

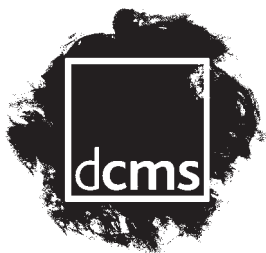
Annex 5

Opinion polling data

Attitude Survey on behalf of the BBC Funding Review

Quantitative Study

Research Study Conducted for Department for
Culture, Media and Sport



April 1999

Introduction

Background and objectives

This report contains the summary findings, and marked-up questionnaire of a study carried out by MORI on behalf of the Department for Culture, Media and Sport.

The study focused on:

- examining public opinion on how public service output funding can be extended from other sources;
- understanding public reaction to long-term alternative methods of funding;
- testing public perception of the most appropriate balance between BBC public and commercial services;
- examining views of the concessionary licence fee;
- understanding attitudes towards BBC development of digital television, and BBC Online.

Methodology

MORI interviewed 1,051 adults aged 15+ in 86 sampling points across the United Kingdom. Interviews were conducted face-to-face, in home between 10-14 April 1999.

Data are weighted to the known profile of the population (by sex, age, social class, working status, tenure and geographical region). Data are based on all respondents unless otherwise stated.

Interpretation of the data

It should be remembered at all times that a sample, not the entire population of the United Kingdom, has been interviewed. In consequence, all results are subject to sampling tolerances, which means that not all differences are statistically significant.

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of 'don't know' categories, or multiple answers. Throughout the volume an asterisk (*) denotes any value of less than half a per cent.

In the report, reference is made to 'net' figures. This represents the balance of opinion on attitudinal questions, and provides a particularly useful means of comparing the results for a number of variables. In the case of a 'net agree' figure, this represents the percentage with a particular issue, less the percentage disagreeing. For example, if a statement records 40% agreeing and 25% disagreeing, the 'net agree' figure is +15 percentage points.

Publication of the Data

Any press release or publication of the findings of this survey requires the advance approval of MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

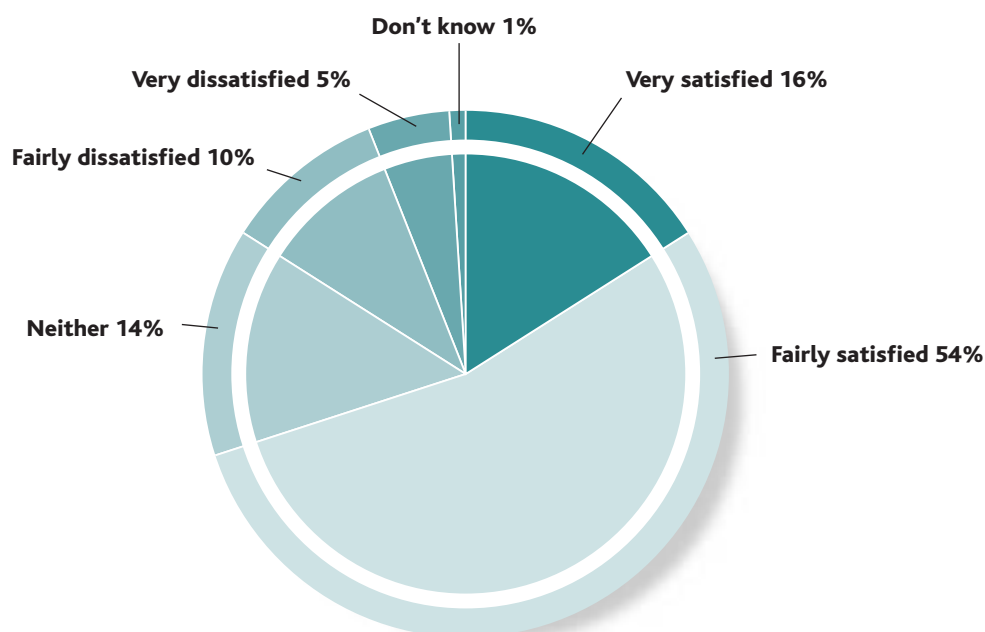
Key findings

Image of the BBC

Seven in ten are satisfied with the BBC - one in six (16%) are very satisfied, with the majority (54%) saying they are fairly satisfied with the BBC.

Satisfaction with the BBC

Q Overall, how satisfied or dissatisfied are you with the BBC?



Base: All (1,051)

Source: MORI

Satisfaction is significantly higher among younger viewers (aged 15-34), 77%, and among the middle class 76% (compared to 65% among DEs). Those who think the BBC provides good value for money are significantly more likely to feel satisfied, 84%.

There is strong endorsement of the view that the BBC is good for Britain's image around the world - seven in ten (71%) agree, and only one in ten disagree. Older (aged 65+) and middle class respondents are more likely to agree.

Half (47%) disagree with the statement 'The BBC is out of touch with people like me' - a third (33%) agree. This sense of affinity varies significantly among population sub-groups. Men are more likely to agree with the statement than women (37% men, 31% women). Younger respondents aged 15-34 (29%) and ABs (24%) are least likely to agree. In contrast, almost half (44%) of older viewers (aged 65+), and two in five (41%) DEs agree the BBC is out of touch.

Quality of programmes

On balance, the BBC is felt to provide better quality, and variety, of programming than other broadcasters.

Almost half (45%) agree the BBC provides better quality programmes, while a third (32%) disagree. Older (aged 65+) 56%, and middle class respondents (58%) are significantly more likely to describe the BBC as providing better quality broadcasting. Similarly, it is younger and working class viewers who are most critical of the variety of broadcasting provided by the BBC.

Respondents were asked to say which broadcaster best provided a number of different types of television programme. The BBC is mentioned as the best broadcaster for 11 of the 14 types of programmes asked about (as listed below).

As a provider of programmes on national events, nature, education and documentaries, the BBC is seen by a majority of respondents as the best provider. When thinking about news, drama and comedy, the BBC predominance is challenged by the ITV, which is considered the second best provider. Respondents cite ITV as the best provider of soap operas, game shows and daytime chat shows.

	BBC	ITV	Channel Four	Channel Five	Satellite	Cable	Don't watch	Don't know
	%	%	%	%	%	%	%	%
National events	63	19	1	*	3	1	5	8
Nature programmes	59	4	6	3	10	6	7	5
Education	53	4	9	1	4	2	19	7
Documentaries	51	11	16	2	6	3	5	7
News	48	31	4	1	8	3	2	2
Drama	40	39	3	3	2	1	5	6
Comedy	40	23	12	1	6	4	5	10
Home and leisure	33	16	2	1	12	7	19	10
Music	32	7	5	2	17	9	20	10
Sport	30	15	3	1	21	6	17	7
Children's TV	29	22	1	1	9	4	26	8
Soap operas	21	45	3	3	3	1	18	6
Daytime chat shows	8	27	5	2	6	4	39	9
Game shows	5	57	5	2	3	2	19	6

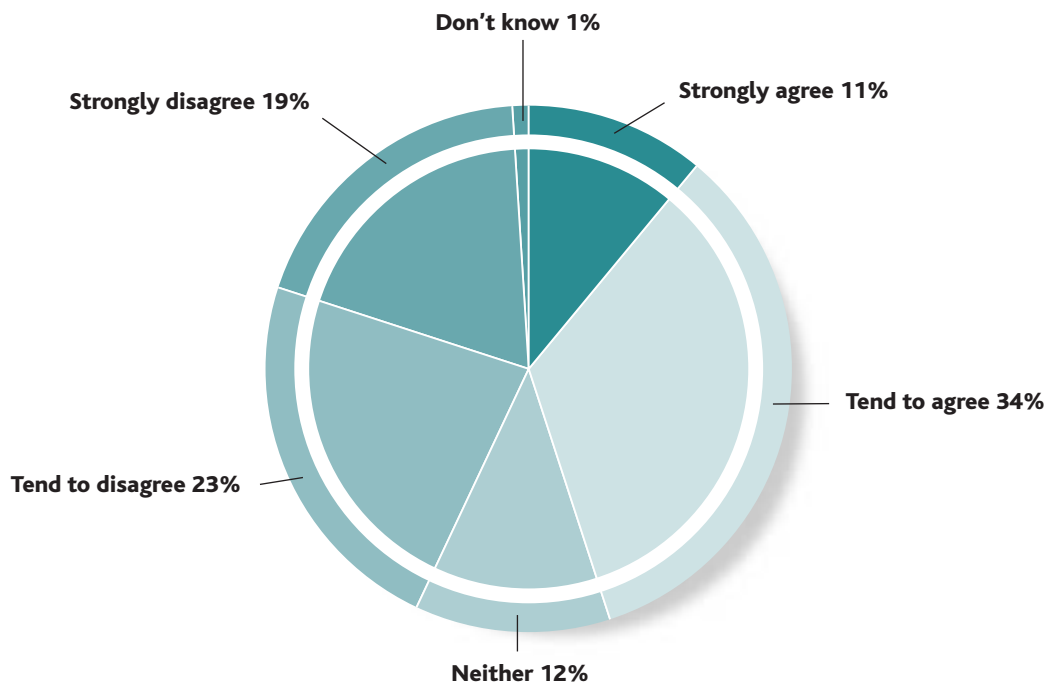
The BBC licence fee

Opinion is divided on whether or not the BBC licence fee provides good value for money - 45% agree, while 42% disagree. There is greatest variation in opinion by social class - among ABs 69% feel they receive good value for money, falling to 31% among DEs.

Perception of value for money is also closely tied to overall satisfaction with the BBC. Those satisfied with the BBC are more likely to consider they receive good value for money from the licence fee, 53%, in contrast to those dissatisfied, 17%.

Value for money

Q 'The BBC licence fee provides good value for money'



Base: All (1,051)

Source: MORI

Almost half (46%) support the maintenance of the existing range of BBC services, with licence fee increases broadly in line with inflation. One in eight (13%) feel that a rise in the licence fee above inflation is necessary to improve BBC services, while three in ten (29%) want the BBC to cut services, for a reduced licence fee. Middle class respondents who tend to be on higher incomes, support inflation rises in the licence fee - in contrast, DEs and those on lower incomes are relatively likely to favour a cut in the licence fee.

Only seven per cent consider the BBC too commercial now. However, a further two in five (37%) feel that it is currently in danger of becoming too commercial. Middle-class and older respondents are more likely to mention this as a concern. On the other hand, over two in five (44%) say that the BBC is not commercial enough. This rises to 47% among those aged 15-34, and 50% among DEs.

Alternatives to the licence fee

Three-quarters (74%) would support the introduction of sponsorship - only one in six are opposed. A majority (55%) feel the BBC should introduce advertising, but a significant minority are opposed. In both cases, support is strongest among younger and working class respondents.

The balance of opinion favours the replacement of the licence fee with advertising on the BBC - 58% in favour, and 38% opposed. This position has remained relatively constant since first asked of the public by MORI in 1988:

Q Would you favour or oppose the replacement of the licence fee with commercial advertising on BBC television?

	May 1988	Jan 1993	April 1999	Change ±%
Favour	58	60	58	-2
Oppose	35	34	38	+4
Don't know	7	6	5	-1

Base: all

There is strong opposition to the introduction of a subscription charge similar to that of BSkyB. Four in five disagree with this idea, with 56% saying they strongly disagree. Only one in seven support this proposed change. Support is marginally higher among those already receiving satellite and cable TV.

Concessionary licence fees

The vast majority (97%) of respondents feel that specific groups should receive a reduced licence fee. Four in five (79%) support a reduced fee for blind people, three-quarters (77%) for pensioners, and seven in ten (70%) support a reduction for deaf people. Two in five (43%) feel those with disabilities should receive a concessionary licence fee, and a third say those on income support should.

Despite this high level of support for the concept of reduced licence fees for particular groups, three in five are not prepared to pay a higher licence fee to fund the scheme. Among those prepared to pay an additional fee, the average supplement is an additional £5.35 per year.

Digital television

Awareness of digital television is low. Only one in seven say they know a lot or a fair amount about digital television, with a further one in four (27%) who know 'just a little'. Half (53%) have heard of it, but know nothing about it. Knowledge is higher among those under 35, and middle class respondents.

Despite remaining low in awareness, there has been a significant increase over the last two years:

Q How much would you say you know about digital TV?

	1997	1999	change ±%
I know a lot about it	1	3	+2
I know a fair amount about it	6	12	+6
I know just a little about it	18	27	+9
I have heard of it but know almost nothing about it	42	53	+11
I have never heard of it	31	4	-27
Don't know	3	2	-1

Base: all

Among those who have at least a little knowledge of digital television, the key advantages are seen to be the wider choice of programmes (57%), and improved picture quality and reception (37%). A small minority mention benefits such as access to information services (6%), home shopping (3%) and home banking (2%).

A majority (54%) support current BBC spending of the licence fee to move into digital broadcasting. Three in 10 (31%) think it is wrong to dedicate 10% of its licence fee revenue in this way. Opposition is greatest among those who are less likely to be aware of digital television (older and working class respondents), and among those who currently feel the licence fee does not provide good value for money.

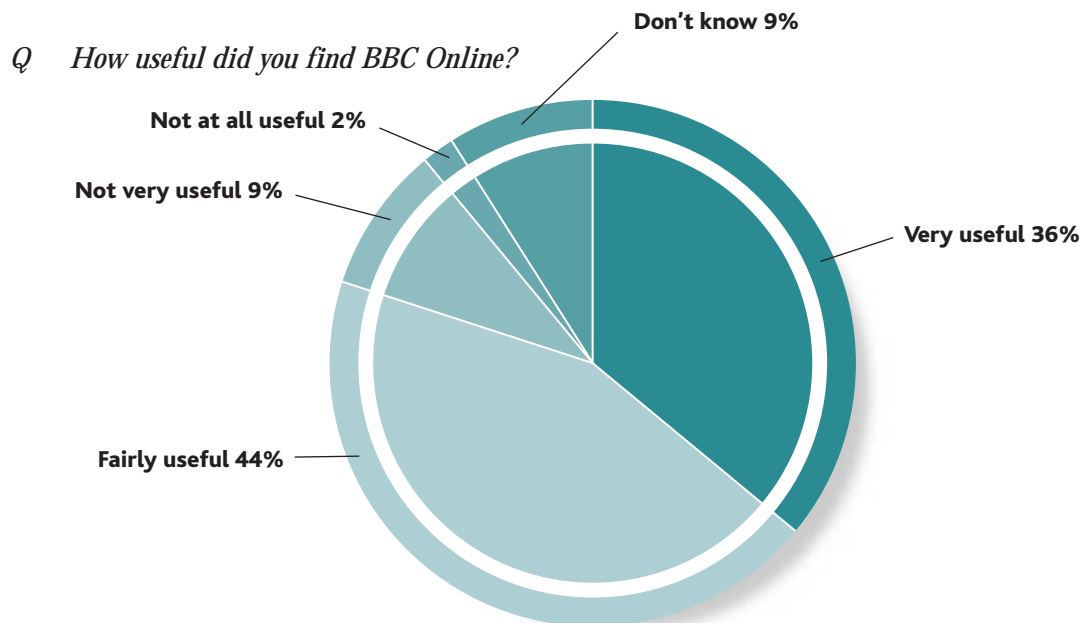
Only a third (33%) agree that a supplement should be charged to the licence fee, for those who use the new digital services. Half (47%) oppose the introduction of the supplement. Were the supplement to be introduced, over a third feel it should be between zero and £10 per year, and three in 10 (29%) 'don't know', reflecting the low level of knowledge about digital TV.

BBC Online

One in ten respondents have accessed BBC Online on the Internet. Users are predominantly under 35, and are more likely to be male and middle class. Their purpose for doing so is to access programme information, education or news.

Users of BBC Online are very positive about the service - four in five found it useful.

BBC Online



Base: All who have accessed BBC Online on the Internet (112)

Source: MORI

As with the move into digital television, respondents support the spending of licence fee revenue on providing BBC Online. Half (51%) think the BBC is right to spend licence fee revenue in this way, while a third think this is wrong. Again, opposition is stronger among those least likely to use the service.

Statistical reliability

The respondents to the questionnaire are only samples of the total 'population', so we cannot be certain that the figures obtained are exactly those we would have if everybody had been interviewed (the 'true' values). We can, however, predict the variation between the sample results and the 'true' values from a knowledge of the size of the samples on which the results are based and the number of times that a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 95 in 100 that the 'true' value will fall within a specified range. The table below illustrates the predicted ranges for different sample sizes and percentage results at the '95% confidence interval':

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90% ±	30% or 70% ±	50% ±
100 interviews	6	9	10
250 interviews	4	6	6
500 interviews	3	4	4
750 interviews	2	3	4
1,000 interviews	2	3	3

For example, with a sample size of 1,051 where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of ± 3 percentage points from the sample result.

When results are compared between separate groups within a sample, different results may be obtained. The difference may be 'real', or it may occur by chance (because not everyone in the population has been interviewed). To test if the difference is a real one - i.e. if it is 'statistically significant', we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen.

If we assume '95% confidence interval', the differences between the results of two separate groups must be greater than the values given in the table below:

Size of samples compared	Differences required for significance at or near these percentage levels		
	10% or 90% ±	30% or 70% ±	50% ±
100 and 100	7	13	14
200 and 200	7	10	11
200 and 500	5	8	8
500 and 500	4	6	6
500 and 1,000	3	5	5

Social class definitions

- A Professionals such as doctors, surgeons, solicitors or dentists; chartered people like architects; fully qualified people with a large degree of responsibility such as senior editors, senior civil servants, town clerks, senior business executives and managers, and high ranking grades of the Services.
 - B People with very responsible jobs such as university lecturers, hospital matrons, heads of local government departments, middle management in business, qualified scientists, bank managers, police inspectors, and upper grades of the Services.
 - C1 All others doing non-manual jobs; nurses, technicians, pharmacists, salesmen, publicans, people in clerical positions, police sergeants/constables, and middle ranks of the Services.
 - C2 Skilled manual workers/craftsmen who have served apprenticeships; foremen, manual workers with special qualifications such as long distance lorry drivers, security officers, and lower grades of Services.
 - D Semi-skilled and unskilled manual workers, including labourers and mates of occupations in the c2 grade and people serving apprenticeships; machine minders, farm labourers, bus and railway conductors, laboratory assistants, postmen, door-to-door and van salesmen.
 - E Those on lowest levels of subsistence including pensioners, casual workers, and others with minimum levels of income.
-

Working Status of Respondent	%
Working - Full-time (30+ hrs)	44
- Part-time (9-29 hrs)	10
Unemployed - seeking work	3
- not seeking work	3
Not working - retired	24
- looking after house/children	7
- invalid/disabled	2
Student	8
Other	1

Signature: _____

Interviewer Name (CAPS): _____

Interviewer Number:

 / _____

Day of Interview: 1 2 3 4 5 6 7

(Mon) (Thu) (Sun) _____

Date of Interview: / /99 _____**Interviewer Declaration**

I confirm that I have carried out this interview face-to-face with the above named person and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct.

THIS FORM IS THE PROPERTY OF MARKET &
OPINION RESEARCH INTERNATIONAL
(MORI) LTD
95 SOUTHWARK STREET, LONDON SE1 0HX

QB SHOWCARD M **Could you please give me the letter from this card for the group in which you would place your total household income from all sources, before tax and other deductions?** SINGLE CODE ONLY

		%
G	Under £2,500	2
C	£2,500-£4,499	5
O	£4,500-£6,499	4
H	£6,500-£7,499	3
J	£7,500-£9,499	5
D	£9,500-£11,499	6
M	£11,500-£13,499	4
K	£13,500-£15,499	4
A	£15,500-£17,499	5
I	£17,500-£24,499	11
P	£24,500-£29,999	5
L	£30,000-£34,999	3
B	£35,000-£39,999	3
F	£40,000-£44,999	2
N	£45,000-£49,999	2
E	£50,000 or over	3
	Refused	14
	Don't know	17

Good morning/afternoon/evening. I'm from MORI, the Market Research company. We're conducting a short survey about broadcasting, and I wonder if you could spare a few minutes of your time.

Q1- SHOWCARD A (R) **I am going to read out some different types of television**

Q14 **programmes. Using this card, please tell me which of these broadcasters best provides each type of television programme.** SINGLE CODE ONLY. READ OUT. ROTATE ORDER. TICK START

		BBC	ITV	C4	C5	Satellite	Cable	Don't watch	Don't know	
		%	%	%	%	%	%	%	%	
<input type="checkbox"/>	Q1	Nature programmes	59	4	6	3	10	6	7	5
	Q2	National events (e.g. Princess Diana's funeral)	63	19	1	*	3	1	5	8
	Q3	Documentaries	51	11	16	2	6	3	5	7
	Q4	Game shows	5	57	5	2	3	2	19	6
	Q5	Comedy	40	23	12	1	6	4	5	10
<input type="checkbox"/>	Q6	Sport	30	15	3	1	21	6	17	7
	Q7	Education	53	4	9	1	4	2	19	7
	Q8	Children's TV	29	22	1	1	9	4	26	8
	Q9	News	48	31	4	1	8	3	2	2
	Q10	Daytime chat shows	8	27	5	2	6	4	39	9
<input type="checkbox"/>	Q11	Home and leisure	33	16	2	1	12	7	19	10
	Q12	Music	32	7	5	2	17	9	20	10
	Q13	Soap operas	21	45	3	3	3	1	18	6
	Q14	Drama	40	39	3	3	2	1	5	6

Q15 SHOWCARD B (R) **Overall, how satisfied or dissatisfied are you with the BBC?** SINGLE CODE ONLY

	%
Very satisfied	16
Fairly satisfied	54
Neither satisfied nor dissatisfied	14
Fairly dissatisfied	10
Very dissatisfied	5
Don't know	*

Q16- SHOWCARD C (R) **I am going to read out some statements about the BBC. For each,**

Q19 **please tell me whether you agree or disagree.** READ OUT. ROTATE ORDER OF Q16-

Q19. TICK START. SINGLE CODE ONLY

		Strongly agree %	Tend to agree %	Neither %	Tend to disagree %	Strongly disagree %	Don't know/ no opinion %
<input type="checkbox"/>	Q16	10	35	22	25	7	1
	Q17	6	29	23	34	6	2
<input type="checkbox"/>	Q18	10	23	17	36	11	2
	Q19	26	45	14	8	2	5

Q20 SHOWCARD D (R) **On this card are a number of statements about the BBC licence fee.**

Please tell me which comes closest to your personal opinion? SINGLE CODE ONLY

		%
A	The BBC should try to maintain its existing range of services, with the television licence fee (currently £101 a year) increasing broadly in line with inflation	46
B	The BBC should improve its services, increasing the licence fee by more than inflation in order to do so	13
C	The BBC should cut its services and cut the licence fee	29
	Other	7
	Don't know	5

Q21 **Would you favour or oppose the replacement of the licence fee with commercial advertising on BBC television?** SINGLE CODE ONLY

	%
Favour	58
Oppose	38
Don't know	5

Q22- SHOWCARD E (R) **I am going to read out a number of suggestions of ways in which the BBC could raise extra money, in addition to the funding it receives from the licence fee. For each, please tell whether you agree or disagree.** READ OUT. SINGLE CODE ONLY. ROTATE START ORDER. TICK START ✓

		Strongly agree %	Tend to agree %	Neither %	Tend to disagree %	Strongly disagree %	Don't know/ no opinion %
<input type="checkbox"/>	Q22 The BBC licence fee provides good value for money	11	34	12	23	19	2
	Q23 The BBC should introduce advertising	25	30	5	14	26	1
	Q24 The BBC should introduce sponsorship of programmes	27	47	8	9	7	2
<input type="checkbox"/>	Q25 The BBC should charge people to receive some of its programmes through a subscription like that charged by BSkyB	2	12	5	23	56	3
	Q26 The BBC should charge a supplement on the licence fee for those who use its new digital services	7	26	10	21	26	10

Q27 showcard F (r) **On this card are a number of statements about the BBC. Please tell me which comes closest to your personal opinion?** Single Code Only

	%
a The BBC is too commercial already	7
b The BBC is in danger of becoming too commercial	37
c The BBC is not commercial enough	44
Don't know	12

Q28 showcard G **Looking at this card, which, if any, of these people do you think should receive a reduced licence fee?** multicode ok

	%
Blind people	79
Deaf people	70
People with other disabilities	43
Old age pensioners	77
People on income support	34
Other	1
None of these	3
Don't know	*

ask all codes 1 to 6 at q28

Q29 **In order to pay for a reduced licence fee for these people, how much more would you be prepared to pay for your licence fee?** Write in exact figures in boxes below.

Using leading zeros, if necessary. If not prepared to pay any extra, write in £00

Base: All think certain groups should receive a reduced licence fee (1,200)

	%
Nothing	57
Up to £5 a year	14
Over £5 - £10 a year	17
Over £10 - £20 a year	6
Over £20 - £30 a year	2
Over £30 - £40 a year	1
Over £40 - £50 a year	1
Over £50 a year	*
Don't know	1
Average £5.35 a year	

ask all

Q30 showcard H (r) **Using the categories on this card, how much would you say you know about Digital TV? Please take into account any of the ways you have learned or heard about the service.** Single Code Only

	%
I have never heard of it	4
I have heard of it but know almost nothing about it	53
I know just a little about it	27
I know a fair amount about it	12
I know a lot about it	3
Don't know	2

ask all who know at least a little about Digital TV (codes 3-5 at q30)

Q31 **You said that you had heard of Digital Television. What benefits, if any, do you think Digital Television will offer over current TV services?**

Multicode ok. do not prompt

Base: All who know at least a little about Digital TV (433)

	%
Access to home shopping	3
Access to home banking	2
Access to information services	6
Better reception/picture quality	37
Wider choice of programmes	57
Other	15
None	7
Don't know	15

ASK ALL

Q32- Showcard I (R) **I am going to read out some statements about Digital Television.**

Q34 **For each, please tell me whether you agree or disagree.** read out. single code only.

alternate start. tick start ✓

	Strongly agree	Tend to agree	Neither	Tend to disagree	Strongly disagree	Don't know/ no opinion
	%	%	%	%	%	%
<input type="checkbox"/> Q32 Digital Television will offer greater choice to viewers	18	41	12	7	1	21
Q33 Digital Television will provide poorer quality programmes	2	14	20	26	10	28
<input type="checkbox"/> Q34 Digital Television will provide better picture and sound definition	21	37	11	4	1	27

Q35 Showcard J (R) **If the BBC introduced an increased licence fee for people using its digital services, how much do you think this additional licence fee should be?**

Single Code Only.

	%
Up to £10 a year	36
Over £10 - £20 a year	17
Over £20 - £30 a year	10
Over £30 - £40 a year	3
Over £40 - £50 a year	3
Over £50 a year	2
Don't know	29

Q36 **The BBC is spending £1 in every £10 of the money it gets from the licence fee on moving into digital broadcasting. Do you think the BBC is right or wrong to do this?** Single Code Only.

	%
Right	54
Wrong	31
Don't know	15

Q37 **Have you ever accessed BBC Online on the Internet?** If yes, ask Q38, if not go to Q40

Q38 **And for what purpose did you access BBC Online?** Multicode ok

	%
Yes:	
News	3
Education	4
Access to programme information	4
To make a complaint	*
Other	4
No	89

Q39 Showcard K (R) **How useful did you find BBC Online?** Single Code Only
Base: All who have accessed BBC Online on the Internet (112)

	%
Very useful	36
Fairly useful	44
Not very useful	9
Not at all useful	2
Don't know	9

ASK ALL

Q40 **The BBC is spending some of the money it gets from the licence fee on providing BBC Online, the BBC's Internet service. Do you think the BBC is right or wrong to do this?** Single Code Only

	%
Right	51
Wrong	33
Don't know	16

Q41 **How many televisions do you have in your home?** Single Code Only

No. of TVs	1	2	3	4	5+	0
%	30	37	19	9	4	1

Q42 showcard L (R) **Which, if any, of these apply to you? Just read out the letters that apply.** Multicode ok

		%
A	I/we have Home Satellite TV	19
B	I/we have Home Cable TV	16
C	I/we have Home Cable telephone (i.e. non BT)	16
D	I/we do not have cable TV or cable telephone but cable companies serve this area	26
E	I/we have home computer games console (e.g. Sega Megadrive, Sony Playstation)	34
F	I/we are connected to the Internet at home	17
G	I personally use the Internet at work, or at my place of study	18
	None of these	25

Go to demographics on pages 1 and 2, thank and close

