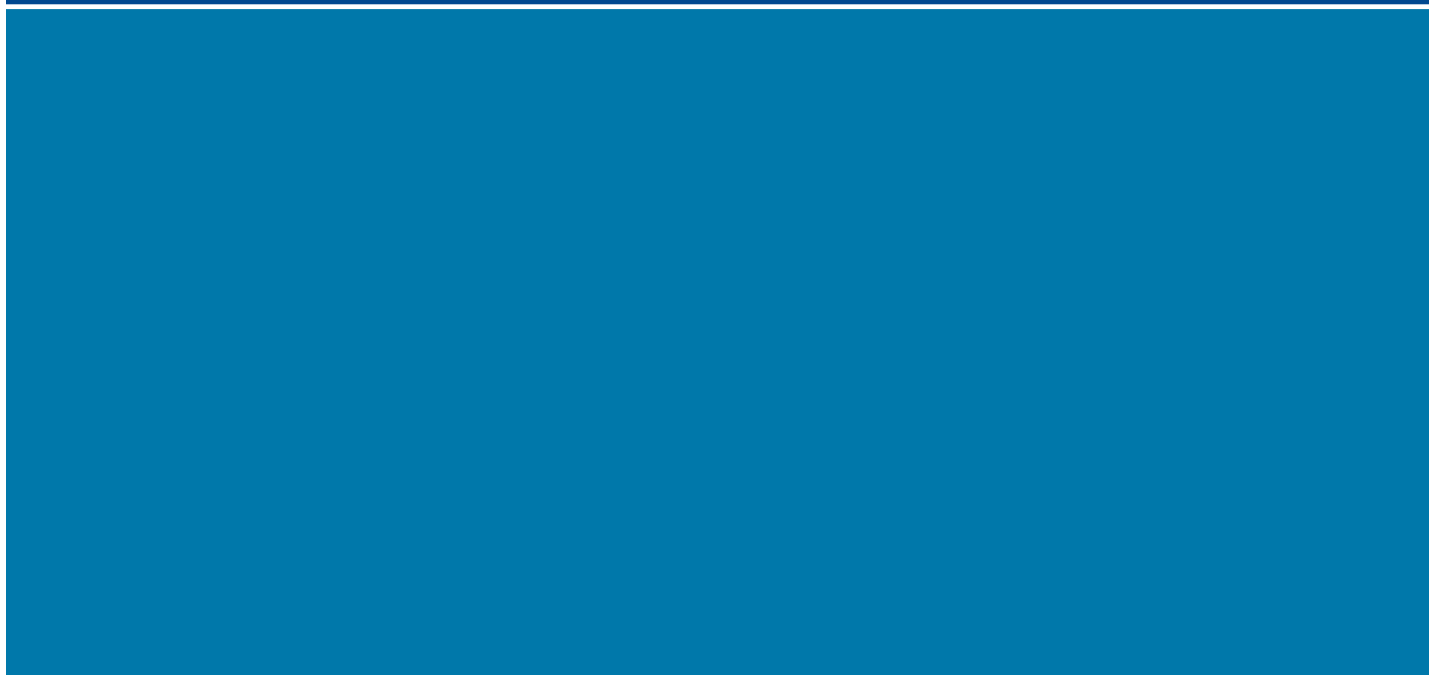


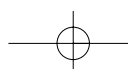
Public Service Broadcasting: What Viewers Want

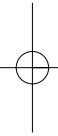
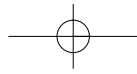
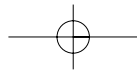
An ITC Research Publication

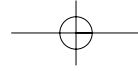


33 Foley Street
London W1W 7TL
Tel 020 7255 3000
Fax 020 7306 7800
Minicom 020 7306 7753
email publicaffairs@itc.org.uk
www.itc.org.uk

Price: £5.00
ISBN: 0 900485 84 1







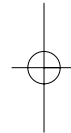
Public Service Broadcasting: What Viewers Want

An ITC Research Publication

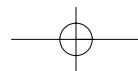
Report by Jane Sancho, ITC

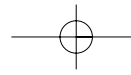
Research conducted by Opinion Leader Research, ICM and Ipsos-RSL/BARB

January 2001



ISBN: 0 900485 84 1





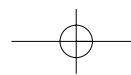
CONTENTS

FOREWORD	03
1 INTRODUCTION	04
2 OVERVIEW OF KEY FINDINGS	05
3 CITIZENS' JURIES: THE FUTURE OF PSB ON ITV	06
4 VIEWS OF PAY-TV AND TERRESTRIAL-ONLY VIEWERS ON PSB	10
5 CHILDREN'S VIEWS ON TELEVISION	13
6 WHAT OPINION LEADERS THINK ABOUT PSB AND ITS FUTURE	15
7 THE PUBLIC'S RESPONSES TO THE ITC'S CONSULTATION ON PUBLIC SERVICE BROADCASTING	18
8 PUTTING VIEWERS FIRST – FINDINGS FROM THE ITC'S OPEN MEETINGS ON PSB	22

FOREWORD

Since its inception, the commercial television sector has played its part in maintaining public service broadcasting (PSB) standards. The Independent Television Commission (ITC) has helped enrich the output through the application of positive programme requirements.

Prompted by the Government's intention to introduce major changes to legislation on communications, the ITC launched a series of public consultations in 2000. One major exercise was a wide-ranging consultation dedicated exclusively to reassessing and redefining the concept and value of public service broadcasting in the digital age.



1 INTRODUCTION

In May 2000, the Independent Television Commission (ITC) launched a major consultation on the role of Public Service Broadcasting (PSB) in the new multichannel, digital age. A wide range of research initiatives were planned and executed throughout the rest of the year to find out what viewers understand by PSB, and what they expect and want from PSB channels in the future. The research was timed to feed into the debate on the Government's proposed communications legislation. This document contains a collection of summaries of each piece of research.

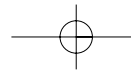
RESEARCH METHODOLOGIES

CITIZENS' JURIES	Due to the complex nature of public service broadcasting, the ITC felt that an in-depth, deliberative research approach was required – one that informed respondents about some of the difficult issues associated with PSB from a variety of different perspectives. Three Citizens' Juries were commissioned, with each jury given the opportunity to hear arguments from a spread of expert witnesses working within the industry, or with an interest in broadcasting, and to question their stance in relation to PSB. This research is summarised in section 3.
SURVEY	In order to quantify the findings from this qualitative research, a questionnaire was drawn up using the information gleaned from the citizens' juries, and placed on the Broadcasters Audience Research Board's QUEST panel of 6,000 people. This self-completion survey aimed to determine any differences of opinion towards PSB between viewers with just terrestrial channels and those with pay-TV.
CHILDREN'S WORKSHOP	Children's programming is very much a part of PSB and it was seen to be a vital element amongst adult representatives on the citizens' juries. But the ITC wanted to give children themselves a voice in the debate, so it commissioned a workshop with a group of eight and nine year olds who were shown programme clips and asked their views on what makes good and bad television.
EXECUTIVE INTERVIEWS WITH OPINION LEADERS	As well as consulting the public, the ITC commissioned executive interviews with three groups of opinion leaders: MPs, journalists and academics. Most of these interviews were based in the South of England, so opinions about the importance of regional programming were somewhat different from the opinions expressed by viewers from across the country. In addition to these groups, the ITC consulted more widely with senior executives from other regulatory industries and from consumer organisations. A summary of all these opinion leaders' views can be found in section 6.
PUBLIC CONSULTATION DOCUMENT	Reactions to the ITC's consultation document on public service broadcasting were received from a wide range of different organisations, groups and individuals. A collation of all these responses is provided in section 7.
OPEN MEETINGS	The ITC hosted a series of 15 open meetings across the UK. A broad spectrum of people were invited with different interests and backgrounds, and the public were invited to attend through advertisements in local press. Reactions to some of the issues raised and discussed at these meetings and responses to a questionnaire are summarised in section 8.

Full, detailed reports of all the research, including the methodologies used, are available upon request from the ITC's Research Department.

2 OVERVIEW OF KEY FINDINGS

- There was broad agreement on the characteristics of PSB. Qualities that were repeatedly echoed included diversity, high quality, education, innovation, entertainment, information, original productions, pluralism, accessibility, inclusion of minorities and free access.
- The vast majority of respondents, including those with pay-TV, believed strongly in the key principles of PSB and felt they were still valid in the multi-channel age.
- Three quarters of 2,412 cable/satellite viewers said they switched between these additional channels and the free-to-air channels to make a varied evening's viewing.
- BBC1, ITV, BBC2 and Channel 4 were the channels claimed to be watched most often by pay-TV subscribers. Sky 1 was the most watched non-terrestrial channel.
- The consensus across all respondents was that PSB requirements were prerequisites for good, quality television and that without them certain strands of programming would disappear altogether, and that quality itself would diminish. Few were confident that market forces alone could deliver diversity, high quality or innovative programming.
- There was widespread support for regulation, with the majority in favour of a single regulator, although this term was used to describe a number of different systems. All respondents considered that the BBC should be brought into the same regulatory framework as other channels.
- The commercial channels felt there should be some measure of self-regulation whereby a broadcaster sets out the proposed range and standard of its services, including taste and decency, and negotiates these terms with the regulator. ITV argued for a lighter touch regulatory position, which was less prescriptive and graduated across all public service broadcasters, including the BBC.
- News and drama were regarded as the two most important genres that ITV should continue to broadcast. Religious programming was seen as the least important.
- Regional programming was highly regarded amongst those who took part in citizens' juries in Telford, Southampton and Glasgow. No jury voted for the requirement to be removed, although it was felt there was room for dropping specific quotas for individual genres, and maintaining a more limited core set of genres. Opinion leaders (MPs, journalists and academics) viewed this aspect of PSB as one of the least important. In comparison, 61 per cent of a panel of 6,000 viewers agreed that whilst they watched few programmes made specifically for their region, they nevertheless regarded regional programming as an essential service for ITV to provide. There was public concern about the concentration of media ownership and a fear that because of it regional television would be lost. Those who expressed views at the ITC's public open meetings felt it was important to maintain regional programming, along with regional production.



- The juries saw high quality and varied children's programming as vital on ITV. Eight and nine year old children who took part in a workshop also wanted programming for them to be available on the main terrestrial channels. They appreciated that not all children had access to pay-TV. They enjoyed having a mix of programmes on CBBC and CITV, despite the popularity of specialist children's channels, such as Nickelodeon.
- The juries generally were supportive of minority programming, such as religion and arts programmes. The Telford jury, however, felt that it was not necessary to have a positive requirement for religious programming believing that some provision would be delivered and that it might be of higher quality if it was not being made simply to meet a quota. Amongst the panel of 6,000, religious programmes were ranked the least important. In contrast, there was mention at the open meetings that religious programmes were of poor quality, but were still regarded as important. A number of respondents suggested that they could be broadened to touch on wider aspects of religion, such as the spiritual and ethical sides, rather than focusing on specific religions.
- The public were unanimous in their support for subtitling with all agreeing that access for the deaf and hard-of-hearing was an essential service for a public service broadcaster to provide.

3 CITIZENS' JURIES: THE FUTURE OF PSB ON ITV

SHOULD ITV BE REGULATED BY POSITIVE REQUIREMENTS TO ENSURE THE RANGE, DIVERSITY AND QUALITY OF ITS PROGRAMMING?

BACKGROUND The ITC commissioned Opinion Leader Research (OLR) to carry out three Citizens' Juries on PSB. The three juries were conducted in Telford, Glasgow and Southampton in March, June and July, 2000.

The juries brought together between 13 and 16 randomly selected citizens from each area, chosen to be broadly representative of the demographic profile of that area. They sat for four days and one evening and were presented with information about public service broadcasting, as well as hearing from expert witnesses arguing from a variety of perspectives.

- KEY MESSAGES**
- There was unanimous agreement across all three juries that range and diversity of content on ITV must be maintained. Jurors said they enjoyed watching a mix of programmes on one channel.
 - All three juries agreed on the need for regulation. Most believed that without a regulatory framework, commercial broadcasters would simply follow the market and that less popular/commercially viable programming would disappear. They considered also that competition from the commercial sector was good for the BBC and ensured that its standards were maintained.
 - In most instances, the juries voted to retain the positive programme requirements, but felt that some flexibility was warranted, for example, some jurors thought that minimum quotas could be removed for certain genres.

- There was strong support for regional programming, despite the juries being held in very different parts of the country. No jury voted to remove the positive requirement for regional programming, but there were suggestions as to how the rules about the different genres might be relaxed.
- A positive requirement for children's programming and for diversity within the genre was regarded as vital.
- Two juries voted to retain a requirement for religious programming, while one jury felt the requirement was not necessary, on the basis that the ITV companies would produce some religious programmes and these might be of a higher quality if they were not simply trying to meet a quota.
- All three juries believed that it was important that ethnic minorities were a part of mainstream television, but overall they disagreed that having a positive requirement for multicultural or ethnic minority programming would be effective.
- The juries all agreed that the vast majority of programmes should be subtitled, to provide access for the deaf and hard-of-hearing.

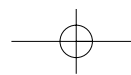
SUMMARY

RANGE AND DIVERSITY ON ITV

- All three juries felt that it was important to maintain the range and diversity of content on ITV, whether or not they received cable, satellite or digital television. One juror, who had pay-TV, said that his household still relied on ITV as *"the bedrock of our viewing"*.
- Jurors said they enjoyed watching a mix of programmes in one channel *"because it ensures that you get the best of the bunch of programmes on each topic"*.
"What we have is good. Channels 1, 2, 3, 4 and 5 have the variety and we like it as a basic diet, but for those who want cable etc it is a good addition."
- They were concerned that many people couldn't afford to subscribe to cable, satellite or digital channels. *"ITV has gone from being one of five channels to being one of 50 channels, but I still consider ITV diversity important for people who do not have the benefits of such technology"*.
- Jurors agreed that maintaining the range on ITV ensured that there was competition for the BBC, which they believed would keep standards on both channels high. *"If the BBC is moving away from PSB, and ITV moves away from it as well, that leaves us with nothing."*
"The competition with the BBC forces the BBC to put on good programmes; the one pushes the other and it's good for the viewer."

THE NEED FOR REGULATION

- All three juries were unanimous about the need for regulation.
- Jurors were concerned that if ratings and advertising were the only pressures on ITV, both the quality and the range of programmes would suffer, leading to lower quality programming for mainstream audiences and the loss of



programmes that didn't gain large audiences. *"Without the control, companies could show whatever they want, minorities would be ignored."*

"We would end up with a lot of programmes like Who Wants To Be A Millionaire?"

"Money will surely dictate what we watch and programmes such as regional ones will be scrapped because they are not popular and so are not profitable."

- The juries were concerned that imported programmes, especially from America, should not come to dominate output. All three juries tended to associate imports with poor quality and 'dumbing down'. *"Surely standards and quality will get worse and by taking away the positive requirements British television may end up like American television, and I like British television the way it is."*
- There was some division over whether the positive programme requirements were responsible for ensuring high quality. Some of the Telford jurors felt that removing the need for quotas, for example, in the areas of Arts and Religion might mean fewer, but higher quality programmes being made in these strands. But the Southampton jury believed strongly that these endangered genres should continue to be protected. They thought it likely that they would disappear from ITV altogether otherwise. In most cases, jurors voted to keep the positive requirements because they felt there was no guarantee that quality would be maintained, let alone increased, without them. With the exception of a minority in Telford, jurors did not trust market forces to deliver quality television.

REGIONAL PROGRAMMING

- Despite being held in very different parts of the country, each jury exhibited strong support and demand for programmes made in, and about, their area. *"We might lose our identity if we do not reflect the area in programmes."* No jury voted to abolish the requirement for regional programming.
- In Glasgow, the jury were more concerned about national, rather than local identity. They felt this gave them a stronger voice. There was a desire not to become too parochial. They believed that the rules could be changed so that 80 per cent of regional programmes were made in Scotland, rather than just in the STV area.
- Jurors, generally, wanted to see their area on television to learn more about its history and to find out about local events. They felt it was important that television used local talent and fed the local economy.
- Most jurors recognised that a more flexible system was needed for the future of regional programming, but there were mixed views as to how regulation might evolve. None of the juries voted to remove the positive requirement for regional programming, but they did suggest various ways in which the rules about the different genres might be relaxed. The Glasgow jury voted for keeping positive requirements for most regional genres, but did not want minimum amounts attached. They suggested the amounts should be negotiated between the company and the ITC. The Southampton jury did not believe positive requirements were needed for regional drama, entertainment or children's programmes, but wished to retain the hours and minutes for the

other strands, with the exception of social action. The Telford jury wanted to retain positive requirements for regional news, current affairs, local sport and history-type programmes, but did not consider the others to be as important.

CHILDREN'S TELEVISION



There is strong support for a continuing requirement for high quality and varied children's programmes on ITV.

- The juries were unanimous in their belief that high quality and varied children's programming on ITV was vital and that it had to be regulated. *"If parents aren't policing their kids' TV then for the sake of our society, someone has to."*
- They felt it was necessary for ITV to continue to broadcast a range of children's programmes (covering entertainment, information and drama). One juror thought that if it were left to other channels like Sky One, *"you'd just see Pokémon from morning till night"*.
- The Southampton jury went further and suggested introducing another category - 'news and current affairs', within children's programming.
- Two of the juries felt it was necessary to have positive requirements to achieve high quality children's programming, but the Telford jury was split on the issue. Some believed that ITV would continue to show the full range of children's programming, without positive requirements, in order to maintain its audiences and thus its advertising revenue. But the majority of jurors felt that in the absence of positive requirements, the balance between different types of children's programmes would be lost. The predicted result was a greater number of American imports, mainly cartoons.

RELIGIOUS PROGRAMMING

- Two juries felt that there should continue to be religious broadcasting on ITV and that it was necessary to have a positive requirement to protect it from commercial pressures. *"The positive requirement has to stay otherwise religious programmes on ITV would definitely go."*
- The Southampton jury felt that the genre could be stretched to include programmes about culture as well as traditional religion or acts of worship. They also considered there was scope for a broader range of faiths to be included and better scheduling of religious programmes to increase audiences.
- The majority of Glasgow jurors felt that there should be a requirement for religious programming, but that the amount should be negotiable with the ITC. These jurors believed this would provide programme makers with the opportunity to make fewer programmes, but of higher quality, which could be better scheduled. *"We don't want to see the hours filled up with rubbish on at 2.00am."* The jury, as a whole, expected to see services from the Church of Scotland, rather than the Church of England, but they felt there was room for the genre to incorporate different faiths as well, to cater for as much of society as possible. They thought religious programmes were currently too biased towards the Scottish Protestant faith. With this in mind, a couple of jurors from ethnic backgrounds wanted to increase the number of hours to allow for a broader coverage of different religions.
- The Telford jury voted to remove the positive requirement. They felt that the television companies would provide some religious programmes without being forced to do so, and that these might be of better quality if they were not simply making programmes to meet a quota.

- ETHNIC MINORITY PROGRAMMING
- All three juries believed that it was important that ethnic minorities were included in and throughout mainstream television.
 - But overall, they disagreed that having a positive requirement for 'multicultural' or 'ethnic minority' programming was necessary, or would be effective. Most felt it was creating an artificial genre and that there could be a danger of misrepresentation and stereotyping.

"You don't watch TV because it has black people on, you watch it for the programme."

"No one can define ethnic. Ethnic means anyone who's not like you."

"General interest programmes that happen to have someone of an ethnic minority background in them, like the Richard Blackwood programme – it seems illogical to me to legislate for that."

"Societies today are one big mix anyway, and as time goes on it is becoming more so, so it is better to bring ethnic minorities into what is existing rather than trying to have them out on a limb."

"Introducing ethnic minority issues into non-ethnic minority programming, such as having a Muslim family in EastEnders, would give important exposure and coverage."

- SUBTITLING
- The juries were unanimous in believing that the vast majority of programmes should be subtitled on the basis that sections of society should not be excluded. *"We're all more aware of people with disabilities, and the progress TV companies have made and the promises they've made are positive and encouraging."*
 - The Glasgow jury felt that live sport should be excluded, on the basis that it could not be subtitled adequately and therefore offered a poor service to deaf viewers.

4 VIEWS OF PAY-TV AND TERRESTRIAL-ONLY VIEWERS ON PSB

BACKGROUND A questionnaire on public service broadcasting, derived from the qualitative Citizens' Juries research, was placed on the Broadcasters Audience Research Board's Quest Panel over a period of four weeks, between 9 October and 5 November, 2000. The questionnaire aimed to quantify some of the juries' findings, specifically looking at differences in attitudes between terrestrial-only viewers and those with pay-TV. A total of 6,166 responses were received, 2,412 from multi-channel homes and 3,754 from terrestrial-only, 320 of whom were former subscribers.

- KEY MESSAGES
- Three quarters of those with pay-TV said they switched between these channels and the free-to-air channels to make up a varied evening's viewing. Half claimed to watch primarily the terrestrial channels, only turning to a cable or satellite channel for the occasional programme.

- When asked to rank the top eight channels that they watched most often, subscribers placed BBC1, ITV, BBC2 and Channel 4 in the first four positions. Sky 1 was the most watched non-terrestrial channel.
- News and drama were regarded as the two most important genres that ITV should continue to broadcast. Religious programming was seen as the least important.
- Slightly more than half the sample endorsed the view that programmes appealing to minority tastes, such as arts and religious programmes should be shown mainly on specialist channels.
- Thirty-nine per cent of all respondents felt that specialist channels were a good thing, rising to 60 per cent of pay-TV subscribers.
- Most respondents agreed that regional programmes kept them up-to-date with news in their area.

SUMMARY

- Penetration of non-terrestrial channels was found to be 39%, with 56% never having subscribed and 5% who were lapsed subscribers.
- Over half had been subscribing for more than two years, but there had been a dramatic increase in subscription over the last six months, especially amongst 16-24s.
- Nearly half of all pay-TV subscribers got their service via a satellite dish (BSkyB/Sky), especially men, 35-44s and C2s. Cable closely followed, with a profile biased towards women and the 65+s. Just one in eight had access through ONdigital (or any other digital terrestrial supplier), although this figure was considerably higher amongst 16-24s (18%).
- Three out of every five pay-TV subscribers were digital. Digital subscribers tended to be men, 25-44s and C1C2s. Conversely, women, the young and the old were least likely to subscribe.
- Three quarters of those who received subscription channels said they switched between them and the free-to-air channels to make a varied evening's viewing. Half claimed to watch primarily the terrestrial channels, switching to the subscription channels for the occasional programme, whilst a quarter claimed the reverse.
- Those subscribers who claimed to watch the free-to-air channels for most of their viewing, flicking to pay-TV channels for the occasional programme, were skewed towards the middle aged, elderly and AB social classes.
- Subscribers who said they mainly watched the pay-TV channels, using the terrestrial ones to supplement their viewing, tended to be male, young and from the lower end of the social class spectrum (DEs).
- Respondents with pay-TV were asked to rank the eight channels they watched most. BBC1, ITV, BBC2 and Channel 4 topped the league. Sky 1 was the most watched non-terrestrial channel. Channel 5 was ranked eighth behind Sky 1, UK Gold and Sky Sports.



A range of news programming is seen as a key element of public service broadcasting.

- News, followed by drama were the two most important programme genres that respondents felt ITV should continue to show, whilst religious programmes were judged to be the least important.
- Almost all agreed that currently there are free general entertainment channels that show a wide variety of different programmes and cater for all tastes.
- There was unanimous support for ITV having to provide national and regional news coverage.
- Just over half the sample agreed that 'programmes that appeal to a minority of people should be shown mainly on specialist channels (eg. religious or arts programmes)'. Young people, C2DEs and pay-TV subscribers were most likely to agree with this stance.
- Whilst less than half of all respondents felt that programming made especially for their area was essential, just over a third neither agreed nor disagreed and only one in ten actively disagreed. Those most in favour of regional programming were the over 45s and those in terrestrial-only homes.
- There were mixed views when it came to thinking about the future, with one third agreeing and the same number disagreeing with the statement, 'I think that in future there will only be specialist channels and that you will pay to watch what you want'. Those aged 25-34 were more likely to support this scenario, along with viewers from multi-channel homes.
- Nearly two thirds of all respondents agreed that because of the range of different kinds of programmes shown by BBC, ITV, Channel4/S4C and Channel 5 they got to see good programmes that they would not have thought to watch. This was particularly the case for the over 45s, ABC1s and those in terrestrial-only homes.
- Thirty-nine per cent of all respondents thought that specialist channels were a good thing because they put all the programme types they liked in one place. Over one third sat on the fence, neither agreeing nor disagreeing with this statement. However a majority of 16-34s supported it, as did over 60 per cent of those in multi-channel homes.
- Opinion about whether or not specialist channels could avoid scheduling clashes, when two similar programmes were put on at the same time on different channels, varied between those from multi-channel homes and those from terrestrial-only. Sixty-five per cent of pay-TV subscribers agreed that specialist channels could avoid such clashes, while far fewer (48%) of those with just the terrestrial channels agreed. 16-34s and C2DEs were more likely to support the viewpoint.
- There was broad agreement by all respondents that regional programmes on BBC/ITV were the way that they kept up-to-date with the news in their part of the country. More women, over 45s, C2DEs and those in terrestrial-only homes endorsed their reliance on regional programming.

- Sixty-one per cent agreed that whilst they watched few programmes made specifically for their region, they nevertheless regarded regional programming as an essential service for ITV to provide.
- When asked to name up to four programmes made in their region or about their region, many respondents cited local news programmes and famous regional productions, notably *Coronation Street* (Granada), *Emmerdale* (Yorkshire) and *Taggart* (Scottish). Other examples of regional programmes named by large numbers of respondents included *Lesser Spotted Ulster* (Ulster TV), a regional drama in Wales, *Nuts & Bolts* (HTV) and *Country Ways* (Meridian).

5 CHILDREN'S VIEWS ON TELEVISION

BACKGROUND The ITC wished to involve children in the debate about public service broadcasting, so Opinion Leader Research were appointed to hold a workshop with a group of eight and nine year old boys and girls, to complement the Citizens' Juries on PSB conducted amongst adults.

The main objectives of the research were to develop a better understanding of what eight and nine year olds want from television. In particular, the workshop aimed to find out more about what makes a good programme for children, and how important it is for them to have a mix of different types of programmes, and to assess their perceptions of the BBC, ITV, and the children's cable and satellite channels.

The workshop was conducted on 14 October 2000 in Bristol. It involved showing reels of programme clips, use of stimulus material, mood boards, and getting the children to draw up their ideas for a perfect evening's viewing (4.00pm – 7.00pm). Due to the small-scale nature of this research the results cannot be regarded as definitive, but they offer a useful steer as to the views of children of this age.

- KEY MESSAGES**
- Like adults, children appreciate diversity. The eight and nine year olds who took part in the workshop said they preferred to see lots of different programmes in an evening, rather than several episodes of the same programme.
 - Both the boys and the girls enjoyed programmes that were fun and funny.
 - The girls preferred dramas and soaps, while the boys liked cartoons and programmes with lots of action.
 - Both the boys and the girls disliked programmes that they perceived were for the other sex.
 - Most of the cable and satellite viewers were channel hoppers. Those with terrestrial-only said they tended to stay with one channel for a long period.

- There was a perception amongst this group of eight and nine year olds that the terrestrial channels were for younger children, while the cable and satellite channels had more provision for children their age.
- SUMMARY
- Like adults, children appreciate diversity. This group of eight and nine year olds' favourite television programmes were mainly drama and entertainment, but they also liked information programmes, such as *Art Attack* and *Blue Peter*.
 - Teen and adult programmes were found to be just as popular as children's programmes, particularly soaps, such as *Holby City*, *EastEnders* and *Coronation Street*, and comedy shows, such as *Friends* and *Buffy the Vampire Slayer*.
 - Both the girls and the boys in the group liked programmes that were fun and funny, and both sexes enjoyed programmes that focused on making things, although they also had different tastes and interests.
 - The girls tended to be enthusiastic about dramas about girls their age, or a little older, while the boys preferred cartoons and programmes with lots of action.
 - There was a strong perception amongst both boys and girls that certain programmes were for the other sex, and consequently they were disliked. For example, most of the girls thought sports programmes and cartoons, such as *Pokémon* were for boys. Any programmes which featured girls as leading characters were likely to be unpopular with the boys.
 - The children valued a mix of programmes, preferring to see lots of programmes in an evening, rather than several episodes of the same programme. When they constructed their perfect television schedules, few included repeats of the same programme. There was strong criticism of an example of Nickelodeon's schedule for having too much repetition.
 - Most cable and satellite viewers were channel hoppers, flicking through both terrestrial and cable and satellite channels to find the next programme they wanted to watch. Those with terrestrial television only were more likely to turn to one channel and stay there for a longer period of time. Some claimed actively to like not having to flick around to find a programme they wanted to see.
 - There was a tendency for children of this age to judge some of the provision for children on the terrestrial channels as too babyish. Boys especially were critical.
 - There were mixed attitudes to the BBC. Many of the boys thought of it as being rather dull and for older people. They also saw it as being rather babyish because of programmes, such as *Teletubbies*. Some of the girls associated it with the news, so thought of it as boring. But others were much more positive because it had programmes they liked, such as *Mona the Vampire*, or *Byker Grove*.
 - Perceptions of ITV also were mixed. Both girls and boys seemed to associate ITV very strongly with its presenters, so saw it as rather trendy. Boys felt CITV was more 'fun' than CBBC and regarded it as a reliable viewing option. Girls thought of it as showing some programmes they liked, but also programmes they didn't like.



A workshop of eight and nine year-olds enabled children to have their say in the debate about PSB.

- Boys were most positive about the cable/satellite channels. They saw these as fun and entertaining and chose pictures full of movement to represent them. Girls felt these channels, Nickelodeon in particular, were quite grown up because of the dramas featuring girls a few years older than themselves. Both boys and girls tended to associate cable/satellite channels with bright colours.
- There was some suggestion that compared to the cable/satellite channels, CITV and CBBC were seen by this group of eight and nine years olds as rather young because they show programmes for younger children. The cable/satellite channels may show programmes for younger kids, but because older children can switch to alternative channels when they are on, they tend not to associate these channels so strongly with programming aimed at pre-school and younger children.

6 WHAT OPINION LEADERS THINK ABOUT PUBLIC SERVICE BROADCASTING AND ITS FUTURE

BACKGROUND The ITC commissioned ICM to conduct research amongst MPs, journalists and academics to find out their views on the future of public service broadcasting. Between 25 July and 4 August 2000, fifty face-to-face interviews were carried out with people from these backgrounds.

- KEY MESSAGES
- Opinion leaders, including MPs, journalists and academics, are overwhelmingly supportive of PSB.
 - The majority of opinion leaders believe PSB requirements are still relevant today, and have a role to play in the multichannel, digital future.
 - The most important and most recognised aspects of PSB are 'wide range of programmes' and 'strong sense of independence/impartiality'.
 - The least important and least recognised aspects of PSB are 'catering for regional interests', 'limiting advertising minutage' and 'reflecting a national identity'.
 - Most believe that without PSB there would be a loss of programming for minorities, a reduction in art, culture and science programmes, and an increase in American imports. Opinion leaders feel that the loss of PSB would result in ITV 'dumbing down' and standards dropping. They predict that this in turn would have a negative impact on the BBC.
 - MPs feel that PSB encourages quality programming that a free market would not necessarily provide, and continued coverage of events of national significance.
 - Some journalists believe that PSB channels force other channels to raise their standards.
 - Labour MPs regard PSB as enhancing social inclusion and catering for minorities without extra cost to them.
 - All three groups agree that the most effective way of enforcing PSB commitments is via an independent regulatory body.

SUMMARY

- THE AIMS OF PSB
- Journalists see the main aim of PSB as being *“to educate, entertain and inform”* and to provide *“programmes that cover all walks of life”*.
 - MPs regard PSB as a means of providing good quality programming and broadcasting that would not be offered if it was left to a free market. They also feel that PSB ensures that events of national significance are covered.
 - Academics agree that PSB delivers programming for minority interests, such as art, culture and science, which would not otherwise be provided by commercial markets. *“The aims are to preserve the quality and balance of public broadcasting.”*

THE RELEVANCE OF PSB

Journalists

- The majority of journalists feel that PSB requirements imposed on ITV and C4 are still valid. Journalists believe they are prerequisites for good, quality television and still offer *“a very valid ambition”*. A minority feel specific requirements have passed their sell-by date and should be relaxed, eg censorship and programme scheduling. For a few, the development of digital television has made them question the relevance of PSB regulations. *“It is very hard to see that there can still be requirements for public service broadcasting as we move towards digital.”* One journalist thought it unfair that PSB requirements are imposed only upon terrestrial channels. *“It is not a fair market place if some people are regulated in one way and others aren’t subject to those requirements.”*

MPs

- PSB is overwhelmingly considered by MPs to be *“an entirely good thing”*. Some feel that PSB has evolved with the times, illustrated, for example, by the addition of a magazine style news programme, the *Nightly News*, to ITV’s range of news output. Several MPs see PSB as enhancing social inclusion. *“People watch television in a social way, rather than an individual way”* (Labour).

Academics

- The majority of academics believe that the bulk of regulations defined during the 1950s remain valid today, but they acknowledge that it *“must be a great deal more difficult now to maintain whatever role they are supposed to because the industry itself has changed so much”*. Academics’ views are mixed over the need for PSB channels to *“reflect a national identity”*. Some feel it contradicts the requirement for broadcasters to cater for cultural and regional diversity. But others consider it provides some form of social cohesion. ITV was criticised by some academics for failing to live up to PSB requirements. They feel it no longer places a *“strong emphasis on extending public knowledge, tastes and interests”*.

THE REASONS FOR PSB

Journalists

- Journalists consider programmes aimed at minority groups would not be provided without PSB requirements. They see PSB as ensuring that *“certain kinds of programming which are democratically valuable, but not in terms of a competitive market, are provided”*. Journalists feel that with the growth of multi-channel television there is a greater need to retain PSB. *“Terrestrial*

channels would probably be keen to maintain a variety of programme topics because part of the appeal of terrestrial channels is that they provide a range of programmes.” Some journalists consider that PSB channels force other channels to raise their standards.

MPs

- MPs agree that minority programming would not be provided without PSB regulation. They see the result being the exclusion of specific pockets of society from mainstream television. *“Wealthy minorities will be catered for by the market, poor minorities will not be provided for unless there are PSB obligations which ensure that they are provided”* (Labour). MPs consider that multi-channel television would cater for some minority groups but *“the fact that there are these channels doesn’t mean to say that all minorities are catered for and it doesn’t mean to say that different minorities would be treated equally”* (Labour). Channel 4 is seen by one MP to carry its remit successfully. *“Channel 4’s remit is a strength rather than a weakness. It glorifies in its difference and makes a virtue out of it.”* In contrast, the same MP sees ITV as more of a general entertainment channel, trying to wriggle out of its PSB commitments.



The quality and balance of public broadcasting are preserved by PSB requirements.

Academics

- Academics think that without a PSB requirement there would be a lack of provision for minorities and a limited number of art and cultural programmes. Academics want terrestrial channels to continue to be committed to diverse programming. There was some debate over the quality and type of programming offered by multi-channel television. Some think niche channels provide some innovative, specialist programming that is targeting some minority groups quite effectively, eg MTV. But most feel the range of programming on terrestrial channels is more attractive to viewers because of its diversity, achieved through PSB requirements.

THE FUTURE OF PSB

Journalists

- If PSB is removed from ITV, journalists think it would result in a decline of programming standards on the channel, and this in turn would bring standards on the BBC down. They suggest that multi-channel television has the potential to meet all PSB requirements, even more so than terrestrial channels, but that it is currently failing to produce quality, informative, educational programmes. Several journalists suggest that a core set of PSB values should be developed and extended to multi-channel television. *“There should be a core set of regulations that govern all channels. People do not care where their programmes are coming from, and regulations should reflect this.”* There is a fear that, if viewers begin to pay only for the channels they watch, there will not be enough money to maintain PSB standards. Overall, journalists feel that a statutory body is the most effective means of ensuring PSB delivery.

MPs

- MPs consider that despite multi-channel television, there will still be a need for some form of regulation. *“I think it might be broadcasting suicide for the UK if PSB is not provided. Take that away and it would have implications far beyond the simple demise of some great institution”* (Liberal Democrat). Several MPs think that some PSB requirements should be extended to at least some of the Pay-TV channels. But others disagree. One MP said he would



Without PSB requirements would market forces alone provide a diverse range of high quality programming available to all?

not want to see every single channel “obliged to have a little bit of politics, a little bit of art and a little bit of culture” (Conservative). One downside of extending PSB regulations was thought to be that it might take away from the “distinctive character of channels providing PSB” (Liberal Democrat). The majority agree that if the rules are relaxed there will be a dumbing down on ITV and C4, which will impact on the BBC. None of the alternative approaches to enforcing PSB is considered by MPs to be as effective as a statutory body, such as the ITC.

Academics

- Without PSB requirements, academics think there will be a reduction in UK productions and an influx of unoriginal American programmes. “It would be the retreat of the idea of public interest and public space to hand over to the domination of culture and entertainment by purely commercial organisations.” Academics think it will have a knock-on effect on the BBC. There is general consensus that PSB regulations can only be enforced by an independent authority such as the ITC.

7 THE PUBLIC’S RESPONSES TO THE ITC’S CONSULTATION ON PUBLIC SERVICE BROADCASTING

BACKGROUND Following the ITC’s launch of its nationwide debate on public service broadcasting, consultation documents on the role of PSB and Regionalism were made available to the public from the ITC’s offices, and via its web site (www.itc.org.uk). Over 40 responses were received. The findings are summarised below together with a list of all those who contributed.

- KEY MESSAGES**
- The vast majority agreed that PSB should remain.
 - There was widespread agreement on the characteristics of PSB.
 - There was considerable support for the continuation of regulation (in varying forms) with most support given to the existence of a single regulator.
 - All respondents agreed that ITV should continue to be a public service broadcaster. There was variation, especially from ITV, as to what form this should take in the future.
 - Channel 4’s special remit and strength was applauded.
 - The commercial broadcasters argued for a degree of self-regulation.

- SUMMARY OF PSB CONSULTATION RESPONSES**
- Virtually all respondents considered that there was a continuing role for PSB towards and after analogue switch-off. The majority considered the current PSB arrangement was effective and should remain.
 - The National Consumer Council (NCC), in particular, strongly argued for the retention of public service requirements because it felt it was not in consumers’ interests to have them removed, especially when multi-channel options were only available to a limited number.

- Some respondents, such as The Catholic Bishops’ Conference and the Broadcasting Standards Commission (BSC) highlighted the importance of universal access. They felt that with the fragmentation of audiences, it was even more important that everyone had access to a broad range of high quality programmes through free-to-air channels. A continued role for PSB was considered necessary to prevent the exclusion of certain sectors of society who were unable to pay for subscription channels.
- There was broad agreement with the ITC’s definition of PSB. Qualities that were repeatedly echoed included diversity, high quality, education, innovation, entertainment, information, original productions, pluralism, accessibility, inclusion of minorities and free access.
- In addition, some respondents spoke of PSB’s wider responsibility to extend public knowledge, tastes and interests and be the essence of social inclusion.
- It was generally considered, when looking towards a longer-term definition, that any new definition should be positive and engage both minorities and majorities. But most respondents (eg, The Presbyterian Church) expressed caution towards redefining PSB to exclude certain requirements that had previously been included.
- It was felt by most that a redefinition of PSB should only be considered when public attitudes towards the importance of the terrestrial channels shifted, and a significant majority also argued that any re-definition should only look towards analogue switch-off and not any further into the future.
- All respondents agreed that ITV should continue to be a public service broadcaster (as did ITV itself), but there was disagreement as to how it should continue. ITV envisaged that the BBC would remain the PSB benchmark and fulfil all its criteria, leaving commercial PSB contributions to be complementary and distinctive from the BBC. In this way, ITV suggested that PSB in the future should be defined by the totality of services. The BSC and the NCC endorsed this view of an overarching PSB framework.
- There was still the continuing belief that public service broadcasters should pay for the privilege of access to universal airwaves, with money and commitments.
- There was a lot of support for the continuation of regulation, though to varying degrees. This was grounded in the widespread belief that without positive requirements, market forces alone would not deliver programme diversity and quality.
- In terms of public service broadcasting in the private sector, respondents commended the role and strength of Channel 4. They noted the benefit of its special remit and wished it to remain.
- Channel 5 also created some debate; the NCC considered the channel should have its remit reassessed in light of the overall role of all public service broadcasters.



Channel 4’s distinctive remit requires it to meet PSB obligations.

- The role of local television was also discussed, with support given for longer licences, and allocated spectrum.
- The commercial broadcasters argued for a degree of self-regulation, whereby a broadcaster sets out the proposed range and standard of its services, including taste and decency, and then negotiates these terms with the regulator.
- In addition, a number of respondents pointed to the need for a Consumer Council to provide direct representation for viewers.

LIST OF RESPONSES RECEIVED

- (i) NCC (National Consumer Council)
- (ii) BSC (Broadcasting Standards Commission)
- (iii) Equity
- (iv) Campaign for Press and Broadcasting Freedom
- (v) National Viewers' and Listeners' Association
- (vi) Presbyterian Church in Ireland (Board of Communications)
- (vii) BECTU (Broadcasting Entertainment Cinematograph & Theatre Union)
- (viii) FSA (Financial Services Authority)
- (ix) Catholic Bishops' Conference of England and Wales
- (x) Community Media Association
- (xi) United Nations Association: Third World and Environment Broadcasting Project (3WE)
- (xii) BREMA (British Radio & Electronic Equipment Manufacturers' Association)
- (xiii) Women in Film and Television
- (xiv) Bruce Grocott, MP
- (xv) ITV Network Centre
- (xvi) United Broadcasting and Entertainment
- (xvii) GMTV
- (xviii) NIACE (National Institute for Adults Continuing Education)
- (xix) Ulster Television
- (xx) Scottish Media Group

- (xxi) Incorporated Society of British Advertisers (ISBA)
- (xxii) PlayBoard
- (xxiii) Producers Alliance for Cinema and Television (PACT)
- (xxiv) ITN
- (xxv) Church of England Diocese of Carlisle
- (xxvi) Ulster Unionist Parliamentary Party
- (xxvii) BBC
- (xxviii) Skillset
- (xxix) Dave Rushton, Director of Institute of Local TV and Chairman of Channel Six Ltd
- (xxx) John Henwood, Former Chief Executive of the Channel Television Group
- (xxxi) Terence Bowman (ITC Viewers Consultative Council, Northern Ireland)
- (xxxii) Jim Cassells (Ulster Television Viewers and Listeners Panel)
- (xxxiii) Les Crabb (Manchester Foyer)
- (xxxiv) Mike Wilkinson (Central Religious Advisory Committee (CRAC) member)
- (xxxv) Dorothy Hobson, Independent Broadcasting Consultant
- (xxxvi) John Ellis, Professor of Moving Image Studies, Bournemouth University
- (xxxvii) T. Appleyard (public)
- (xxxviii) Kevin Hutchens (public)
- (xxxix) K. Williams (public)
- (xl) John West (public)
- (xli) John C. Bland (public)

8 PUTTING VIEWERS FIRST – FINDINGS FROM THE ITC'S OPEN MEETINGS ON PSB

BACKGROUND This section summarises the findings from the open meetings on Public Service Broadcasting (Putting Viewers First) held throughout October and November 2000 by the ITC. It includes results from 242 respondents, spread across 15 meetings held in Scotland, Wales, Northern Ireland and the English regions, who returned a self-completion questionnaire administered at the end of each meeting. There were few variations in opinion between the different regions, but where there were differences, these are mentioned.

Audio recordings of the meetings were transcribed and the discussions subsequently analysed. A brief summary of the key issues raised is also included in this section. Different regions raised different concerns and a more detailed report of each individual meeting is available upon request from the ITC's Research Department.

KEY FINDINGS FROM QUESTIONNAIRE RESPONSES

- Attendees/respondents came from all walks of life, split evenly between those who considered themselves 'concerned viewers' and those who had a professional interest in public service broadcasting (worked in television, academics, students or representatives of a particular lobby group).
- Attendees felt the meetings had helped them gain a better understanding of public service broadcasting and the issues surrounding it. They also felt that they had gained more knowledge about the work and role of the ITC.
- A considerable number of people welcomed the opportunity to air their views and also said they benefited from hearing the diversity of opinions surrounding PSB.
- The main concerns held by attendees were about: the future of PSB and regional programmes; the quality of programmes on television; the moral standards of programming; the future of Restricted Service Licenses (RSLs); specific types of genres such as educational, religious, and science programmes.
- Respondents across all regions agreed strongly that it was important that there are free general entertainment channels catering for all tastes. Agreement was less emphatic in Yorkshire.
- Asked whether programmes that appeal to a minority of people should mainly be shown on specialist channels, the response in aggregate was neutral, but this was because opinions were polarised at either extreme of the scale. Attendees in Plymouth and Bristol were more likely to disagree with this statement. Those in Bournemouth and Londonderry were more likely to agree.
- Respondents were neutral when it came to whether or not they thought in the future there would be only specialist channels and that viewers would pay to watch exactly what they wanted. Those who attended meetings in Manchester, Isle of Man and Plymouth were more likely to disagree with this statement, while those in Derby were more likely to agree that this is how television would develop in the future.



Regional programmes keep viewers in touch with what's going on in their area.

KEY FINDINGS FROM TRANSCRIPTS OF THE OPEN MEETINGS

- Respondents in all regions agreed that because of the range of programmes on terrestrial channels they got to see good programmes.
- When asked whether they thought specialist channels were a good thing respondents were neutral, choosing neither to agree nor disagree. Attendees in Plymouth were more likely to disagree with this statement. Those in Bournemouth, Derby, Derry and Belfast were more likely to agree.
- Respondents agreed that regional programmes on BBC/ITV were the way they kept up to date with the news in their region. Attendees in Newcastle were more likely to agree strongly with this statement. Those in Cambridge neither agreed nor disagreed.
- Respondents in all regions agreed that it was essential for ITV to provide programmes specifically for their region. Attendees in Newcastle and Aberdeen were more likely to agree strongly with this statement. Those in Cambridge were less likely to agree.
- Finally, when asked for any other comments, there was a tremendous range of opinions. The most common across all the regions were to:
 - restate how important it was to protect PSB;
 - complain about the bad language, sex and violence on television at the moment;
 - remind the ITC of the right/need to show programmes in minority languages (Welsh/Gaelic/Cornish);
 - mention that religious programmes were of a poor quality, but were still important (a number of attendees suggested that religious programmes should include more on the spiritual/ethical side of religion, and not focus so much on specific religions);
 - raise concerns about the quality of regional programming, whilst also stressing the importance of maintaining the individual regional identities.
- There was broad general agreement that PSB must remain if quality and standards are to be maintained.
- Concern was expressed that, with the concentration of media ownership, regional television will be lost. Respondents felt it to be important that it is maintained, along with regional production.
- Strong feelings existed in favour of preserving and extending broadcasting in the Welsh, Gaelic and Cornish languages.
- There was much confusion as to what digital television will mean and concern that it will be expensive for low-income families.
- 'Access to all' was seen as not being fully fulfilled for the blind/partially sighted, deaf/hard of hearing and disabled people generally.

- There was a sense that the diversity of modern British society is not being reflected by the marginalisation of ethnic and cultural minorities.
- There was concern that in a multi-channel future there will be insufficient funds to finance the many channels available, and that quality will be the loser.
- Regulation was seen as necessary, but there was a perception that it will be increasingly difficult to police with the convergence of television and the internet.
- There were concerns about the current amount of advertising and sponsorship.
- Respondents believed that there was a need for children to be protected. Some people expressed concern about the suitability of some programmes pre-watershed. In particular, Channel 5 was criticised for lowering standards (Plymouth), while others felt there was too much violence in soaps (Derby).
- It was thought to be important to retain religious broadcasting.
- News coverage, both regional and national, was considered essential. There was an increasing demand also, amongst respondents, for more international coverage, particularly from Africa and the developing countries.



Access to programming by the deaf and other minority groups is an important issue.