



Digital Britain: Attitudes to supporting non-BBC regional news from the TV licence fee

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1 Executive Summary

The findings in this report are based on a quantitative survey conducted during the period 27th August to 3rd September 2009. Data were collected via TNS-BMRB's face-to-face Omnibus survey and were based on a nationally representative sample of 2024 adults aged 18+ in the United Kingdom. The Omnibus survey covered 1960 adults in GB and an additional *ad hoc* sample of 64 interviews was carried out in Northern Ireland. The final survey data were weighted to ensure that demographic profiles matched those for all adults in the UK aged 18+.

In brief, the research objectives were to:

- Evaluate the degree of importance that the UK population attaches to plural provision of news in the nations, as well as locally and regionally.
- Assess the extent to which TV licence holders support or oppose the principle of using the TV licence fee to fund public service content beyond the BBC, primarily for regional news bulletins
- Assess support or opposition towards setting out an agreed maximum percentage of the licence fee revenue to be set aside to fund essential public service content, beyond the BBC

1.1 Awareness of licence fee use (Chapter 3)

Respondents were asked to state what they believed the licence fee paid for both in an open format to start with and then from a prompted list.

Spontaneous mentions of uses of the licence fee were varied. As might be expected, the largest single source recorded was the BBC, mentioned by 45% of people.

A negligible proportion believed the licence fee was **spent on other channels** – three per cent when grouped together but one per cent or less mentioning each of the other terrestrial channels individually. The only other source referred to by a relatively large minority of the sample was 'Staff salaries/wages' at 10%, likely to reflect the fact that transparency of BBC salaries and expenses had been a topical issue at the time of fieldwork.

Males were more likely than females to say that the licence fee was **used for the BBC** (50% compared with 40%). Those in the middle age groups (45-54 and 55-64) tended to cite the BBC more frequently than those at the younger and older ends of the spectrum (51% and 57% compared with 35% of 18-24s and 38% of

those aged 75+). ABC1s were also more likely to name the BBC (51%) than C2DEs (37%)

When **prompted** with a list of services that the licence fee might pay for, nine in ten (87%) chose at least one of the BBC options on the list. A quarter (27%) selected aspects of digital switchover. A small proportion said Channel 4 (9%), ITV1 (8%) or general government spending (8%). There were similar demographic differences in responses to those given spontaneously.

1.2 National and level of news consumption (Chapter 4)

The most common source of **national news** was television. More than eight in ten adults aged 18 or over watched the national news on television (85%), compared with three in ten for both radio (31%) and newspapers and magazines (28%), and two in ten who normally used the internet for national news (22%).

Almost two-thirds of respondents usually watched the **national news** on the **BBC** (63%). Even among those who watched the news less often than once a week, a quarter watched the BBC (26%). Three in ten usually watched the news on ITV.

Three out of four respondents watched, listened to, or looked at, **national news** on a daily basis. More than nine in ten watched the national news at least on a weekly basis (93%).

There was a strong relationship between **age** and **frequency of watching**, listening to, or looking at the national news. The proportion of respondents who saw the news on a daily basis increased up until the age of 75 or over. Less than half of respondents aged 18 to 24 years old watched, listened to or looked at the national news (46%), compared with more than nine in ten aged between 65 and 74 (93%).

Television was the most popular source for **regional and local news** (72%). Respondents were more likely to have read a newspaper or magazine to find out regional or local news (26%) than to have listened to the radio (17%). Only one in ten had used the internet to find out about local news. BBC was the most popular source of regional or local news. However a smaller proportion used the BBC for regional news than national news (46% for regional compared with 63% for national). As with national news, 30 per cent of respondents usually watched regional news on ITV.

Six in ten respondents watched, listened to or looked at **regional or local news** nearly every day and nine in ten at least once a week (89%). Only five per cent never caught regional or local news. The correlation between **age** and **frequency of regional news consumption** was the same for regional news as it was for national news. Frequency increased by age (up until aged 75 or over). Four in

ten aged 18 to 34 watched, listened to, or looked at regional or local news nearly every day. This rose to seven in ten aged 35 or over (68%).

1.3 General views on licence fee sharing (Chapter 5)

Respondents were informed that a small proportion of the licence fee had been used to fund the **digital switchover**. The majority of respondents (71%) had not previously been aware of this. Demographic differences in awareness were very similar to those seen for specific uses of the licence fee. Those who consumed news on a daily basis were more likely to have heard about the licence fee being used for digital switchover than those who watched it less than once a week (33% compared with 12% for national news and 32% compared with 22% for regional news).

Further information was provided about possible plans to use a portion of the licence fee to **help fund public service content on other channels**. When presented with a choice, half of respondents (48%) felt a small part of the licence fee should be spent on other channels, compared with 35% who felt the licence fee should only be used for the BBC. Six per cent said they didn't know which option they would prefer and ten per cent said they didn't care what happened.

Older groups tended to prefer more than younger groups that the licence fee be set for **BBC only** (47% of 55-54s compared with 19% of 18-24s). White respondents were also more likely to show this preference than BME respondents (37% compared with 21%). **Level of apathy** at this question was higher among those who consumed less national news (24% compared with 9% among those who watched daily) even though this particular question did not refer specifically to the news.

Respondents were also asked why they had given these preferences. Thirty three per cent of those who said they would like the licence fee to stay with the BBC said this was because other channels are funded by advertising. Of those who thought the licence fee should be shared, reasons given included to provide a larger variety of programmes (11%) and because they thought the fee should be shared out equally (10%).

1.4 Perceived importance of plurality in the regions (Chapter 6)

Three quarters of the public (73%) felt it important to have a **choice of TV channels** providing news programming about their nation or local area. Residents of the devolved nations felt more strongly about this than residents of England. More regular viewers of regional news and those who watched regional news on non-BBC channels were also more in support of choice compared with their counterparts.

The **reasons given for favouring plurality** of regional news centred around choice and diversity of coverage; while those who did not feel that choice was important cited unnecessary repetition of news coverage and a feeling that a single source of news was sufficient.

When offered a direct choice between **BBC-only coverage** of regional news and coverage on **different channels as well as the BBC**, over seven in ten (71%) opted for choice, 17% for BBC-only and 10% did not care either way. Plurality was favoured even among those who normally access regional news via the BBC (68% compared with 79% who watch regional channels on other channels).

Respondents were also strongly in favour of **multi-platform access to regional news** – i.e. TV, online, radio and newspapers - with 84% agreeing that this was important. Preference for multi-platform regional news correlated strongly with preferences for plurality.

1.5 Reactions to using licence fee to fund plurality of regional news (Chapter 7)

A quarter (25%) said that they had been aware of the **potential loss of commercial regional news output** as a result of declining advertising revenues before the interview – this proportion was higher among men (31%); ABs (41%); those with higher qualifications (39%).

The proposal to use the **small part of the licence fee previously used for digital switchover for funding regional and local news outside the BBC** after 2013 was explained to respondents. When faced with a dichotomous choice, two-thirds (65%) said they would favour licence fee sharing while a quarter (24%) wanted the licence fee to be spent exclusively on the BBC. One in eight (12%) did not have an opinion either way.

Support for fee sharing was stronger in Wales and Scotland than England. It was also stronger among those who watched regional news more frequently (69% of those watching daily compared with 51% watching less than once a week). On the other hand, **preference for the BBC to have exclusive use** of the licence fee rose with age, peaking in the 55-64 age group.

2 Introduction & Method

2.1 Background

The *Digital Britain* White Paper was published on 16 June 2009 and set out an action plan to secure the UK's place at the forefront of the new media age.

An important element of the new digital age is public service broadcasting and the Government's commitment to audiences having access to high quality and diverse public service content in the new media market environment, especially in relation to news. It is essential for civic society and democracy to have a range of sources of accurate and impartial news at all levels, spanning from local to regional to nation-specific to UK-wide and international.

However, the *Digital Britain* report also recognises that there are significant challenges facing the sustainability of this provision particularly at the local, regional and Nations level. Changes in the market place arising from audience fragmentation, and shift in commercial revenues due to the significant growth in online advertising, mean that commercially provided local and regional news across all media (radio, newspapers, online and television) risks diminution. Without intervention, there will be a substantial decline in the range and quality of sources of commercially-provided news at the local level.

The Government believes that plurality of news in the Nations, locally and in the regions is an integral part of democracy which helps hold public institutions into account, and provide citizens with choice and diversity.. To address this, the Government has set out its proposals to introduce regional news consortia - Independently Funded News Consortia (IFNC) - to replace the current model. These will represent a joining of interested parties (e.g. existing TV news providers, newspaper groups, news agencies) who will aim to provide a more enhanced and multi-platform service compared with the current model, making full use of new digital media, and providing content that is more tailored to the distinctive needs of each local area/region/nation.

One proposal to fund the expected gap in funding for such a proposition is to use an agreed proportion of TV licence fee revenue as a "top-up". This would involve the creation of a "contained contestable element" worth broadly 3.5% of the licence fee from the beginning of the next licence fee settlement in 2013. This is broadly equivalent to the 3.5% currently ring-fenced for the Digital Switchover Help Scheme.

A consultation document on these proposals has been published to close on September 22nd 2009.

2.2 Scope and Objectives

To support the consultation responses, DCMS commissioned TNS-BMRB to undertake a survey to capture public opinion on these issues. As the issues covered in the research were quite complex, background information on the proposals was given to respondents before asking certain questions, in order to ensure that people were answering on an informed basis.

In summary, the research had the following objectives:

- to investigate the public's understanding of the use of the TV licence fee;
- to assess current knowledge of the use of the licence fee to help fund digital switchover;
- to measure nature and volume of TV news consumption, both national and regional;
- to evaluate the degree of importance that the UK population attaches to plural provision of regional news;
- to investigate the potential level of concern people would have if news in the Nations, locally and in the regions were only available on the BBC;
- to assess the extent to which TV licence holders support or oppose the principle of using a part of the TV licence fee to fund regional news beyond the BBC.

2.3 Method

The research was based on a quantitative survey conducted during the period 27th August to 3rd September 2009. Data were collected via TNS-BMRB's face-to-face Omnibus survey and were based on a nationally representative sample of 2024 adults aged 18+ in the United Kingdom. The Omnibus survey covered 1960 adults in GB and an additional *ad hoc* sample of 64 interviews was carried out in Northern Ireland. The final survey data were weighted to ensure that demographic profiles matched those for all adults in the UK aged 18+.

The table below shows the number of respondents in key demographic groups:

Demographic	Subgroup	Unweighted base size (n)
Sex	Men	962
	Women	1062
Age	18-24	226
	25-34	331
	35-44	358
	45-54	348
Nation	England	1749
	Scotland	133
	Wales	78
	Northern Ireland	64
TV Licence holder	Yes	1282
	No	742
TOTAL		2024

The final questionnaire was approximately 10 minutes in length (see Appendix D for the full questionnaire). This was developed in consultation with DCMS, and then tested through a cognitive pilot of 20 interviews conducted with respondents recruited to ensure a good spread across the key demographics (gender, age, social class). The cognitive pilot enabled TNS-BMRB to refine the question wording, to ensure the questions were fully comprehensible to all members of the public, and that the questions would deliver an accurate and unbiased measure of public opinion. (Please see Appendix C for full details of the cognitive pilot.)

3 Knowledge about use of the Licence Fee

This chapter details how the public feel the licence fee is currently spent which provides useful context for exploring more in depth views on licence fee allocation.

3.1 TV ownership & licence fee purchase

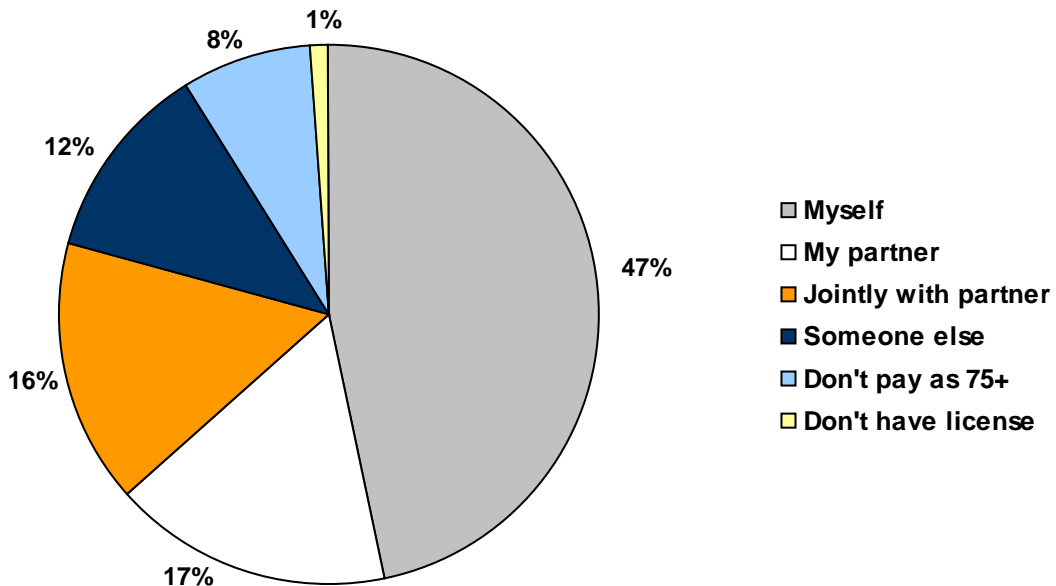
By way of context, in this section we detail the level among the sample of TV ownership and responsibility for paying the TV licence.

Nearly all UK adults watched TV at home (98%) or through a PC, laptop or mobile phone – 99% watching in total.

Six in ten respondents (62%) were TV licence holders, holding this either solely (47%) or jointly with a partner (16%). (Chart 3.1) Sole or joint responsibility for TV licence purchase was lower than average among those aged 18-24 (33% compared with 62% overall).

Chart 3.1 Person in household responsible for purchasing the TV licence

Who is the person responsible for purchasing the TV licence in your household? Is it yourself, your partner or someone else?



Base: All respondents (n=2024)

3.2 Spontaneous awareness of licence fee use

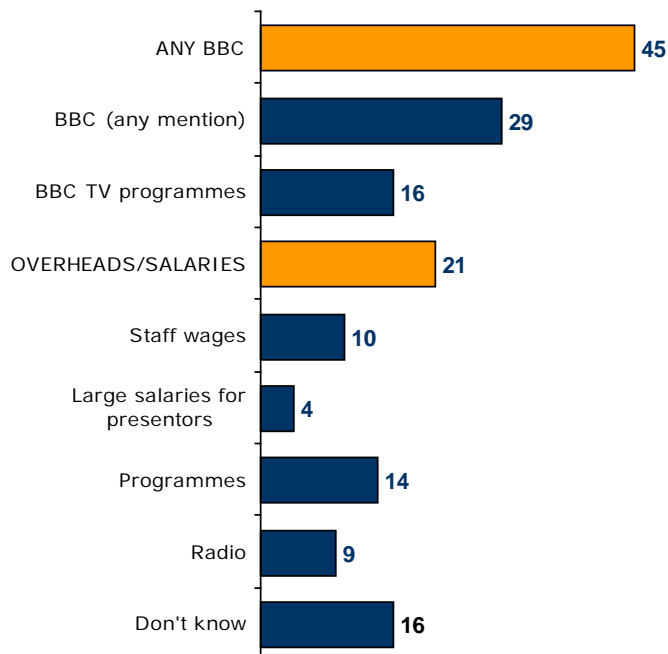
In order to gauge the public's level of knowledge about use of the licence fee, before asking more detailed questions about how they felt the licence fee money should be allocated, respondents were asked to state what they believed it paid for. The question was first asked in an open format to collect spontaneous responses (this section), before measuring prompted awareness (refer to section 3.3).

Spontaneous mentions of uses of the licence fee were varied. The largest single source recorded was the BBC, mentioned by 45% of people. (Chart 3.2) This included general mentions of the BBC (29%), 'BBC programmes' (16%), 'BBC Services' (2%) and 'BBC World Service' (1%). Thus the majority of respondents (55%) did not specifically mention the BBC spontaneously but some cited general sources such as 'Programmes' (14%), 'Radio' (9%) and 'TV programmes' (4%).

A negligible proportion believed the licence fee was currently spent on other channels – three per cent when grouped together but one per cent or less mentioning each of the other terrestrial channels individually. The only other source referred to by a relatively large minority of the sample was 'Staff salaries/wages' at 10%. This was likely to reflect the fact that transparency of BBC salaries and expenses had been a topical issue at the time of fieldwork. In fact, 21% of respondents referred to 'any staff costs or overheads' when all of these types of mentions were grouped together.

Chart 3.2 What public believe money spent on licence fee pays for (spontaneous)

Most UK households are required to pay a television licence fee of £142.50 a year. What do you think the money from the TV licence pays for?



Base: All respondents (n=2024)

There was also a significant minority of the sample who did not know what the licence fee money was spent on (16%). This group was disproportionately younger (35% of 18-24s), C2DE (24%), and of BME origin (32%). (Tables 3.2 and 3.3)

Men were more likely than women to say that the licence fee was used for the BBC (50% compared with 40%). Those in the middle age groups (45-54 and 55-64) tended to cite the BBC more frequently than those at the younger and older ends of the spectrum (51% and 57% compared with 35% of 18-24s and 38% of those aged 75+). ABC1s were also more likely to name the BBC (51%) than C2DEs (37%). There were similar differences depending on level of education achieved increasing from 34% of those with no qualifications, to 44% with school level qualifications and 56% with higher qualifications. White respondents were also more likely to cite the BBC (46%) than BME respondents (37%).

Table 3.2: What public believe money spent on licence fee pays for (spontaneous awareness) by social grade, education and ethnicity

	Social Grade		Highest Qualifications			Ethnicity	
	ABC1	C2DE	Higher Qualifs	School Qualifs	No Qualifs	White	BME
	%	%	%	%	%	%	%
ANY BBC	51	37	56	44	34	46	37
BBC (Any mention)	31	27	33	28	27	29	27
BBC TV programmes	20	10	21	16	8	17	9
OVERHEADS/ SALARIES	23	17	17	23	19	22	12
Staff wages	13	7	9	12	8	11	5
Large salaries for presenters	4	5	3	4	6	4	3
Programmes	14	13	11	14	14	14	8
Radio	11	5	15	7	5	9	3
Don't know	10	24	12	17	21	14	32
Base:	1,004	1,020	419	1,186	415	1,771	250

Table 3.3: What public believe money spent on licence fee pays for (spontaneous awareness) by age

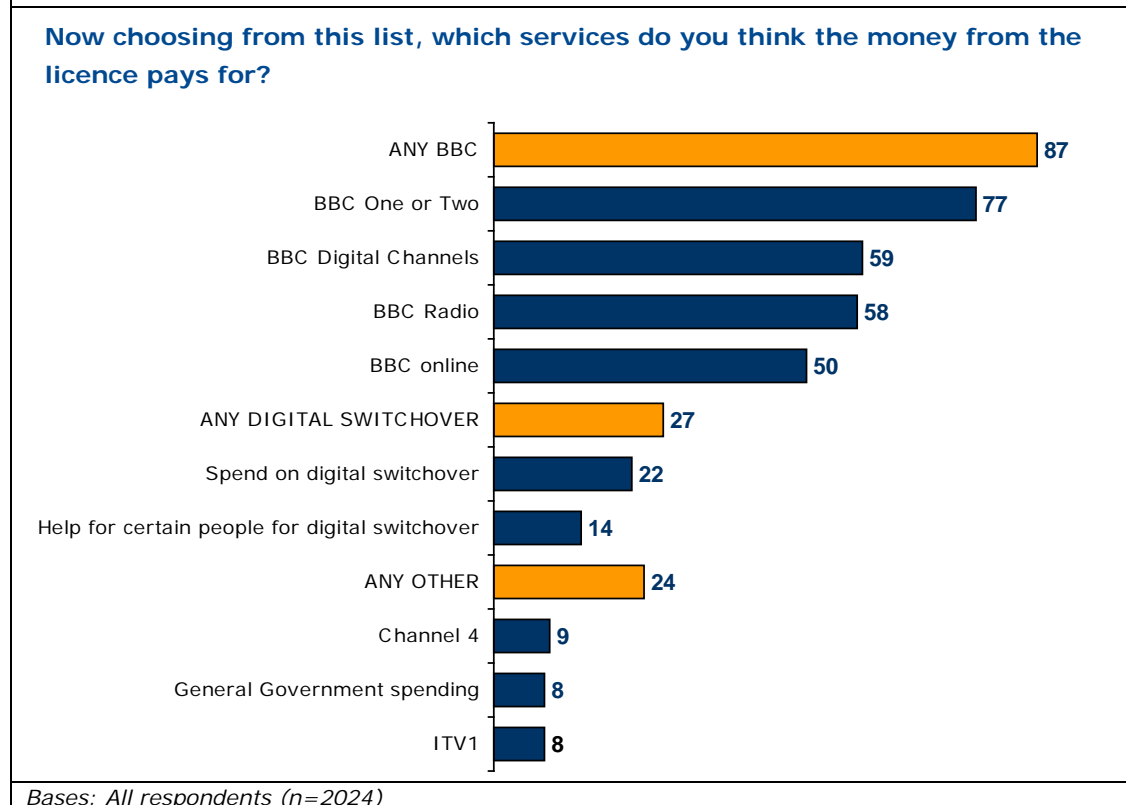
	Age						
	18-24	25-34	35-44	45-54	55-64	65-74	75+
	%	%	%	%	%	%	%
ANY BBC	35	42	43	51	57	43	38
BBC (Any mention)	27	30	26	29	36	27	27
BBC TV programmes	7	10	18	23	21	16	11
OVERHEADS/ SALARIES	10	14	18	21	26	31	32
Staff wages	5	6	10	12	15	12	16
Large salaries for presenters	-	4	3	3	5	12	3
Programmes	5	6	16	18	17	15	18
Radio	5	7	11	12	10	7	4
Don't know	35	27	15	10	7	7	11
Base:	226	331	358	348	288	249	224

3.3 Prompted awareness of licence fee use

When prompted with a list of services that the licence fee might pay for, nine in ten (87%) chose at least one of the BBC options on the list. (Chart 3.3) Just over three quarters selected BBC One or BBC Two, half selected BBC online and

around six out of ten chose either BBC radio or BBC digital channels. A quarter (27%) selected aspects of digital switchover. A small proportion said Channel 4 (9%), ITV1 (8%) or general government spending (8%).

Chart 3.3 What public believe money spent on licence fee pays for (prompted)



As was the case with spontaneous mentions, younger respondents had a lower propensity to select the BBC (74% compared with 87% overall) with mentions of the BBC tending to peak around the 45-64 age groups (this peak was particularly evident for BBC radio). (Table 3.4)

Table 3.4: What public believe money spent on licence fee pays for (prompted) by age

	Age						
	18-24	25-34	35-44	45-54	55-64	65-74	75+
	%	%	%	%	%	%	%
BBC One & Two	63	75	76	83	83	77	77
BBC Digital Channels	47	56	64	65	72	54	48
BBC Radio	41	51	57	67	71	61	54
BBC Online	39	48	57	58	56	41	36
Digital switchover	18	21	25	20	27	21	18
Help for some people for switchover	7	17	15	13	19	14	12
Channel 4	14	10	11	7	5	11	8
General Government spending	11	9	8	6	6	7	9
ITV1	11	9	12	5	3	5	7
Channel 5	7	7	7	3	4	4	6
Other digital channels	8	6	5	5	3	4	1
S4C	5	4	5	5	5	3	3
Other	1	*	-	*	2	1	1
Don't know	12	7	5	4	3	8	7
Base:	226	331	358	348	288	249	224

Prompted mentions of BBC digital switchover services were higher among those in ABC1 social grades than those classified as C2DE. (Table 3.5) In addition, BBC radio and BBC online were more likely to be selected by ABC1s than C2DEs (66% compared with 48% for radio and 58% compared with 39% for online). Prompted mentions of these BBC services were also higher for white respondents (compared with BME respondents) and for those with higher level qualifications (compared with respondents with no qualifications or school level qualifications).

Table 3.5: What public believes money spent on licence fee pays for (prompted) by social grade, education and ethnicity

	Social Grade		Highest Qualifications			Ethnicity	
	ABC1	C2DE	Higher Qualifs	School Qualifs	No Qualifs	White	BME
	%	%	%	%	%	%	%
BBC One & Two	83	69	85	78	61	79	63
BBC Digital Channels	67	50	75	57	45	61	44
BBC Radio	66	48	71	56	48	61	37
BBC Online	58	39	67	48	33	51	37
Digital switchover	27	15	31	22	11	23	15
Help for some people for switchover	17	11	19	14	9	15	8
Channel 4	9	10	9	10	6	9	8
General Government spending	7	9	6	9	7	8	10
ITV1	6	9	5	9	8	7	10
Channel 5	5	7	5	6	5	6	4
Other digital channels	5	5	5	5	4	5	4
S4C	5	4	4	5	2	5	2
Don't know	4	9	3	6	11	6	7
Base:	1004	1020	419	1186	415	1771	250

4 Nature and level of news consumption

In order to understand the nature of news consumption, respondents were asked what sources they used for national news. Respondents were then asked how often they watched/listened to/looked at national news. This was followed by similar questions about regional and local news consumption.

4.1 National news consumption

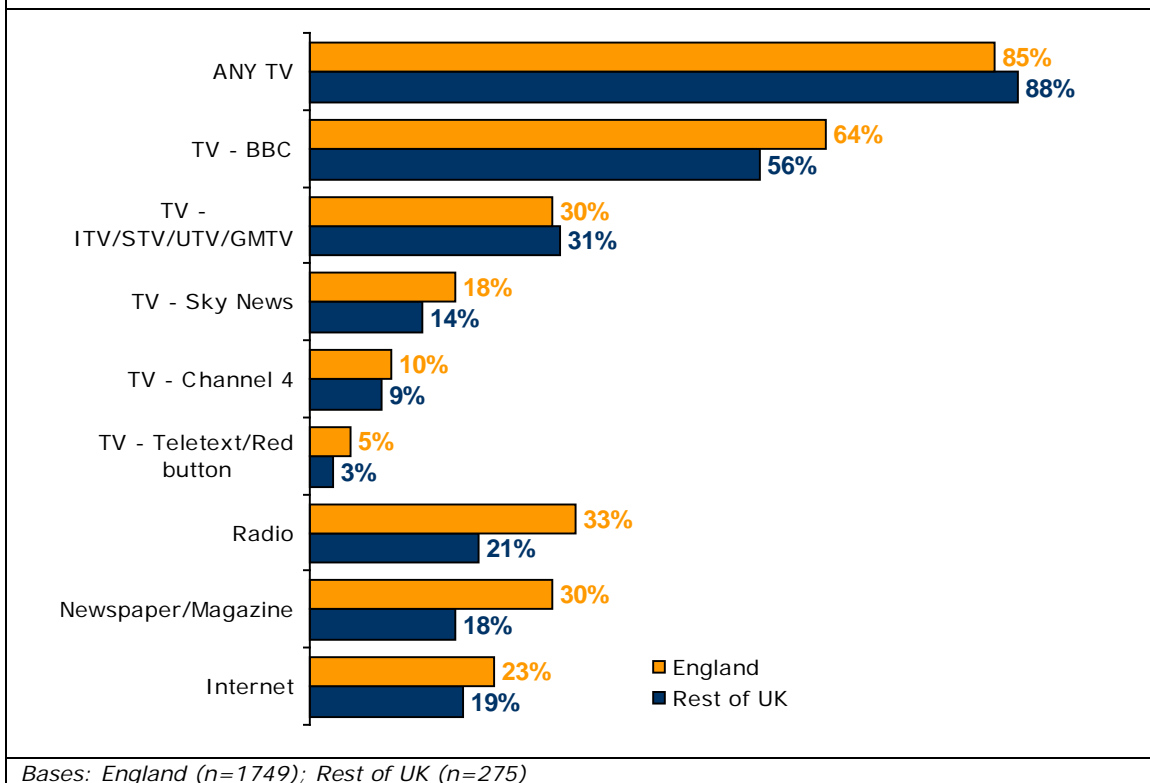
As would be expected, the most common source of national news was television. More than eight in ten adults aged 18 or over watched the national news on television (85%), compared with three in ten for both radio (31%) and newspapers and magazines (28%), and two in ten who normally used the internet for national news (22%).

Table 4.1: Sources of national news consumption

Source	Total
	%
ANY TV	85
TV - BBC	63
RADIO	31
TV – ITV/STV/UTV/GMTV	30
Newspapers/magazines	28
Internet	22
TV – Sky News	17
TV – Channel 4	9
TV – Teletext/Red button	4
TV - Channel 5	4
Other TV news	3
TV - S4C	1
None	2
Base	2024

Almost two-thirds of respondents usually watched the national news on the BBC (63%). Even among those who watched the news less often than once a week, a quarter watched the BBC (26%). Three in ten usually watched the news on ITV (30%). A smaller proportion had seen the national news on Sky News (17%), Channel 4 (9%), Channel 5 (4%) or S4C (1%).

Chart 4.1: Sources used for national news (by nation)



The source of national news differed by location, as shown above (chart 4.1). Respondents in England were more likely to watch BBC than respondents in the rest of the United Kingdom. More than four in ten respondents in Northern Ireland (44%) watched the national news on UTV, compared with three in ten who watched ITV in England.

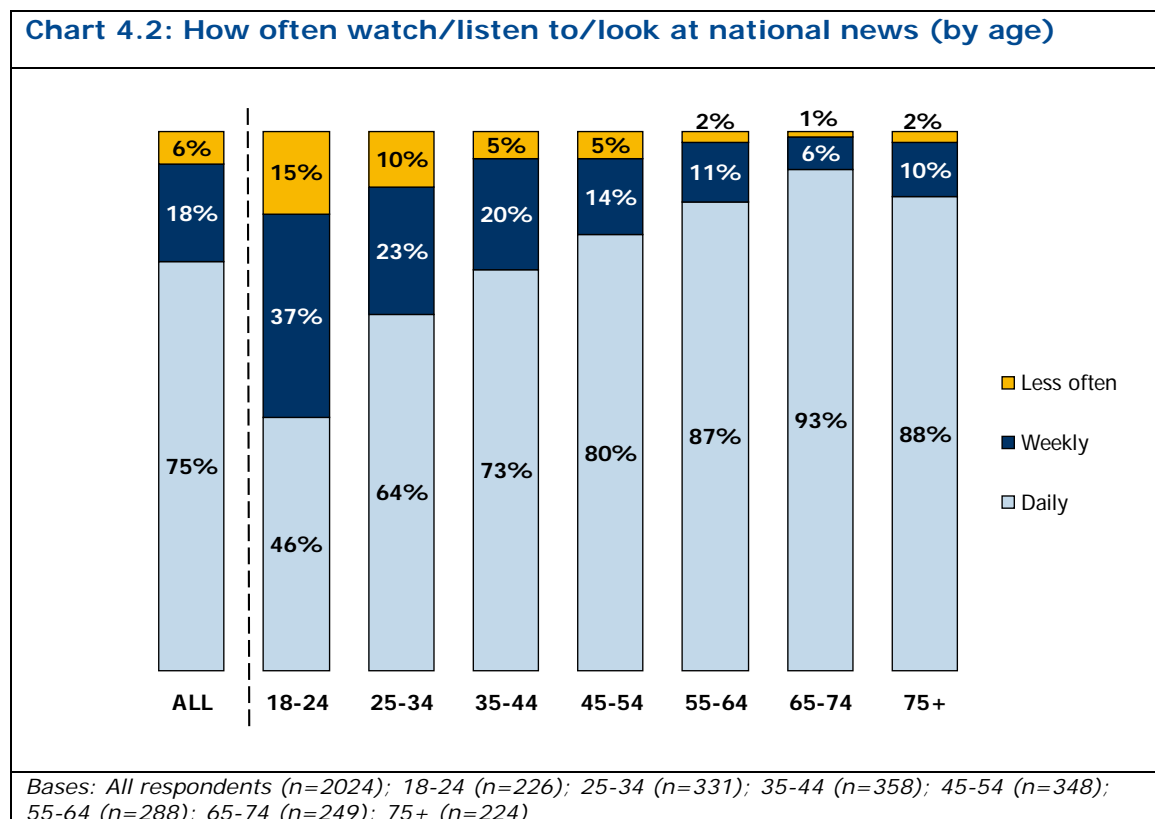
There was variation by social grade in national news viewing habits. ABC1 respondents were more likely to watch BBC than C2DE respondents (68% ABC1 compared with 57% of C2DE respondents). However, this pattern was reversed for ITV which was watched by 36% of C2DE respondents compared with 26% of ABC1.

Table 4.2: Frequency of watching/listening to/looking at national news

Q7 How often watch/listen to/look at national news	%
Every day or nearly every day (at least 5 times a week)	75
3-4 times a week	11
Once or twice a week	7
Occasionally or if it happens to be on/available	4
Never	2
Base:	2024

As shown in the table above (table 4.2), three out of four respondents watched, listened to, or looked at, national news on a daily basis. More than nine in ten watched the national news at least on a weekly basis (93%).

There was a strong relationship between age and frequency of watching, listening to, or looking at the national news. The chart below (Chart 4.2) shows that the proportion of respondents who saw the news on a daily basis increased up until the age of 75 or over. Less than half of respondents aged 18 to 24 years old watched, listened to or looked at the national news (46%), compared with more than nine in ten aged between 65 and 74 (93%).



4.2 Regional and local news consumption

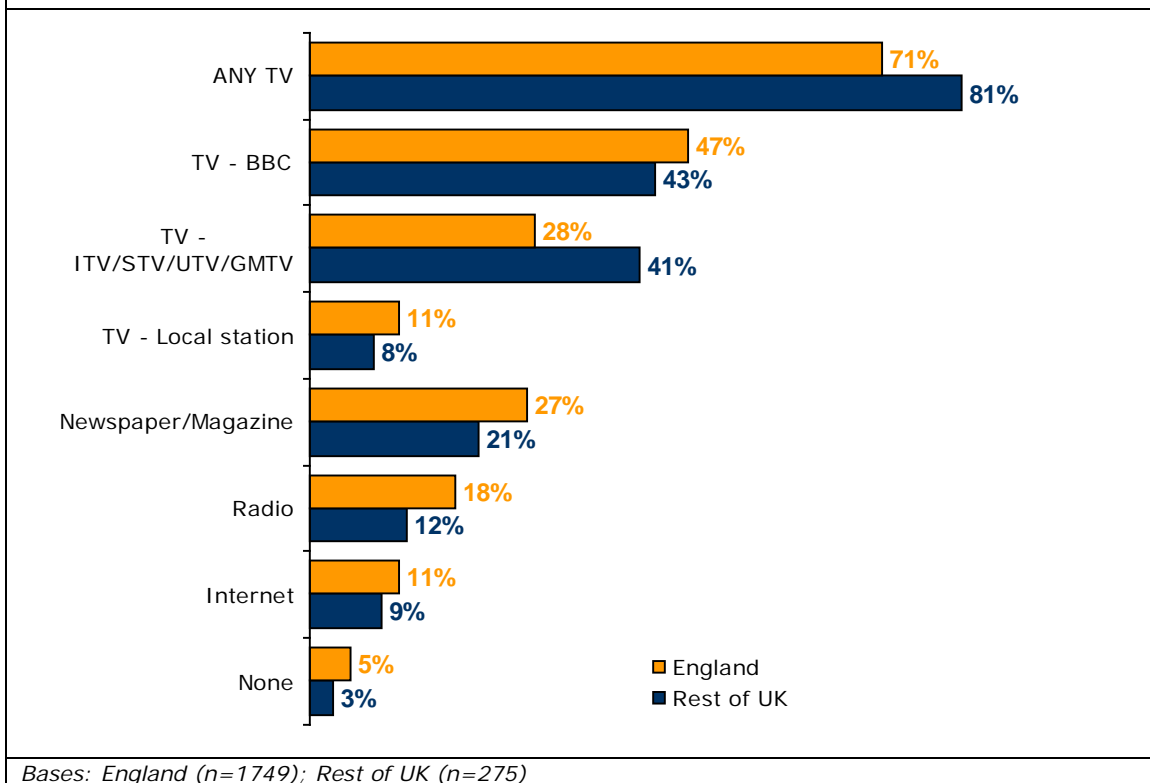
Respondents were asked to think about what sources they used to get news just for their region (or devolved nation for Scotland, Wales and Northern Ireland) and local area. Television was the most popular source for regional and local news (72%). Respondents were more likely to have read a newspaper or magazine to find out regional or local news (26%) than to have listened to the radio (17%). Only one in ten had used the internet to find out about local news.

Table 4.3: Sources used for regional and local news consumption

Source	Total
	%
ANY TV	72
TV - BBC	46
TV – ITV/STV/UTV/GMTV	30
Newspapers/magazines	26
Radio	17
TV – Local Station	11
Internet	10
TV – Teletext/Red button	2
TV - S4C	1
None	4
<i>Base</i>	<i>2024</i>

BBC was the most popular source of regional or local news. However a smaller proportion used the BBC for regional news than national news (46% for regional compared with 63% for national). As with national news, 30 per cent of respondents usually watched regional news on ITV.

Chart 4.3: Sources used for regional news



There was a small difference in regional viewing habits when analysing by location. Eight in ten respondents (81%) in Scotland, Wales and Northern Ireland watched regional news on television, while seven in ten (71%) watched regional news on television in England.

The largest difference in regional and local news consumption was that respondents in England and Wales were less likely to watch regional news on ITV, than respondents in Scotland and Northern Ireland (28% and 32% compared with 44% and 48%).

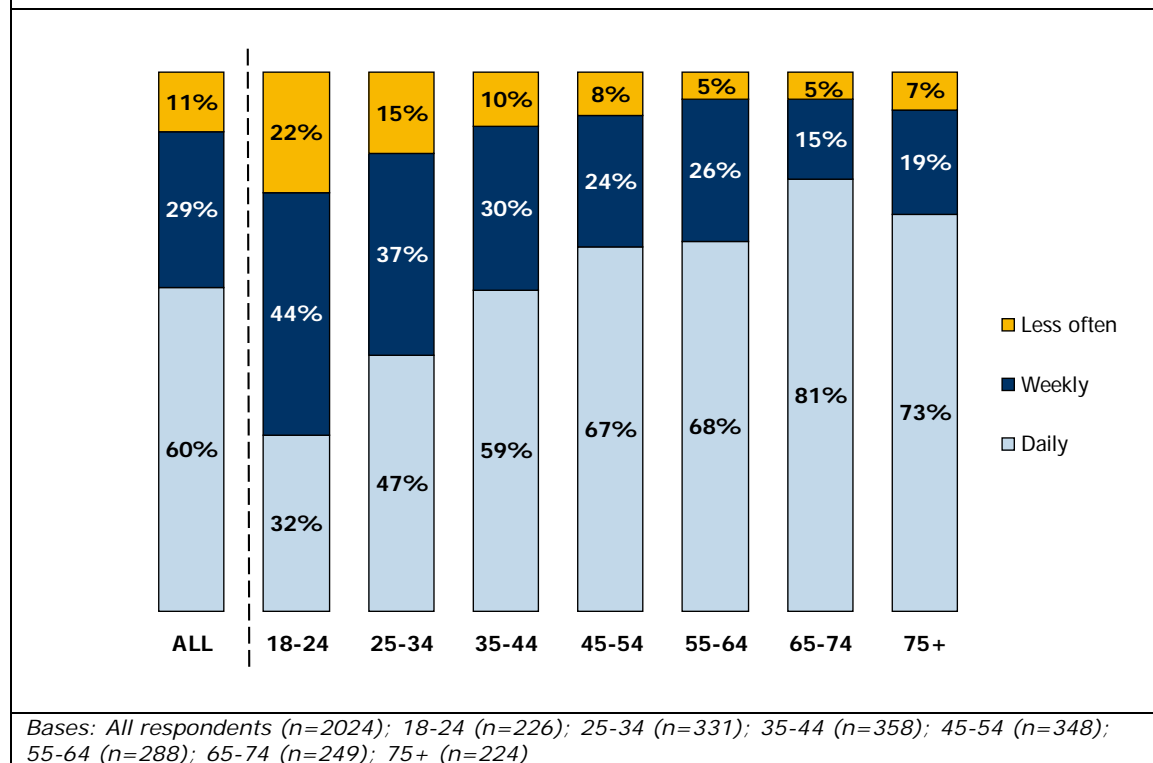
There was also variation by social grade in regional news viewing habits. ABC1 respondents were more likely to usually watch regional news on BBC than C2DE respondents (50% ABC1 compared with 41% of C2DE respondents), and conversely a higher proportion of C2DE adults watched ITV than ABC1s (36% C2DE compared with 26% of ABC1).

Table 4.4: Frequency of watching/listening to/looking at regional or local news

Q9 How often watch/listen to/look at regional or local news	%
Every day or nearly every day (at least 5 times a week)	60
3-4 times a week	15
Once or twice a week	13
Occasionally or if it happens to be on/available	6
Never	5
Base:	2024

As shown in the table above (Table 4.4) six in ten respondents watched, listened to or looked at regional or local news nearly every day and nine in ten at least once a week (89%). Only five per cent never caught regional or local news.

Chart 4.4: How often watch/listen to/look at regional or local news (by age)



The correlation between age and frequency of regional news consumption was the same for regional news as for national news. Frequency increased by age (up until aged 75 or over). Four in ten aged 18 to 34 watched, listened to, or looked at regional or local news nearly every day. This rose to seven in ten aged 35 or over (68%).

5 General views on licence fee sharing

5.1 Awareness of use of licence fee to fund digital switchover

After knowledge of licence fee usage had been established, respondents were provided with two sections of contextual information about the licence fee. These were read out by the interviewer, and also provided to the respondents on show cards so they could read them if they wished or refer back to them whilst answering questions in this section.

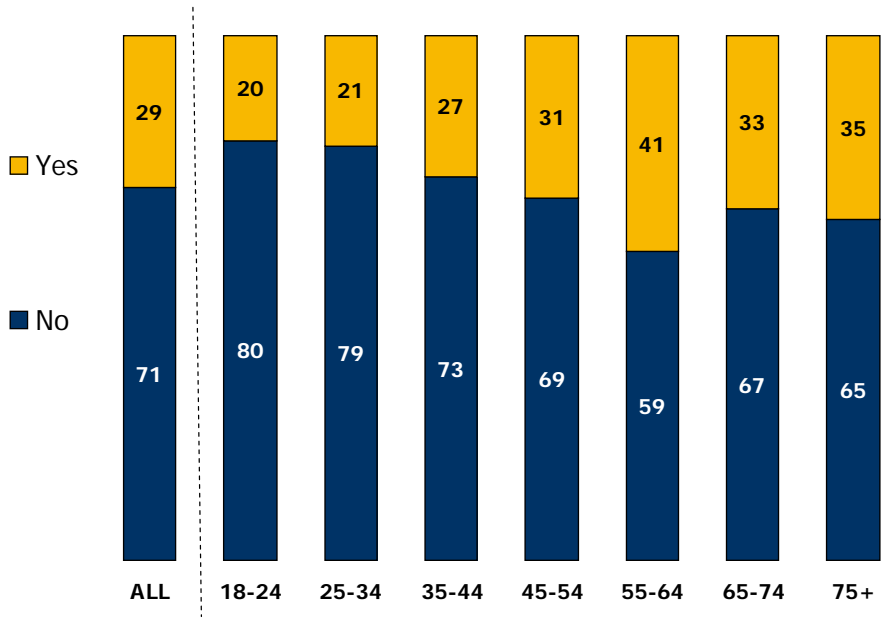
The first section informed respondents that a small part of the licence fee has been used to help fund Digital Switchover for vulnerable groups. Information was presented as follows:

The television licence fee is primarily used to fund BBC content and services. However at present, a small part (about 4% or roughly £5 per year) of each licence fee is not used for BBC services but is used to help make the switchover to Digital TV easier for groups like the elderly and disabled.

The majority of respondents (71%) had not been previously aware that licence fee money had been used for the digital switchover. (Chart 5.1) However, awareness gradually increased with age until age 64, dropping off again among older respondents. The proportion who were aware was 20% among 18-24 year olds and 27% among 35-44 year olds, increasing to four in ten (41%) of those aged 55-64. A third of those in both of the oldest age groups claimed to have prior awareness of the use of licence fee money for digital switchover (33% 65-74 year olds, 35% 75+).

Chart 5.1 Awareness of licence fee money being used for digital switchover by age

Before this interview, were you aware that licence fee money has been used both to fund the BBC and help with digital switchover?

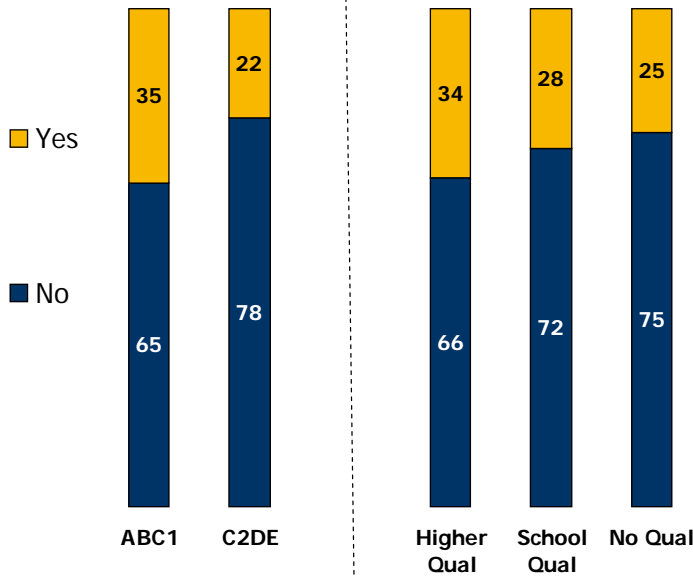


Bases: ALL (n = 2024); 18-24 (n=226); 25-34 (n=331); 35-44 (n=358); 45-54 (n=348); 55-64 (n=288); 65-74(n=249); 75+(n=224)

A larger proportion of ABC1s claimed to have been aware of the digital switchover licence use (35%) than C2DEs (22%). (Chart 5.2) Those with higher level qualifications were also more likely to be aware than those with lower level qualifications (Awareness was 25% amongst those without qualifications compared with 34% for those with higher qualifications).

Chart 5.2 Awareness of licence fee money being used for digital switchover by social grade and educational qualification

Before this interview, were you aware that licence fee money has been used both to fund the BBC and help with digital switchover?



Bases: ABC1 (n = 1004); C2DE (n=1020); Higher qualifications (n=419); School level qualifications (n=1186); No qualifications (n=415)

Those who watched news on a daily basis were more likely to have heard about the licence fee being used for digital switchover than those who watched it less than once a week (33% compared with 12% for national news and 32% compared with 22% for regional news). (Table 5.1)

Table 5.1: Awareness of licence fee money being used for digital switchover by frequency of news consumption

	Frequency watch national news on TV			Frequency watch regional news on TV		
	Daily	1-4 x per week	Less often	Daily	1-4 x per week	Less often
	%	%	%	%	%	%
Yes	33	20	12	32	27	22
No	67	80	88	68	73	78
Base:	1511	367	127	1234	558	214

5.2 Feelings about using TV licence fee to fund public service content on other channels

After asking about awareness of using the licence fee for digital switchover respondents were given further information setting out the basic premise of the government's proposal to transfer the portion of the licence fee that has been used for digital switchover to help fund public service content on other channels after 2013. At this stage the premise was presented as a generic concept – no mention was made of the possible use of this money to fund regional news outside the BBC. This allowed us to gauge respondents' general inclinations either towards or against the proposal before measuring their opinion on the specific issue of funding regional news (covered in Chapter 7).

Information was presented as follows:

In 2013, once the switchover to Digital TV has been completed, the amount people will pay for their TV licence will be reviewed.

At that point, one possibility is to keep the small part of the licence fee money previously used for digital switchover to ensure certain types of programmes are available on other channels in addition to the BBC. These programmes would include quality news, but possibly also UK-made documentaries, children's programmes and quality dramas. The majority of the licence fee would continue to be used by the BBC.

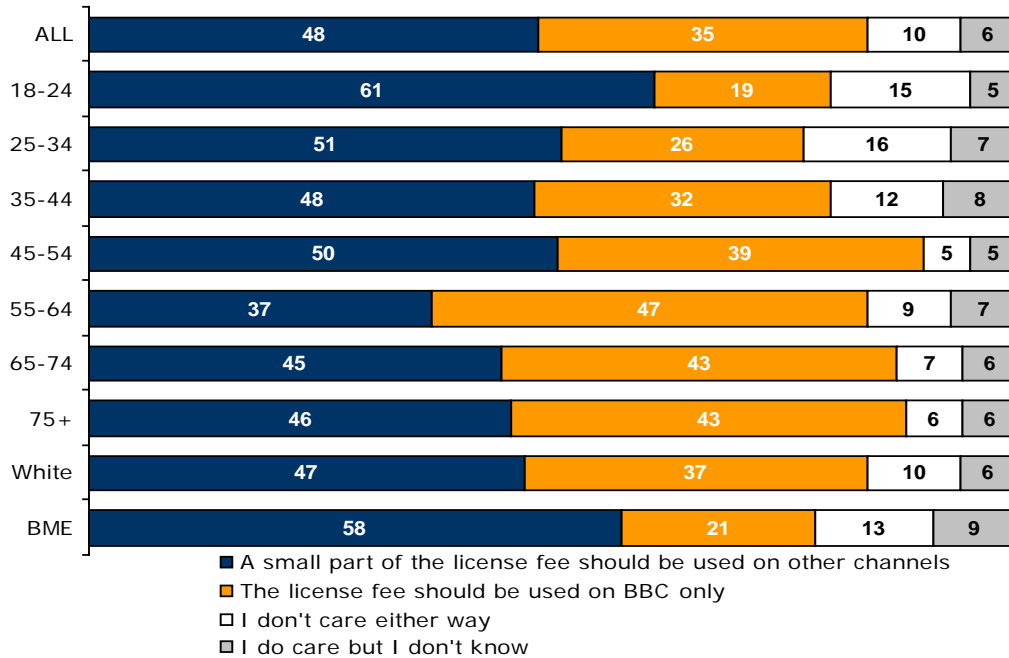
When offered a choice half of respondents (48%) opted for a small part of the licence fee to be spent on other channels, while 35% felt the licence should be used only for the BBC. Ten per cent said they didn't care either way and six per cent said they did care but did not know which option they preferred. (Chart 5.3)

Those in the older age groups (55-64, 65-74 and 75+) tended to show greater preference for the BBC than younger respondents (47%, 43% and 43% compared with 19% of 18-24s and 26% of 25-34s). On the other hand, younger respondents tended to display greater apathy than older respondents (15% of 18-24s, 16% of 25-34s did not care either way compared with 5% of 45-54s and 6% of 75+).

White respondents were more likely to choose BBC exclusivity than BME respondents (37% compared with 21% of BME respondents).

Chart 5.3 Q4 Perceptions on how licence fee should be spent by age and ethnicity

After 2013 in your personal opinion, should a small part of the licence fee be used to support certain types of programmes on other (that is non-BBC) channels, OR do you think the licence fee should be set for the BBC's use only?



Bases: All respondents (n=2024); 18-24 (n=226); 25-34 (n=331); 35-44 (n=358); 45-54 (n=348); 55-64 (n=288); 65-74(n=249); 75+(n=224); White (n= 1,771); BME (n=250)

Level of apathy at this question was higher among those who rarely watched national news: a quarter of those who watched the news less than once a week said they did not care how the fee was spent, compared with one in ten who watched daily (9%) or between one and four times per week (11%). (Table 5.2)

Table 5.2: Perceptions of how licence fee should be spent by frequency of national news viewing

	Frequency watch national news on TV		
	Daily (1551)	1-4 x per week (367)	Less often (127)
	%	%	%
Small part used to support public service content on other channels	48	50	43
Only on BBC content or services	38	27	24
Don't care	9	11	24
Don't know	5	11	9
<i>Base:</i>	1,511	367	127

Respondents were asked two questions about their awareness of issues prior to the survey. The first of these was about their awareness of the use of the licence fee for digital switchover. The second was asked later in the survey and checked whether they had been aware that in the future regional news may only be available on the BBC due to declining advertising revenues (refer to chapter 7). Self-reported awareness of these issues may be taken as an indicator of prior knowledge about some of the contextual issues; it is of interest to see how prior knowledge might be related to attitudes towards licence fee sharing.

The results indicate that prior knowledge is related to a preference for BBC exclusivity. For example, 43% of those previously aware of the link between the licence fee and digital switchover opted for BBC exclusivity compared with 32% of those unaware. The pattern is similar for the second knowledge measure. (Table 5.3)

Table 5.3: Views on how licence fee should be spent by prior knowledge of licence fee funding issues

	Aware licence fee money used for digital switchover		Aware regional news may become BBC only	
	Yes	No	Yes	No
	%	%	%	%
Small part used to support public service content on other channels	47	49	46	49
Only on BBC content or services	43	32	42	33
Don't care	6	12	7	12
Don't know	4	7	5	7
<i>Base:</i>	579	1,445	478	1,546

To gain some understanding of what was driving the different preferences for use of the licence fee, respondents were asked why they had selected the particular option they did. Responses were collected in an unprompted open format and were later coded into categories. The results are summarised in Table 5.4 (only responses given by at least 5% of each subset are shown).

Table 5.4: Reasons for views on how licence fee should be spent

	%
Reasons for feeling that the licence fee should be used only on BBC content and services	
<i>Base:</i>	<i>n=835</i>
Other channels are commercial/funded by advertising	33
Traditionally the licence fee has always been for the BBC	11
BBC does not have advertising	5
Reasons for feeling that a small part of the licence fee should be used to support certain programmes on other channels	
<i>Base:</i>	<i>n=961</i>
Wider range/more variety of programmes	11
The licence fee should be shared out equally	10
Should benefit/help other channels	7
BBC makes enough/has too much money	6
Fairer (for everyone)	5

The reasons given for preferring to keep the licence fee within the BBC centred around advertising, either because other channels are funded by advertising (33%) OR, the flipside of this, that the BBC does not have advertising (5%); others felt that traditionally the licence fee has been spent on the BBC, and this shouldn't change. Reasons for wanting to share the licence fee with other channels related to variety and fairness. Eleven per cent of respondents said it would give a wider range or more variety of programmes; ten per cent thought it

should be shared out equally; and seven per cent thought that it should benefit or help other channels. A small proportion thought the BBC already had enough money (6%).

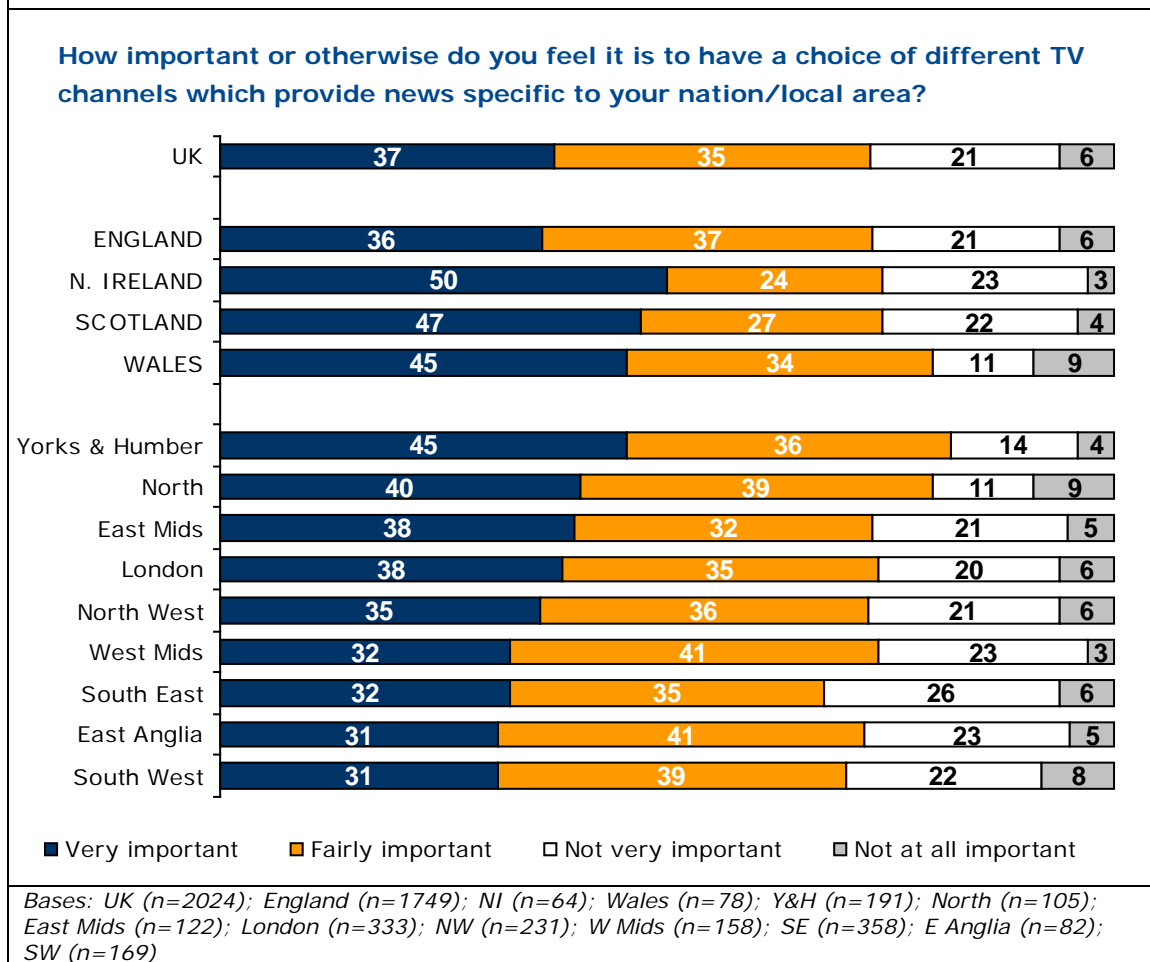
6 Perceived importance of plurality of news in the regions

This chapter covers general views on plurality before we prompted respondents with information about the regional news market and funding issues surrounding this (covered in Chapter 7).

6.1 Importance of choice of TV channels for regional news

When asked how important or otherwise it was to have a **choice** of TV channels to watch regional news, there was a clear skew in favour of choice: overall 73% felt it “important” to have this. There was relatively little variation by standard demographics (sex, age, social grade) although there were regional differences as illustrated in Chart 6.1.

Chart 6.1: Perceived importance of choice of TV channels for regional news by region and nation



The level of support in favour of plurality varied from a low of 68% in the South East to 82% in Yorkshire and Humberside. However, looking solely at the proportion who felt that plurality is “very important” it is clear that those living in the devolved nations felt most strongly on this issue: while only around three in

ten of those living in the South of England (not including London) and East Anglia felt that plurality was “very important” this rose to 45% in Wales, 47% in Scotland and 50% in Northern Ireland. Residents living in Yorks and Humberside also felt more strongly on this issue relative to other parts of England.

TV viewers who watched regional news on a daily basis were significantly more in favour of plurality (45% thinking this “very important”) than those who watched it on a less than weekly basis (19%). In addition, and according to this same measure, those who watched regional news on ITV or other regional/commercial stations were more in favour of plurality (43%) than those who only watched regional news on the BBC (36%) or who consulted other sources or none at all (32%). See Table 6.1.

Table 6.1: Perceived importance of choice of TV channels for regional news by frequency and source of regional news

	Frequency watch regional news on TV			Source of regional news		
	Daily	1-4 x per week	Less often	BBC TV only	Other TV channels	Other sources/ none
	%	%	%	%	%	%
Very important	45	28	19	36	43	32
Fairly important	34	39	33	35	36	34
Not very important	16	27	30	22	18	23
Not at all important	4	6	15	6	3	10
<i>Base:</i>	1234	558	214	602	854	568

Respondents who felt choice was either important or unimportant were asked why they felt this way. Responses were collected in an unprompted open format and responses were later coded into categories. The results are summarised in Table 6.2 (only responses given by at least 5% of each subset are shown).

Responses given by those in favour of plurality generally centred around choice and variety with around one in six stating that they want choice or that it’s good to have different perspectives presented. Others felt that alternative channels might pick up on different stories or news items (9%) or that it is important to help keep them in touch with regional news (7%) or to keep them informed more generally (7%).

Among those who felt that choice was not important, the main reasons given were unnecessary repetition of coverage (13%), feeling that one channel is sufficient (10%), or that as long as the news is there the source is unimportant (8%). Other responses generally centred on apathy/indifference although 5% said that they prefer to get their local news coverage from local newspapers.

Table 6.2: Reasons given for feeling plurality in regional news provision is important/unimportant: spontaneous responses given by at least 5% of each subset

	%
Reasons for feeling choice is <u>important</u>	
<i>Base:</i>	<i>n=1476</i>
Good to have different points of view	17
Variety/choice/people want different things	15
Different channels could pick up on different stories	9
I like to keep in touch with regional/local news	7
Important for people to keep in touch with regional news	7
Helps keep me informed	7
Other channels give impartial/unbiased news	5
Reasons for feeling choice is <u>not important</u>	
<i>Base:</i>	<i>n=531</i>
All cover the same things anyway	13
One channel is enough	10
As long as get the news, not bothered about source	8
Not important/not interested	7
Prefer only BBC news	6
No interest in any news	6
No interest in regional/local news	6
Get local news from newspapers rather than TV	5

6.2 Support for regional news on BBC only vs on other channels as well

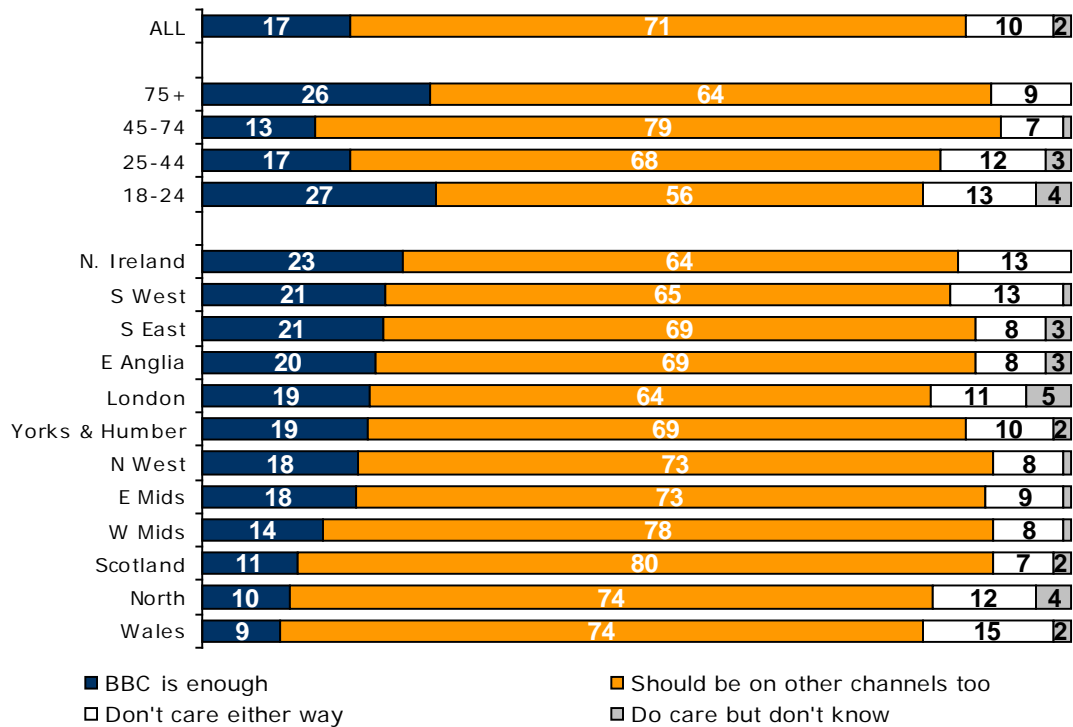
Views on the subject of plurality were further elicited through a more direct question asking whether respondents felt it was enough to have regional news on BBC only as opposed to having a wider variety on other channels as well as the BBC.

Supporting the findings discussed in section 6.1 above around seven in ten (71%) were in favour of regional news on channels in addition to the BBC; 17% felt it would be enough for the BBC to be the sole source; and 10% did not have a view either way.

Interestingly, younger viewers (aged 18-24) were less in favour of choice than average, while those aged 45-74 were most likely to be in favour of choice. By region, respondents in Scotland were most in favour of choice (80%) while those resident in London and Northern Ireland were least in favour of choice (64%). See Chart 6.2.

Chart 6.2: Attitudes towards plurality of regional news by region and age

Would it be enough to have regional news on the BBC only or should it be available on other channels in addition to the BBC?



Bases: UK (n=2,024); 18-24 (n=226); 25-44 (n=689); 45-74 (n=885); 75+ (n=224); NI (n=64); Scotland (n=133); Wales (n=78); Y&H (n=191); North (n=105); East Mids (n=122); London (n=333); NW (n=231); W Mids (n=158); SE (n=358); E Anglia (n=82); SW (n=169); 18-24 (n=226); 25-44 (n=705); 45-74 (n=885); 75+ (n=224)

Even among those who only usually watch the BBC for their local news, support in favour of plurality was 68% (compared with 79% who watch regional news on other channels as well or instead of the BBC). As with the earlier question on plurality regular viewers of regional news were significantly more in favour of choice than occasional viewers with 79% of those watching daily in support of choice compared with only 49% of those who watch regional news less often than once a week. Occasional viewers were also much less likely to care about the issue than regular viewers (27% not offering an opinion compared with 5% of regular viewers).

Table 6.3: Attitudes towards plurality of regional news by frequency and source of regional news and age

	Frequency watch regional news on TV			Source of regional news		
	Daily	1-4 x per week	Less often	BBC TV only	Other TV channels	Other sources/ none
	%	%	%	%	%	%
It would be enough to have regional news on the BBC only	14	22	21	23	12	19
Regional news should be available on other channels in addition to the BBC	79	62	49	68	79	62
I don't care either way	5	12	27	7	8	16
I do care, but I don't know	1	4	3	2	2	3
<i>Base:</i>	1234	558	214	602	854	568

Reasons for having either opinion were then elicited and the responses coded from open questions given by at least 5% of all respondents are shown in Table 6.4. The responses given for the two viewpoints cover similar ground to those shown in Table 6.2 above.

Table 6.4: Reasons given for viewpoint on plurality of regional news provision: spontaneous responses given by at least 5% of each subset

	%
Reasons for feeling that BBC regional news is enough	
<i>Base:</i>	<i>n=387</i>
One channel is enough	13
I like or prefer BBC news	11
All cover the same things anyway	8
BBC news is good or better quality	6
Reasons for feeling that regional news should be on other channels too	
<i>Base:</i>	<i>n=531</i>
Variety/choice/people want different things	24
Good to have different points of view	17
Different channels could pick up on different stories	8

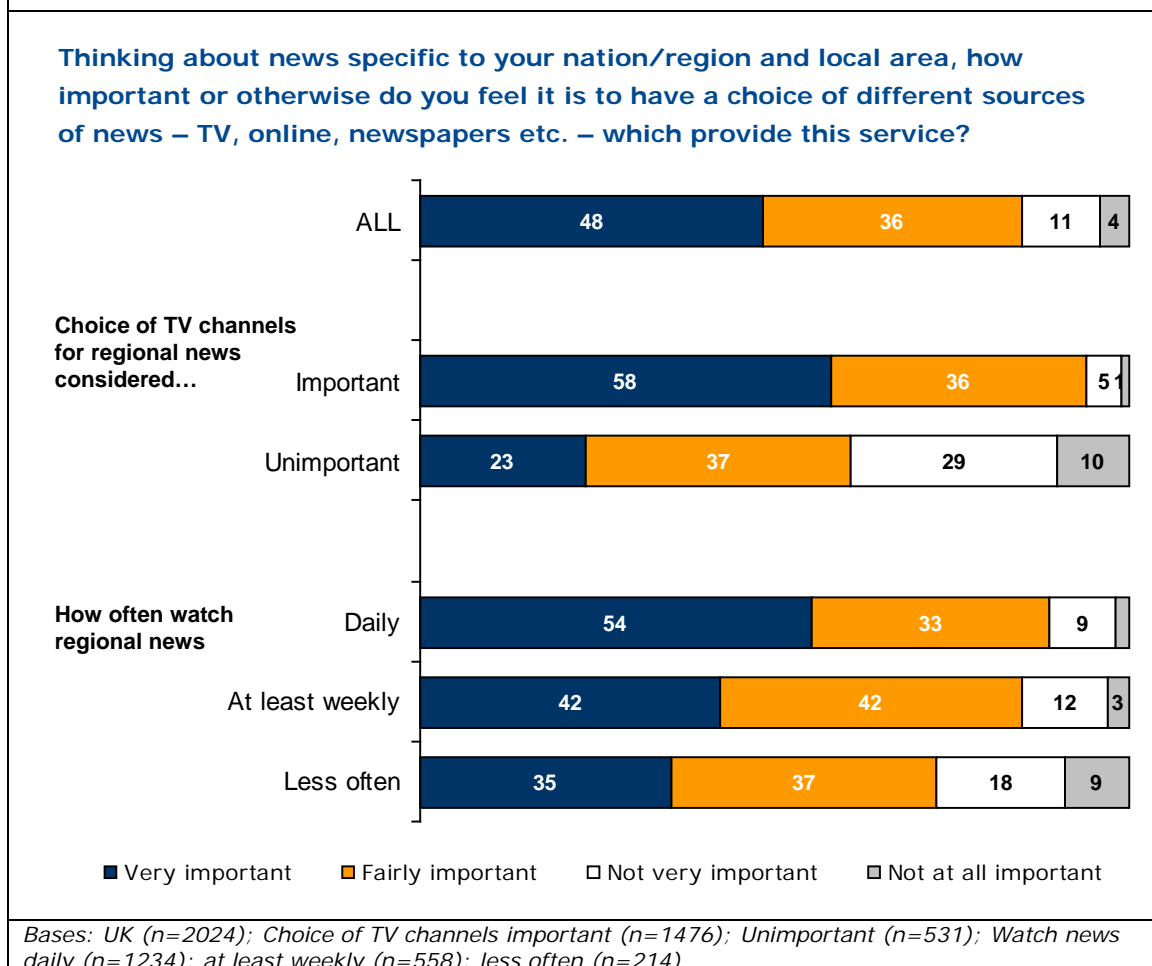
6.3 Views on importance of diversity of platforms for news

Respondents were also asked their opinion on the extent to which regional news should be offered across a range of sources - including TV, online and through newspapers.

The large majority (84%) were in favour of having a choice of platforms for accessing regional news, with only 15% feeling that this was **unimportant**. Older respondents aged 75+ were more likely than other age groups to feel that multi-platform regional news reporting was unimportant (23% compared with 15% overall). Other than this there was little variation across demographic subgroups.

However, as might be expected, preference for multi-platform regional news correlated with preferences for having a choice of TV output and with volume of regional news viewing. Chart 6.3 displays the full figures.

Chart 6.3: Perceived importance of having a choice of sources to access regional news by views on plurality and volume of regional news viewing



7 Reactions to using licence fee to fund plurality of regional news

This section details more specific reactions to the proposal to use a proportion of the licence fee to help encourage regional and local news on other channels, beyond the BBC. Where necessary, respondents were given relevant factual information to ensure that they responded on an informed basis.

7.1 Awareness of potential reduction in local and regional news outside the BBC

Before asking for opinions on the subject of licence fee sharing, respondents were given the following information which was both read out and shown on a card:

ITV announced that in the near future they may no longer be able to afford to provide regional or local news as they are getting less and less money from advertising. The same is true of radio and newspapers that are supported by advertising.

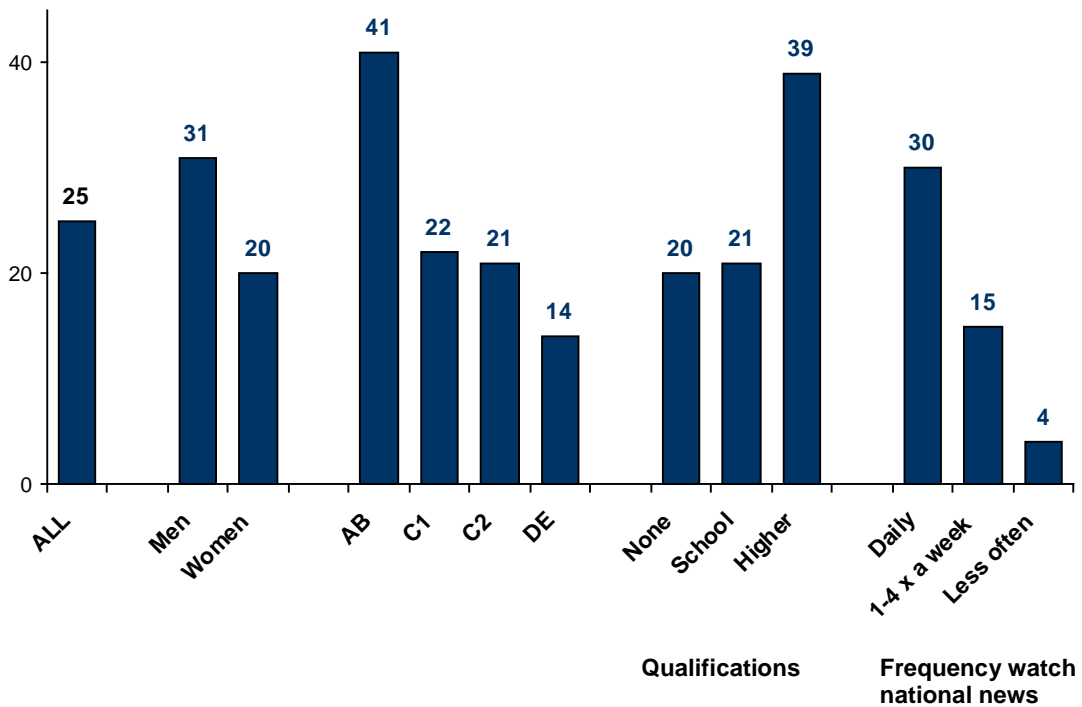
As a result, there is a real possibility, for example, that in the near future only the BBC (and S4C in Wales) will provide quality regional or local news on the TV.

Respondents were then asked whether they had been aware of this issue before the interview. Overall a quarter (25%) claimed that they had been aware. Self-reported awareness was highest among the following demographic groups: men (31% compared with 20% women); respondents aged 55-74 (39% compared with only 12% of 18-24s); ABs (41% declining to 16% of DEs); and those with higher post-school qualifications (39% compared with 20% without qualifications). Respondents who rarely kept in touch in with national news were particularly unlikely to have been aware of this issue (4% compared with 30% who watch national news on a daily basis).

There was also a strong correlation between awareness of the existing use of the licence fee to fund digital switchover and awareness of the potential future reduction of regional news: 42% of those aware of the former were also aware of the latter. (Chart 7.1).

Chart 7.1: Self-reported knowledge of reduction in provision of regional news by demographics and national news viewing

Percent aware of this issue [reduction in provision of regional news due to declining advertising revenues] before interview?



Bases: All respondents (n=2024); Men (n=962); Women (n=1062); AB (n=432); C1 (n=572); C2 (n=350); DE (n=415); No qualifications (n=415); school qualifications (n=1186); higher qualifications (n=419); watch national news daily (n=1511; 1-4 x a week (n=367); watch less often (n=127);

7.2 Views on licence fee sharing to fund plurality of regional news

Respondents were then further informed about the specifics of the government’s proposal to fund sustainability of regional news after 2013 as follows:

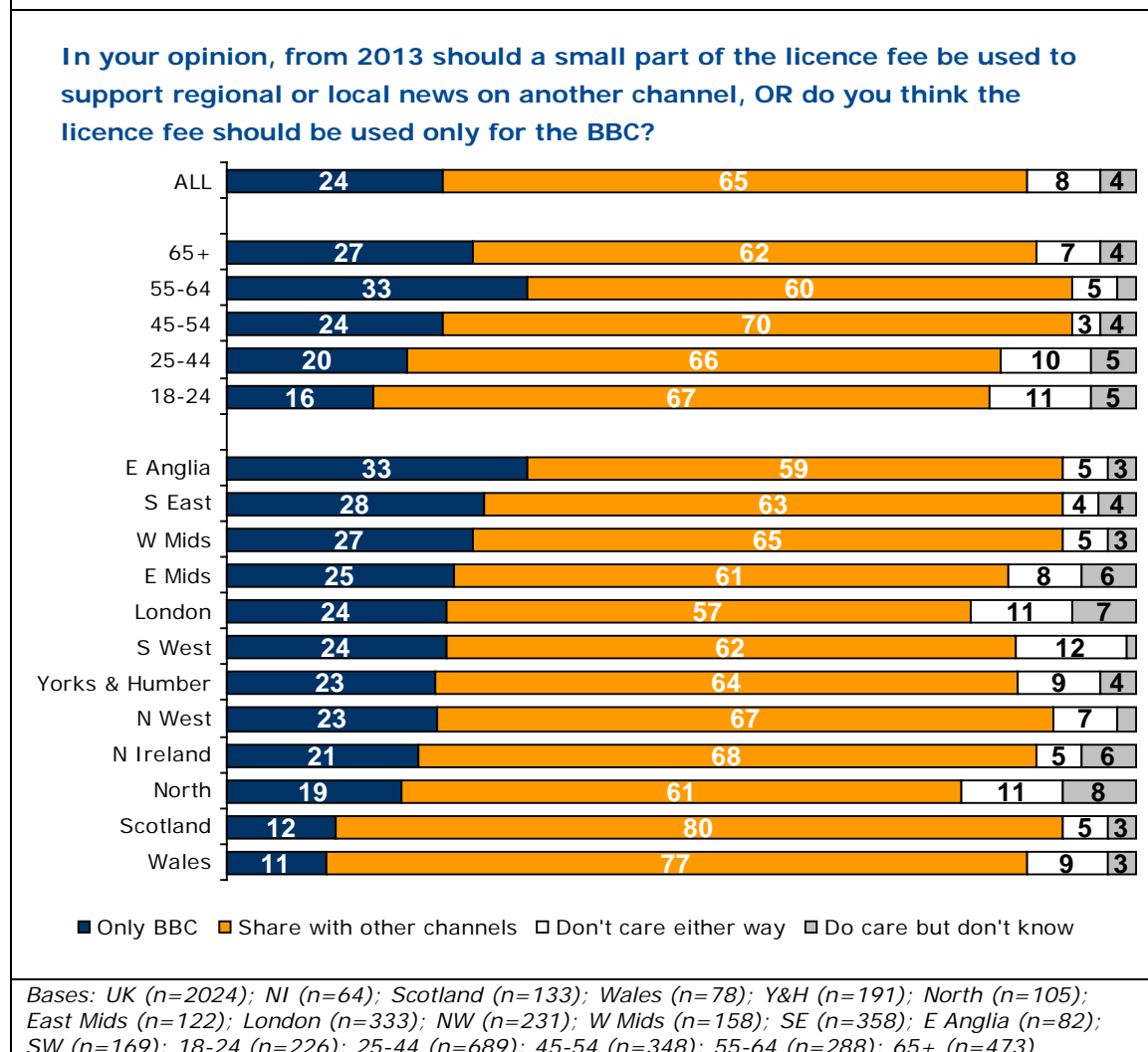
As you heard earlier, from 2013 when the licence fee is reviewed, there is a proposal to address this issue.

This is to take the small part of the licence fee that had previously been spent on the switchover to digital channels, i.e. about £5 per year or 4% of the licence fee, and use it instead to provide financial support for regional & local news on another channel and also possibly on the internet, on radio or in local newspapers.

Most of the licence fee would still go to the BBC.

Respondents were then asked whether they supported the idea of licence fee sharing or whether they felt the licence fee should be used exclusively for the BBC. Consistent with the support for diversity in regional news output discussed in Chapter 6, the balance of opinion was in favour of licence fee sharing. Two-thirds (65%) felt that a small part of the licence fee should be used to support regional news beyond the BBC, while a quarter (24%) felt that the BBC should have exclusive use of the fee. Eight per cent said they didn't care and 4% said they did care, but didn't know which option to choose.

Chart 7.2: Attitudes towards use of licence fee for regional news by region and age



Preference for BBC exclusivity rose with age from 16% of 18-24s choosing this option to 33% of 55-64s, falling off slightly among older viewers (27% of those aged 65+). This position was also slightly heightened among ABs (29% falling to 21% of DEs) although this was largely explained by a rise in the level of "don't care" responses among the lower social grades (12% of DEs don't care compared with 4% of ABs).

By region, support for the concept of licence fee sharing was particularly strong in Wales (77%) and Scotland (80%) suggesting a desire for diversity in nation-specific news reporting. On the other hand, support for licence fee sharing was lower than average in London (57%) and East Anglia (59%).

Those who watched regional news on other (non-BBC) channels were more strongly in favour of licence fee sharing (72% compared with 59% who only watch regional news on the BBC and 60% who either watch other sources or non at all). In addition, those who watched regional news regularly favoured the fee sharing proposal more than those who rarely watched regional news – in fact one in five of the latter group said that they didn't care how the licence fee money was allocated for regional news. See Table 7.1.

Table 7.1: Attitudes towards use of licence fee for regional news by frequency and source of regional news

	Frequency watch regional news on TV			Source of regional news		
	Daily	1-4 x per week	Less often	BBC TV only	Other TV channels	Other sources/ none
	%	%	%	%	%	%
Only BBC	23	26	22	33	18	22
Share with other channels	69	62	51	59	72	60
Don't care either way	6	7	19	4	7	12
Do care but don't know	3	5	8	4	3	6
Base:	1234	558	214	602	854	568

Finally, views on licence fee sharing strongly correlated with opinions on plurality expressed earlier in the interview: thus those who felt choice in regional news provision was important supported the government's proposals significantly more (71%) than those who did not think was an important issue (50%). Similarly, those who had earlier stated that there should be choice of channels for watching regional news were twice as likely (75%) to support the proposal than those who would be happy with the BBC as the sole provider (38%).

7.3 Shift in attitudes on licence fee sharing

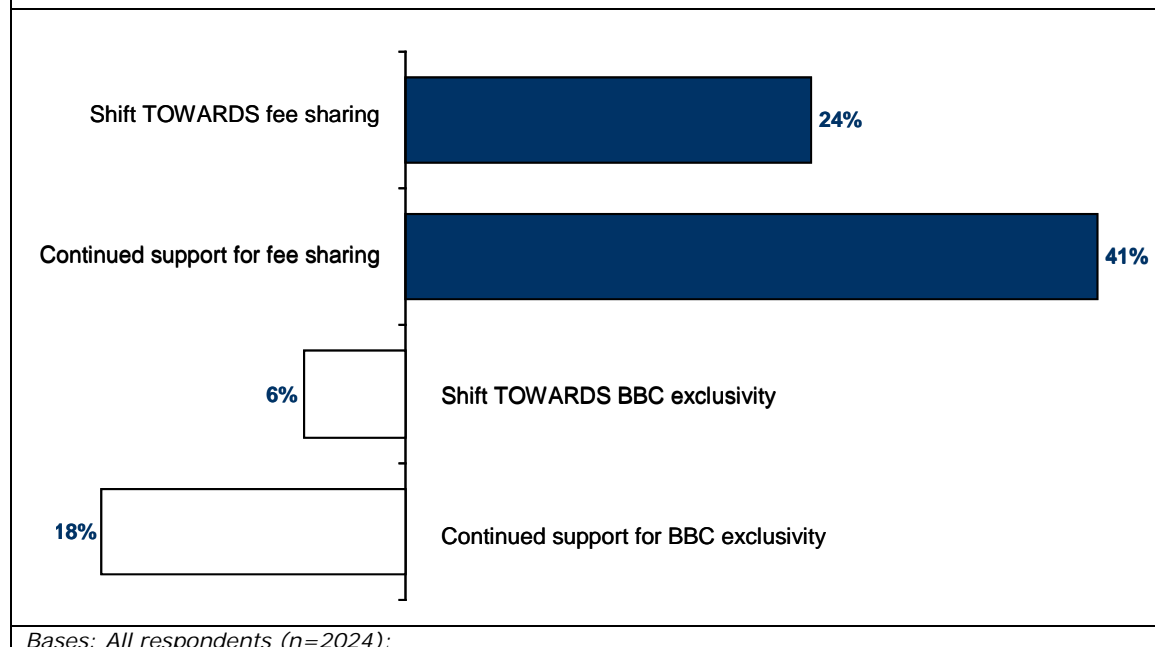
Views on this matter had been sought earlier in the questionnaire before the issue of reduction in advertising revenues and potential challenges facing the sustainability of regional news had been explained (see section 5.2 for detail on this earlier question). It is of interest to compare the responses given at the two

questions to see whether respondents' opinions shifted over the course of the interview.

At the earlier question, 48% came out in support of the licence fee being used beyond the BBC while 35% were in favour of protecting it solely for the BBC. By this latter stage, the equivalent proportions were 65% and 24% indicating a net shift in opinion of towards the government's proposals. Chart 7.3 displays how this shift occurred.

Overall, 24% shifted their opinion towards the proposal of fee sharing while 6% shifted their opinion in the opposite direction (a net shift towards the proposal of 17% once rounding taken into account). Across the two questions, eighteen per cent held firm in their view that the licence fee should only be spent on the BBC.

Chart 7.3: Shift in attitudes towards and against licence fee sharing pre and post being given contextual information



8 Conclusions

Overall there was a good understanding of the link between the licence fee and the BBC

When prompted the large majority of people were aware that the Licence fee was linked to the BBC and nearly half cited the BBC without prompting. Only a negligible proportion thought the licence fee currently paid for other channels.

Regional news was consumed by most people on at least a weekly basis

Six in ten people watched, listened to or looked at regional or local news every day and nine out of ten did so at least once a week. Three quarters sourced regional news through television and a quarter through newspapers or magazines. The BBC was the most popular source for regional or local news, watched by nearly half of respondents whilst three in ten people watched regional news on ITV.

The majority of people valued plurality of sources for TV news about their local area or region

Three quarters of the public felt it was important to have a choice of TV channels providing regional news and this was felt more strongly among those in the devolved nations and among those who consumed regional news more regularly. Key reasons given for citing plurality centred on choice and diversity of coverage.

Most people said they would favour sharing the licence fee when asked to choose between this or spending it exclusively on the BBC

After all respondents had been informed about the potential decline in regional news and the proposal to use the portion of the licence fee that had been used for digital switchover to fund regional news outside the BBC most people (two-thirds) favoured licence fee sharing; a quarter still wanted the licence fee to be spent exclusively on the BBC and about one in ten were undecided or held no opinion.

9 Appendix A: Profile of Sample

		Unwtd total	Wtd total	Total %
Unweighted base size		2024	2024	2024
SEX	Men	962	980	48%
	Women	1062	1044	52%
AGE	18-24	226	265	13%
	25-34	331	327	16%
	35-44	358	378	19%
	45-54	348	339	17%
	55-64	288	302	15%
	65-74	249	224	11%
	75+	224	188	9%
SOCIAL GRADE	AB	432	539	27%
	C1	572	583	29%
	C2	350	426	21%
	D	273	308	15%
	E	397	169	8%
	ABC1	1004	1121	55%
	C2DE	1020	903	45%
STANDARD REGION	London	333	249	12%
	South East	358	383	19%
	South West	169	174	9%
	Wales	78	101	5%
	East Anglia	82	80	4%
	East Midlands	122	147	7%
	West Midlands	158	177	9%
	Yorkshire and Humberside	191	174	9%
	North West	231	213	11%
	North	105	100	5%
	Scotland	133	171	8%
	Northern Ireland	64	55	3%
	ENGLAND	1749	1697	84%
	REST OF UK	275	327	16%
Choice of channels for regional news	Important	1476	1474	73%
	Not important	531	533	26%
	Don't know	17	17	1%
Choice of media for regional news	Important	1696	1710	84%
	Not important	315	304	15%
	Don't know	13	11	1%
ITV region	London (Carlton LWT)	484	410	20%
	South (Meridian)	117	120	6%
	South West (West Country)	47	49	2%

	Wales and West (HTV)	135	159	8%
	East of England (Anglia)	185	190	9%
	Mids (Central)	261	296	15%
	Yorks (Yorks)	222	216	11%
	North East (Tyne Tees)	102	99	5%
	North West (Granada)	274	259	13%
	Scotland (Grampian/STV/Border)	133	171	8%
	Northern Ireland (UTV)	64	55	3%
Rural or Urban	Rural	277	302	15%
	Urban	1675	1659	82%
Highest level of education achieved	No qualifications	415	355	18%
	School level qualifications	1186	1204	60%
	Higher qualifications	419	463	23%
Working Status	Full-time	739	776	38%
	Part-time	298	301	15%
	Not working (excluding retired)	498	482	24%
	Retired	489	466	23%
Used internet in last month	Yes	1362	1452	72%
	No	662	572	28%
Commercial TV viewing	Heavy 28.50+	961	942	47%
	Medium 14.50 – 28.49	628	646	32%
	Light 14.49 or less	435	436	22%
Ethnicity	White	1771	1785	88%
	BME	250	236	12%
TV used for nation news	Use BBC TV only	671	677	33%
	Use TV other than BBC for national news	1060	1050	52%
Media used for national news	TV	1731	1727	85%
	Radio	599	625	31%
	Internet	410	450	22%
	Newspaper/Magazines	544	564	28%
National news frequency	Daily	1511	1516	75%
	Weekly	367	366	18%
	Less often than weekly	127	122	6%
TV used for regional news	Use BBC TV only	602	623	31%
	Use TV other than BBC for regional/local news	854	842	42%
Media used for regional news	TV	1456	1465	72%
	Radio	352	346	17%
	Internet	195	208	10%
	Newspaper/Magazines	525	535	26%

Regional news frequency	Daily	1234	1210	60%
	Weekly	558	582	29%
	Less often than weekly	214	214	11%
Preferred licence fee use (1st question)	BBC only	702	708	35%
	Multiple channels	961	979	48%
	I don't care either way	228	211	10%
	I do care, but I don't know	133	126	6%
Channels for regional news	BBC only	341	350	17%
	Choice of channels	1435	1433	71%
	I don't care either way	202	195	10%
	I do care, but I don't know	46	45	2%
Preferred licence fee use (2nd question)	BBC news only	477	476	24%
	Multiple channels	1291	1313	65%
	I don't care either way	171	152	8%
	I do care, but I don't know	85	83	4%
Aware licence fee money used for digital switchover	Yes	579	592	29%
	No/DK	1445	1432	71%
Aware regional news may become BBC only	Yes	478	508	25%
	No/DK	1546	1516	75%
Watch or have TV at all	Yes	2004	2004	99%
	No	20	20	1%
Responsible for purchasing TV licence fee	Yes	1282	1262	62%
	No	742	762	38%

Appendix B: Sampling & Weighting

9.1 Sampling Technique

The sampling technique used in this survey is a tightly controlled form of random location sampling developed within TNS-BMRB, and is the basis of most consumer surveys which TNS-BMRB conducts.

The aim of random location sampling is to eliminate the more unsatisfactory features of quota sampling without incurring the cost and other penalties involved in conducting surveys according to strict probability methods.

One of the principal advantages of probability techniques of sampling is that selection of respondents is taken from the hands of interviewers. In conventional quota sampling, on the other hand, interviewers are given quotas to fill, usually from within specified administrative areas. When, for example, an interviewer is asked to complete a quota of AB respondents, she will tend to go to a part of the district where she knows such individuals to be available. AB individuals living in mixed social class areas will have little chance of inclusion. This and similar defects lead to biases which are concealed by superficial agreements between sample profiles and accepted standard statistics.

The principal distinguishing characteristic of random location sampling, as operated by TNS-BMRB, is that interviewers are given very little choice in the selection of respondents. Respondents are drawn from a small set of homogenous streets, selected with probability proportional to population after stratification by their ACORN characteristics and region. Quotas are set in terms of characteristics which are known to have a bearing on individuals' probabilities of being at home and so available for interview. Rules are given which govern the distribution, spacing and timing of interviews.

The sample of areas takes as its universe all sample units (groups of Census 2001 Output Areas, on average, 300 households) in Great Britain. Output areas are stratified in the following manner:

- (i) Standard Region
- (ii) Within Standard Region - by Acorn type
- (iii) Within Standard Region by County and ITV Region

Thus, the design is single stage, using direct selection of appropriate groups of Output areas, rather than taking streets at random from larger units such as wards or parishes.

9.2 Weighting technique

The data is weighted to ensure that demographic profiles match those for all adults in the UK aged 18+. A rim weighting technique is used in which target profiles are set for eight separate demographic variables. The computer system then allocates a weight to each individual such that the overall composition of the sample is balanced in terms of the targets set.

9.3 Target Weights Applied

Group	Subgroup	Weight
Sex	Men	48.41
	Women	51.59
Age	18-24	13.09
	25-34	16.17
	35-44	18.68
	45-54	16.77
	55-64	14.91
	65+	20.38
Social grade	AB	26.61
	C1	28.79
	C2	21.04
	D	15.22
	E	8.34
Standard region	Scotland	8.43
	North West	10.53
	North	4.92
	Yorks/Humberside	8.61
	East Midlands	7.27
	East Anglia	3.97
	South East	18.90
	Greater London	12.32
	South West	8.58
	Wales	5.00
	West Midlands	8.73
Northern Ireland	2.74	

(Source of profile data: TNS-BMRB Target Group Index, 2009 and NRS, 2007)

Appendix C: Cognitive Testing Pilot

9.4 Introduction

This section contains details of the cognitive testing stage of the 'sustainable regional news' research study commissioned by the Department of Culture, Media and Sport. The overall aim of the study was to measure the reaction of the UK public to using the licence fee to fund plurality of news in the regions.

9.4.1 Aim

The aim of this stage was to determine exactly how respondents interpret and respond to questions in order to assess what question wording will best provide the required measures of comprehension.

9.4.2 Method

This stage was conducted in a central location (Ealing Town Hall) as a wide range of people pass by this location on a daily basis. Respondents were recruited on street to ensure coverage of a range of demographics (age, sex, working status). No fixed quotas were set, but researchers monitored the people interviewed, and asked recruiters to look out for specific types of people to fill any gaps. A £10 high street voucher was given to respondents as an incentive to take part. They then took part in an interview using the techniques described below.

'Talk aloud' techniques were used, with researchers asking respondents to read each question aloud, commenting on what they understood it to mean, and then asked to talk through the decision process they use to come up with their final answer. Respondents were asked to describe the question in their own words, and asked for their understanding of words and their interpretation of the response scales. Where necessary, the researchers probed to elicit further detail. The researchers noted down their comments as the interview progressed and probed as necessary. The researcher instructions and questionnaire are included in the appendix to this document.

9.4.3 Interview

We interviewed 20 respondents over 1 day (19 August). Interviews lasted between 20 and 40 minutes on average. We interviewed people in the following groups:

	Number
SEX	
Men	9
Women	11
AGE	
Under 35	10
35-54	4
55+	6
WORKING STATUS	
Working	10
Not working	7
Retired	3
TOTAL	20

9.4.4 Analysis

The researchers collated their notes and met to discuss their findings, and to suggest possible improvements for each question. This stage also produced information about licence fee sharing which will be used to help understanding of the findings at the main stage.

9.5 Key Recommendations Executive Summary

The following is a condensed summary of the key recommendations following the cognitive testing:

- Q1: As some responses to this question were very short and required additional probing to elicit more detail or further uses of the licence fee it was recommended that a probe instruction was added to ensure interviewers elicit maximum detail from respondents.
- Q3: The fact that a portion of the licence fee had already been used beyond the BBC for the digital switchover was not explicit in the information boxes and there were a number of superfluous details included. Therefore, it was recommended that any non critical detail was removed and that emphasis was placed on the fact that not all the funding from the licence fee currently goes to the BBC.
- Q4 & Q5: Respondents were not considering the contextual information provided at Q3 when responding to these questions. Providing great clarity at Q3 was critical to improving these responses as well. In addition, it was recommended that Q4 also makes specific reference to the issues in brief. It was also suggested that the word 'content' be replaced with 'programmes' as this is easier to understand. It was also recommended that the phrase 'regardless of cost' be removed, as it affected responses to the questions but was not the key issue being explored at this point. Finally, it was recommended that where relevant, questions include a reference to 'your personal opinion' in order to avoid people thinking about society as a whole and displaying a 'social desirability bias'.
- Q6 & Q7:
 - There was significant confusion about the terms 'nation', 'region' and 'local' and asking identical questions at each of these levels whilst switching between the definitions several times magnified this and led respondents to feel the survey was very repetitive. It was recommended that the questions look at national news first and in entirety before moving on to the regional/local level. It was also recommended that region and local are merged together as responses did not differ between them and that a tailored list of options is used reflecting what is actually available at the regional/local level.

- At Q6 there tended to be a main preference for channels and including a free choice of channels watched infrequently could result in misleading data. It was recommended that the question asks which media are **normally** used and that an additional prompt is included to clarify this if necessary.
- Q8 & 10: As these questions also referenced region and local the same issues arose here as per Q6 & 7 but the additional division within the questions of 'TV channels' and 'sources of news' meant respondents defaulted to this in their responses as it was an easier distinction for them to make. The recommendation was simply to adapt the question to the one already understood and collapse region and local into one, whilst continuing to ask the question at the 'TV channel' and 'sources of news' levels.
- Q9 & 11: Responses to these two spontaneous questions were very similar. It was recommended that only the first one is kept as it seems the choice of TV channels equate better to choice of producer of news (the key issue) whereas a choice of source media could mean the same producer in different sources. The question removed here could be used elsewhere in the survey.
- Q12: Respondents generally understood and answered this question appropriately but as it is similar to Q4 it was recommended that the structure, format and phrasing of the question are kept consistent with Q4. Therefore, it was suggested as per Q4 that the question be expanded to reiterate the issues covered so far within the question. It was also recommended that the open question removed from the previous section be inserted after Q12 to make it possible to do a direct comparison with answers at the other open question after Q8.
- Q13: On the whole this second information section was followed more easily by respondents, but as the critical piece of information about use of the licence fee outside of the BBC had not been made explicit in the earlier section, it was not referenced here at all. Naturally, the recommendation was to include this in the second information box and again to make the section as succinct as possible in order to focus respondents on the key points.
- Q14 & Q15: Any confusion or misunderstanding created earlier on in the survey was naturally carried through to these final questions. The main recommendation, in order to rectify this, was clarification of information earlier on in the survey. As Q14 is a similar question

once again to Q4 and Q12 it was therefore also recommended that the same consistencies be applied her

9.6 Questionnaire content for cognitive testing

SUSTAINABLE INDEPENDENT REGIONAL NEWS:

QUESTIONNAIRE FOR COGNITIVE TESTING

18 August 2009

SECTION 1: KNOWLEDGE OF LICENCE FEE

I now want to ask you some questions about watching TV and the TV licence fee

ASK ALL

Q1. Most UK households are required to pay a television licence fee of £142.50 a year. What do you think the money from the TV Licence Fee pays for?

OPEN QUESTION

ASK ALL

Q2. Now choosing from this list, which services do you think the money from the licence pays for? Which others?

- BBC One & Two
- BBC Digital Channels (i.e. BBC3, BBC4, CBeebies, CBBC, BBC News, BBC Parliament)
- BBC Radio
- BBC Online / bbc.co.uk
- ITV1
- Channel 4
- Channel Five
- Other [digital] TV Channels
- General government spending (e.g. on health or education)
- Spend on digital switchover
- Help for older and less well off people to meet the costs of digital switchover
- Other (SPECIFY)
- Don't know

SECTION 2: GENERAL VIEWS ON LICENCE FEE SHARING

READ OUT TO ALL

Q3 I'm now going to read out some information about the TV licence fee. This is also shown on this card for reference.

Almost all of the TV licence fee is used to support the BBC, including all of its TV and radio stations and its website. However, since 2007 a small part (about 4% or roughly £5 per year) of each licence fee has been used to help make the switch-over to Digital TV easier for groups like the elderly and disabled.

ASK ALL

Q4. Before this interview, were you aware that licence fee money has been used to help with digital switchover?

- Yes
- No
- DK

In 2013, the amount people will pay for their TV licence will be reviewed. One decision to be made at that point is whether to spend the **entire** licence fee on the BBC **OR** use a small part of it to ensure certain types of programmes are available on **other channels**. This would be for quality news but possibly also UK-made documentaries, children's programmes and quality dramas. The majority of the fee would continue to go to the BBC.

ASK ALL

Q5. Which of these comes closest to what you think should happen to the licence fee after 2013, regardless of how much it is?

- The licence fee should be used **only** on BBC content and services
- The licence fee should be used to support both the BBC and certain types of content on **other** channels
- I don't care either way
- I do care, but I don't know

ASK ALL

Q6. Why do you say that?
(OPEN)

SECTION 3: NEWS CONSUMPTION

One of the main types of programmes the licence fee pays for is news on BBC TV, radio and online. I want now to look at where you get your news from.

Q7. Which of these would you say you use for:

- a) National news - that is news affecting the whole of the UK
- b) News specific to Wales/Scotland/ NI/ [ENGLAND] your region TAILOR TEXT BY COUNTRY OF RESIDENCE
- c) News specific to your local area - by local, I mean within about 10 miles of where you live.
 - TV
 - BBC1
 - BBC News24
 - Channel 4
 - ITV/STV/UTV
 - GMTV
 - Five
 - Sky
 - Teletext
 - Other TV News
 - Radio
 - Internet
 - Newspapers/Magazines
 - Other (SPECIFY)
 - None – don't follow this type of news
 - don't know

Q8. Thinking about all the ways you get the news, how often do you watch/listen to/look at each of the following?

- a) National news - that is news affecting the whole of the UK
- b) News specific to Wales/Scotland/ NI/ [ENGLAND] your region TAILOR TEXT BY COUNTRY OF RESIDENCE
- c) News specific to your local area - by local, I mean within about 10 miles of where you live.
 - Every day or nearly every day (at least 5 times a week)
 - 3-4 times a week
 - Once or twice a week
 - Occasionally or if it happens to be on
 - Never
 - (Varies)
 - DK

SECTION 4: PLURALITY OF CHOICE FOR REGIONAL NEWS

REGIONAL

Q9. Now thinking about news specific to W/S/NI/your region. How important or otherwise do you feel it is to have a choice of different TV channels which provide this service?

- Very important
- Fairly important
- Not very important
- Not at all important
- DK

ASK ALL

Q10 Why do you say that?

DO NOT PROMPT

Q11. Thinking now about local news only. How important or otherwise do you feel it is to have a **choice** of different sources of news – TV, online, newspapers etc - which provide this service?

- Very important
- Fairly important
- Not very important
- Not at all important
- DK

ASK ALL

Q12. Why do you say that?

DO NOT PROMPT

Q13. Which of these comes closest to your personal opinion?

- It would be enough to have regional TV news on the BBC only
- There should be a choice of TV channels to watch regional news
- I don't care either way
- I do care, but I don't know

SECTION 5: REACTION TO USING LF TO FUND PLURALITY OF REGIONAL NEWS

I'm now going to read out some more information which is also shown on this card for reference.

ITV announced that in the near future they may no longer be able to afford to provide Nations/regional or local news as they are getting less and less money from advertising. The same is true of radio and newspapers that are supported by advertising.

As a result, there is a real possibility, for example, that in the near future only the BBC will provide quality Nations/regional or local news on the TV.

Q14 Were you aware of this issue before today?

- Yes
- No
- DK

One proposal to address this is to use a small part of the licence fee to support Nations/regional and local news on other on other channels in addition to the BBC. The news produced would be available on TV (for example, on the existing slot on ITV/STV/UTV) but also possibly on the internet, on radio or in local newspapers. This would happen after 2013 when the new TV licence fee is set.

Q15. Bearing this in mind, which of these comes closest to how you think the licence fee should be spent after 2013, regardless of how much it is?

- The licence fee should be used **only** for the BBC
- The licence fee should be used to support both the BBC and Nations/regional news on **other** channels
- I don't care either way
- I do care but I don't know

ASK ALL

Q16. Why do you say that?
(OPEN)

SECTION 6: CLASSIFICATION

ASK ALL

Q17 Finally, can I check do you have a TV at home?

- Yes
- No

IF NO

Q18 Can I check, do you watch TV programmes via a PC, laptop or mobile telephone?

- Yes
- No

ASK ALL

Q19 Who is the person responsible for purchasing the TV licence in your household? Is it yourself, your partner or someone else?

- Myself
- Partner
- Jointly with my partner
- Someone else
- I don't have to pay as I'm over 75
- Don't have a licence

9.7 Researcher instructions for cognitive testing

GENERAL

- Use usual cognitive think aloud and probing techniques
- Ask to read each question and then talk through how they understand them, including the answer lists, and talk through their thought process
- For all text boxes please gauge reactions – are they too long, would people read them thoroughly in an interview? Do people refer back to them when answering the following question?
- STAPLE your notes to the questionnaire at the end of the interview – put your initials and an identifying number on all documents in case they come apart.

Question / Text Number	Issue	Researcher Notes
Q1		
Q2		
Text box 1 (Q3)		
Q3		
Text Box 2 before Q4	What do people think is meant by 'small part' of the licence fee? Do they refer back to the 4% or £5 referenced in text box one or do they have a different interpretation of this?	
Q4	Are people able to allocate themselves to one of the options given or is there another option that is not covered by these responses? How do they interpret "certain types of programmes" – do they refer back to text box?	
Q5	Explore fully their reasoning behind the answer at Q5 – note any key issues taken into account.	
Q6	Are people able to distinguish between national/regional & local news? How do they define these? Is the 10 mile radius to define local a relevant proxy?	

Q7	Are they thinking about ALL of their news consumption, or just the media mentioned at Q7?	
Q8	How are they interpreting region at this question?	
Q9	<p>Do people think about their response to Q9 on a personal level or think about impact on society as a whole?</p> <p>ONCE they have given you their answer verbatim (make a note of key issues) if they have NOT already mentioned them, ask if the following are important to them ...</p> <ul style="list-style-type: none"> • Because I can watch it at different times/on different days • Because I like to have different points of view on news; • Because it's important for society as a whole to have different points of view on news; • Because it creates a competition for quality between the journalists and the channels 	
Q10	<p>Are people able to jump to thinking more broadly than just TV?</p> <p>Do they realise this is local (as per 10 mile radius) or do they think it is actually the same question as Q9? Is it too repetitive even if they do differentiate?</p>	
Q11	<p>SAME AS Q9</p> <p>Do people think about their response to Q12 on a personal level or think about impact on society as a whole?</p> <p>ONCE they have given you their answer verbatim (make a note of key issues) if they have NOT already mentioned them, ask if the following are important to them ...</p> <ul style="list-style-type: none"> • Because I can watch it at different times/on different days • Because I like to have different points of view on news; • Because it's important for society as a whole to have different points of view on news; <p>Because it creates a competition for quality between the journalists and the channels</p>	
Q12	Are people able to allocate themselves	

	<p>to one of the options given or is there another option that is not covered by these responses?</p> <p>Are they able to differentiate this from Q4?</p>	
Text box pre Q13		
Q13		
Text Box 4 Before Q14	<p>What is understood by 'on ITV' and 'made by ITV'? Do people make a distinction between the business ITV which produces programmes and the channel which airs them?</p>	
Q14	<p>Are people able to allocate themselves to one of the options given or is there another option that is not covered by these responses?</p> <p>Can they differentiate this from Q4 and Q12?</p> <p>As it is actually only ITV that would show regional or local news are people confused by this being phrased as 'on the other main channels' when considering the first option at this question? What do they take this to mean?</p> <p>When considering their response do people think this would mean a higher fee or less money for the BBC or both?</p>	
Q15	<p><u>Explore fully their reasoning behind the answer at Q14</u> – note any key issues taken into account.</p> <p>Check if they would have given a different answer if the first bullet had the additional proviso, "even if there was less choice..."</p>	

FURTHER NOTES:

9.8 Appendix D: Final Survey Questionnaire

Sustainable Independent - FINAL QUESTIONNAIRE

H968 - JN: 45108307 - 26 Aug 2009

Quanquest v2.1 - QAL v2.2bmr13 - CAPI

H968

QUANCEPT ITEM:

INTERVIEWER: PLEASE SHOW SCREEN UNTIL INSTRUCTED OTHERWISE

I now want to ask you some questions about watching TV and the TV licence fee.

-
1. Most UK households are required to pay a television licence fee of £142.50 a year. What do you think the money from the TV Licence Fee pays for?

(113 - 116)

Don't Know

Y (113)

-
2. Now choosing from this list, which services do you think the money from the licence pays for?

Which others?

INTERVIEWER: PLEASE PUT "_" AROUND OTHER RESPONSES

BBC One & Two	1	(117)
BBC Digital Channels (i.e.BBC3, BBC4, CBeebies, CBBC, BBC News Channel, BBC Parliament)	2	
BBC Radio	3	
BBC Online / bbc.co.uk	4	
ITV1	5	
Channel 4	6	
S4C	7	
Channel Five	8	
Other [digital] TV Channels	9	
General government spending (e.g. on health or education)	0	(118)
Spend on digital switchover	1	
Help for older and less well off people to meet the costs of digital switchover	2	
Don't Know	Y	(117)
Other	0	

Other specify...

(119 - 122)

I'm now going to read out some information about the TV licence fee. This is also shown on this card for reference.

INTERVIEWER: PLEASE PASS THE RESPONDENT SHOWCARD NP968

A

The television licence fee is primarily used to fund BBC content and services. However at present, a small part (about 4% or roughly £5 per year) of each licence fee is not used for BBC services but is used to help make the switchover to Digital TV easier for groups like the elderly and disabled.

3. Before this interview, were you aware that licence fee money has been used both to fund the BBC and help with digital switchover?

Yes	1	(123)
No	2	
Don't Know	Y	

INTERVIEWER: PLEASE HAND RESPONDENT SHOWCARD NP968 B

In 2013, once the switchover to Digital TV has been completed, the amount people will pay for their TV licence will be reviewed.

At that point, one possibility is to keep the small part of the licence fee money previously used for digital switchover to ensure certain types of programmes are available on other channels in addition to the BBC. These programmes would include quality news, but possibly also UK-made documentaries, children's programmes and quality dramas. The majority of the licence fee would continue to be used by the BBC.

4. After 2013, in your personal opinion, should a small part of the licence fee be used to support certain types of programmes on other (that is non-BBC) channels, OR do you think the licence fee should be set for the BBC's use only?

A small part of the licence fee should be used to support certain types of programmes on other channels, with most of the fee still going to the BBC
The licence fee should be used only on BBC content and services
I don't care either way
I do care, but I don't know

1 (124)
2
3
4

-
5. You said "ANSWER GIVEN AT Q4"

Why do you say that?

(125 - 128)

Don't Know

Y (125)

One of the main types of programmes the licence fee pays for is news on BBC TV, radio and online. I want now to look at where you get your news from.

-
6. Which of these do you normally use for national news - that is news affecting the whole of the UK?

PLEASE CHOOSE ALL THAT YOU WOULD NORMALLY USE

INTERVIEWER: PLEASE PUT "_" AROUND OTHER RESPONSES

TV - BBC	1	(129)
TV - Channel 4	2	
TV - S4C	3	
TV - ITV/STV/UTV/GMTV	4	
TV - Five	5	
TV - Sky News	6	
TV - Teletext/red button	7	
Other TV news	8	
Radio	9	
Internet	0	(130)
Newspapers/magazines	1	
Don't Know	Y	(129)
None of these	X	
Other	0	

Other specify...

(131 - 134)

-
7. Thinking about all the ways you get the news, how often do you watch/listen to/look at national news - that is news affecting the whole of the UK?

READ OUT IF NECESSARY - "Please tell me how often you get hold of national news in total, not for each of the different ways you get it."

Every day or nearly every day (at least 5 times a week)	1	(135)
3-4 times a week	2	
Once or twice a week	3	
Occasionally or if it happens to be on/available	4	
Never	5	
It varies	6	
Don't Know	Y	

-
8. Thinking now about news just for your region and your local area, which of these do you normally use for this kind of regional or local news?

PLEASE CHOOSE ALL THAT YOU WOULD NORMALLY USE

INTERVIEWER: PLEASE PUT "_" AROUND OTHER RESPONSES

TV - BBC	1	(136)
TV - S4C	2	
TV - ITV, STV, UTV, GMTV	3	
TV - Local station	4	
TV - Teletext/red button	5	
Radio	6	
Internet	7	
Newspapers/magazines	8	
Don't Know	Y	
None of these	X	
Other	0	

Other specify...

(137 - 140)

-
9. Thinking about all the ways you get this type of news, how often do you watch/listen to/look at regional or local news?

Every day or nearly every day (at least 5 times a week)	1	(141)
3-4 times a week	2	
Once or twice a week	3	
Occasionally or if it happens to be on/available	4	
Never	5	
It varies	6	
Don't Know	Y	

-
10. Still thinking about news specific to your region and your local area, how important or otherwise do you feel it is to have a choice of different TV channels which provide this service?

Very important	1	(142)
Fairly important	2	
Not very important	3	
Not at all important	4	
Don't Know	Y	

11. You said "ANSWER GIVEN AT Q10"

Why do you say that?

(143 - 146)

Don't Know

Y (143)

12. And still thinking about news specific to you region and your local area, how important or otherwise do you feel it is to have a choice of different sources of news - TV, online, newspapers etc - which provide this service?

Very important

1 (147)

Fairly important

2

Not very important

3

Not at all important

4

Don't Know

Y

13. In your personal opinion, would it be enough to have regional news on the BBC only, or should regional news be available on other channels in addition to the BBC?

It would be enough to have regional news on the BBC only

1 (148)

Regional news should be available on other channels in addition to the BBC

2

I don't care either way

3

I do care, but I don't know

4

14. You said "ANSWER GIVEN AT Q13"

Why do you say that?

(149 - 152)

Don't Know

Y (149)

I am now going to read out some more information which is also shown on this card for reference.

**INTERVIEWER: PLEASE HAND RESPONDENT SHOWCARD NP968
&d968ca1&**

ITV announced that in the near future they may no longer be able to afford to provide regional or local news as they are getting less and less money from advertising. The same is true of radio and newspapers that are supported by advertising.

As a result, there is a real possibility, for example, that in the near future only the BBC (and S4C in Wales) will provide quality regional or local news on the TV.

15. Were you aware of this issue before today?

Yes
No
Don't Know

1 (153)
2
Y

And some more information which is also shown on this card...

**INTERVIEWER: PLEASE HAND RESPONDENT SHOWCARD NP968
&d968ca2&**

As you heard earlier, from 2013 when the licence fee is reviewed, there is a proposal to address this issue.

This is to take the small part of the licence fee that had previously been spent on the switchover to digital channels, i.e. about £5 per year or 4% of the licence fee, and use it instead to provide financial support for regional and local news on another channel and also possibly on the internet, on radio or in local newspapers.

Most of the licence fee would still go to the BBC.

16. Bearing all of this in mind, in your personal opinion, from 2013 should a small part of the licence fee be used to support regional or local news on another channel, OR do you think the licence fee should be used only for the BBC?

The licence fee should be used only for the BBC	1	(154)
A small part of the licence fee should be used to support regional news on another channel with most of the money still going to the BBC	2	
I don't care either way	3	
I do care, but I don't know	4	

17. You said "ANSWER GIVEN AT Q16"

Why do you say that?

(155 - 158)

Don't Know	Y	(155)
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18. Can I just check, do you have a TV at home?

Yes	1	(159)
No	2	
Don't Know	Y	

**IF 18 = No
THEN ASK: 19**

19. Do you watch TV programmes via a PC, laptop or mobile telephone?

Yes	1	(160)
No	2	
Don't Know	Y	

End of Filter i968a1

20. Who is the person responsible for purchasing the TV licence in your household? Is it yourself, your partner or someone else?

Myself	1	(161)
Partner	2	
Jointly with my partner	3	
Someone else	4	
I don't have to pay as I'm 75 or over	5	
Don't have a licence	6	
Don't Know	Y	