

The contribution and value of Public Service Broadcasting

Findings from research with YouGovStone's media 'influentials' and the YouGov Omnibus with the general public, conducted in May 2009

PURPOSE OF THE RESEARCH

- Explore attitudes to and support for Public Service Broadcasting (PSB)
- Understand the views of 'influentials' on ways of funding PSB in the future
- Contrast 'influentials' with the general public on some key indicators

MAIN FINDINGS

- 'Influentials' value the role that TV plays in their lives
 - ✚ 84% say that television is important to them, though 52% say that the quality of TV has declined
 - ✚ Reasons they give for this perceived decline include: proliferation of cheap, reality-TV formats; more competition for audience numbers in a multi-channel environment; decline in advertising revenues
- 'Influentials' feel they get good value for money from the licence fee and say they would be prepared to pay more for a future subscription fee that covered all BBC services. 'Influentials' over-estimate what the general public would like to pay for the licence fee.
 - ✚ As compared with the current licence fee of £142.50, 'influentials' would, on average, be prepared to pay £159.84 for continued access to all BBC services
 - ✚ 81% of 'influentials' find that the current licence fee represents good or fair value
 - ✚ Asked about the licence fee, but without previous discussion of the topic, only 37% of the general public in the Omnibus survey agreed with this assessment
 - ✚ 'Influentials' thought the general public, on average, would be prepared to pay £121.32 for the licence fee. But the general public themselves say in the Omnibus survey that, on average, that they would only be prepared to pay half that - £63.22.
- 'Influentials' value the contribution of PSB to the UK now and in the future
 - ✚ 71% agree that television is one of the best things that Britain does
 - ✚ 84% agree that it is long term commitment to PSB that has made British television amongst the best in the world
 - ✚ 62% agree that more emphasis on the creative economy for jobs and exports will increase the need for high quality PSB programmes in the future
- 'Influentials' rate impartial news programmes as the most significant benefit of PSB (53%), followed by safeguarding high quality UK-made programmes (41%), and ensuring diversity of

content for audiences of all kinds (29%). For 25% of 'influentials' high quality national radio stations were the most important benefit of PSB

- Asked what categories of programmes on mainstream channels should be British-made, the 'influentials' select national, regional and local news (97%), serious current affairs (87%), documentaries (63%) and children's programmes (also 63%)
- When asked to rank different ways of paying for PSB in the future, by far the most popular option with the 'influentials' is to continue with the current flat rate licence fee (61%). However, 45% support the idea that PSB funding should be completely revamped with all channels having the right to bid for licence fee money

Note to Editors:

The survey was conducted by YouGovStone on behalf of Voice of the Listener & Viewer which campaigns to safeguard the future of PSB and the interests of citizens and consumers. YouGovStone is a joint venture between leading market research agency YouGov and business consultant Carole Stone, specialising in asking people of influence their views on subjects that matter to us all.

437 'influentials' from the YGS ThinkTank who work in the media and related industries completed the questionnaire in May 2009. One third of these respondents are active journalists or editors, the remainder work in other ways in the media, whether broadcasting, print or on-line.

At the same time a short list of questions was included in the YouGov weekly on-line Omnibus, generating 1,969 responses from a representative sample of the British public.

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