

ICMUnlimited..

BBC Trust Public Value Assessment Quantitative Research Report

February - March 2015

A report by ICM on behalf of the BBC Trust

BBC | Trust

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Executive summary

This Executive Summary sets out the key findings from the BBC Trust Public Value Assessment quantitative research conducted by ICM Unlimited. The findings are based on a nationally representative sample of 3,227 UK adults aged 16+. Fieldwork was conducted online and by telephone between 9th February and 10th March 2015.

Overall

- The **BBC is held in high regard** by the vast majority of the public with many watching a range of BBC services regularly.
- When asked about their overall impression of the BBC, half (50%) are very or fairly **favourable towards the BBC as a whole** (i.e. give a score of 8-10 on a scale of 1-10)¹. Four in five are neutral (4-7/10) and one in ten are unfavourable (1-3/10).

BBC Three

- Over two in five (44%) people claim to **watch BBC Three at least once a week**. However, just 6% do so 'once a day or more' compared to over half for BBC One and a quarter for BBC News.
- The majority (85%) **tend to watch BBC Three live on TV**. On-demand (e.g. iPlayer) and live streaming on an internet-enabled device are also used (26% and 9%). Two in five of those aged 16-24 watch BBC Three via iPlayer (37%), more so than any other age group although 77% still watch live on television.
- **Television is the key device used** (mentioned by 83%). Also used are Smart TV (20%), Laptop/Notebook (14%), iPad/tablet (12%), Smartphone (10%), PC/Mac (8%).
- **The main reasons for not accessing BBC Three online** are:
 - Prefer watching it on TV (72%)
 - Easier to access BBC Three programming on TV (27%)
 - Watch BBC Three while browsing TV channels and do not look for specific programmes online (14%)
 - Slow internet connection/broadband not sufficient to stream (15%)
 - Unaware of BBC Three online (6%).
- The **most watched programmes** on BBC Three are:
 - Original programming: drama (43%), factual (34%), comedy (34%)
 - Third-party content (39%), content via the BBC website or iPlayer (20%).
- Two in five (40%) **believe that BBC Three is aimed at them**, including 9% who say 'very' strongly.

¹ All questions which were contained in the research questionnaire for this project can be found in the marked up questionnaire in the appendices of this document.

- **Unprompted awareness of proposed changes** to BBC Three is low: a third (35%) have heard/read/seen something. Among those who are aware, almost half know a great deal (12%) or a fair amount (34%). Over two in five know just a little (44%).
- **The majority of audiences are viewing BBC Three at least the same amount as a year ago** (60%). This includes 12 percent who are watching the channel **more** than a year ago and almost half (48%) watching the **same amount**. One in five (18%) state that they are watching **less** of BBC Three compared to twelve months ago.
- When prompted, two in five people (39%) are **aware of the proposed change** to BBC Three.
- People hold mixed views when asked about their **general impression** of the proposal. Based on a scale of 1-10, 17% are favourable (8-10), 29% are unfavourable (1-3) and 43% are neutral (4-7).
- More people are unlikely rather than likely to **use the proposed BBC Three service** (53% vs 20%). Among BBC Three's target age group of 16-34s, 34% say that they would be likely to use the service. However, an almost equal proportion (32%) would be unlikely to use the service.
- When presented with a series of attitudinal statements about BBC Three:
 - 80% say that they prefer to watch programmes on TV
 - 48% only watch TV programming online that they specifically search for
 - 47% believe BBC should be making savings elsewhere
 - 45% use the internet as a way of catching up with TV missed, not as main source of TV watching
 - 39% feel BBC Three is a launch pad for new and emerging talent
 - 33% find it easy to find new content/programmes to view online
 - 24% claim to often go online and browse to find TV content
 - 22% agree their internet speed is not fast enough to stream video or TV programmes (51% disagree). This is a more prevalent issue for those from a BME² background compared to white audiences (27% BME audiences versus 21% white audiences) as well as those living in rural areas as opposed to urban (32% versus 20% respectively).

BBC One +1

- Most people **watch plus one television programming** at least once a month: just 16% say never or that they can't remember. Three in five (58%) people watch it at least once a week including 12% every day.
- **Support is higher for the BBC to air a plus one channel** on BBC One (58%) than it is for BBC Two (36%), BBC Three (19%) and BBC Four (16%).
- A fifth (22%) do not support a plus one channel on any of the four BBC channels. **Opposition** is mainly driven by a sense that 'money would be better spent on original content than a plus one channel' (50%) and the belief that 'iPlayer is a sufficient catch-up service' (50%).

²BME refers to the non-white population of the UK. A more extensive definition can be found in the appendices to this report.

- When prompted, audiences are **broadly supportive of the proposed change** to BBC One. Based on a scale of 1 to 10, half are favourable (50%; 8-10), one in three are neutral (30%; 4-7) and 14% are unfavourable (1-3).
- There is a strong likelihood that the public will **use the proposed BBC One+1 service** (61%, compared to 14% who say they will not use it). Those living in rural areas are significantly more likely to say they would use a plus one service (69%) than those living in urban areas (60%).

The general consensus is that BBC One+1 will bring many benefits although 73% believe BBC One+1 should be available to everyone at the launch.

- 69% agree BBC One+1 would help them if they've missed a programme
- 63% agree BBC One+1 offers them an alternative to iPlayer
- 28% intend to use iPlayer to catch up on BBC and would not use BBC One+1
- 27% would not use BBC One+1 as they record programmes to watch later.

BBC iPlayer

- **Two in five people use iPlayer at least once a week** (43%) while one in six have never used iPlayer (16%).
- Of those who have ever used iPlayer, the **most commonly used device to access iPlayer is a laptop or notebook computer** (37%), followed by a Smart TV or Internet-enabled TV (36%) and 23% using a PC or Mac.
- The **most watched programme genres** on iPlayer are drama (52%); factual programming (45%) and comedy (41%).
- When prompted with the proposal for online premiering³ to feature on iPlayer, a quarter (24%) assign the proposal a score of 8-10 out of 10. One in five (19%) are **unfavourable towards the proposal** i.e. a score of 1 to 3 out of ten.
- **iPlayer users are generally more positive about third-party content**⁴ featuring on iPlayer. Three in ten (28%) give the proposal 8 to 10 while just 14% give the proposal a score of 1 to 3.
- A third (35%) of iPlayer users say they are likely **to use online premiering**; 28% would be likely to watch third-party content on iPlayer.
- When asked their views about a series of attributes:
 - Half (54%) would be **in favour of online premiering but only if those programmes are also shown on television as well**.
 - The majority (79%) **prefer watching programmes on television**.
 - 46% agree with **improvements being made to iPlayer but they should not come at the cost of BBC Three**.
 - 52% agree that funding should not be put into iPlayer if everyone can not currently access it.

³ To 'premiere' some programmes on iPlayer (i.e. make them available first on iPlayer, before they are broadcast on a linear service)

⁴ To include a selected range of non-BBC content from not-for-profit cultural and arts organisations, such as the Arts Council

CBBC

- Three in ten (30%) households have at least one **child aged 0 to 16**.
- A quarter (23%) have someone in their household who **currently watches CBBC**.
- Among CBBC viewers, the **peak viewing time** is 3pm-7pm.
- Two-thirds (65%) of people as a whole think the **current broadcasting hours of CBBC are sufficient**, rising to three-quarters (75%) among those with children.
- When prompted, **public opinion is split toward the CBBC proposal** (18% favourable versus 24% unfavourable). Among those with children in their household, 31% are favourable towards the proposal and 18% are unfavourable.
- Of those with children in their household, two in five would be **likely to use the new service** (39%). However, a similar proportion would be unlikely to use the service (37%).
- Among those with children in their household:
 - 66% believe 7pm is a good cut-off point for CBBC
 - 51% feel extending CBBC's hours could disrupt family routines
 - 49% prefer BBC Three original programming to two hours of repeats on CBBC (35% are neutral or do not know)
 - 48% say that it is good that children will be able to catch up on programmes they have missed earlier in the day
 - 40% agree extending CBBC hours will benefit children as they have more evening entertainment available to them

1. Background and methodology

1.1 Background

The BBC Trust is the governing body of the BBC. The BBC Trust's responsibility is to get the best out of the BBC for licence fee payers whether that means protecting it from political interference or ensuring that the BBC continues to provide excellent value for money while staying true to its principles. The Trust must also ensure that the BBC has high standards of openness and transparency.

The BBC Trust works on behalf of licence fee payers to ensure that the BBC provides high-quality services and good value for everyone in the UK.

A key element of the BBC Trust's work is to consult publicly. Public consultations are one of the most powerful and democratic mechanisms for receiving audience feedback. The BBC Trust recently conducted an initial Public Value Assessment (PVA) consultation looking for the public's views regarding potential changes to services. Public consultation exercises, while robust, are self-selecting so there are no guarantees that those who respond to them will be reflective of the demographics of the general population.

This quantitative report looks to expand on the findings from the PVA consultation among a nationally representative sample of the UK general public. The survey was created by looking into initial findings from the consultation as well as using structured questions similar to the unstructured or open-ended questions found in the public consultation.

This research was undertaken by ICM Unlimited on behalf of the BBC Trust.

1.2 The Public Value Assessment Research

The proposed changes evaluated in both the public consultation and this quantitative research project are:

- Closing BBC Three as a broadcast television channel and reinventing it online
- The introduction of a BBC One+1 channel
- The addition of online premieres of programmes and selected third-party content to BBC iPlayer
- Extending CBBC's hours by two hours in the evening, changing the closure time from 7pm to 9pm.



1.3 Methodology

A total of 3,227 interviews were conducted with a representative sample of the UK population aged 16+. Interviews were conducted using a mixed-mode online and telephone approach between 19th February and 10th March 2015

The sample was split as follows:

- 2,470 interviews were conducted online using the *BBC Trust Audience Panel*⁵ and *ICM's newvista panel*⁶
- 757 interviews were conducted via telephone (CATI)⁷ among adults living in rural locations across the UK.

Within the above figures, booster interviews were conducted with 100 black and minority ethnic (BME) respondents. An additional booster was included to ensure a minimum of 150 surveys were achieved in Northern Ireland.

⁵ The BBC Trust Audience Panel consists of a nationally representative sample of the public who were recruited and maintained by ICM.

⁶ ICM's newvista panel is an online research community made up of members of the public who take part in a wide variety of research projects.

⁷ CATI stands for Computer Assisted Telephone Interviewing and is a market research term referring to interviews conducted via a telephone methodology.

Quotas were set by age, gender, ethnicity, socioeconomic status and region/nation to ensure a representative sample across the UK. No quotas were set on frequency of using BBC services. At the analysis stage the data was weighted by the same variables plus urban/rural location status.

This report is based on the combined data from all 3,227 online and telephone interviews.

The average length of the questionnaire was 18 minutes (online) and 26 minutes (telephone).

1.4 Presentation and interpretation of the data

It should be remembered that while data has been based on interviews conducted with quotas and then weighted to represent the UK population, a sample was interviewed and not the entire UK population. A consequence of this is that all results are subject to sampling tolerances, meaning that not all differences are statistically significant. Further information about sampling tolerances is appended to this document.

Where percentages do not add up to 100, this may be due to computer rounding, the exclusion of “don’t know” categories, or multiple answers. Throughout the volume an asterisk (*) denotes any value of less than half of one per cent but greater than zero. Within the charts in this report, a green circle denotes a statistically significant higher figure, while a red circle denotes a statistically significant lower figure.

In the report, reference is made to “net” figures. This represents the balance of opinion on attitudinal questions and provides a particularly useful means of comparing the results for a number of variables.

Within tables showing demographic breakdowns of data in the report, some numbers will appear in bold and italic e.g. ***36***, this means that the figure is significantly higher than for other groups within that demographic.

All research is carried out in compliance with ISO 20252 and ISO 27001.

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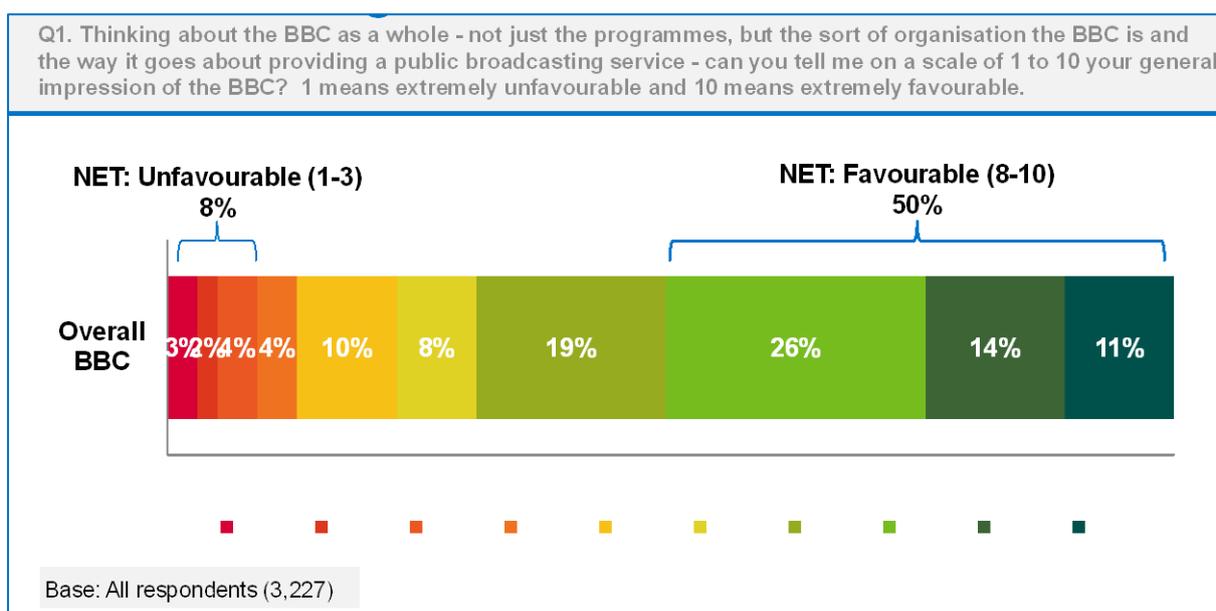
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2. Overall views towards the BBC



2.1 Overall favourability

The UK public generally hold the BBC as a whole in high regard. Half (50%) of the population are favourable, giving a score of at least eight out of ten on a ten point scale, while just eight per cent are unfavourable.



Those aged over 65 are significantly more favourable towards the BBC as a whole than people in general: 56% give a score of 8-10 out of ten compared to 50% overall.

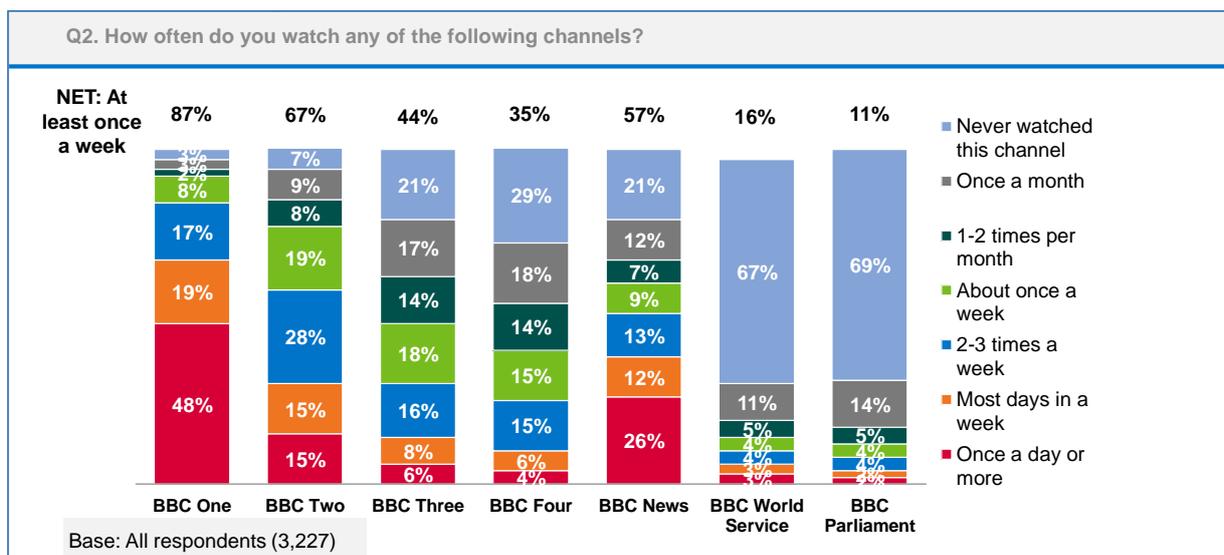
Favourability towards the BBC varies between the UK nations. People living in Wales are most likely to be favourable towards the BBC overall, in contrast to those in Scotland who are least positive (56% versus 44%). Around half of people in Northern Ireland and England are favourable though this is higher in the south-east and south-west regions of England (both 55%).

Those who use a variety of BBC services are especially positive towards the BBC in general. Six in ten (60%) of those who use iPlayer at least once a week are favourable towards the BBC as are viewers of BBC Four (59%).

2.2 Frequency of watching BBC channels

Unsurprisingly, **BBC One** is the most watched BBC television channel of all, with nine in ten (87%) watching the channel at least once a week. This is followed by seven in ten (67%) who watch **BBC Two** at least once a week and six in ten (57%) who watch **BBC News** at least once a week.

Half (48%) of the public watch BBC One once a day or more, although this falls to a quarter (26%) watching BBC News, one in six (15%) watching BBC Two and one in twenty (6%) watching **BBC Three** as frequently.



Older people are the most regular consumers of BBC One and BBC Two content. Those aged 55 years and over are significantly more likely to say they watch BBC One at least once a week (89%), while those aged over 65 are significantly more likely to watch BBC Two (76%) and BBC Four (39%) at least once a week.

Conversely, younger audiences are more likely to watch BBC Three at least once a week (65% 16-24 year olds; 56% 25-34 year olds).

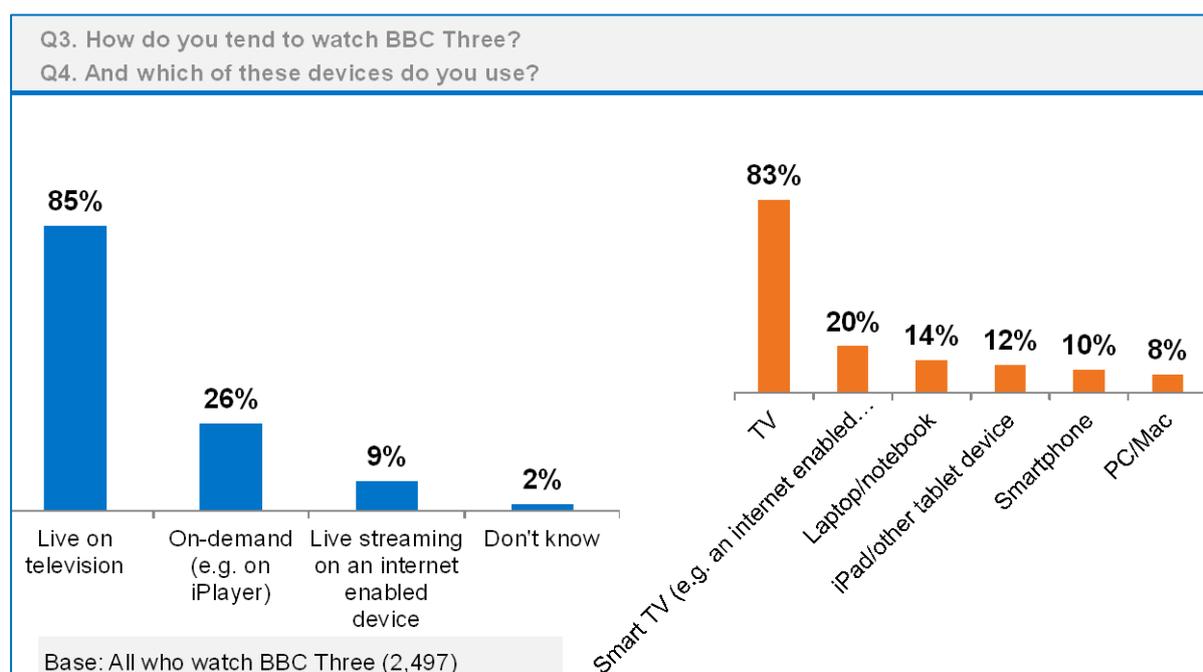
3. Views on proposed changes to BBC Three



3.1 Ways of watching BBC Three

The vast majority of BBC Three viewers currently watch the channel live on television (85%), the dominant mode by some margin. In terms of other methods, a quarter (26%) watch the channel on-demand such as on iPlayer while one in eleven (9%) view the channel using live streaming on an internet-enabled device.

In terms of devices used, television is the most popular (83%) followed by Smart TVs or internet-enabled televisions (20%). One in six (14%) use a laptop or notebook to access BBC Three content while slightly smaller proportions use an iPad/tablet (12%), smartphone (10%) or desktop PC or Mac (8%).



Younger viewers are significantly more likely to watch BBC Three content on-demand: around a third of 16-24 (37%) and 25-34 year olds (33%) view the channel in this way. These age groups are also more likely than other age cohorts to stream the channel live on an internet-enabled device (16-24s, 16%; 25-34s, 17%).

White audiences are significantly more likely to watch BBC Three live on television compared to black and minority ethnic audiences (BME) (86% of white audiences compared to 79% of BME groups). On the other hand, more ethnic minority groups embrace live streaming to access the channel compared to white audiences (BMEs: 18%, White 8%).

A broadly similar pattern exists with the kinds of devices used for accessing BBC Three:

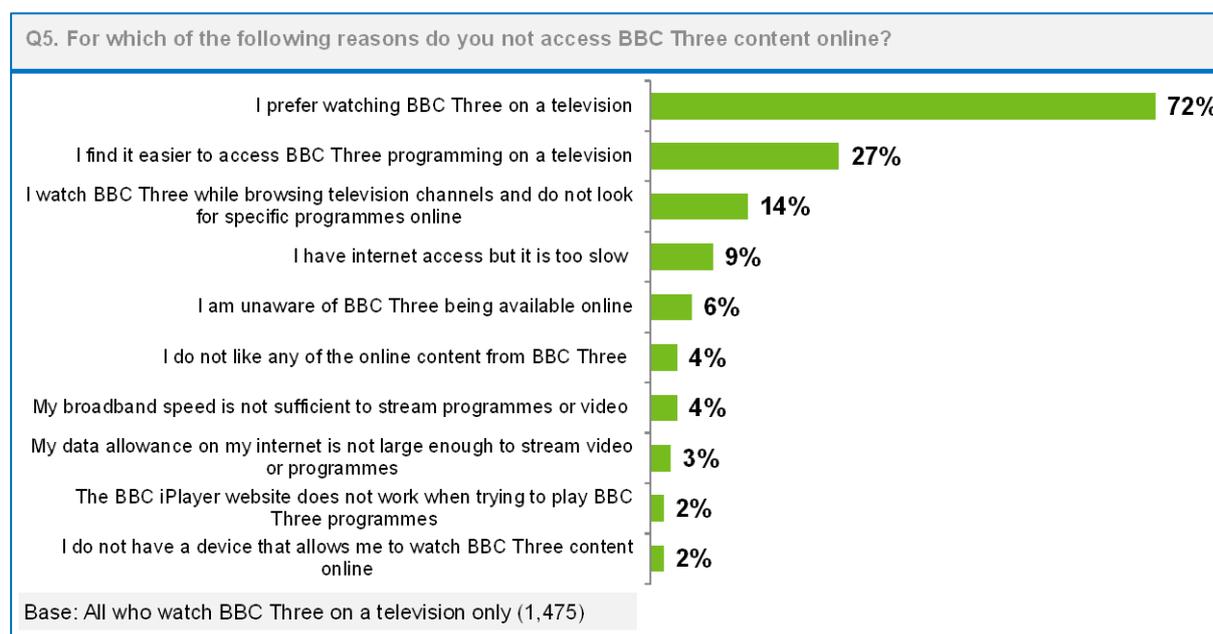
- The youngest age group, 16-24, are far more likely to use a laptop or notebook to access BBC Three content than any other age cohort (31% compared to 14% of the population in general).
- A fifth of 16-34 year olds use either an iPad/tablet device (21%) or a smartphone (21%) to access BBC Three content, significantly higher than older age groups.

3.2 Reasons for not accessing BBC Three content online

The most commonly cited (unprompted) reason for not accessing BBC content online is a preference for **watching BBC Three live on television** (72%). There is a considerable gap between this factor and the second highest ranked reason: the sense that it is **easier to access the channel on a television**, mentioned by a quarter (27%).

Elsewhere, one in six (14%) say they watch the channel while browsing through channels and are therefore not looking for specific programmes online, while one in eleven (9%) say their internet access is too slow to access BBC Three content.

In addition, a minority of people are unaware of BBC Three programming being available online (6%) and say that they do not like any of the online content from BBC Three (4%).



Reasons for not accessing BBC Three content online are driven primarily by age, life stage and disability.

Older groups are more likely to say they prefer to watch BBC Three on a television compared to young audiences although, over half (56%) of 16-24 year olds state that their

preference for watching BBC Three on a television is a reason for *not* accessing BBC Three content online.

Moreover, young people are significantly more likely to state that they do not like any of the online content from BBC Three (11% compared to 4% overall) as well as being far more likely to have internet access which is too slow to access programming online (13%). A quarter (24%) of those BBC Three television viewers aged 16-24 identify internet issues, of any kind, as barriers to accessing the channel online, compared to one in six (15%) of BBC Three television viewers of all ages.

Linked to this, students are significantly more likely than any other work status classification to identify internet connection issues as a reason for not accessing BBC Three content via the internet:

- Data allowance on their internet plan is not large enough to stream video or programmes (8% compared to 3% overall).
- Their internet is too slow to access content (14%).⁸
- An internet issue of any variety (26% compared to 15% overall).

Those with a disability are also more likely to find it easier to access BBC Three content using a television rather than by online means. A third of those with a disability state that it is easier to use a television to access BBC Three compared to a quarter of those without a disability (33% compared to 26%).

Ethnic minority audiences are significantly more likely to cite internet issues as reasons for not accessing BBC Three content online. One in six state that their internet access is too slow (14% compared to 8% of white audiences). BMEs are also over three times as likely to mention that the BBC iPlayer website does not work when trying to play BBC Three programmes (7% compared to 2% of white population).

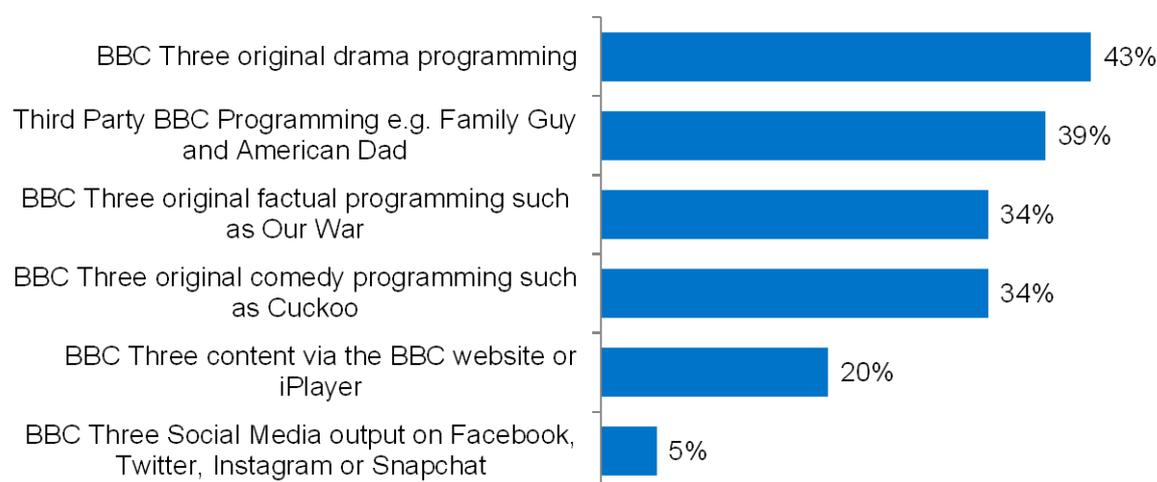
3.3 BBC Three content watched

The UK population watches a range of content from BBC Three including both **BBC Three original programming** as well as **third-party programmes**. Two in five watch **drama content** on BBC Three (43%) while a slightly smaller proportion watch third-party programming such as *Family Guy* and *American Dad* (39%). A third of the public watch original factual programming as well as original comedy programming (both 34%).

BBC Three online content on the website and iPlayer are slightly less popular with just one in five (20%) consuming this output from BBC Three. Social media output from the channel is by far the least consumed, with just one in twenty (5%) interacting with the station via Facebook, Twitter, Snapchat or Instagram.

⁸ Internet being too slow is also an issue for those working part time (mentioned by 12%).

Q7. Which of the following do you currently watch or use on BBC Three?



Base: All who watch BBC Three (2,497)

The 16-24 age group is significantly less likely to watch BBC Three original drama programming compared to the population in general (34% compared to 43%). However, they are far more likely to watch third-party programming (58%), original comedy programming (38%), to access BBC Three online content (33%) and are twice as likely to interact with BBC Three through its various social media channels (10%).

White audiences are significantly more likely to watch BBC Three drama programming and BBC Three factual programming than those from ethnic minority groups (drama programming: 45% compared to 34%; factual programming 36% compared to 26% BME audiences). On the other hand, BME audiences are significantly more likely to watch third-party programming (52% compared to 37%), content via the BBC Three website (25% compared to 19% white) and use BBC Three's social media output (9% compared to 4%).

Third-party programming is also popular among students with over half of this group watching third-party programming (56% compared to 39% overall). Students are also more likely to watch comedy programming (39% compared to 34% overall) as well as being more likely to use the BBC Three website than other groups (31% compared to 20%).

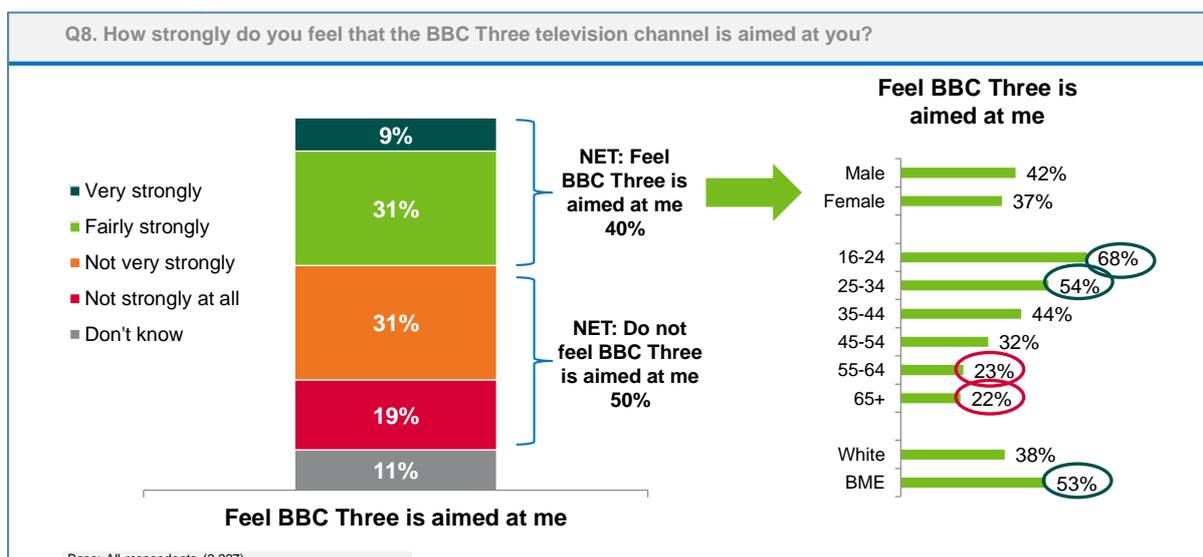
Use of BBC Three varies across the devolved nations of the UK. Those living in Northern Ireland are the biggest users of third-party programming on BBC Three, with 55% stating that they watch this kind of programming compared to 39% across England, 35% in Wales and 34% in Scotland. Those living in Wales are most likely to be fans of BBC Three original drama programming (53%), significantly higher than those in Scotland (39%). Respondents in Northern Ireland and England are the most likely to use the BBC website or iPlayer to access BBC Three content, with one in five stating that they do this (Northern Ireland 23%; England 21%) compared to just 12% of those in Scotland.

3.4 Perceived target audience for BBC Three

Overall, more members of the public feel that BBC Three is *not* aimed at them rather than being aimed at them (50% versus 40%). Two-fifths of audiences feel the channel relates to them including one in ten (9%) who say it is *very* strongly aimed at them.

The belief that BBC Three is aimed at people like them is highest among:

- *Those who watch BBC Three regularly* (54% compared to 40% of non-regular viewers) and
- *Those who use iPlayer at least once a week*. Half (53%) of those who use iPlayer weekly believe the channel is aimed at them compared to a third (34%) of those who use iPlayer less than weekly but at least monthly and a quarter (25%) of those who never use iPlayer.



Men are significantly more likely to feel BBC Three is aimed at them than women (42% versus 37%).

Unsurprisingly, identifying with the channel is strongest among younger audiences and declines with age. However, although BBC Three is aimed at 16-34 year olds, around a fifth of older audiences feel as though the station is aimed at them (55-64s, 23%; 65+, 22%).

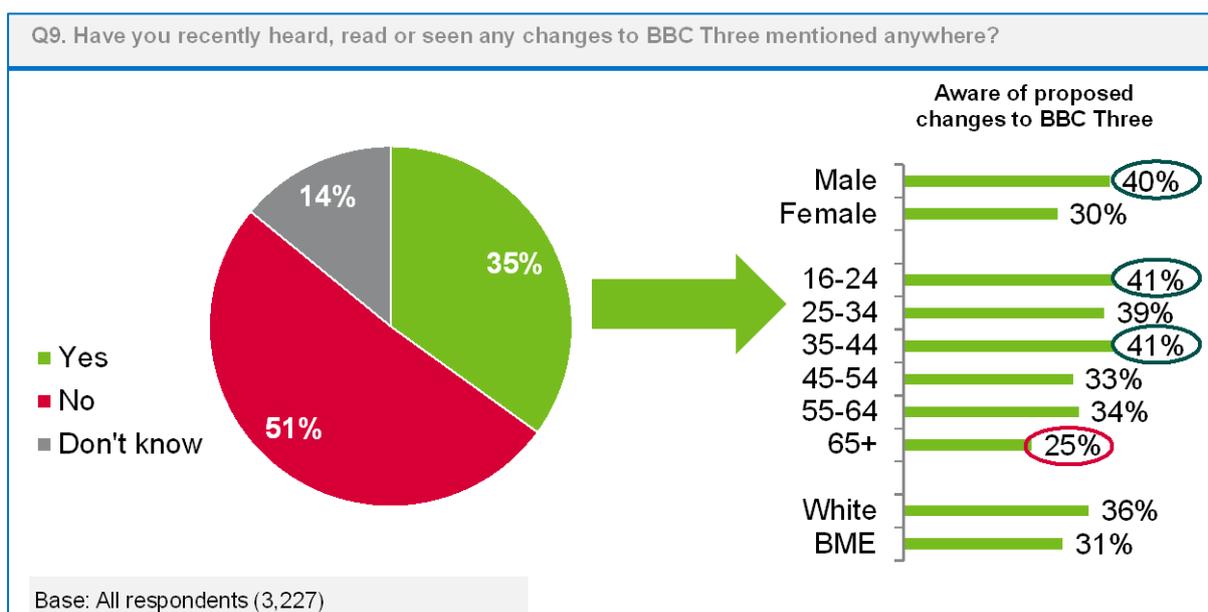
Ethnic minority audiences are more likely to feel as though the station is aimed at them than white audiences (53% compared to 38%). Furthermore, almost one in six from ethnic minority groups feel 'very strongly' that the channel is aimed at them (13%), compared to just eight per cent of white audiences.

Students are more likely than those working or not working to identify with BBC Three. Three in five (60%) students feel as though the station is aimed at them compared to under half (47%) of those who are in full-time employment and one in five (21%) retirees.

Geographically, audiences in Northern Ireland and the North East of England are the most likely to feel that the channel is aimed at them (64% and 51% respectively). Areas of the UK where the majority of the public do not feel BBC Three is aimed at them include the East (56%), East Midlands (55%), North West (54%), Scotland (54%) and the South West (53%).

3.5 Unprompted awareness of proposed changes to BBC Three

Unprompted, around a third (35%) of the public state that they have heard, read or seen something about changes to BBC Three recently. Half (51%) are unaware of any changes while 14 per cent are unsure or do not know.



Awareness of changes to BBC Three is highest among:

- Men (40%)
- 16-34 year olds (40%)
- 35-44 year olds (41%)
- ABC1 socioeconomic grades (40%).

Conversely, awareness is lowest among:

- Women (30%)
- Over 65s (25%)
- C2DE socioeconomic grades (29%).

There is a strong relationship between unprompted knowledge of changes to BBC Three and overall attitudes towards the BBC. Two in five (40%) of those who are favourable towards the BBC as a whole are aware of reforms to BBC Three; among those who have an unfavourable view of the organisation, only a quarter (27%) are aware of proposed changes.

High use of BBC services is linked to unprompted awareness of changes. At least two in five of those who watch BBC Three at least once a week (41%) and who feel the channel is aimed at them (46%) know something about changes to the channel.

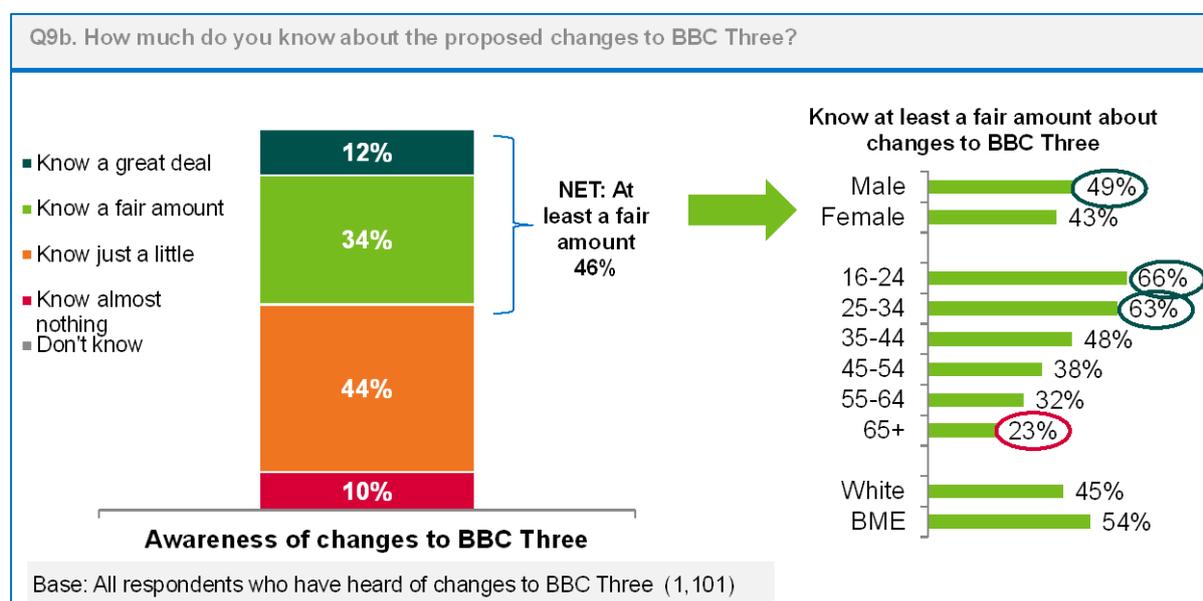
Engagement with iPlayer also drives awareness of the proposed changes to BBC Three; those who use iPlayer at least once a week are significantly more likely to be aware of changes to BBC Three compared to those who use the service less frequently.

Awareness of changes to BBC Three among iPlayer users/non-users

	%
Use iPlayer at least once a week	45
Use iPlayer less than weekly, but at least monthly	34
Use iPlayer less often than once a month	32
Never use iPlayer	15

3.6 Knowledge of proposed changes to BBC Three

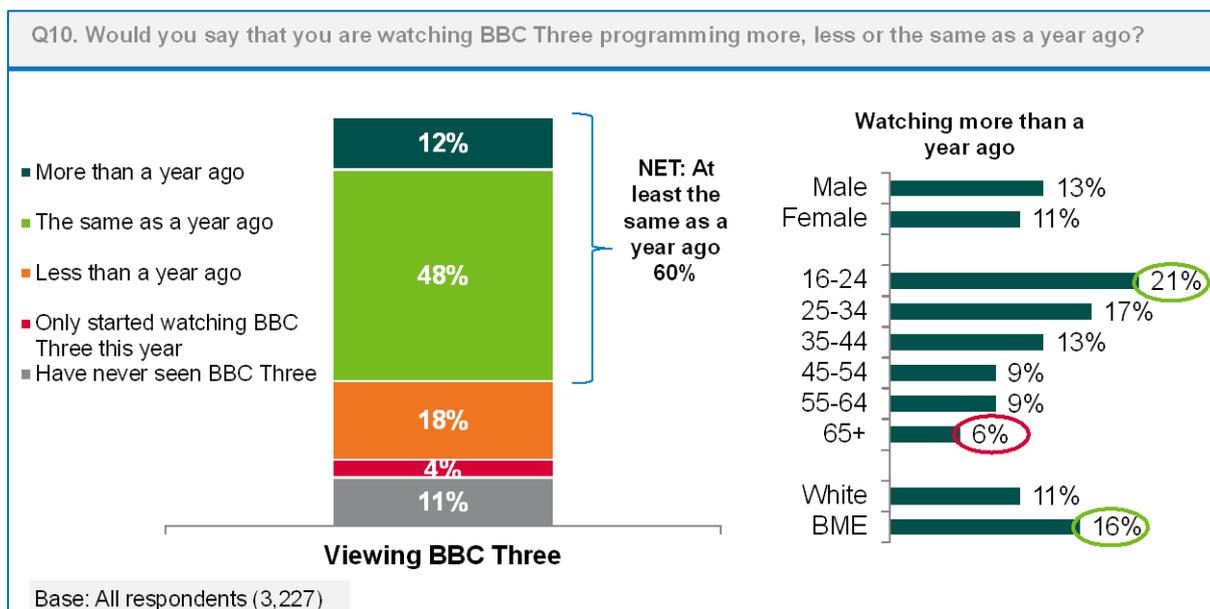
Of those who claim to be aware of changes to BBC Three, just under half (46%) state they know at least a fair amount about these proposed changes. However, a similar proportion (44%) state they know just a little and one in ten (10%) know almost nothing.



As per overall awareness of changes to BBC Three, men and younger age groups are significantly more likely to be knowledgeable about these reforms than other groups. The chart above shows that over two in five young people aged 16-34 years claim to know at least a fair amount, a proportion which declines markedly with age.

3.7 BBC Three viewing compared to a year ago

The majority of audiences are viewing BBC Three at least the same amount as a year ago (60%). This includes 12 percent who are watching the channel **more** than a year ago and almost half (48%) watching the **same amount**. One in five (18%) state that they are watching **less** of BBC Three compared to twelve months ago.



Those who currently watch BBC Three weekly are just as likely to say they watch less of the channel as more compared to twelve months ago (both 18%) but the majority of weekly viewers watch with the same frequency.

One in five (21%) of 16-24 year olds are watching more BBC Three television than they were a year ago, and while this is a higher proportion than any other age group, 23% of this age group are also watching less BBC Three programming. This means that there is a net reduction in BBC Three viewership amongst young groups of two percentage points. Among 25-34 year olds, the net reduction in viewership is three percentage points.

Most men are watching at least the same amount of BBC Three compared to a year ago. Six in ten men are watching the channel as often or more (64%), compared to just over half of women (56%).

Those who feel BBC Three is aimed at them are the most likely group to be watching the channel more often. A quarter (24%) of those who feel BBC Three is aimed at them state that this is the case compared to 13% of this group who report watching less. Just five per cent of those who do not feel that the channel is aimed at them are watching more than a year ago.

3.8 Reasons for watching BBC Three

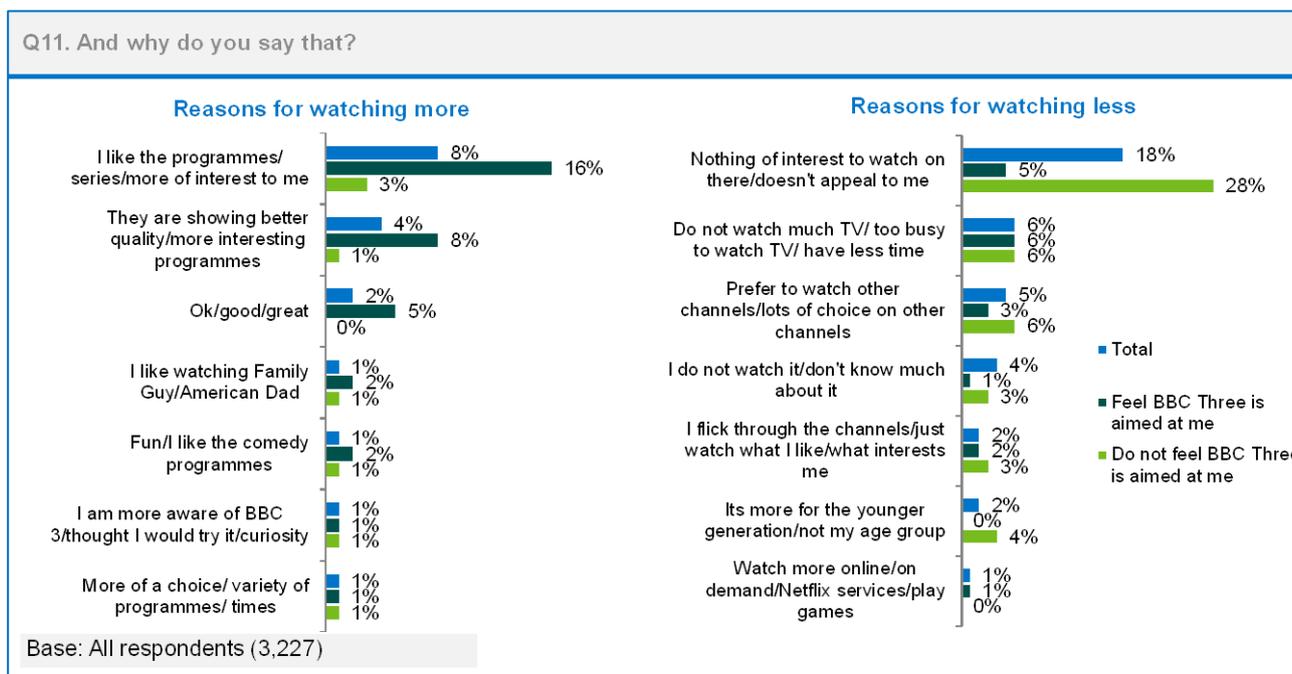
Respondents were asked 'unprompted' for the reasons why they watch more or less BBC Three compared to 12 months ago.

Reasons for watching BBC Three more than a year ago

- Programming and a rise in awareness of the channel are driving audiences to watch more of the channel
- General comments towards the quality of programming come out highest followed by specific mentions of programmes such as *Family Guy* and *American Dad* as well as comedy programming in general
- One in six (16%) of those who feel the channel is aimed at them say that they like the programmes on BBC Three and feel the channel is of more interest to them than other channels

Reasons for watching BBC Three less than a year ago

- There is a general preference for other channels while BBC Three holds less of an appeal for those who do not feel the channel is aimed at them
- One in five (18%) say that the channel has nothing of interest for them
- However, equal proportions of those who feel BBC Three is aimed at them and those who do not feel the channel is aimed at them state that they are watching less television generally
- Only 1% of people mention watching more television online as a reason for watching less



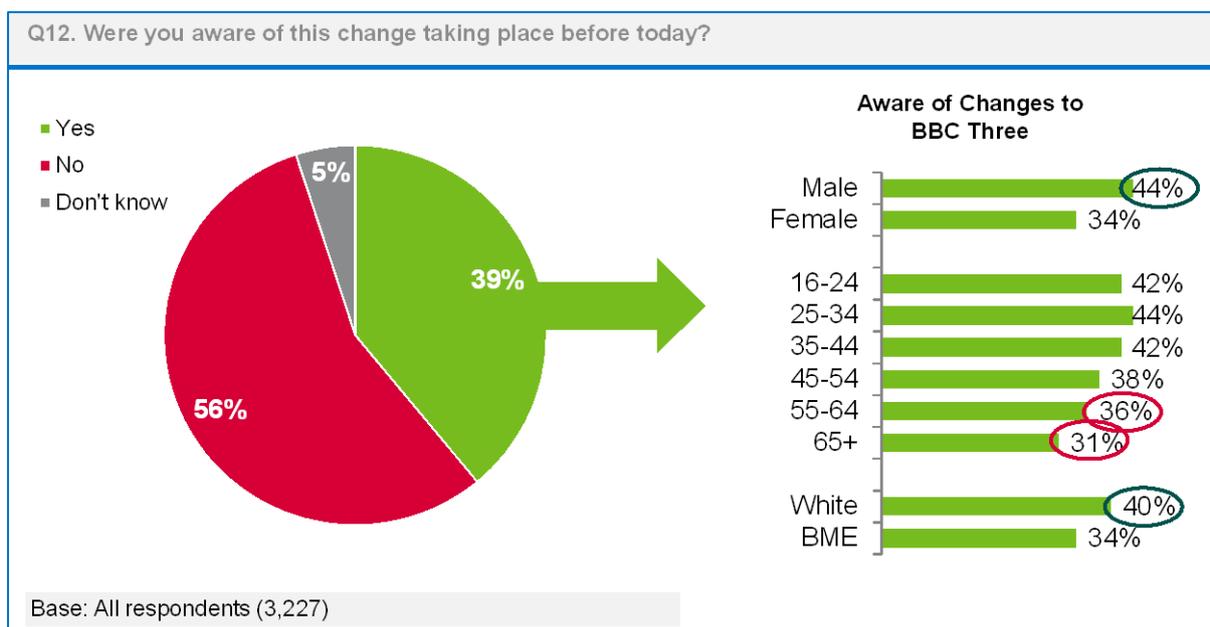
3.9 Prompted awareness of the BBC Three proposal

Respondents were presented with the following outline of the proposed change to BBC Three and asked, firstly, whether they had heard of it and, secondly, how favourable they are towards the initiative:

The BBC wants to close BBC Three as a broadcast channel and reinvent it online. The new service would continue to target 16-34-year-olds. Content would be available on a variety of BBC services, including a dedicated BBC Three website, BBC Online and BBC iPlayer. The content budget would be roughly halved, but BBC Three online would still offer a range of programmes (drama, comedy, serious factual) along with new types of content, like video clips, articles and quizzes. All new long-form programmes would still air on television, on late night slots on BBC One and BBC Two, after the first showing online.

When prompted with the text, two in five (39%) say they are aware of this change taking place. This is only partially higher than those who state *unprompted* that they are aware of changes (35%).

However, the vast majority of those who, when *unprompted*, state that they have heard of changes to BBC Three also say when prompted that they are aware of the specific proposal (83% aware; 14% unaware).



Consistent with unprompted awareness of changes to BBC Three, men and younger audiences are more likely than other segments of the population to be aware of the proposed changes.

Just under half (44%) of men state they have heard of the BBC Three proposal, compared to a third of women (34%).

Those aged over 55 are significantly less likely to be aware of the proposed changes to BBC Three than younger audiences, although a higher proportion of those aged over 65 state that they are aware of the changes when prompted than unprompted (31% and 25% respectively).

White audiences are also far more likely to be aware of changes to BBC Three when prompted than those from an ethnic minority background (40% compared to 34%).

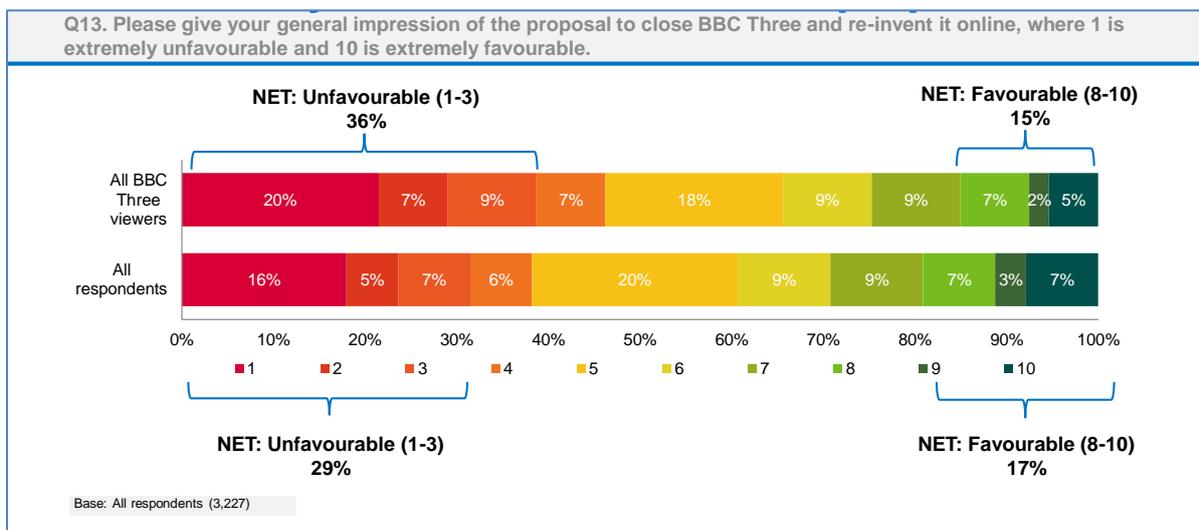
Unsurprisingly, those who are more engaged with the channel are far more likely to be aware of changes than those who do not identify with the service. Almost half (47%) of those who feel that BBC Three is aimed at them are aware of the changes to the channel compared to two in five (37%) of those who do not feel the station is aimed at them .

3.10 Favourability towards the BBC Three proposal

When asked to give their general impression of the proposal on a scale of 1 to 10 where 10 is 'extremely favourable', among the population as a whole, more people speak unfavourably (29%, 1-3) than favourably (17%, 8-10) about the initiative.

A larger proportion give a middling score out of ten, with two in five (43%) giving a score of between 4 and 7. The mean score given overall is 4.9 out of 10, further evidencing the divide in opinion.

What most stands out most from this research is that those who regularly watch BBC Three or feel as though the channel is aimed at them, are generally the most dissatisfied with the proposed change to move the channel online. Of those who watch BBC Three, over a third are unfavourable towards the proposal, twice as many who speak positively about it (36% versus 15%). Of those who feel as though the channel is aimed at them, two in five are unfavourable to the proposed changes (40%) and one in five are favourable towards the change (19%).



The following table presents favourability scores across various demographic and geographical subgroups. While the 8 to 10 score is generally consistent across the board, it disguises significant variation in the level of unfavourability which is indicated by the mean score. So, for example, while 17% of both men and women speak positively about the change, women are more critical.

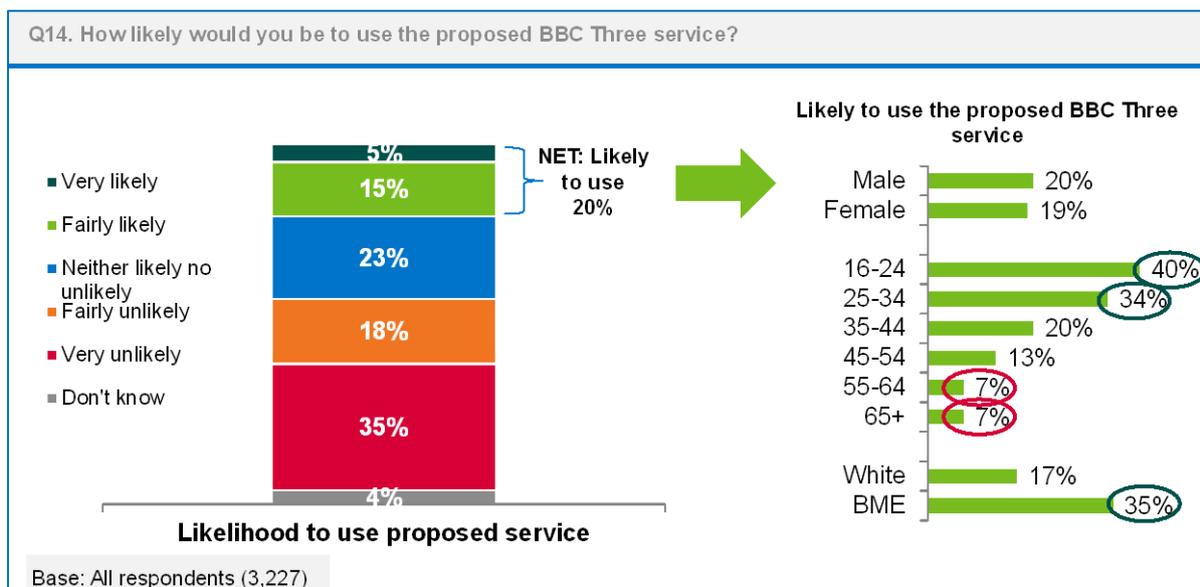
Generally speaking, those who are most positive about the proposal are ethnic minority audiences, young audiences (the most likely users of the channel in its current format), households with children and those living in Northern Ireland. Favourability also increases with frequency of use of iPlayer. In contrast, older age groups and those living in rural areas are most critical of the proposal.

There is also a tendency for those who are aware of the changes (unprompted) to be more unfavourable than those who are not aware. Two in five of those who were aware of the changes are unfavourable towards the proposal (37%) compared to a quarter (24%) who were unaware.

Favourability towards BBC Three proposal			
Base: All respondents (3,227)	% Favourable (8-10/10)	% Unfavourable (1-3/10)	Mean score (out of 10)
Overall:	17		4.9
Gender:			
Men	17	32	4.8
Women	17	25	5.1
Age:			
16-24	21	27	5.3
25-34	23	26	5.3
35-44	15	33	4.7
45-54	14	28	4.8
55-64	14	31	4.6
65+	15	26	4.9
Ethnicity:			
White	16	30	4.8
BME	26	18	5.9
Children in household:			
Yes	22	27	5.3
No	15	29	4.8
Work status:			
Full-time	18	29	5.0
Part-time	18	27	5.0
Not working	10	36	4.2
Retired	16	25	5.0
Student	16	26	5.2
iPlayer use:			
At least every week	22	27	5.3
Less than weekly but at least monthly	14	28	4.9
Less often than once a month	13	31	4.6
Never	12	31	4.5
Location:			
Urban	17	27	5.0
Rural	16	34	4.6
Country:			
England	17	28	5.0
Wales	14	29	4.8
Scotland	13	27	4.8
Northern Ireland	22	34	4.9
Social Grade:			
AB	19	27	5.1
C1	18	27	5.0
C2	16	30	4.9
DE	15	30	4.7

3.11 Likelihood to use the proposed BBC Three service

The majority of the public say that they would be unlikely to use the proposed BBC Three service (53%). A fifth (20%) say they would be likely to use the service including just five per cent who say they would be very likely to use it. However, this proportion is considerably higher – 28% – among those who currently watch BBC Three.



Young people, the age group BBC Three is principally aimed at, are most likely to say they will use the proposed service. Over a third of those aged 16-34 years say they will use the proposed BBC Three, a proportion which drops off markedly with age. Partly for this reason, ethnic minority audiences are twice as likely as the majority white population to say they would use the proposed service (35% versus 17%).

Accessibility to the new service could be an issue for certain groups. Six in ten of those with a disability would be unlikely to use the service (57%), significantly higher than those without a disability (52%). Furthermore, those people living in rural areas are significantly more likely to state that they would be unlikely to use the service (68%) compared to those living in urban areas (50%). In addition, likelihood to use the new BBC Three service is higher than average among:

- *Those who feel the channel is aimed at me currently* (37% versus 9% who do not feel the channel is aimed at them)
- *Audiences who are generally favourable towards the BBC Three proposal* (44% compared to 10% of those who are unfavourable. However, even among those who are favourable, 40% would be unlikely to use the service) and;
- *Regular iPlayer users.*

Likelihood to use proposed BBC Three service				
		%		%
Overall:		20	Children in household:	
			Yes	31
Gender:			No	15
	Men	20	Work status:	
	Women	19	Full-time	25
Age:			Part-time	22
	16-24	40	Not working	13
	25-34	34	Retired	7
	35-44	20	Student	37
	45-54	13	Country:	
	55-64	7	England	20
	65+	7	Wales	16
Socio-economic status:			Scotland	14
	AB	22	Northern Ireland	35
	C1	21	Location:	
	C2	21	Rural	20
	DE	15	Urban	18
Ethnicity:			Frequency of iPlayer use	
	White	17	At least once a week	36
	BME	35	Less than weekly, at least monthly	11
			Less often than once a month	5
			Never	7

3.12 Overall attitudes towards proposed BBC Three service

Respondents were presented with a series of attitudinal statements about the proposed changes to BBC Three and were asked the extent to which they agree or disagree with each statement.

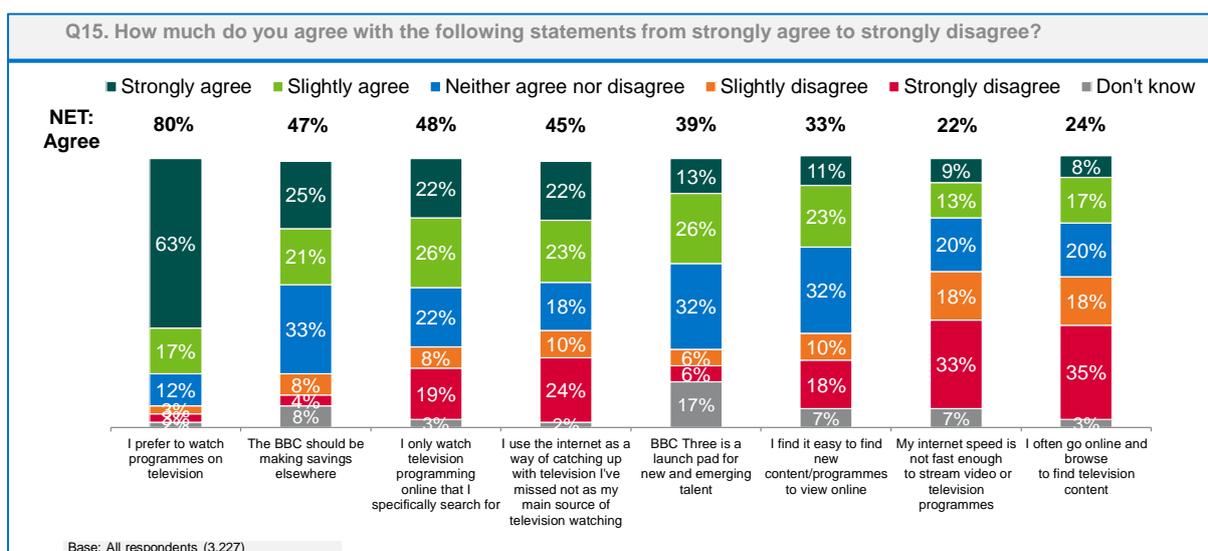
The general public are near unanimous in expressing their **preference for watching programmes on a television**: 80% agree with this sentiment building on similar findings earlier in the report. There is also a strong sense that **people watch television programming online that they specifically search for** (48% agree versus 27% disagree); indeed, half (53% disagree) of the public say that they do not often **go online and browse to find television content**.

Yet, there is a clear split in terms of the ease and attractiveness of accessing content online:

- While over two in five (45%) agree that they **use the internet as a way of catching up with television they've missed rather than their main source of television watching**, a third (34%) disagree;
- A third (33%) **find it easy to find new content or programmes to view online**; 28% take the opposite view.

On the other hand, some respondents have issues with **internet access speeds being fast enough to stream video or television programmes**: with 22% agreeing that their internet speed is not fast enough.

Finally, there is recognition that **BBC Three is a launch pad for new and emerging talent** (39% agree; 12% disagree) and that **the BBC should be making savings elsewhere** (47% agree).



Somewhat predictably, the extent to which people agree or disagree with the statements varies by demographic subgroup and country.

⁹ Overall attitudes towards BBC Three		
	% Agree	% Disagree
<p>I prefer to watch programmes on a television (Agree, 80%; Disagree, 6%)</p>	<ul style="list-style-type: none"> • Over 65s (92%) • 55-64 year olds (90%) • AB social grade (84%) • Disability (84%) • Retired (92%) • Wales (87%) • Owner Occupier (84%) • Unfavourable towards BBC Three changes (91%) • Use iPlayer less often than once a month (88%) • Never use iPlayer (86%) 	<ul style="list-style-type: none"> • 16-24 year olds (13%) • 25-34 year olds (9%) • BMEs (10%) • Students (15%) • Private renter (12%) • North East (11%) • Use iPlayer at least once a week (8%)
<p>The BBC should be making savings elsewhere (Agree, 47%; Disagree, 13%)</p>	<ul style="list-style-type: none"> • 25-34 year olds (51%) • Disability (54%) • Northern Ireland (62%) • Not working (54%) • Working part time (50%) • Rural (54%) • Use iPlayer at least weekly (50%) • Unfavourable towards the BBC (56%) • Watch BBC Three (53%) • Feel BBC Three is aimed at me (61%) 	<ul style="list-style-type: none"> • C1 Social grade (15%) • No disability (14%) • Retired (15%) • Owner Occupier (14%) • Use iPlayer less than weekly, at least monthly (16%) • Watch BBC One/BBC Two (both 13%) • Do not feel BBC Three is aimed at me (18%)
<p>I only watch television programming online that I specifically search for (Agree, 48%; Disagree, 27%)</p>	<ul style="list-style-type: none"> • Female (50%) • 16-24 year olds (56%) • BMEs (55%) • Students (58%) • Private renter (51%) • Favourable towards the BBC (54%) • Feel BBC Three is aimed at me (52%) • Read, heard or seen changes to BBC Three (56%) • Favourable towards BBC Three changes (56%) • Use iPlayer at least once a week (59%) 	<ul style="list-style-type: none"> • Over 65s (40%) • Disability (33%) • Retired (39%) • Rural (37%) • Unfavourable towards the BBC (37%) • Never use iPlayer (53%)

⁹ Figures included in these charts are 'net' figures. This means they are a combination of strongly agree and slightly agree responses for 'Agree' and a combination of strongly disagree and slightly disagree for 'Disagree'. These figures do not include those who answer 'don't know' or 'neither agree nor disagree', therefore 'Agree' figures are not the inverse of 'Disagree' figures and vice versa.

Overall attitudes towards BBC Three (CONTINUED)

	% Agree	% Disagree
<p>I use the internet as a way of catching up with television I've missed, not as my main source of television watching (Agree, 45%; Disagree, 34%)</p>	<ul style="list-style-type: none"> • 25-34 year olds (57%) • 16-24 year olds (55%) • AB social grade (52%) • Northern Ireland (53%) • Students (60%) • Working full time (50%) • Private renters (51%) • Use iPlayer at least once a week (63%) • Favourable towards the BBC (52%) • Watch BBC Three (50%) • Watch BBC Four (50%) • Feel BBC Three is aimed at me (53%) 	<ul style="list-style-type: none"> • Over 65s (49%) • 55-64 year olds (44%) • DE social grade (39%) • White people (36%) • Disability (41%) • Retired (49%) • Rural (40%) • Never use iPlayer (65%) • Unfavourable towards the BBC (43%) • Unfavourable towards changes to BBC Three (41%)
<p>BBC Three is a launch pad for new and emerging talent (Agree, 39%; Disagree, 12%)</p>	<ul style="list-style-type: none"> • Male (43%) • 35-44 year olds (48%) • AB social grade (44%) • Working full time (48%) • Student (41%) • Northern Ireland (51%) • London (44%) • Private renter (42%) • Rural (46%) • Unfavourable towards BBC Three changes (57%) • Use iPlayer at least once a week (53%) • Watch BBC Three (50%) • Feel BBC Three is aimed at me (62%) • Favourable towards the BBC (50%) 	<ul style="list-style-type: none"> • Never use iPlayer (16%) • Do not feel BBC Three is aimed at me (18%) • Unfavourable towards the BBC (35%)
<p>I find it easy to find new content/programmes to view online (Agree, 33%; Disagree, 28%)</p>	<ul style="list-style-type: none"> • 16-24 year olds (52%) • BMEs (48%) • Students (56%) • Private renters (40%) • Northern Ireland (47%) • London (43%) • Use iPlayer at least once a week (50%) 	<ul style="list-style-type: none"> • Over 65 year olds (42%) • White people (30%) • Disability (33%) • Retired (42%) • Never use iPlayer (49%)

Overall attitudes towards BBC Three (CONTINUED)

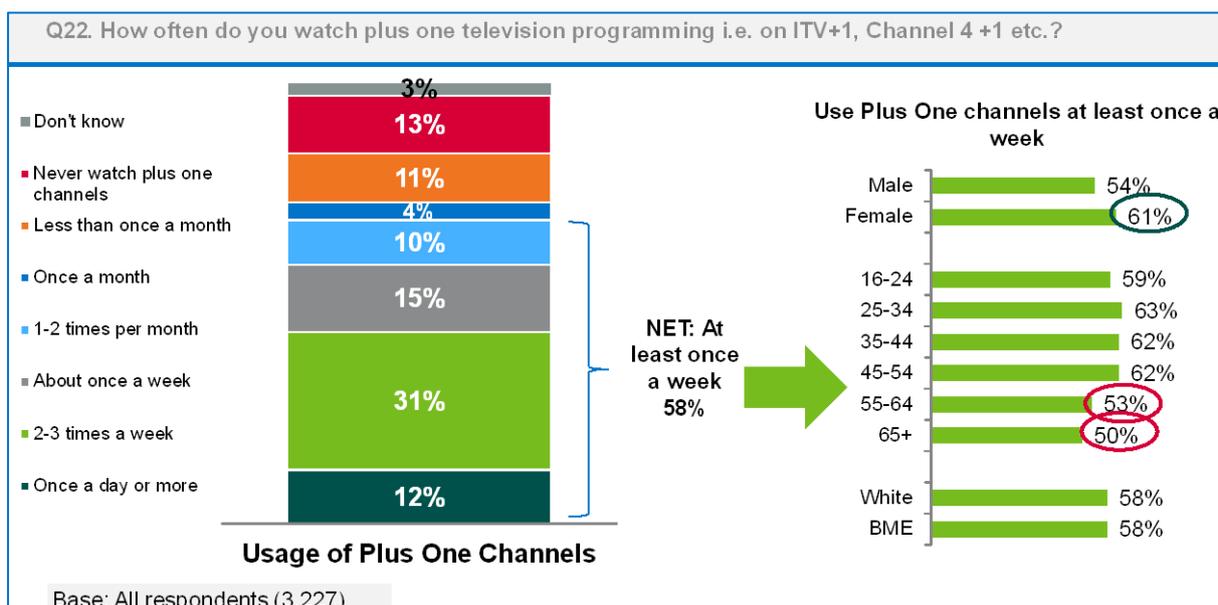
	% Agree	% Disagree
<p>My internet speed is not fast enough to stream video or television programmes (Agree, 22%; Disagree, 51%)</p>	<ul style="list-style-type: none"> • 16-44 year olds (25%) • BMEs (27%) • Children in household (27%) • Working full time (25%) • Working part time (27%) • Rural (32%) • Use iPlayer at least once a week (24%) • Favourable towards the BBC (24%) 	<ul style="list-style-type: none"> • Male (55%) • 55-64 year olds (55%) • ABC1s (54%) • No children in household (53%) • North West (56%) • East (55%) • Use iPlayer at least once a week (54%) • Use iPlayer less than weekly, at least monthly (57%)
<p>I often go online and browse to find television content (Agree, 24%; Disagree, 53%)</p>	<ul style="list-style-type: none"> • 16-24 year olds (45%) • 25-34 year olds (39%) • BMEs (43%) • Students (50%) • Northern Ireland (40%) • Use iPlayer at least once a week (41%) • Feel BBC Three is aimed at me (37%) 	<ul style="list-style-type: none"> • Over 65s (75%) • 55-64 year olds (66%) • 45-54 year olds (62%) • DE social grade (59%) • White people (56%) • Disability (60%) • Not working (56%) • Retired (75%) • Owner Occupier (58%) • Wales (60%) • Use iPlayer less often than once a month (73%) • Never use iPlayer (70%)

4. Views on proposed changes to BBC One+1



4.1 Frequency of watching plus one television programming

The vast majority of people (83%) watch plus one television programming such as ITV +1 and Channel 4 +1. Most (58%) watch it at least once a week while 14 per cent watch it less often than weekly but at least once a month.



The pattern of plus one television viewing is generally consistent across the population. Although younger and middle-aged people are more likely than older people to watch it, the differences are not statistically significant.

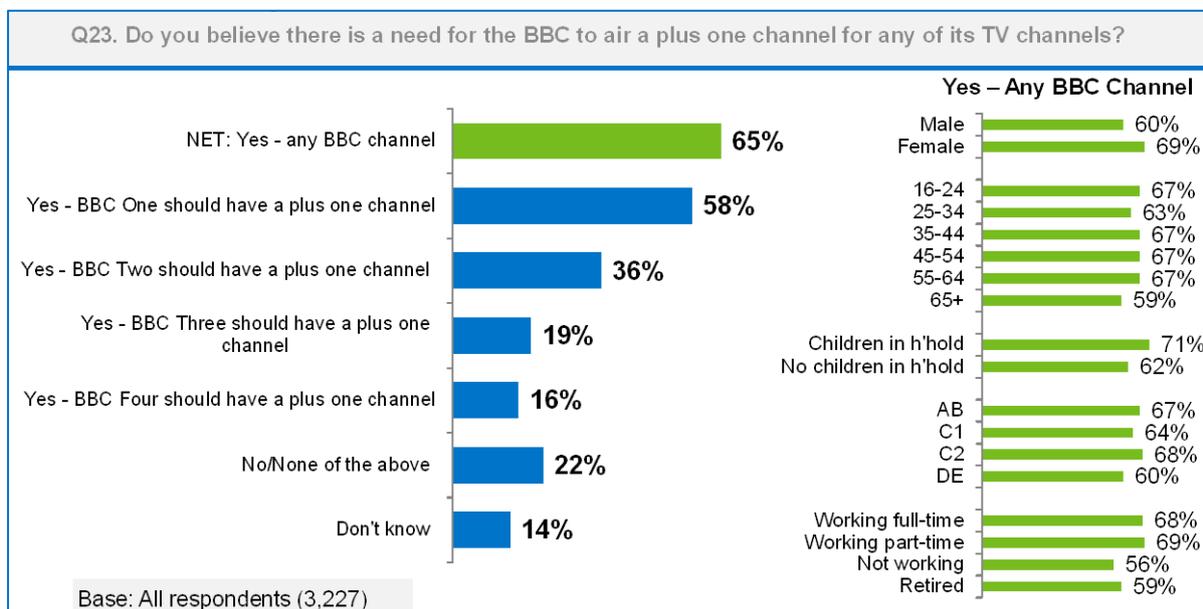
Nonetheless, use of plus one television programming is lowest among older people aged 65+, members of socioeconomic grade DE and those who rent their home privately. Around a fifth of each group (22%, 19% and 18% respectively) do not watch plus one television programming compared to 13% of the population in general.

The research shows that users of iPlayer are also avid watchers of plus one channels. Two-thirds (67%) of people who use iPlayer once a week also watch plus one TV compared to half (50%) of those who never use iPlayer.

4.2 Unprompted support for BBC One +1 channel

Before being presented with the proposal to create a BBC One +1 channel, respondents were asked if they believe there is a need for the BBC to air a plus one channel for any of its

TV channels. By a margin of three to one (65% versus 22%) people think there is a need, with support strongest for a plus one channel for BBC One (58%) followed by BBC Two (36%). The public are less favourable towards the idea of BBC Three and BBC Four having plus one channels.



Support for the initiative is consistently high across all sections of UK society: no demographic subgroup registers support below 50 per cent.

Women are stronger advocates of any BBC plus one television channels than men (69% versus 60%) with the exception of older people aged 65 and over who are marginally less likely to express support for plus one channels, views are broadly consistent by age.

The BBC airing plus one channels for any of its TV channels is especially popular among parents with children (71%). In contrast, belief in the need for these channels is lowest among social class DEs, retired people and those in work.

Scotland is less positive on this measure. Fewer people living in this country (60%) favour BBC plus one channels compared to those in Northern Ireland (74%) and Wales (69%).

- Reasons not to have plus one channels

The fifth of the UK population who do not believe there is a need for the BBC to have plus one television channels identify two main reasons why they hold this view. Half state *unprompted* that money would be better spent on original content rather than a plus one channel (50%) and that iPlayer is a sufficient catch-up service (also 50%).

Elsewhere, a quarter (25%) believe that a plus one channel should not be considered if other channels such as BBC Three are being earmarked for cancellation.

Q24. Why do you say that (there is no need for a BBC plus one channel)?*Base: All who do not believe there is a need for a BBC plus one channels (699)*

	%
Money would be better spent on original content than a plus one channel	50
iPlayer is a sufficient catch up service	50
I would not use a plus one channel from the BBC	32
A plus one channel should not be considered if other channels are being considered for cancellation (BBC Three)	25
If improvements were made to iPlayer this would be sufficient instead of a new channel	19
I have a PVR/make use of a PVR/recording facilities available	3
Not needed/not interested/there are other ways of watching programmes	2
Costly/waste of money	1
Too many channels already/there would be too much choice	1
Repeats/too many repeats	*
Reduce the cost/fee	*
Limited usage/don't watch it much	*
Poor quality/quality needs to be better	*
None/nothing	*
Other	1
Don't know	1

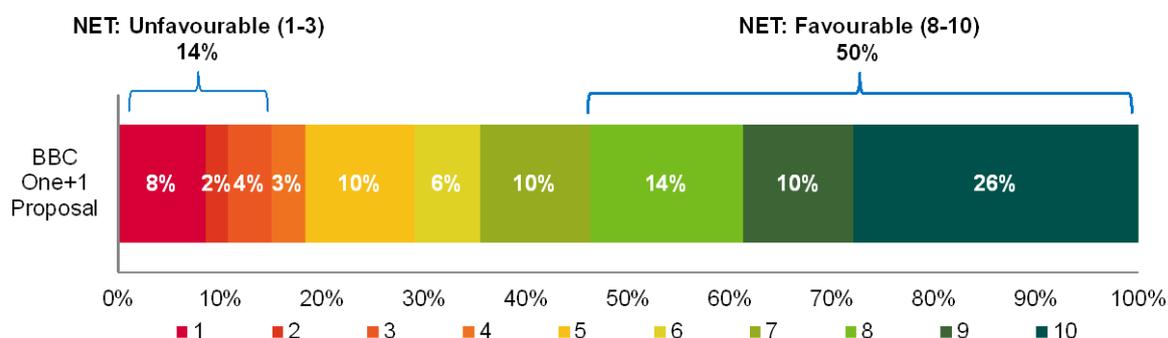
4.3 Prompted support for the BBC One +1 channel proposal

Following the unprompted question about the BBC having plus one television channels, respondents were presented with the following summary of the BBC One +1 proposal and asked how favourable they are towards the initiative:

The BBC does not currently have any +1 channels, unlike other public service broadcasters such as Channel 4, ITV and Channel 5. They are proposing to introduce a new BBC One+1 channel. The new channel would be broadcast on all television platforms: digital television (such as Freeview or YouView), cable (Virgin) and satellite (Sky, Freesat). However, on Freeview and YouView, it would only be available initially to households with a Freeview HD, YouView television or set-top-box; as these are the only devices capable of receiving the channel.

On the whole, the general public are supportive of the proposed BBC One +1 service: half (50%) rate it at least 8 out of 10 on a ten point scale, where 10 is 'extremely favourable' and 1 is 'extremely unfavourable' while just 14 per cent of people speak unfavourably about the plan i.e. rank it 1-3 out of 10. A significant minority are neutral (29%) assigning the proposal a score of between 4 and 7.

Q25. How favourable would you find a BBC One+1 service on a scale of one to ten, where one means extremely unfavourable and ten means extremely favourable?



Base: All respondents (3,227)

While favourability towards the BBC One +1 proposal is high across the population, it enjoys above average support among women, middle-aged people and households with children.

Conversely, those from social grade DE, students and those from ethnic minority groups are less sympathetic to the proposed new service.

Looking at the findings across the country, those living in Scotland are less supportive of the proposal than other parts of the UK.

Prompted Support for BBC One +1

Base: All respondents (3,227)		% Favourable (8-10/10)	% Unfavourable (1-3/10)
Overall:		50	14
Gender:			
	Men	45	17
	Women	56	11
Age:			
	16-24	43	12
	25-34	50	13
	35-44	52	13
	45-54	52	13
	55-64	55	15
	65+	49	16
Socio-economic status:			
	AB	51	13
	C1	50	12
	C2	55	12
	DE	47	18
Ethnicity:			

	White	51	15
	BME	44	10
Prompted Support for BBC One +1 (CONTINUED)			
		% Favourable (8-10/10)	% Unfavourable (1-3/10)
<i>Base: All respondents (3,227)</i>			
Overall:		50	14
Children in household:			
	Yes	53	11
	No	49	15
Work status:			
	Full-time	52	12
	Part-time	55	12
	Not working	43	17
	Retired	49	15
	Student	37	17
Country:			
	England	50	14
	Wales	56	13
	Scotland	46	17
	Northern Ireland	57	10

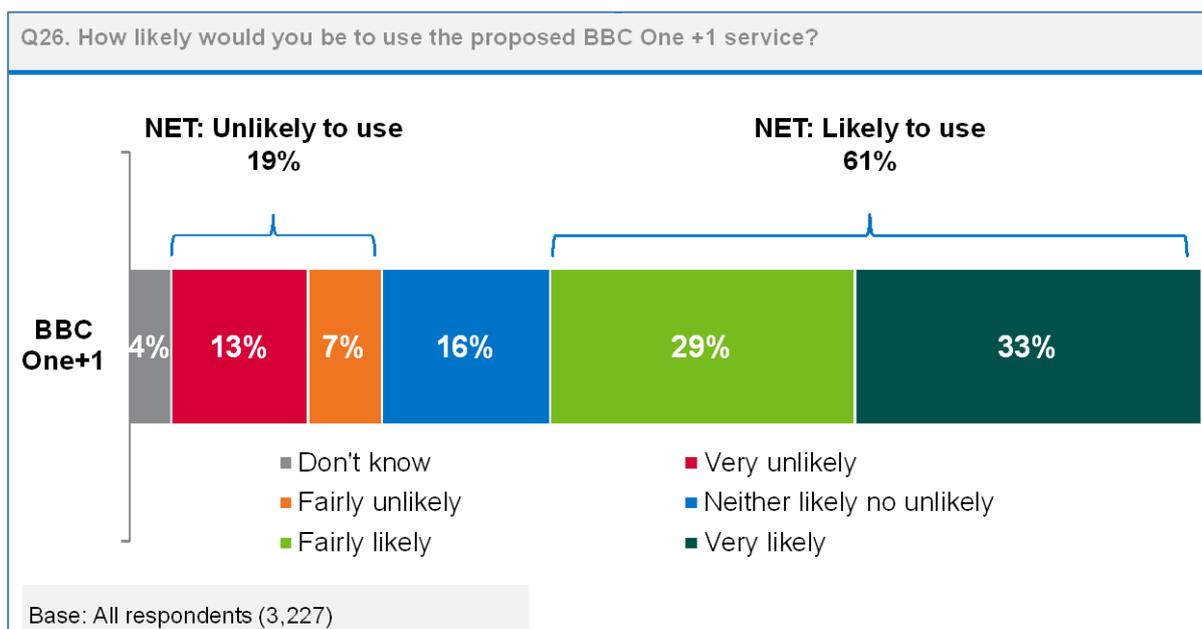
4.4 Likelihood to use proposed BBC One +1 channel

Significantly more people say they will use the proposed BBC One +1 service than not use it (61% versus 19%). Those who intend to use it are split equally between being *very* and *fairly* likely to use it (33% versus 29%).

Unsurprisingly, intention to use the new service is highest among those who are:

- *Favourable to the creation of BBC One +1* (90% who rate it 8-10/10 are likely to use) and
- *Regular watchers of plus one channels* (81% of those who watch a plus one channel at least once a week are likely to use it) ¹⁰.

¹⁰ Compared to 55% of those who watch plus one channels less than weekly/at least monthly and 38% who watch it less than once a month.



Likelihood to use the new BBC One +1 service follows a similar demographic pattern as support for the proposal. Women, who are more favourable towards the initiative than men, are also more likely to say they will take advantage of the new service (66% versus 57%).

Those most predisposed to using BBC One +1 live in urban areas, are middle-aged, are in employment and own their home either outright or with a mortgage. Conversely, likelihood to use the new service is below average among socio-economic DEs, households without children, people who rent their home and those who live in rural areas. However, among all demographic subgroups, at least half of people say they are very or fairly likely to use BBC One +1.

Given that support for the proposal is lower in Scotland than it is among the other three UK nations, it is unsurprising that those living in Scotland are least likely to use the new service.

Much has been said in this report about the relationship between iPlayer and one plus channels and it is interesting to note that those who use iPlayer every week are considerably more interested in using BBC One +1 than those who never use iPlayer (68% compared to 53%).

Likelihood to use BBC One +1			
		%	%
Overall:		61	
			Children in household:
			Yes 67
Gender:			No 59
	Men	57	Work status:
	Women	66	Full-time 64
Age:			Part-time 66
	16-24	60	Not working 53
	25-34	61	Retired 58
	35-44	65	Student 51
	45-54	64	Tenure:
	55-64	62	Owner occupier 66
	65+	58	Social renter 54
Socio-economic status:			Private renter 55
	AB	64	Country:
	C1	62	England 62
	C2	65	Wales 66
	DE	56	Scotland 54
Ethnicity:			Northern Ireland 69
	White	62	Location:
	BME	60	Rural 60
			Urban 69

4.5 Overall attitudes towards BBC One +1

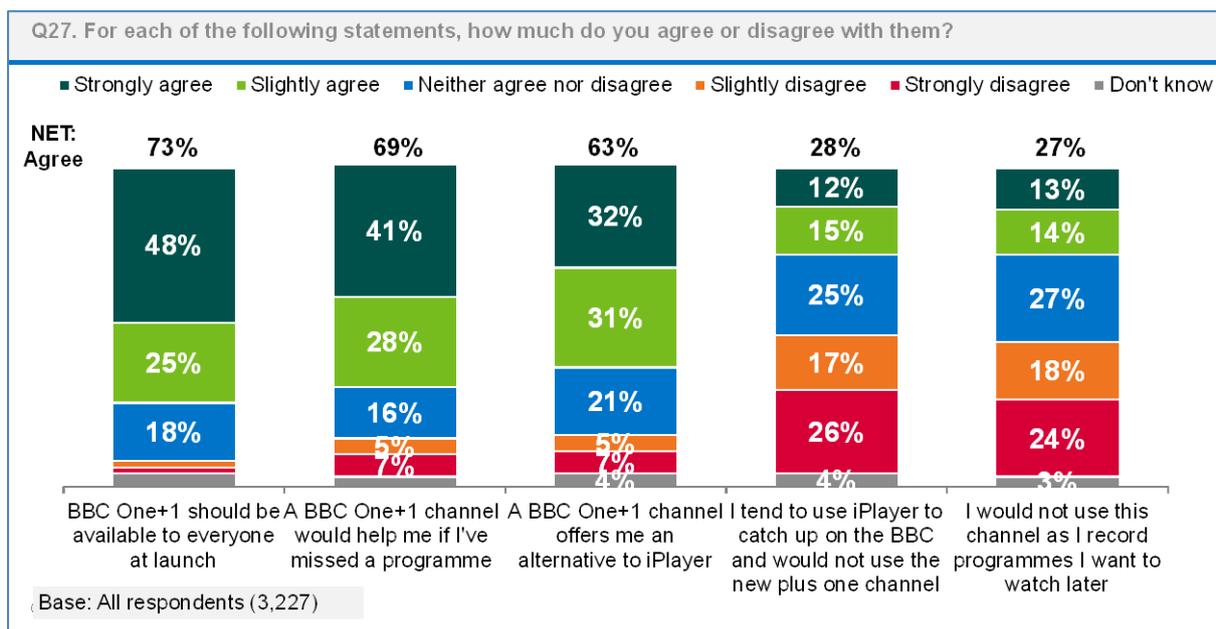
Respondents were presented with a series of five attitudinal statements about the proposed BBC One +1 service and were asked the extent to which they agree or disagree with each.

There is near unanimous support for the idea that BBC One +1 **should be available to everyone at the launch**: three-quarters (73%) agree with this sentiment with only four per cent disagreeing.

There is also a strong belief that a BBC One +1 channel **offers people an alternative to iPlayer** (63% agree) and **would help them if they have a missed a programme** (69% agree).

Elsewhere, attitudes and behaviours are generally split. For example, three in ten (28%) people state that they **tend to use iPlayer to catch up on BBC and would not use the new plus one channel**. This proportion rises to four in ten (40%) among those who use iPlayer at least once a week. Furthermore, just over a quarter (27%) report that they **would not use the channel since they record programmes they want to watch later**. The views of iPlayer users are in line with those of the population in general. Four in ten (43%) disagree with both of these statements.

It is worth noting, however, that a significant minority – around a fifth – of the population do not express an opinion one way or another for each of the five statements.



The extent to which people agree or disagree with the statements varies by demographic subgroup and country. These are summarised in the table below.

Overall attitudes towards BBC One +1		
	% HIGHEST level of agreement	% LOWEST level of agreement
<p>BBC One+1 should be available to everyone at the launch</p> <p><i>(Agree, 73%; Disagree 4%)</i></p>	<ul style="list-style-type: none"> Support BBC One +1 channel (89%) Rural areas (84%) Currently watch one plus one channels at least once a week (83%) Wales (80%) Women (77%) 45-64 (76%) Owner occupiers (76%) Favourable impression of BBC overall (76%) Working (74%) Retired people (74%) 	<ul style="list-style-type: none"> BMEs (69%) Men (68%) Not working (67%) Students (67%) Currently watch one plus one channels less often than once a month (67%) Private renters (65%) Unfavourable impression of BBC overall (61%)
	<p>I tend to use iPlayer to catch up on the BBC and would not use the new plus one channel</p> <p><i>(Agree, 28%; Disagree 43%)</i></p>	<ul style="list-style-type: none"> Favourable towards online premiering (46%) Use iPlayer weekly (40%) BMEs (39%) 25-34 (39%) Student (37%) 16-24 (35%) Working full-time (33%) Children in household (33%)

	<ul style="list-style-type: none"> • ABs (32%) • Private renter (32%) • Men (31%) • 35-44 (31%) • Northern Ireland (30%) • Urban areas (29%) 	
<p>A BBC One +1 channel offers me an alternative to iPlayer</p> <p><i>(Agree, 63%; Disagree 12%)</i></p>	<ul style="list-style-type: none"> • Support BBC One +1 channel (84%) • Currently watch one plus one channels at least once a week (77%) • Northern Ireland (70%) • Rural areas (70%) • Women (67%) • 35-44 (67%) • Owner occupier (67%) • Use iPlayer at least monthly (67%) • Working (66%) • Children in household (66%) • 45-64 (65%) 	<ul style="list-style-type: none"> • Men (59%) • Scotland (59%) • BMEs (58%) • 16-24 (57%) • DEs (57%) • Social renter (57%) • Private renter (56%) • Not working (55%) • Do not use iPlayer (53%) • Student (50%) • Currently watch one plus one channels less often than once a month (46%)
<p>I would not use this channel as I record programmes I want to watch later</p> <p><i>(Agree, 27%; Disagree 43%)</i></p>	<ul style="list-style-type: none"> • Do not favour BBC One +1 service (50%) • Currently watch one plus one channels less often than once a month (40%) • Northern Ireland (33%) • 25-34 (31%) • ABs (31%) • Men (30%) • Retired (30%) • Disabled people (30%) • Children in household (29%) 	<ul style="list-style-type: none"> • Private renter (22%) • Currently watch one plus one channels at least once a week (22%) • Student (21%) • Favour BBC One +1 service (19%)
<p>A BBC One +1 channel would help me if I've missed a programme</p> <p><i>(Agree, 69%; Disagree 12%)</i></p>	<ul style="list-style-type: none"> • Favour BBC One +1 service (92%) • Currently watch one plus one channels at least once a week (84%) • Rural areas (80%) • Women (73%) • Working part-time (73%) • Owner occupier (73%) • 35-64 (72%) • iPlayer users (71%) 	<ul style="list-style-type: none"> • Men (65%) • Scotland (65%) • 16-34 (64%) • Social renter (64%) • DEs (64%) • Non iPlayer users (63%) • Private renter (61%) • Student (60%) • Currently watch one plus one channels less often than once a month (52%) • Do not favour BBC One +1 service (26%)

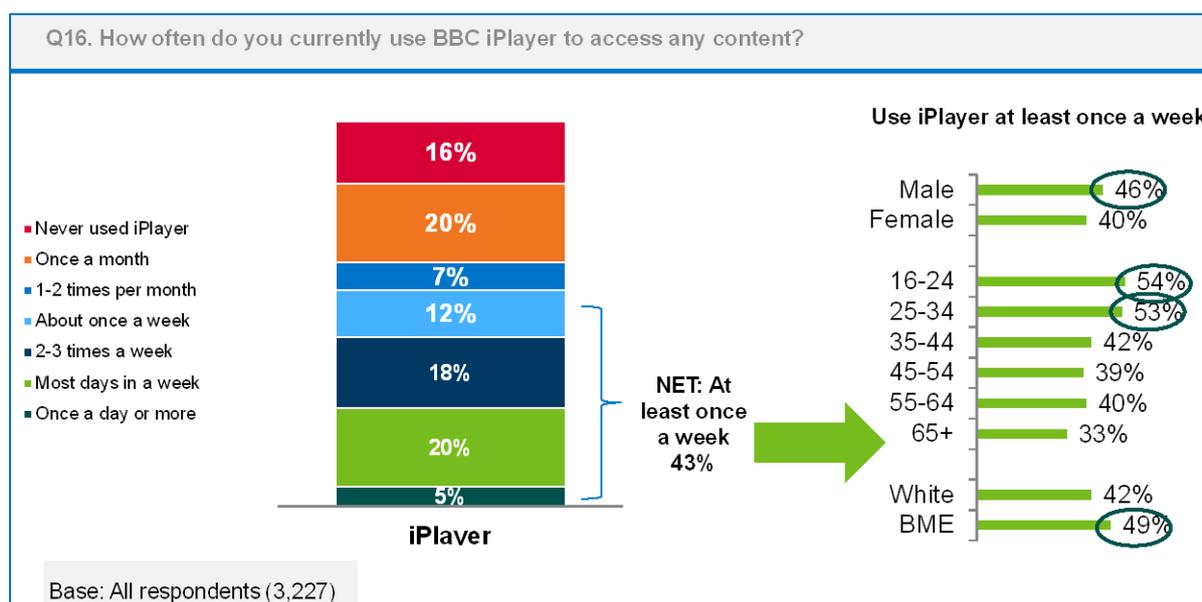
5. Views on proposed changes to BBC iPlayer



5.1 Usage of BBC iPlayer

The vast majority of the UK public have used iPlayer at some point in their lives; just 16% say they have never used iPlayer.

In terms of frequency of use, two in five (43%) people currently use BBC iPlayer at least once a week including one in twenty (5%) who access it at least once a day or more.



There are notable differences in usage by gender, age, ethnicity and work status.

- Men are significantly more likely to use iPlayer (at least once a week) than women (46% compared to 40%)
- Younger adults are far more likely to use the service, with over half of those aged 16-24 (54%) and 25-34 (53%) using the service at least once a week or more. Indeed, the figure is 50% among students. Just a third of those aged over 65 use BBC iPlayer at least once a week (33%)
- Half of BME groups use the service at least once a week (49%), significantly higher than those from a white background.(42%)

In addition, those with children aged 0-16 years in their household are significantly more likely to use iPlayer at least once a week than those without (49% versus 40%).

Those in full-time work (49%) and part-time work (46%) are more frequent users (i.e. at least once a week) than retirees.

iPlayer use also varies geographically with those in Northern Ireland and London the most frequent users (55% and 48% respectively use the service at least once a week). In contrast, use is comparatively low in the east of England (38%), Scotland (37%) and Wales (35%).

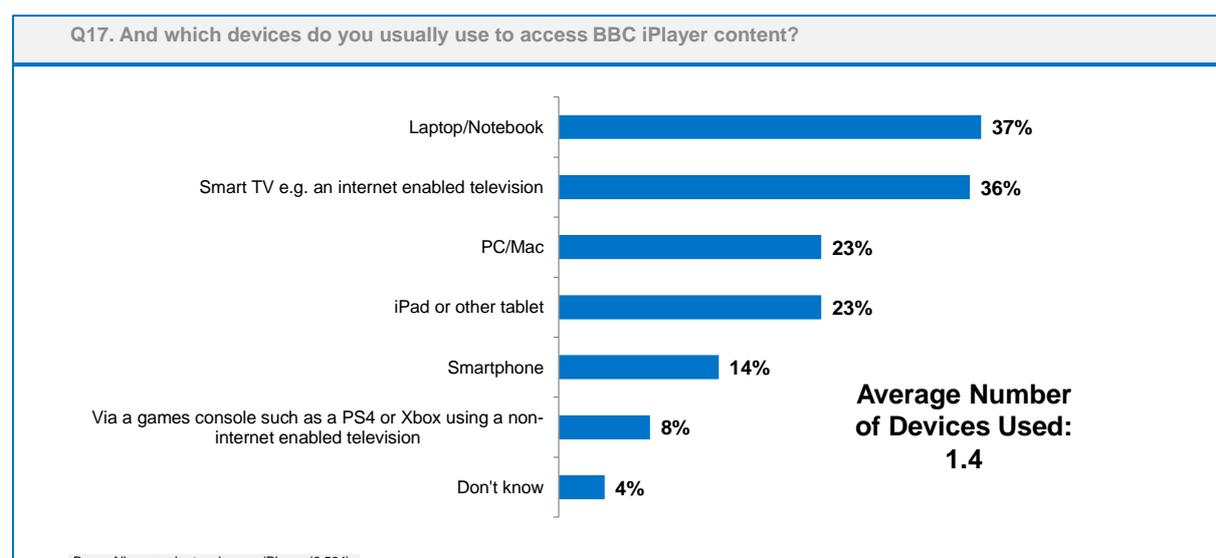
Those living in rural areas are also far less likely to use iPlayer, with a third having never used the service (30%).

Use of BBC iPlayer		
Base: All respondents (3,227)	% Urban	% Rural
At least once a week	44	38
Less than weekly, at least once a month	20	17
At all	87	70

Use of iPlayer also differs according to BBC channel watched. Viewers of BBC Three and BBC Four are more frequent users of iPlayer than viewers of BBC One and BBC Two (51%, 52%, 45% and 47% respectively use iPlayer weekly).

5.2 Devices used to access iPlayer

The most popular devices for accessing BBC iPlayer are laptops/notebooks (37%) and Smart TVs (36%) followed by PC/Macs and iPads/Tablets (both 23%). Fewer people use smartphones (14%) or games consoles (8%) to access iPlayer.



Younger people are the most likely to use a range of devices although, conversely, they are also the least likely to use a desktop PC or Mac to access iPlayer. Almost half (45%) of 16-24 year olds use a laptop/notebook to access iPlayer while a quarter use either an iPad or

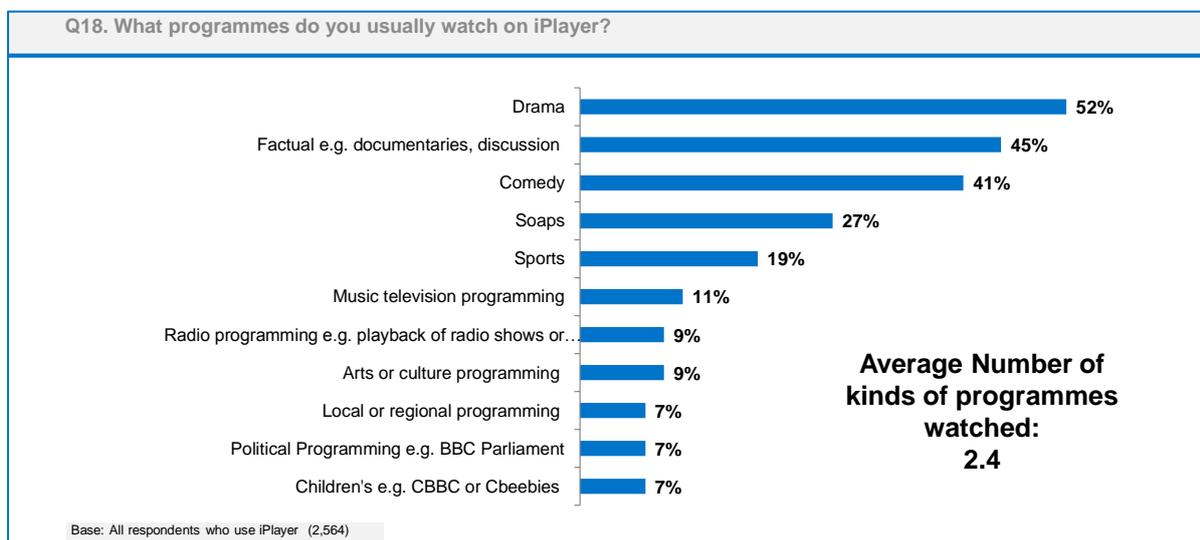
other tablet (26%) or smartphone (25%). Those aged 25-34 are the most likely to use a games console to access the service, with one in six stating that they use iPlayer this way (15%).

Ethnic minority groups are more likely than white people to use portable devices: a third use either an iPad or other tablet or smartphone to access iPlayer (both 33%), compared to 21% of white people who use iPads or tablets and 11% who use a smartphone.

5.3 Types of programmes watched on iPlayer

The general public enjoy a wide range of programmes on BBC iPlayer although content from drama (52%), factual (45%) and comedy (41%) are the most popular on the service.

On average, people watch 2.4 different kinds of programmes on iPlayer.



Drama programming is most popular among older people aged 45 and over while comedy programming has strong appeal to the young.

Factual programming spans all age groups although 16-24 year olds are slightly less likely to watch these via iPlayer.

5.4 Favourability towards the iPlayer proposals

Respondents were presented with the following outline of the BBC iPlayer proposal and asked how favourable they are towards the change:

The BBC is proposing changes to the current BBC iPlayer service that would make it more than a BBC catch-up service. There are two main changes:

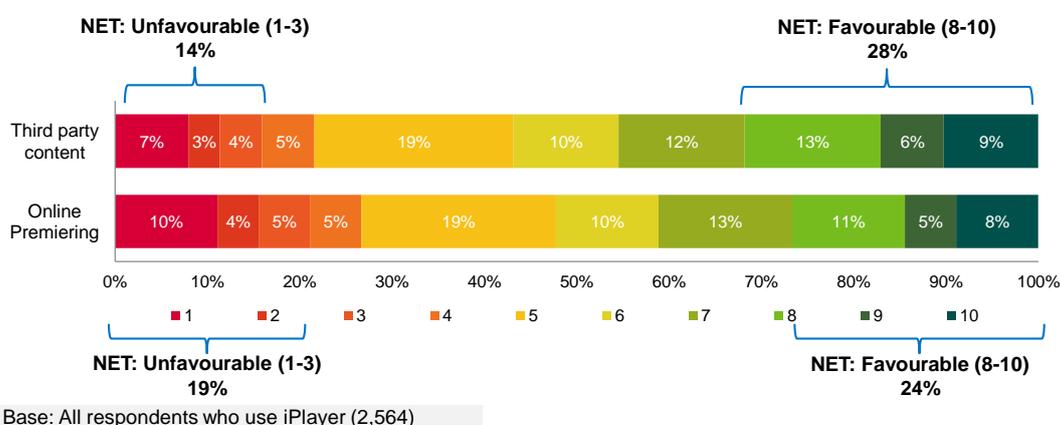
1. To 'premiere' some programmes on iPlayer (i.e. make them available first on iPlayer, before they are broadcast on a linear service) and

2. To include a selected range of non-BBC content from not-for-profit cultural and arts organisations, such as the Arts Council.

Among all those who use iPlayer, opinion is divided over the BBC iPlayer proposals with roughly equal proportions split between being in favour (defined as giving a score of 8-10 out of 10) and not in favour (a score of between 1 and 3).

Support is marginally higher for the **inclusion of third-party content on iPlayer** (28%) than it is for **online premiering of programmes** (24%). Yet, for both options, the majority of public opinion is somewhat neutral (i.e. between 4 and 7 out of 10).

Q19. How favourable or unfavourable do you find each of the proposed changes on a scale of one to ten, where one is extremely dissatisfied and ten is extremely satisfied?



The table overleaf outlines differences in favourability (or otherwise) to the proposals among different groups of the population.

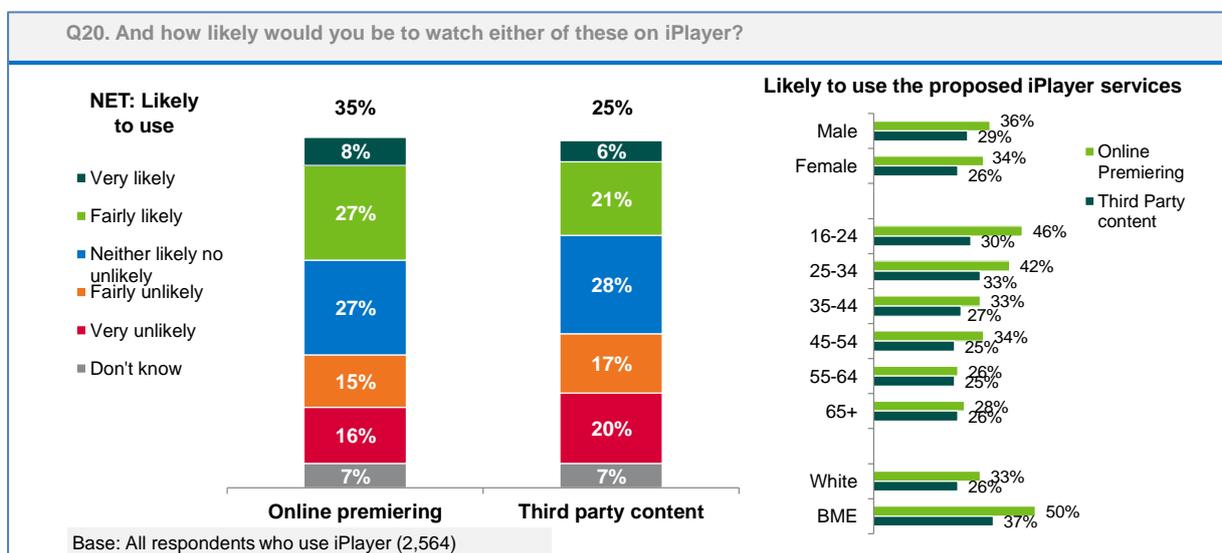
Support for the changes to BBC iPlayer is considerably higher among younger people, particularly students, than it is among older people and retirees.

Ethnic minority audiences are significantly more favourable to either proposal than the white population reflecting the younger age profile of BMEs. Geographically, those in Northern Ireland are the most positive about both proposals. There are no differences, however, between rural and urban areas.

Prompted Support for BBC iPlayer				
	Online Premiering		Third Party Content	
<i>Base: All respondents (3,227)</i>	% Favourable (8-10/10)	% Unfavourable (1-3/10)	% Favourable (8-10/10)	% Unfavourable (1-3/10)
Gender:				
Men	23	20	28	15
Women	25	18	27	14
Age:				
16-24	30	14	28	8
25-34	30	15	31	13
35-44	25	18	29	12
45-54	23	19	27	14
55-64	17	23	25	19
65+	20	23	25	21
Socio-economic status:				
AB	26	17	34	11
C1	25	20	27	12
C2	27	16	26	16
DE	19	22	20	20
Ethnicity:				
White	22	20	26	16
BME	40	9	39	7
Children in household:				
Yes	31	14	33	13
No	21	20	25	15
Work Status:				
Full time	27	16	30	12
Part time	24	18	29	11
Not working	20	25	20	19
Retired	18	23	25	21
Student	30	15	33	6
Country:				
England	24	19	28	14
Wales	22	18	31	17
Scotland	23	21	25	18
Northern Ireland	29	13	28	8
Country:				
Urban	24	18	28	14
Rural	24	21	29	16

5.5 Likelihood of using iPlayer services

Among those who use iPlayer, people are generally more likely to say they would use online premiering over third-party content (35% compared to 25%). However, for both services, the public are just as likely to say they will not use them as use them.



As with overall favourability towards the proposals, younger people and those from ethnic minority groups are most likely to use either service.

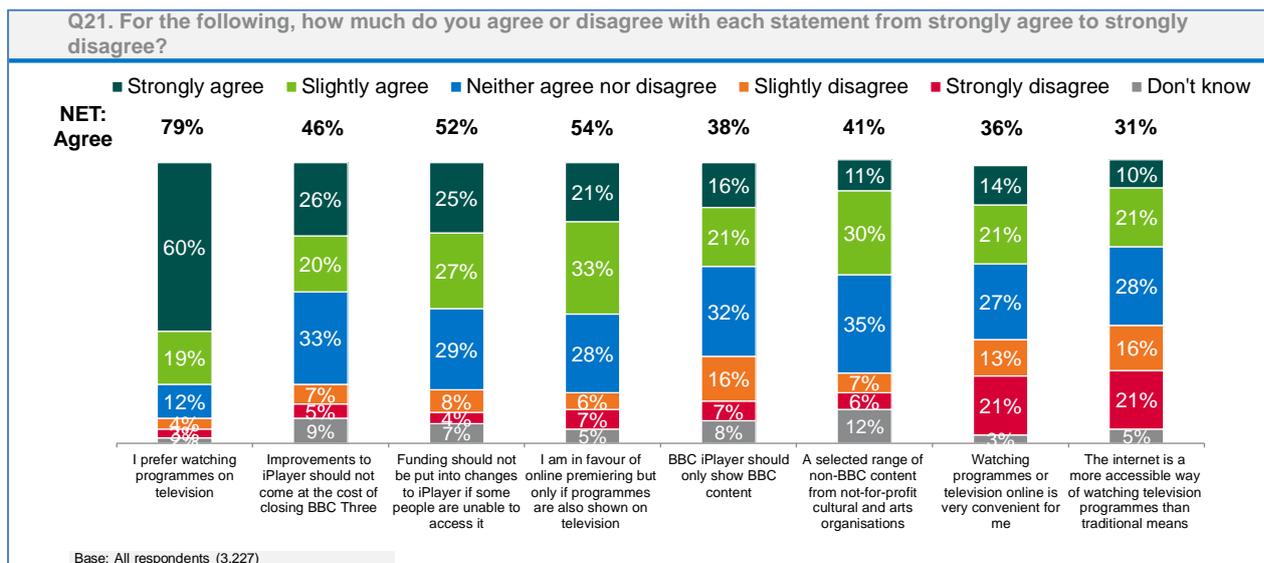
Almost half (46%) of 16-24 year olds would use online premiering and three in ten (30%) would be likely to use third-party content on the site.

Half (50%) of Britain's ethnic minority groups claim that they intend to use online premiering, while two in five (37%) say the same about third-party content. Among white people just a third (33%) expect to use online premiering and a quarter (26%) third-party material.

5.6 Overall attitudes to iPlayer proposal

Respondents were presented with a series of attitudinal statements about the BBC's proposed changes to its iPlayer service and were asked the extent to which they agree or disagree with each.

The public are most likely to agree with the assertion that they **prefer watching programmes on a television** (79% agreement). In addition, around half are in favour of **online premiering but only if programmes are also shown on television** (54%) and a similar proportion believe **funding should not be put into changes to iPlayer if some people are unable to access it** (52%). Closely related to this is a desire held by many for improvements to iPlayer not to come at the cost of closing BBC Three (46% agree).



At the same time, people are more divided on other statements relating to the iPlayer service as it currently stands and the proposed changes to the service.

- **The internet is a more accessible way of watching television programmes than traditional means** (31% agree; 37% disagree)
- **Watching television programmes or television online is very convenient for me** (36% agree; 34% disagree)
- **BBC iPlayer should only show BBC content** (38% agree; 23% disagree). This is despite the fact that two in five people (41%) agree that a **selected range of non-BBC content from not-for-profit cultural and arts organisations will allow new and emerging talent to be showcased**

These findings suggest that across the population there is still resistance towards watching television programming online. However, some groups are more inclined to use online services than others, as outlined in the following tables.

Overall attitudes towards BBC iPlayer

	% Agree	% Disagree
<p>I prefer to watch programmes on a television</p> <p><i>(Agree, 79%; Disagree 6%)</i></p>	<ul style="list-style-type: none"> • Over 55s (91%) • White people (82%) • No children in household (80%) • Wales (86%) • Retired (91%) • Owner occupier (83%) • Rural (90%) • Favourable towards the BBC (84%) • Use iPlayer less often than once a month (85%) • Never use iPlayer (85%) • Unfavourable towards online premiering (91%) • Unfavourable towards third party content on iPlayer (88%) 	<ul style="list-style-type: none"> • 16-24 year olds (16%) • BMEs (12%) • Students (19%) • Private renters (13%) • North East (10%) • Unfavourable towards the BBC (11%)
<p>Improvements to iPlayer should not come at the cost of closing BBC Three</p> <p><i>(Agree, 46%; Disagree 12%)</i></p>	<ul style="list-style-type: none"> • 25-44 year olds (50%) • Working full time (49%) • Northern Ireland (61%) • Rural (53%) • Use iPlayer at least once a week (52%) • Watch BBC Three (57%) • Favourable towards BBC generally (50%) • Unfavourable towards online premiering (62%) 	<ul style="list-style-type: none"> • Men (13%) • ABC1 (14%) • Students (17%) • South West (17%)
<p>Funding should not be put into changes to iPlayer if some people are unable to access it</p> <p><i>(Agree, 52%; Disagree 12%)</i></p>	<ul style="list-style-type: none"> • 45-54 year olds (56%) • Women (54%) • Disability (58%) • Social renters (54%) • Use iPlayer at least once a week (54%) • Unfavourable towards online premiering (69%) 	<ul style="list-style-type: none"> • Men (15%) • AB social grade (16%) • Use iPlayer at least once a week (15%)
<p>I am in favour of online premiering but only if programmes are also shown on television</p> <p><i>(Agree, 54%; Disagree 13%)</i></p>	<ul style="list-style-type: none"> • AB social grade (58%) • Owner occupier (56%) • Working part time (58%) • Wales (63%) • London (57%) 	<ul style="list-style-type: none"> • Disability (16%) • White people (13%) • North East (16%)

Overall attitudes towards BBC iPlayer (CONTINUED)

	% Agree	% Disagree
<p>BBC iPlayer should only show BBC content</p> <p><i>(Agree, 38%; Disagree 23%)</i></p>	<ul style="list-style-type: none"> • C2 social grade (43%) • Working part time (43%) • Children in household (42%) • Northern Ireland (42%) • Unfavourable towards third party content on iPlayer (57%) 	<ul style="list-style-type: none"> • Men (24%) • 16-24 year olds (26%) • ABC1s (26%) • Students (29%) • Private renters (25%)
<p>A selected range of non-BBC content from not-for-profit cultural and arts organisations will allow new and emerging talent to be showcased</p> <p><i>(Agree, 41%; Disagree 12%)</i></p>	<ul style="list-style-type: none"> • AB social grade (51%) • No disability (43%) • Students (49%) • Working full time (45%) • Owner Occupier (43%) • Private Renters (43%) • Children in household (45%) • Rural (53%) • Use iPlayer at least once a week (52%) • Watch BBC Three (46%) • Watch BBC Four (48%) • Favourable towards third party content on iPlayer (80%) 	<ul style="list-style-type: none"> • Men (14%) • White people (13%) • Retired (14%) • North West (15%) • Yorkshire & Humber (16%) • Rural (14%) • Use iPlayer less than once a week (15%) • Unfavourable towards the BBC (25%) • Unfavourable towards third party content on iPlayer (39%)
<p>Watching programmes or television online is very convenient for me</p> <p><i>(Agree, 36%; Disagree 34%)</i></p>	<ul style="list-style-type: none"> • 16-24 year olds (54%) • BMEs (51%) • Students (61%) • Private renters (44%) • Northern Ireland (44%) • Use iPlayer at least once a week (55%) • Favourable towards online premiering (64%) • Favourable towards third party content on iPlayer (58%) 	<ul style="list-style-type: none"> • Over 65s (55%) • DE social grade (41%) • White people (37%) • Disability (42%) • Retired (56%) • Never use iPlayer (62%) • Unfavourable towards online premiering (55%) • Unfavourable towards third party content on iPlayer (54%)
<p>The internet is a more accessible way of watching television programmes than traditional means</p> <p><i>(Agree, 31%; Disagree 37%)</i></p>	<ul style="list-style-type: none"> • 16-24 year olds (48%) • BMEs (51%) • No disability (32%) • Children in household (39%) • Northern Ireland (42%) • Private renters (41%) • Use iPlayer at least once a week (44%) • Favourable towards online premiering (57%) 	<ul style="list-style-type: none"> • Over 65s (59%) • DE social grade (40%) • Disability (44%) • Owner Occupier (41%) • Unfavourable towards online premiering (56%)

6. Views on proposed changes to CBBC

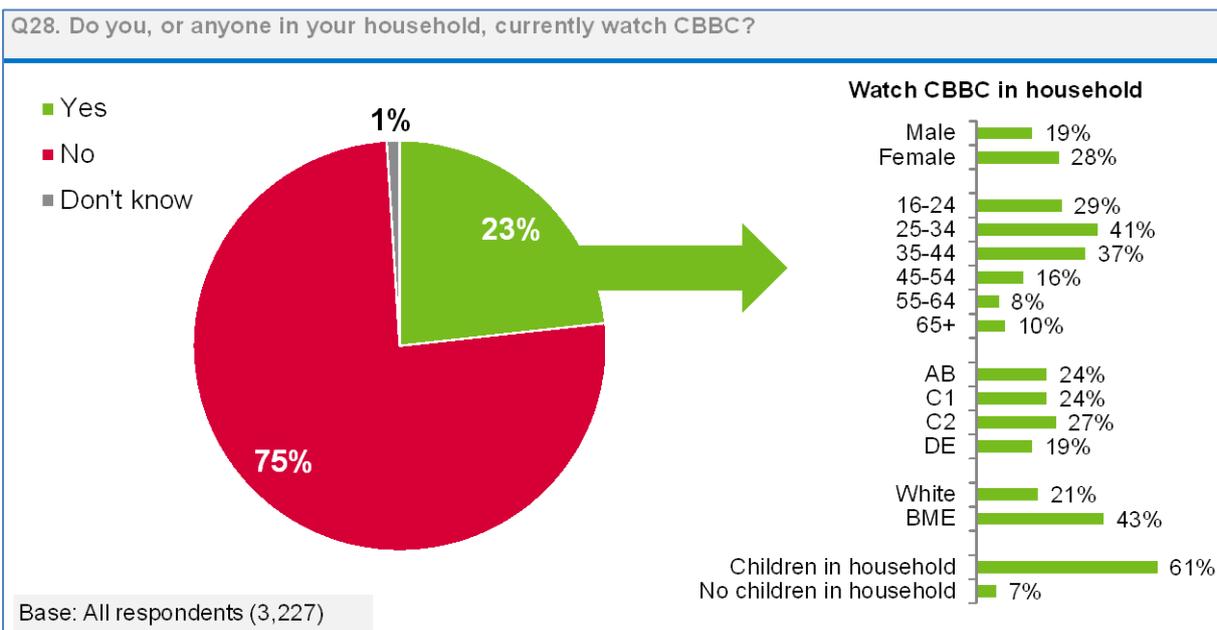


6.1 Proportion of households watching CBBC

A quarter (23%) of Britons have someone in their household who currently watches CBBC, rising to three in five (61%) among those who have children aged 0-16 years in their household.¹¹

CBBC is most commonly watched in households with women living in them (28%), people in employment (28%), young people aged 16-44 years and those from ethnic minority groups (43%).

In contrast, CBBC is viewed less by households with men residing in them (19%), people aged 55+ (9%), those who are not working (10%) and households without children (7%).

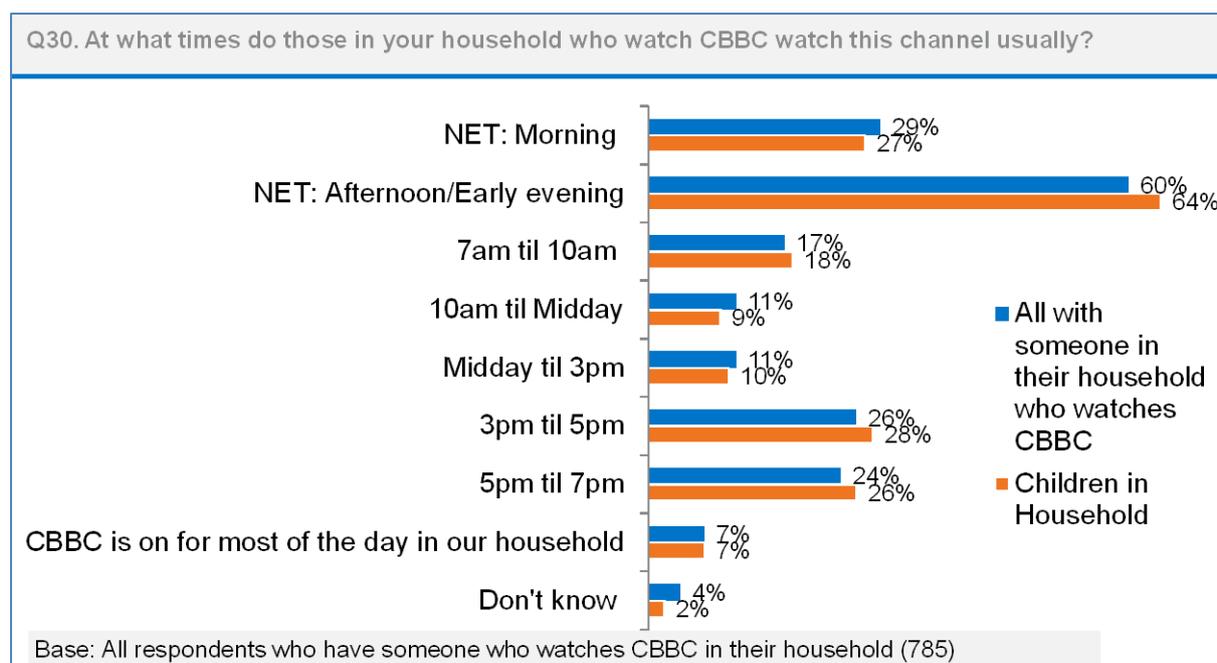


CBBC is watched by significantly more households in Northern Ireland (43%) than elsewhere in the UK, particularly Scotland (17%).

¹¹ 30% of people have at least one child aged 0 to 16 in their household. 15% have 1 child, 11% have two children and 4% have three or more children.

6.2 Times of the day people watch CBBC

Among people who have someone in their household who watches CBBC, the most common time for viewing the channel is in the afternoon and early evening. Three in five (60%) people say those in their household watch CBBC after midday, including half (50%) who do so between 3pm and 7pm. Three in ten (30%) watch it in the morning and a small proportion have the channel switched on for most of the day.

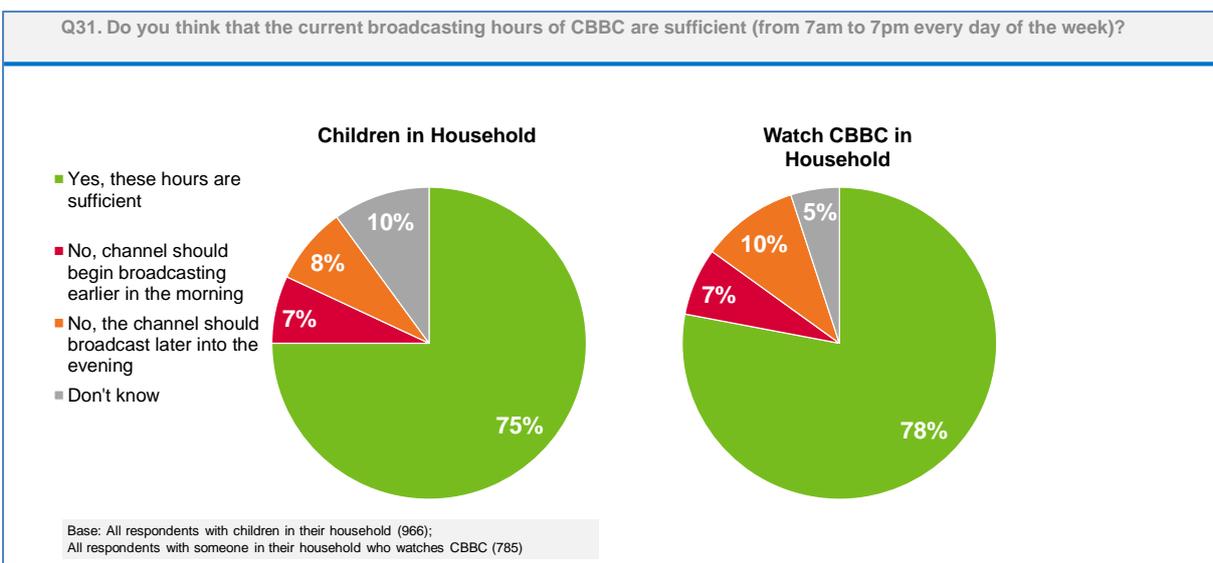
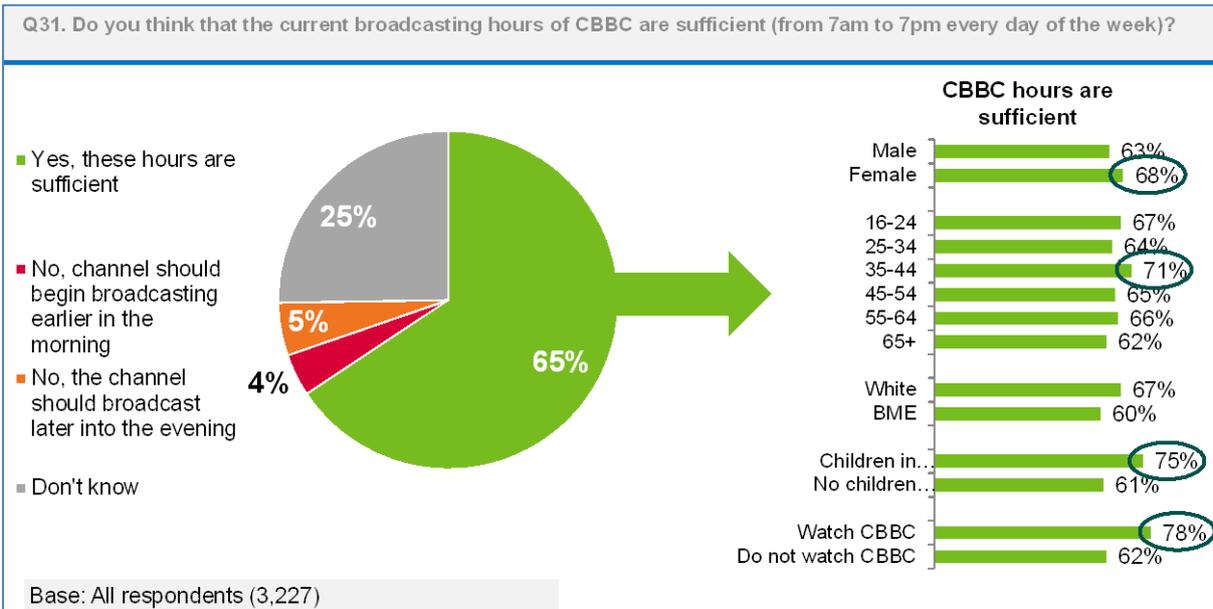


6.3 Perception of current broadcasting hours of CBBC

Two-thirds (65%) of the general population feel that CBBC's current broadcasting hours (7am – 7pm every day of the week) are sufficient. This proportion is higher among those who have someone in their household who watches the channel (78%) and where there is a young person aged 0-16 years.

Just one in ten (9%) take the opposite view and say the channel should begin broadcasting either earlier in the morning or later into the evening. This percentage doubles (17%) among households where there is a CBBC viewer.

Among the population as a whole, a quarter say they do not know if the current broadcasting hours are sufficient or not. Those with a CBBC viewer in their household are more likely to express a view (7% 'don't know').



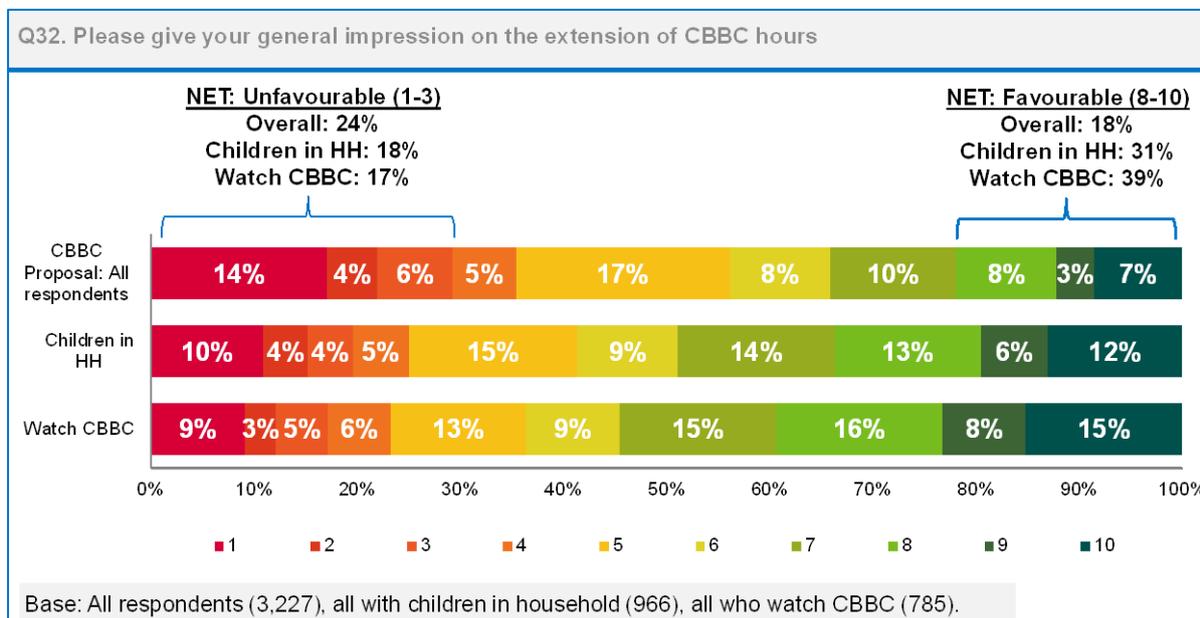
6.4 Favourability towards CBBC proposal

Respondents were presented with the following summary of the CBBC proposal and asked how favourable they are towards the initiative:

CBBC currently broadcasts from 7am to 7pm every day of the week. The BBC is proposing that CBBC broadcast hours be extended by two hours per evening, with the extra two hours being used to show repeats of programmes which aired earlier in the day.

Unsurprisingly support for the proposal is much higher among both current CBBC viewers and households with children than it is among the population in general. Four in ten (39%) people with a child living in their household and three in ten (31%) of those who currently watch the channel rate the CBBC proposal at least 8 out of 10, where 10 is extremely

favourable. The level of favourability for both these audiences surpasses the extent of unfavourability, defined as a score to 1 to 3 out of 10. However, it is evident in the chart below that the majority of people across all three audiences adopt a neutral position on the proposal (4-7/10).



Among the population as a whole, women, younger people and those from ethnic minority groups speak more positively about the proposed change to CBBC’s broadcasting hours. On the other hand, the proposed extension enjoys less support, among men, those aged 55+ and white people.

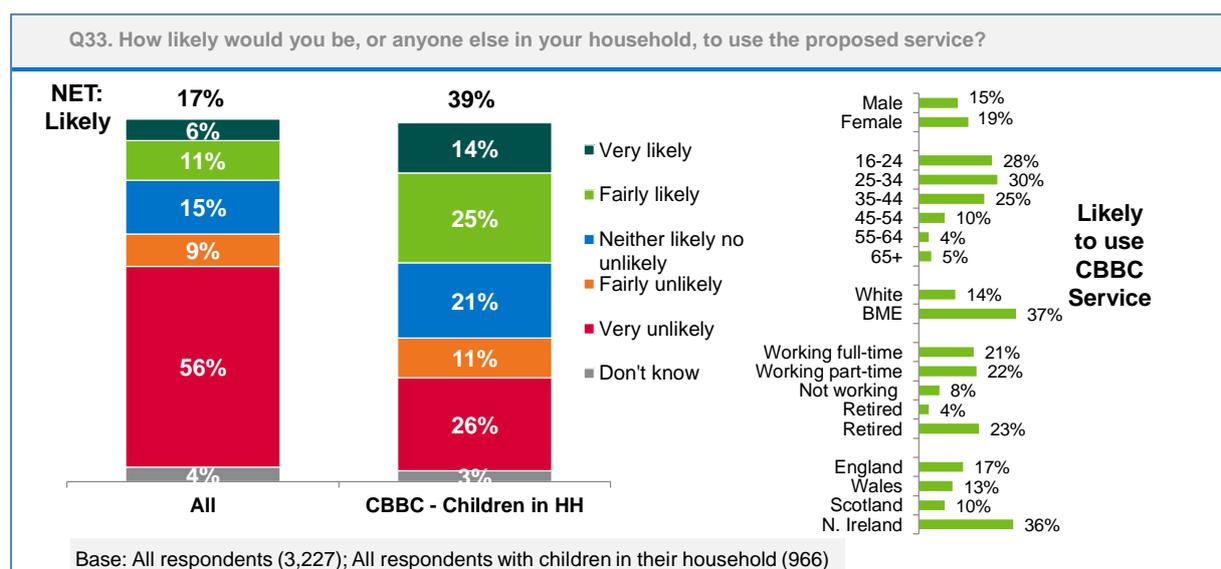
Prompted Support for CBBC proposal		
<i>Base: All respondents (3,227)</i>		
	% Favourable (8-10/10)	% Unfavourable (1-3/10)
Overall:	18	24
Gender:		
	Men	14
	Women	21
Age:		
	16-24	28
	25-34	27
	35-44	21
	45-54	16
	55-64	7
	65+	9
Socio-economic status:		
	AB	18
	C1	17
	C2	18
	DE	18

Prompted Support for CBBC proposal (CONTINUED)			
Base: All respondents (3,227)		% Favourable (8-10/10)	% Unfavourable (1-3/10)
Ethnicity:			
	White	16	25
	BME	30	14
Work status:			
	Full-time	19	23
	Part-time	22	23
	Not working	14	22
	Retired	9	30
	Student	22	11
Country:			
	England	17	24
	Wales	17	29
	Scotland	16	20
	Northern Ireland	30	11

6.5 Likelihood to use proposed CBBC service

People with children in their household are more likely to say they will use the new CBBC service than not use it (39% versus 17%). Indeed, intention to use the channel with its extended broadcasting hours is highest among those who already have someone in their household who watches CBBC (53% likely; 6% unlikely).

As the chart below shows, among the different population subgroups' likelihood to use the new CBBC service broadly mirrors favourability towards the proposal.



6.6 Overall attitudes towards the CBBC proposal

Respondents were presented with a series of attitudinal statements about the CBBC proposal and were asked the extent to which they agree or disagree with each. Overall, there are mixed views towards the proposed change in CBBC's broadcasting hours, as evidenced in the table below.

Many existing viewers of CBBC as well as people with young children believe it will have a negative impact on the channel:

- Around half agree that extending CBBC's hours **could disrupt family routines**
- Two-thirds contend that **7pm is a good cut-off point** and
- Half would **prefer BBC Three original programming than two hours of repeats on CBBC**.

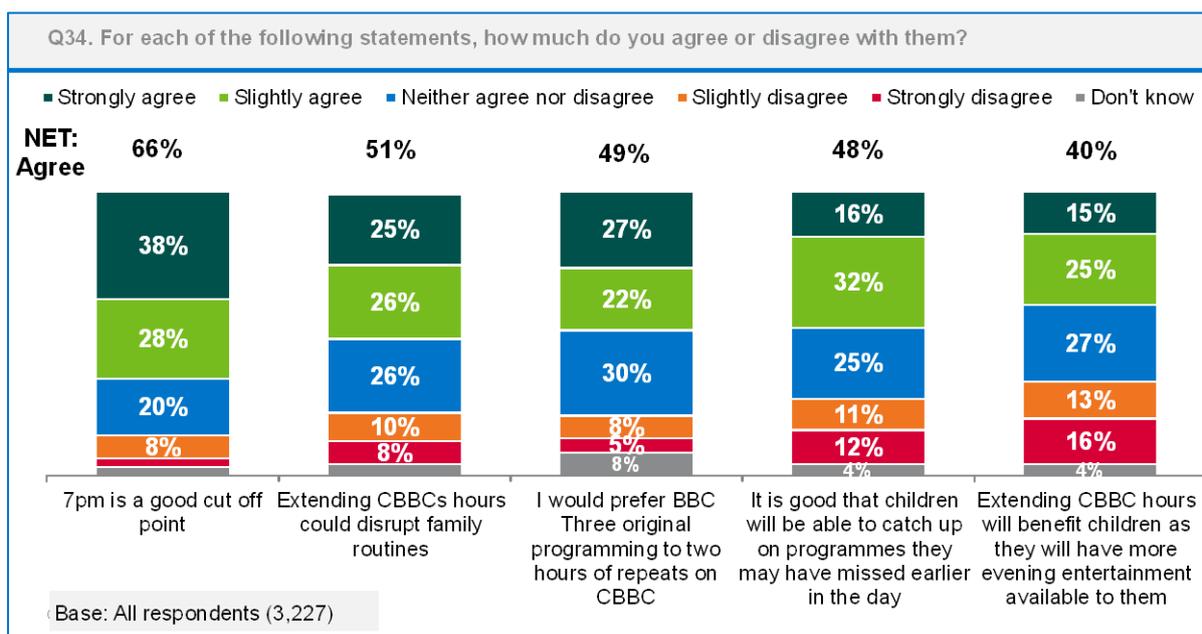
However, on a more positive note, people who have a child in their household and/or someone who watches CBBC tend to agree more than disagree that:

- Extending **CBBC hours will benefit children as they will have more evening entertainment available to them**; and
- It is **good that children will be able to catch up on programmes they may have missed** earlier in the day.

Overall attitudes towards the CBBC proposal

Base: All respondents (3,227); All with children in household (966); All with someone in household who watches CBBC (785)

		NET: Agree	NET: Disagree
Extending CBBCs hours could disrupt family routines	Overall %	51	14
	With children in household %	51	18
	Currently watch CBBC %	55	19
7pm is a good cut off point	Overall %	65	7
	With children in household %	66	11
	Currently watch CBBC %	67	12
I would prefer BBC Three original programming than two hours of repeats on CBBC	Overall %	43	11
	With children in household %	49	13
	Currently watch CBBC %	51	15
Extending CBBC hours will benefit children as they will have more evening entertainment available to them	Overall %	28	33
	With children in household %	40	29
	Currently watch CBBC %	48	28
It is good that children will be able to catch up on programmes they may have missed earlier in the day	Overall %	35	26
	With children in household %	48	23
	Currently watch CBBC %	53	21



The belief that extending CBBC’s broadcasting hours **could disrupt family routines** is a particular concern among women: 56% agree with this statement compared to 46% of men. Concern around disruption also increases with age: 59% of those aged 65+ mention this against 46% of young people aged 16-34. This is likely to explain why ethnic minority groups, who tend to be younger than white people on average, are less likely to believe that the proposal will disrupt family routines (46% versus 52% of white people). An almost identical pattern emerges when considering whether **7pm is a good cut-off point or not**. However, attitudes in relation to the preference for **BBC Three original programming than two hours of repeats on CBBC** are broadly consistent across the population.

The belief that **extending CBBC hours will benefit children as they will have more evening entertainment available to them** is most pronounced among young people (16-34, 37%; 35-44, 33%) and ethnic minority groups (42%). Similarly, younger adults and those from an ethnic minority background are more likely than average (and older people and white people in particular) to hold the view that it is **good that children will be able to catch up on programmes they may have missed earlier in the day**.

7. Views on overall package of proposed changes

Respondents were given the opportunity to say in their own words via an open (free text) question what they think overall about the BBC's proposed changes. The responses in the table below have been coded from verbatim responses to this question.

As befits the enormous range of BBC services and their general popularity, the public give a wide range of views towards the BBC's proposal. Just one in five (19%) had nothing to add at this question.

However, from the myriad responses given by the members of the public, two key issues emerge. One of these relates to **the potential extension of CBBC broadcasting hours**. One in eight (13%) people believe that children's television should not be extended or that it will cause disruption to family routines. Secondly, a similar percentage of people (12%) claim that a **BBC One +1 channel will be beneficial** to the viewing public.

Q35. With regard to the proposed changes you have been asked, do you think these are something that the BBC should be considering? Within your answer you may want to explain or refer to previous answers you have given in the questionnaire.

Base: All respondents (3,227)

	% ¹²
Children's TV should not be extended/will cause disruption to family routine	13
Plus 1/Catch Up will be beneficial	12
Keep BBC Three/Four on TV/ Do not agree with BBC Three or Four closing/changing/going online	8
Good/they should consider implementing these changes	7
Stop/abolish/reduce licence fee/introduce advertising/sponsorship instead of licence fee	5
Not necessary/adequate/fine as it is	4
Improve the variety/quality of programmes	4
Good idea to extend children's viewing hours	3
Moving BBC Three/BBC Four online is ok/the extension to online availability of programmes is welcome	3
The changes/some of the changes do not affect me	3
Improve iPlayer service	2
Not everyone has access to the internet or good internet speed	2
Make it more up to date/modern/keep up with technology	2
Cut down on repeats/channels should not be cut to provide a platform for more repeats	2
Should be subject to consultation/listen to the public	2
Stop wasting money/should spend the money wisely	2

¹² Responses of 2% and above.

Appendices

Appendix 1: Guide to Statistical Reliability

The respondents to this research are only a sample of the total UK population. We cannot, therefore, be certain that the figures obtained are exactly those we would have if everybody in the UK had been interviewed (the 'true' values). We can, however, predict the variation between the sample results and the 'true' value from knowledge of the size of the samples on which the results are based and the number of times that a particular answer is given.

The confidence with which we can make this prediction is usually chosen to be 95% – that is, the chances are 19 in 20 that the 'true' value will fall within a specified range. The table below illustrates the predicted ranges for different sample sizes and percentage results at the '95% confidence interval'¹³, assuming an infinite population.

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	Statistical reliability		
	10%/90%	30%/70%	50%/50%
500 interviews	2.6%	4.0%	4.4%
1,000 interviews	1.9%	2.8%	3.1%
2,000 interviews	1.3%	2.0%	2.2%
3,000 interviews	1.1%	1.6%	1.8%
3,227 interviews	1.0%	1.6%	1.7%

For example, on a question where 50% of the people in a sample of 3,227 respond with a particular answer, the chances are 95 in 100 that this result would not vary by more than 1.7 percentage points, plus or minus from a complete coverage of the entire population using the same procedures. However, while it is true to conclude that the "actual" result (95 times out of 100) lies anywhere between 48.3% and 51.7%, it is proportionately more likely to be closer to the centre of this band (i.e. at 50%).

¹³ It should be noted that these figures assume a simple random possibility sample design with no design effects; in reality, with quota surveys these are likely to occur and widen the margin of error, so this should be treated as a guide.

Comparing percentages between subgroups and the overall totals

When results are compared between separate groups within a sample, different results may be obtained. The difference may be “real”, or it may occur by chance (because not everyone in the population has been interviewed). To test if the difference is a real one - i.e. if it is “statistically significant”, we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. If we assume the “95% confidence interval”, the differences between the two sample results must be greater than the values given in the table below:

Size of samples compared	Differences required for percentage levels significance at or near these		
	Statistical reliability		
	10%/90%	30%/70%	50%/50%
500 and 500	3.7	5.0	6.2
500 and 1,000	3.2	4.9	5.4
1,000 and 1,000	2.6	4.0	4.4
1,000 and 2,000	2.3	3.5	3.8
2,000 and 3,000	1.7	2.6	2.8
3,000 and 3,227	1.5	2.3	2.5

For example, when comparing the results between those who watch BBC One and BBC Three (2,918 compared to 1,866), where 30% give a particular answer, a difference of 2.7% is required for it to be considered to be statistically significant.

Appendix 2: Definition of BME

BME (black and minority ethnic) is a standard definition to define those who are from a non-white background.

This is derived from the following question in the questionnaire:

Which of these best describes your ethnic origin?

Ethnicity Code	Grouping
WHITE	
English/Welsh/Scottish/Northern Irish/British	White
Irish	White
Eastern European	White
Another white background	White
MIXED	
White and black Caribbean	BME
White and black African	BME
White and Asian	BME
Any other mixed/multiple ethnic background	BME
ASIAN	
Indian	BME
Pakistani	BME
Bangladeshi	BME
Chinese	BME
BLACK	
African	BME
Caribbean	BME
Another black/African/Caribbean background	BME
OTHER	
Arab	BME
Another ethnic group	BME
Prefer not to say	N/A

Appendix 3: Sample Profile

	TOTAL	Watch BBC One	Watch BBC Two	Watch BBC Three	Someone in HH watches CBBC
TOTAL*	3,227	2918	2455	1866	785
<u>Age</u>					
16-24	15%	15%	14%	19%	18%
25-34	17%	17%	17%	20%	29%
35-44	17%	17%	17%	19%	27%
45-54	17%	16%	17%	15%	12%
55-64	14%	15%	14%	12%	5%
65+	20%	21%	22%	17%	9%
<u>Gender</u>					
Male	49%	51%	51%	51%	39%
Female	51%	49%	49%	49%	61%
<u>Region</u>					
Wales	5%	5%	5%	5%	4%
Scotland	8%	8%	8%	7%	6%
Northern Ireland	3%	3%	3%	4%	5%
North East	4%	4%	4%	4%	4%
North West	11%	11%	10%	11%	11%
Yorkshire & Humber	8%	8%	8%	8%	9%
East Midlands	7%	7%	7%	7%	6%
West Midlands	9%	9%	8%	9%	11%
East Anglia	9%	10%	10%	9%	6%
London	13%	12%	13%	15%	16%
South East	14%	14%	14%	14%	14%
South West	8%	9%	9%	8%	7%
<u>Social Grade</u>					
A	7%	7%	7%	6%	7%
B	16%	15%	15%	16%	16%
C1	31%	31%	32%	32%	32%
C2	21%	21%	22%	23%	24%
D	11%	11%	11%	11%	13%
E	15%	14%	13%	12%	9%

	TOTAL	Watch BBC One	Watch BBC Two	Watch BBC Three	Someone in HH watches CBBC
<i>Ethnicity</i>					
WHITE					
English/Welsh/Scottish/Northern Irish/British	83%	83%	83%	80%	70%
Irish	1%	1%	2%	2%	3%
Eastern European	1%	1%	1%	1%	1%
Another white background	2%	2%	2%	2%	3%
NET: BME	13%	13%	13%	15%	23%
MIXED					
White & Black Caribbean	1%	1%	1%	1%	1%
White & Black African	*	*	*	1%	1%
White & Asian	1%	1%	1%	1%	1%
Another mixed/multiple ethnic background	1%	1%	*	1%	1%
ASIAN					
Indian	3%	3%	3%	4%	5%
Pakistani	2%	2%	2%	2%	5%
Bangladeshi	1%	1%	1%	1%	1%
Chinese	1%	1%	1%	1%	1%
Another Asian background	1%	1%	1%	1%	2%
BLACK					
African	1%	1%	1%	1%	2%
Caribbean	1%	1%	1%	2%	2%
Another Black/African/Caribbean background	*	*	*	*	*
OTHER ETHNIC BACKGROUND					
Arab	*	*	*	*	*
Another ethnic group	*	*	*	*	*

Appendix 4: Marked-up questionnaire

Q1. Thinking about the BBC as a whole - not just the programmes, but the sort of organisation the BBC is and the way it goes about providing a public broadcasting service - can you tell me on a scale of 1 to 10 your general impression of the BBC? 1 means extremely unfavourable and 10 means extremely favourable. SINGLE CODE

Base: All respondents (3,227)

Score out of ten	%
1 - Extremely unfavourable	3
2	2
3	4
4	4
5	10
6	8
7	19
8	26
9	14
10 - Extremely favourable	11
NET: Unfavourable (1-3)	8
NET: Favourable (8-10)	50
MEAN SCORE	7.06 out of 10

Section 1: BBC 3**Q2. How often do you watch any of the following channels? SINGLE CODE FOR EACH***Base: All respondents (3,227)*

Channel		Once a day or more	Most days in a week	2-3 times a week	About once a week	1-2 times per month	Once a month	Never watched this channel	NET: At least once a week
a. BBC One	%	48	19	17	8	2	3	3	87
b. BBC Two	%	15	15	28	19	8	9	7	67
c. BBC Three	%	6	8	16	18	14	17	21	44
d. BBC Four	%	4	6	15	15	14	18	29	35
e. BBC News	%	26	12	13	9	7	12	21	57
f. BBC World Service	%	3	3	4	6	5	11	67	16
g. BBC Parliament	%	2	2	4	4	5	14	69	11

Q3. How do you tend to watch BBC Three? Please select all that apply. MULTICODE*Base: All who watch BBC Three (2,497)*

Ways of watching	%
Live on television	85
On-demand (e.g. on iPlayer)	26
Live streaming on an internet enabled device	9
Don't know	2

Q4. And which of these devices do you use to watch BBC Three? Please select all that apply.

MULTICODE

Base: All who watch BBC Three (2,497)

Devices	%
TV	83
Smart TV i.e. an internet enabled television	20
Laptop/Notebook	14
iPad/Other Tablet device	12
Smartphone	10
PC/Mac	8

Q5. For which of the following reasons do you not access BBC Three content online? Please select all that apply. MULTICODE

Base: All who watch BBC Three on a television only (1,475).

Reasons	%
I prefer watching BBC Three on a television	72
I find it easier to access BBC Three programming on a television	27
I watch BBC Three while browsing television channels and do not look for specific programmes online	14
I have internet access but it is too slow	9
I am unaware of BBC Three programming being available online	6
I do not like any of the online content from BBC Three	4
My broadband speed is not sufficient to stream programmes or video	4
My data allowance on my Internet is not large enough to stream video or programmes	3
The BBC iPlayer website does not work when trying to play BBC Three programmes	2
I do not have a device that allows me to watch BBC Three content online	2
I do not have access to the internet (ONLY SHOWN FOR CATI SAMPLE)	1
NET: Internet access issues	15

Q6. And why do you not have access to the internet? MULTICODE

Base: All who watch BBC Three but do not have internet access (43).

Reasons	%
I don't want or need internet access	59
I do not have a laptop, PC or tablet that uses the internet	24
It costs too much money	14
I cannot get broadband connection in my area	7
I cannot get superfast internet in my area	6
I did have internet access but recently got rid of it	2
My internet access is not working due to technical issues	2
I access the internet in public places like libraries or coffee shops	-
Other	17

Q7. Which of the following do you currently watch or use on BBC Three? MULTICODE.

Base: All who watch BBC Three (2,497)

Types of programmes	%
BBC Three original drama programming such as <i>Being Human</i>	43
Third party BBC Three programming e.g. <i>Family Guy, American Dad</i>	39
BBC Three original comedy programming such as <i>Cuckoo</i>	34
BBC Three original factual programming such as <i>Our War</i>	34
BBC Three content via the BBC website or iPlayer	20
BBC Three Social Media output on Facebook, Twitter, Instagram or Snapchat	5

Q8. How strongly do you feel that the BBC Three television channel is aimed at you? SINGLE CODE

Base: All respondents (3,227)

	%
NET: Feel BBC Three is aimed at me	40
NET: Do not feel BBC Three is aimed at me	50
Very strongly	9
Fairly strongly	31
Not very strongly	31
Not strongly at all	19
Don't know	11

Q9. Have you recently heard, read or seen any changes to BBC Three mentioned anywhere? SINGLE CODE

Base: All respondents (3,227)

	%
Yes	35
No	51
Don't know/Can't remember	14

Q9b. How much do you know about the proposed changes to BBC Three? SINGLE CODE.*Base: All respondents who have heard of changes to BBC Three (1,101)*

	%
NET: Know at least a fair amount	46
Know a great deal	12
Know a fair amount	34
Know just a little	44
Know almost nothing	10
Don't know	*

Q10. Would you say that you are watching BBC Three programming more, less or the same as a year ago? SINGLE CODE*Base: All respondents (3,227)*

	%
NET: At least the same amount as a year ago	60
More than a year ago	12
The same as a year ago	48
Less than a year ago	18
Only started watching BBC Three this year	4
Have never seen BBC Three	11
Don't know	6

Q11. And why do you say you are doing this?

Base: All respondents (3,227)

	%
Nothing of interest to watch on there/doesn't appeal to me	18
My viewing habits/ routines have not changed	10
I like the programmes/ series/more of interest to me	8
Watch more online/on demand/Netflix services/play games	8
Do not watch much TV/ too busy to watch TV/ have less time	6
Watch occasionally/depends what is on/if it is of interest to me	6
Prefer to watch other channels/lots of choice on other channels	5
I do not watch it/don't know much about it	4
They are showing better quality/more interesting programmes	4
I flick through the channels/just watch what I like/what interests me	2
Its more for the younger generation/not my age group	2
Ok/good/great	2
No changes/still the same programme content/ quality	2
Like to watch other BBC channels	1
More of a choice/ variety of programmes/ times	1
Can catch up on programmes I have missed/want to see again	1
Have more time/watching more TV in general/have a TV now	1
I like watching Family Guy/American Dad	1
Fun/I like the comedy programmes	1
Only watch it when there is nothing on other channels	1
Programmes I watched have ended/nothing new to watch	1
I am more aware of BBC 3/thought I would try it/curiosity	1
It will be available online only/want it to stay on terrestrial TV	1
Too many repeats	1
Dislike/distrust the BBC/licence fees are a rip-off/too politically biased	1
Love BBC 3/it is one of the better channels	1
Less quality programming/content not as good as it used to be	1
BBC 3 is not advertised/promoted	1
Its rubbish/boring/ don't like it/it won't be missed	1
Prefer to watch Sky channels	*
I like to watch ITV	*
Dislike BBC programmes	*
It appeals more to my age group now	*
Do not have a TV/did not have a TV a year ago	*
No adverts	*
I watch it on iPlayer/ would like more on iPlayer	*
Change in routine/ lifestyle/tastes	*
None/no reason	2
Other	2

Don't know	6
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Q12. An official consultation asking licence fee payers about various possible changes to the BBC's services has just ended.

The BBC wants to close BBC Three as a broadcast channel and reinvent it online. The new service would continue to target 16-34-year-olds. Content would be available on a variety of BBC services, including a dedicated BBC Three website, BBC Online and BBC iPlayer. The content budget would be roughly halved, but BBC Three online would still offer a range of programmes (drama, comedy, serious factual) along with new types of content, like video clips, articles and quizzes. All new long-form programmes would still air on television, on late night slots on BBC One and BBC Two, after the first showing online.

Were you aware of this change taking place before today? SINGLE CODE

Base: All respondents (3,227)

	%
Yes	39
No	56
Don't know	5

Q13. Please give your general impression of the proposal to close BBC Three and reinvent it online, where 1 is extremely unfavourable and 10 is extremely favourable: SINGLE CODE

Base: All respondents (3,227)

	%
1 – Extremely unfavourable	16
2	5
3	7
4	6
5	20
6	9
7	9
8	7
9	3
10 – Extremely favourable	7
NET: Unfavourable (1-3)	29
NET: Favourable (8-10)	17
MEAN SCORE	4.94 out of 10
Don't know	11

Q14. How likely would you be to use the proposed BBC Three service? SINGLE CODE

Base: All respondents (3,227)

	%
NET: Likely to use	20
NET: Unlikely to use	53
Very likely	5
Fairly likely	15
Neither likely nor unlikely	23
Fairly unlikely	18
Very unlikely	35
Don't know	4

Q15. How much would you agree with the following statements from strongly agree to strongly disagree? ROTATE STATEMENTS. SINGLE CODE FOR EACH.

Base: All respondents (3,227)

		NET: Agree	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	NET: Disagree	Don't know
a) I prefer to watch programmes on television	%	80	63	17	12	3	2	6	2
b) The BBC should be making savings elsewhere	%	47	25	21	33	8	4	13	8
c) I use the internet as a way of catching up with television I've missed not as my main source of television watching	%	45	22	23	18	10	24	34	2
d) My internet speed is not fast enough to stream video or television programmes	%	22	9	13	20	18	33	51	7
e) BBC Three is a launch pad for new and emerging talent	%	39	13	26	32	6	6	12	17
f) I often go online and browse to find television content	%	24	8	17	20	18	35	53	3
g) I only watch television programming online that I specifically search for	%	48	22	26	22	8	19	27	3
h) I find it easy to find new content /programmes to view online	%	33	11	23	32	10	18	28	7

Section 2: iPlayer

The next few questions are about BBC iPlayer.

Q16. How often do you currently use BBC iPlayer to access any content? SINGLE CODE

Base: All respondents (3,227)

	%
NET: At least once a week	43
NET: Less than weekly, at least once a month	19
Once a day or more	5
2-3 times a week	20
About once a week	18
1-2 times per month	12
Once a month	7
Less often than once a month	20
Never used BBC iPlayer	16
Don't know	2

Q17. And which devices do you usually use to access BBC iPlayer content? MULTICODE

Base: All respondents who use iPlayer (2,564)

	%
Laptop/Notebook	37
Smart TV e.g. an internet enabled television	36
PC/Mac	23
iPad or other tablet	23
Smartphone	14
Via a games console such as PS4 or Xbox using a non-internet enabled television	8
Don't know	4

Q18. What programmes do you usually watch via iPlayer? MULTICODE

Base: All respondents who use iPlayer (2,564)

	%
Drama	52
Factual e.g. documentaries, discussion	45
Comedy	41
Soaps	27
Sports	19
Music television programming	11
Arts or culture programming	9
Radio programming e.g. playback of radio shows or podcasts	9
Local or regional programming	7
Political programming e.g. BBC Parliament	7
Children's e.g. CBBC or CBeebies	7

Q19. The BBC are proposing changes to the current BBC iPlayer service that would make it more than a BBC catch-up service. There are two main changes:

- To 'premiere' some programmes on iPlayer (i.e. make them available first on iPlayer before they are broadcast on a linear service);) and
- To include a selected range of non-BBC content from not-for-profit cultural and arts organisations, such as the Arts Council

How favourable or unfavourable do you find each of these proposed changes on a scale of one to ten, where one is extremely unfavourable and ten is extremely favourable. SINGLE CODE EACH.

Base: All respondents who use iPlayer (2,564)

	A) Online Premiering %	B) The inclusion of a selected range of non-BBC content from not-for-profit cultural and arts organisations, such as the Arts Council %
1 – Extremely unfavourable	10	7
2	4	3
3	5	4
4	5	5
5	19	19
6	10	10
7	13	12
8	11	13
9	5	6
10 – Extremely favourable	8	9
NET: Favourable	24	28
NET: Unfavourable	19	14
Don't know	10	12

Q20. And how likely would you be to watch either of these on iPlayer? SINGLE CODE EACH.

Base: All who use iPlayer (2,564)

	A) Online Premiering %	B) The inclusion of a selected range of non- BBC content from not-for- profit cultural and arts organisations, such as the Arts Council %
Extremely likely	8	6
Fairly likely	27	21
Neither likely nor unlikely	27	28
Fairly unlikely	15	17
Extremely unlikely	16	20
NET: Likely	35	28
NET: Unlikely	31	37
Don't know	7	7

Q21. For the following, how much do you agree or disagree with each statement from strongly agree to strongly disagree? ROTATE STATEMENTS.SINGLE CODE EACH.

Base: All respondents (3,227)

	NET: Agree %	Strongly agree %	Slightly agree %	Neither agree nor disagree %	Slightly disagree %	Strongly disagree %	NET: Disagree %	Don't know %
a) Watching programmes or television online is very convenient for me	36	14	21	27	13	21	34	3
b) A selected range of non-BBC content from not-for-profit cultural and arts organisations, such as the Arts Council will allow new and emerging talent to be showcased	41	11	30	35	7	6	12	12
c) The internet is a more accessible way of watching television programme than traditional means	31	10	21	28	16	21	37	5
d) I am in favour of online premiering but only if programmes are also shown on television	54	21	33	28	6	7	13	5
e) I prefer watching programmes on television	79	60	19	12	4	3	6	2
f) Improvements to iPlayer should not come at the cost of closing BBC Three	46	26	20	33	7	5	12	9
g) Funding should not be put into changes to iPlayer if some people are unable to access it	52	25	27	29	8	4	12	7
h) BBC iPlayer should only show BBC Content	38	16	21	32	16	7	23	8

Section 3: BBC One +1

The following questions are about time-shift or 'plus one' channels.

Q22. How often do you watch plus one television programming i.e. on ITV+1, Channel 4 +1 ?etc.?

SINGLE CODE.

Base: All respondents (3,227)

	%
Once a day or more	12
2-3 times a week	31
About once a week	15
1-2 times per month	10
Once a month	4
Less often than once a month	11
Never watch plus one channels	13
NET: At least once a week	58
NET: Less than weekly, at least once a month	14
Don't know	3

Q23. Do you believe there is a need for the BBC to air a plus one channel for any of its TV channels? Please select all that apply. SINGLE CODE.

Base: All respondents (3,227)

	%
NET: Yes – Any BBC Channel	65
Yes - BBC One should have a plus one channel	58
Yes – BBC Two should have a plus one channel	36
Yes – BBC Three should have a plus one channel	19
Yes – BBC Four should have a plus one channel	16
No / None of the above	22
Don't know	14

Q24. Why do you say that? MULTICODE

Base: All who do not believe there is a need for a BBC plus one channels (699)

	%
Money would be better spent on original content than a plus one channel	50
iPlayer is a sufficient catch up service	50
I would not use a plus one channel from the BBC	32
A plus one channel should not be considered if other channels are being considered for cancellation (BBC Three)	25
If improvements were made to iPlayer this would be sufficient instead of a new channel	19
I have a PVR/make use of a PVR/recording facilities available	3
Not needed/not interested/there are other ways of watching programmes	2
Costly/waste of money	1
Too many channels already/there would be too much choice	1
Repeats/too many repeats	*
Reduce the cost/fee	*
Limited usage/don't watch it much	*
Poor quality/quality needs to be better	*
None/nothing	*
Other	1
Don't know	1

Q25. The BBC does not currently have any +1 channels, unlike other public service broadcasters such as Channel 4, ITV and Channel 5. They are proposing to introduce a new BBC One+1 channel. The new channel would be broadcast on all television platforms: digital television (such as Freeview or YouView), cable (Virgin) and satellite (Sky, Freesat). However, on Freeview and YouView, it would only be available initially to households with a Freeview HD, YouView television or set-top-box; as these are the only devices capable of receiving the channel.

How favourable would you find a BBC One +1 service on a scale of one to ten, where one means extremely unfavourable and ten is extremely favourable? SINGLE CODE

Base: All respondents (3,227)

	%
1 – Extremely unfavourable	8
2	2
3	4
4	3
5	10
6	6
7	10
8	14
9	10
10 – Extremely favourable	26
NET: Favourable	50
NET: Unfavourable	14
Don't know	6

Q26. How likely would you be to use the proposed BBC One +1 service? SINGLE CODE

Base: All respondents (3,227)

NET: Likely to use	61
NET: Unlikely to use	19
Very likely	33
Fairly likely	29
Neither likely nor unlikely	16
Fairly unlikely	7
Very unlikely	13
Don't know	4

Q27. For each of the following statements, how much do you agree or disagree with them? Please answer from strongly agree to strongly disagree. ROTATE ORDER. SINGLE CODE EACH.

Base: All respondents (3,227)

		NET: Agree	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	NET: Disagree	Don't know
a) BBC One+1 should be available to everyone at the launch	%	73	48	25	18	2	2	4	4
b) I tend to use iPlayer to catch up on the BBC and would not use the new plus one channel	%	28	12	15	25	17	26	43	4
c) A BBC One +1 channel offers me an alternative to iPlayer	%	63	32	31	21	5	7	12	4
d) I would not use this channel as I record programmes I want to watch later	%	27	13	14	27	18	24	43	3
e) A BBC One +1 channel would help me if I've missed a programme	%	69	41	28	16	5	7	12	3

Section 4: CBBC

The final few questions are about CBBC i.e. Children's BBC.

Q28. Do you or anyone in your household, currently watch CBBC? SINGLE CODE.

Base: All respondents (3,227)

	%
Yes	23
No	75
Don't know	1

Q29. How many children aged 0 to 16 reside in your household? SINGLE CODE.

Base: All respondents (3,227)

Number of children	%
0	70
Net: Children in household	30
1	15
2	11
3+	4

Q30. At what times do those in your household who watch CBBC watch this channel usually? SINGLE CODE

Base: All respondents who have someone who watched CBBC in their household (785)

Time	%
7am until 10am	17
10am until Midday	11
Midday until 3pm	11
3pm until 5pm	26
5pm until 7pm	24
CBBC is on for most of the day in our household	7
NET: Morning	29
NET: Afternoon/Early evening	60
Don't know	4

Q31. Do you think that the current broadcasting hours of CBBC are sufficient (from 7am to 7pm every day of the week)? SINGLE CODE.

Base: All respondents (3,227)

	%
Yes, these hours are sufficient	65
Net: No	9
No, the channel should begin broadcasting earlier in the morning	4
No, the channel should broadcast later into the evening	5
Don't know	25

Q32. CBBC currently broadcasts from 7am to 7pm every day of the week. The BBC is proposing that CBBC broadcast hours be extended by two hours per evening, with the extra two hours being used to show repeats of programmes which aired earlier in the day.

Please give your general impression of the proposal to extend CBBC's hours of broadcast (from its current hours of 7am to 7pm, to the hours of 7am to 9pm) where 1 is extremely unfavourable and 10 is extremely favourable: SINGLE CODE

Base: All respondents (3,227)

	%
1 – Extremely unfavourable	14
2	4
3	6
4	5
5	17
6	8
7	10
8	8
9	3
10 – Extremely favourable	7
NET: Favourable (8-10)	18
NET: Unfavourable (1-3)	24
Don't know	19

Q33. How likely would you be or anyone in your household, to use the proposed service?
SINGLE CODE

Base: All respondents (3,227)

	%
NET: Likely	17
NET: Unlikely	64
Very likely	6
Fairly likely	11
Neither likely nor unlikely	15
Fairly unlikely	9
Very unlikely	56
Don't know	4

Q34. For each of the following statements, how much do you agree or disagree with them? Please answer from strongly agree to strongly disagree. SINGLE CODE EACH. ROTATE ORDER.

Base: All respondents (3,227)

		NET: Agree	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	NET: Disagree	Don't know
a) Extending CBBCs hours could disrupt family routines	%	51	25	26	26	8	6	14	9
b) 7pm is a good cut off point	%	65	39	26	21	5	2	7	8
c) I would prefer BBC Three original programming than two hours of repeats on CBBC	%	43	26	17	33	6	5	11	12
d) Extending CBBC hours will benefit children as they will have more evening entertainment available to them	%	28	9	19	30	14	19	33	10
e) It is good that children will be able to catch up on programmes they may have missed earlier in the day	%	35	10	25	29	10	17	26	9

Q35. With regard to the proposed changes you have been asked, do you think these are something that the BBC should be considering? Within your answer you may want to explain or refer to previous answers you have given in the questionnaire.

Base: All respondents (3,227)

	%
Children's TV should not be extended/will cause disruption to family routine	13
Plus 1/Catch Up will be beneficial	12
Keep BBC Three/Four on TV/ Do not agree with BBC Three or Four closing/changing/going online	8
Good/they should consider implementing these changes	7
Stop/abolish/reduce licence fee/introduce advertising/sponsorship instead of licence fee	5
Not necessary/adequate/fine as it is	4
Improve the variety/quality of programmes	4
Good idea to extend children's viewing hours	3
Moving BBC Three/BBC Four online is ok/the extension to online availability of programmes is welcome	3
Yes (unspecified)	3
The changes/some of the changes do not affect me	3
Improve iPlayer service	2
Not everyone has access to the internet or good internet speed	2
Make it more up to date/modern/keep up with technology	2
Cut down on repeats/channels should not be cut to provide a platform for more repeats	2
Should be subject to consultation/listen to the public	2
Stop wasting money/should spend the money wisely	2
Neutral/neither agree nor disagree	1
Cut back on the fat cat/celebrity salaries/get rid of the dead wood at the top	1
They need to save money somewhere else within the BBC	1
OK	*
Consider a dedicated sports channel	*
The BBC will do what they want regardless of public opinion	*
The BBC should concentrate on being impartial/too politically biased	*
Close/put BBC 4 online rather than BBC Three	*
Maybe	*
Not in favour of another plus one channel	*
Reduce the number of BBC channels/get back to basic channels	*
Cool	*
Extend hours of/support BBC 4	*
Fun/funny	*
Give parents more options/choice	*
No/none/nothing	19