A BMRB Report for:
Independent Quantitative Research to feed into the Market Impact Assessment of the BBC Local Video Service

Report

March 2008

Prepared for:

Eilir Jones: Head of Audiences, BBC Wales

Prepared by:

BMRB Media – Trevor Vagg and Laura Chandler

Telephone: 020 8433 4068/ 020 8433 4379

Email: Trevor.Vagg@bmrb.co.uk / Laura.chandler@bmrb.co.uk

Part of BMRB Limited (British Market Research Bureau)

BMRB/45107345/TV


Copyright: survey findings and deliverables are normally intended for use within the Client's organisation or its consultants and other associate organisations such as advertising agencies. Should the Client intend wider circulation of the survey findings and deliverables, the Client should inform BMRB prior to such disclosure and agree the form and content with BMRB. The client should acknowledge BMRB as the source of the information with wording acceptable to BMRB.
Table of Contents

1 Background .................................................................................................................. 2

2 Methodological overview .......................................................................................... 3
  2.1 Sample profile ......................................................................................................... 3
  2.2 The Questionnaire .................................................................................................. 5

3 Summary ....................................................................................................................... 6

4 Increasing broadband penetration provides a large and broad potential audience for the BBC local video service ................................................................. 7
  4.1 Current online landscape ......................................................................................... 7
  4.2 Potential service users ............................................................................................. 8
  4.3 Use of video on the internet ...................................................................................... 8
    4.3.1 Internet via a computer ..................................................................................... 8
    4.3.2 Internet via a mobile device ............................................................................. 8

5 Current use of local media is varied and widespread ................................................. 9
  5.1 Current use of local commercial media ................................................................. 9
  5.2 When are commercial local media platforms being used? .................................. 16
  5.3 Reason for platform use .......................................................................................... 17

6 Potential uptake of the proposed BBC Local service is strong ................................. 19
  6.1 When and where would the service be used? ....................................................... 20
  6.2 How the service should be funded ........................................................................... 21
  6.3 Key drivers of decision to use the new service ..................................................... 21

7 Impact of the new BBC Local service on local commercial media is likely to be small ........................................................................................................... 23

Appendix A ....................................................................................................................... 27
  Fact sheet - Sheffield ..................................................................................................... 27
1 Background

The BBC Executive intends to make an application to the BBC Trust for a Public Value Test of a proposal to introduce bespoke local news and news-related video offers, delivered via broadband internet, in 60 areas across the UK.

This project fulfils the BBC’s commitment to provide “new quantitative research assessing existing regional and local media consumption and the perceived possible impact on this consumption of the planned launch of BBC Local Video” to be drawn on by BBC Management’s preliminary Market Impact Assessment (MIA) and Ofcom’s MIA.

The specific objectives of this piece of research are to:

- understand current online behaviour and usage of online video content
- establish the media sources currently used for local news and information
- understand people’s perceptions of what is ‘local’
- gauge how interesting or useful the UK population feel the BBC’s local broadband service would be (after showing a short film explaining the service)
- identify what the most important drivers of using the service would be
- assess any potential impact on other local media provision by providing data to feed into a forecasting model
- establish whether the public support the launch of this new service
2 Methodological overview

The research comprised of 1,036 self-completion interviews conducted in 21 venues across the UK using CASI (Computer Assisted Self-Interviewing). Interviewers explained the task to participants who could then complete the interview at their own pace, watching the video explanation only at the correct point.

Interviewing took place between 1\textsuperscript{st} and 6\textsuperscript{th} March 2008. The following locations were chosen to provide adequate representation across the UK.

<table>
<thead>
<tr>
<th>Region</th>
<th>Locations</th>
<th>Number of days of interviewing</th>
<th>Estimated interviews</th>
<th>Achieved interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>England – North</td>
<td>Newcastle upon Tyne, Sheffield, Doncaster, Liverpool</td>
<td>4 days</td>
<td>200</td>
<td>190</td>
</tr>
<tr>
<td>England – Midlands</td>
<td>Kidderminster, Solihull, Nottingham, Ipswich, Gloucester</td>
<td>5 days</td>
<td>200</td>
<td>237</td>
</tr>
<tr>
<td>England – South</td>
<td>Exeter, Salisbury, Canterbury, Southampton</td>
<td>4 days</td>
<td>200</td>
<td>203</td>
</tr>
<tr>
<td>England - Greater London</td>
<td>Brent, Kingston</td>
<td>2 days</td>
<td>100</td>
<td>92</td>
</tr>
<tr>
<td>Scotland</td>
<td>Edinburgh, Glasgow</td>
<td>2 days</td>
<td>100</td>
<td>110</td>
</tr>
<tr>
<td>Wales</td>
<td>Cardiff, Neath</td>
<td>2 days</td>
<td>100</td>
<td>102</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>Belfast, Derry</td>
<td>2 days</td>
<td>100</td>
<td>102</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>21 days</strong></td>
<td><strong>1,000</strong></td>
<td><strong>1,036</strong></td>
</tr>
</tbody>
</table>

2.1 Sample profile

All adults aged 16+ in the UK were eligible to take part in the survey. We interviewed 1,036 people and quotas were set to ensure a broad representation of views at each location.
Weighting was applied to ensure the overall results were nationally representative in terms of sex, age, social grade, broad region and internet use. A breakdown of the sample profile before and after weighting can be found below.

<table>
<thead>
<tr>
<th>Profile of respondents: Total sample (1,036)</th>
<th>Unweighted</th>
<th>Weighted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male *</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Female *</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>AB *</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>C1 *</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>C2 *</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>DE *</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>16-24 *</td>
<td>23%</td>
<td>15%</td>
</tr>
<tr>
<td>25 – 34 *</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>35 – 44 *</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>45 – 54 *</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>55+ *</td>
<td>32%</td>
<td>34%</td>
</tr>
<tr>
<td>England*</td>
<td>69%</td>
<td>83%</td>
</tr>
<tr>
<td>England – London*</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>England – South*</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>England – Midland*</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>England – North*</td>
<td>18%</td>
<td>24%</td>
</tr>
<tr>
<td>Northern Ireland*</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>Scotland*</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Wales*</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Big City/ City*</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>Town*</td>
<td>37%</td>
<td>39%</td>
</tr>
<tr>
<td>Village/ countryside*</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Used the internet in the past month</td>
<td>77%</td>
<td>65%</td>
</tr>
<tr>
<td>Watch video on the internet via a computer</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>Watch video on the internet via a mobile device</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

* Where quotas were set.
2.2 The Questionnaire

A 20 minute self-completion questionnaire was completed by all participants using a laptop. The questionnaire covered the respondents’ current use of local media sources and the internet and their opinions of the BBC’s local video proposal. The questionnaire also contained a 5 minute film detailing the proposed new service from the BBC (all laptops had headphones connected). The video was accompanied by a fact sheet and map containing information specific to each venue.
3 Summary

Internet use in the UK is continuing to grow steadily with around 32.5 million adults online in the UK. Six-in-ten (61%) of the UK population have used the internet via a broadband connection in the last month, whether at work, home or an internet café and this could be described as the potential audience for the new BBC Local service in its broadest sense. Furthermore, there is already high levels of use of video on the internet with 71% of internet users (47% of the UK population) having watched videos online (via either a computer or mobile device).

There is a great level of interest in obtaining local news with 90% of the UK population currently using local media sources. People also favour using a range of sources for local information with 90% of those accessing news about their local area preferring to use a range of sources rather than one source alone. Opinions about how people define their local area of interest are more mixed but six-in-ten adults defined the local area that they are interested in finding out about in a much narrower sense than the current BBC regional provision caters for.

Commercial local media are used for a wide range of topics, many of which would not be replicated by the proposed BBC Local Video service (such as entertainment listings and information on local businesses) and almost nine-in-ten (88%) use commercial media to obtain the sort of information that would be available through the BBC Local service.

There is strong support for the BBC proposal with 68% likely to use the service (16% said they would definitely use it). There was an objection to using the licence fee to fund the project among a fifth of adults with 45% in favour of this and 36% neutral. There is a sense that the service would be beneficial to the general population (59% agreed) as well as people individually (43%).

The interest in the BBC Local service does not appear to be at the expense of commercial local media - 97% of the UK population would use still use a commercial local media source if the BBC Local service was launched. The BBC Local service would not affect the commercial media consumption of the majority of UK adults be it for news or any other purpose although between a tenth and a fifth of adults claim they would use particular local media less if the BBC Local service were launched (the figure differs for each medium).
Increasing broadband penetration provides a large and broad potential audience for the BBC local video service

4.1 Current online landscape

The internet population continues to grow steadily with around a 5 per cent increase year on year since 2005. Almost two-thirds (65%) of UK adults have used the internet in the past month, which equates to around 32.5 million internet users in the UK.

Men and women are equally likely to have used the internet in the last month but social grades ABC1 and those aged 16 to 44 are more likely to be internet users than average. Internet usage is below the UK average in Northern Ireland (52%) and Wales (56%).

Internet use is predominantly from home (82% of those who used the internet in the past month did so from their own home) but there is also a large amount of internet use elsewhere, with only 28% using the internet only at home. More than four-in-ten (43%) use the internet from work and a quarter (29%) of UK adults use a mobile device (mobile phone, PDA or blackberry) to access the internet.

Broadband internet connections at home have also been growing steadily and broadband is now the standard for home internet connections with 92% of those who have used the internet at home in the past month having a broadband connection. With overall penetration so high among home internet users there is little room for variation between age groups, genders or social grades. Of course, amongst all adults broadband penetration remains skewed towards 16 to 34 year olds, ABC1s and people in England and Scotland.

Broadband use at home is likely to continue to grow over the next 12 months with 35% of adults who currently do not have a broadband connection at home stating that they are likely to get a broadband internet connection at home within this time period (20% said ‘very likely’). Reflective of the internet population there are greater levels of intention to get broadband from those aged 16 to 34 who are still to get access.

Work users are largely similar to broadband users with little differentiation between sexes. Users again are more likely to be under 55 years old and from social grades ABC1 (but they are less likely to be aged 16 to 24).

Use of the internet through a mobile device has the most specific audience consisting largely of males aged 16 to 34. Those living in villages/countryside are less likely to use the internet through a mobile device, perhaps as a result of mobile phone signals.

---

1 Source: BMRB’s Internet Monitor
4.2 Potential service users

At the broadest level, the current potential audience for the BBC Local service could be described as anybody with broadband at home or who uses the internet from anywhere else (such as work where there will also be a broadband connection). Over half (61%) of UK adults fit this description meaning there is a sizeable potential audience for the service (around 30 million adults in the UK). Furthermore, as we have demonstrated above, the audience has a pretty broad profile with people aged over 55 and those in social grades DE the only groups significantly under represented.

4.3 Use of video on the internet

4.3.1 Internet via a computer

Of course, using the new service will mean watching video content online but this behaviour is already common for internet users with 46% watching online video content at least once a week and 71% ever doing so (this covers to films, TV programmes, professional video clips or video clips submitted by other internet users). Watching videos on the internet is most common among internet users who are male (78% ever watch) and 16-24 year olds (93%). Three quarters of 25-44 year old internet users have watched videos on the internet and there is also greater usage amongst ABC1s (74%).

Those who watch videos on the internet also do so fairly frequently with over half (65%) watching videos at least once a week. Again there is a tendency for males and those aged 16 to 24 to use these services more frequently than other age groups.

Types of clips viewed are fairly varied but “Funny clips” (59%) with clips submitted by others (59%) come out as the most common type of videos watched with news (46%) also rating highly. The main areas that the BBC are proposing to cover as part of the new service (News, Sport, Weather, Travel and Community content) are currently already being used by 64% of those watching video on the internet. This puts the size of the audience currently accessing similar information through online video at 30% of all UK adults (14.9 million). Over half of all age groups that are currently using videos on the internet are viewing videos that contain similar content to the proposed BBC service and penetration of this type of content among online video watchers increases with age.

4.3.2 Internet via a mobile device

Watching videos through a mobile internet connection is less widespread with 8% of all UK adults ever watching video online through a mobile device. This is just under half of all those who access the internet through a mobile device. As with use of internet through a mobile device use is highest amongst males but appeals to broader age bands with levels of use being consistent for those aged 16 to 44. Use of videos on mobile devices is less frequent than on the internet via a computer (41% of those who ever use watch at least once a week v 65% via a computer).

Topics of interest are consistent with videos via the internet on a computer with News (47%) and funny clips (39%) again rating highly and Sport clips also proving popular via mobile (38%). News and sport were mentioned by greater proportions of online video watchers via mobile than via computer reflecting the need to keep up to date whilst out and about. Again much like videos watched through a
computer users are already watching videos with similar content to the BBC’s proposal (68%).

5 **Current use of local media is varied and widespread**

There is huge demand for local news with nine out of ten UK adults currently accessing local news through any local medium. This is consistently high across all ages, sex and social grade. Those who use local media also favour using a range of sources for local news with only 9% opting to use only one source. People are in the habit of getting their local information from a range of sources.

There are mixed opinions as to definitions of what “local” means in relation to interest in news stories. Of three options provided, 40% of UK adults chose to receive news on a regional level (broadly in line with the BBC service now), 35% chose news at a county/city level and 23% preferred news about their town/village. In summary, almost six in ten adults defined the local area that they are interested in finding out about in a much narrower sense than the current BBC regional provision caters for and closer to the areas for the new proposed service.

5.1 **Current use of local commercial media**

Local commercial media sources are used for information on a wide variety of topics. News (73%), Weather (57%), Entertainment (53%) and event listings (41%) are the most accessed topics. These are followed by the other elements that would be offered by the BBC Local service in addition to news and weather – Travel (38%), Sport (38%) and community related information (33%). Almost nine-in-ten adults (88%) currently use a local commercial media source to obtain the sort of information that would be given by the proposed BBC service. There is little variation among demographic groups except 16-24 year olds are less likely to currently use this information (77%).

Regional TV programmes are the most commonly used source for news (72% of all who use local media to find out about the subject), sport (67%), weather (78%) and travel (49%) but local newspapers (free / paid for) are more likely to be turned to for community related information (68% / 56%), entertainment (56% / 48%) and event listings (62% / 50%). Free and paid for local newspapers also play a key role in delivering information on local businesses, shops and sales and paid for titles are turned to for family notices and obituaries. Currently local internet websites are used by up to 37% of respondents for local information and attract greater levels of use across all topics from those aged 16 to 24.

As mentioned above, 90% of adults who use local news media use a range of local media sources. This is certainly supported by the large numbers using more than one media source for each area of content (see chart 1 below). All of the patterns are very similar if you look at use of each platform on at least a weekly basis (chart 2).
Chart 1: Regional TV programmes ever used by genre of content

Chart 2: Local radio stations ever used by genre of content
Chart 3: Internet websites for local area ever used by genre of content

Chart 4: Free local newspapers ever used by genre of content
Charts 1 – 6: Q: “You said you use a commercial local media source (i.e. one which carries advertising) to get information about..., which commercial local media do you ever use to find out about this?” Base: Consumers of... News (748) Sport (387) Weather (577) Travel (373) Community related information (340) Entertainment (567) Entertainment listings (445) Local businesses (255) Information on local shops (320) Family notices (139) Obituaries (159) Other (22) – Multiple platforms can be selected for each type of content

Chart 5: Paid for local newspapers ever used by genre of content

Chart 6: Other local media ever used by genre of content
Chart 7: Regional TV programmes used at least once a week by genre of content

Chart 8: Local radio stations used at least once a week by genre of content
Chart 9: Internet websites for local area used at least once a week by genre of content

Internet websites for local area use at least once a week for local news/content

Chart 10: Free local newspapers used at least once a week by genre of content

Free local newspapers use at least once a week for local news/content
Charts 11 – 12: Q: “And which commercial local media sources, if any, do you use AT LEAST ONCE A WEEK to get information about...?” Base: Consumers of... News (742) Sport (381) Weather (571) Travel (364) Community related information (339) Entertainment (561) Entertainment listings (442) Local businesses (250) Information on local shops (315) Family notices (137) Obituaries (155) Other (22) – Multiple platforms can be selected for each type of content
5.2 When are commercial local media platforms being used?

Regional TV programmes and local radio stations are the most frequently accessed platforms with over half of people using each specific medium using it at least once a day. Currently the internet is being used least frequently for local information with 32% using a local internet website at least once a day and 70% using a site at least once a week in comparison to 64% and 50% using regional TV programmes and local radio respectively at least once a day. Local newspapers are less likely to be read daily due to the fact most local titles are printed weekly rather than daily.

The charts below demonstrate how different local media are used at different times of day. It is interesting to note that local websites become the most used medium on weekday lunchtimes as people browse from work and that local media consumption is much more prevalent during the week than at the weekend.

Chart 13: Times of day different media are used (weekday)

Q: "And when do you tend to use/ watch/ listen to...?" Base: Regional TV users (729) Local radio users (562) Local internet website users (489) Users of free local newspapers (656) Users of paid for local newspapers (593)
Chart 14: Times of day different media are used (weekend)

<table>
<thead>
<tr>
<th>Time of day</th>
<th>Adult 16+ using the platform (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morning</td>
<td>Regional TV</td>
</tr>
<tr>
<td>Lunchtime</td>
<td>10%</td>
</tr>
<tr>
<td>Afternoon</td>
<td>30%</td>
</tr>
<tr>
<td>Evening</td>
<td>40%</td>
</tr>
</tbody>
</table>

5.3 Reason for platform use

We found that there are different motivations for using different local media. There were three main reasons why people watch regional TV programmes, the relevance of the stories (43% of those who use the medium), a good range of topics (42%) and easy to use (40%) and this was broadly similar for paid for local newspapers too. Ease of use was the clear most common driver for local websites (52%) and free local newspapers (47%) while people tended to use local radio for other things but also catch the news (47%).

The depth and quality of stories and levels of trust in the source play a minimal role in driving use of local commercial media.

Use of commercial media is embedded in people’s lives and this and the habit of using a range of media sources for different purposes would indicate that the BBC Local service would not have a big impact on local commercial media consumption, especially as some of the key areas of strength for local commercial media would not be covered by the BBC Local service (e.g. entertainment and listings).

There is a high level of usage of current BBC regional services; 72% use BBC TV regional news and only 12% do not currently use any BBC regional service. Around a fifth of UK adults already use BBC local websites. Current usage of regional/local BBC output sits alongside consumption of commercial local media. Indeed, people accessing local information most days from commercial sources are currently the highest users of the BBC’s regional TV offerings. Chart 5 shows that users of commercial services (at least once a week) are more likely to use equivalent BBC services in addition to their commercial consumption than the average UK adult.
On average those who use any BBC local output have about 26 touchpoints with BBC local services every month. Six in ten use a BBC local service at least once a day.

**Chart 15: Usage of BBC local output – all adults v users of commercial services**

Q: “The BBC already provides a number of ways for you to get information on your local area. Do you currently use any of the following...?” Base: All adults aged 16+ (1036) Q: “And which commercial local media sources, if any, do you use AT LEAST ONCE A WEEK to get information about...?” Base: Regional TV users (656) Local radio users (388) Local website users (453)
6 Potential uptake of the proposed BBC Local service is strong

The following introduction was given to participants in the research before a 5-minute film was played to explain the concept of the BBC Local service in more detail. There is an example of the factsheet provided to participants to further explain the concept in Appendix A.

It is part of the BBC’s remit to cater for the different nations, regions and communities of the UK, and encourage interest in the local communities and communications regulator Ofcom has recommended that the UK would benefit from delivering local programmes in new and innovative ways.

As a result, the BBC is proposing a new service that would be available on demand and would be accessed through a computer, laptop or mobile phone with an internet connection.

Currently the BBC show regional content for 15 broad areas of the UK, this new service would split the UK into 60 local areas and for each it would provide news, sport, weather, travel and community related videos. (As shown on the fact sheet).

We’re now going to show you a short film about the new service the BBC would like to launch. Please pay attention to the information in the video as we will be asking your opinions afterwards.

There is strong interest in the proposed service with 68% of UK adults claiming they are likely\(^2\) to use the service, 16% said they would definitely use it. Only 6% stated that they would definitely not use the service and 90% of this group were people who did not currently have broadband at home meaning these were generally people without easy access to the service. Of course, there is greater interest in the service amongst those who already have a broadband internet connection at home (81% likely) and those already watching similar content via video on the internet (85%).

There was little difference between those likely to use the service and those who would definitely, around one-in-five adults’ ages 25 to 54 would definitely use the service if launched.

\(^2\) Net of Would definitely use, very likely and fairly likely from a 7-point scale
Q: “So firstly, how likely or unlikely do you think you would be to use this service at all?” Base: All adults aged 16+ (1036)

The audience profile of those likely to use the service mirrors the broadband audience with those aged under 55 and ABC1s being more likely to use the service. Demand was stronger in the three nations of the UK other than England (76% likely to use within these nations) whilst people in the South of England and London were least likely to use (63% and 65%)

6.1 When and where would the service be used?

As with commercial sources of local information those over 25 years old are more likely to use the service daily. Over a third of the UK population (32%) stated they would use the service at least once a day with 65% likely to use the service at least once a week. Of those likely to use the service 47% would use the service at least once a day and 94% stating they would use the service at least once a week.

---

3 The questions in this section (frequency of use, time of day, length of use and location) were affected by a scripting problem. For the majority of fieldwork, only people who were ‘very likely’ or ‘fairly likely’ to use the service were asked the questions, missing people who would ‘definitely’ use the service. In total 154 of these ‘definitely’ users were missing from the question but the 31 ‘definitely’ users who did complete the question support the hypothesis that if this entire group had completed the questions, results would have been more positive still as ‘definitely’ users gave more positive answers (e.g. 85% of the ‘definitely’ users are likely to use the service every day as opposed to 35% of ‘very or fairly likely’). Results in this section have been modelled to represent how the 154 respondents are likely to have answered.
Use of the service would follow a similar pattern to uses of other commercial media with peak use occurring weekday evenings, again those who use the internet at work show an increased interest in accessing the service at lunchtime on weekdays.

96% of the UK population would use the service for under 30 minutes at a time (75% of those likely to use the service would spend under 30 minutes on the site); there is little interest in using the service for more than 30 minutes on each occasion. The average length of a likely visit to the service is 18 minutes (26 minutes for those likely to use the service. This remains fairly consistent across sex although ABC1s would spend less time than C2DEs due to a need for quick, relevant information whilst, probably for similar reasons under 45s would spend less time than over 45s.

The service would largely be used on the internet at home (44% of the UK population; 64% of those likely to use the service) through a laptop or computer, with 14% (20% of those likely to use the service) anticipating using the service at work and 15% (22% of those likely to use the service) intending to use their mobile devices. This equates to nine-in-ten of those likely to use the service with access to the internet at home claiming that they'll use the service at home and six-in-ten of those likely to use the service with access to the internet at work claiming that they'll use the service at work.

6.2 How the service should be funded

Opinion about using the licence fee to fund the new service was split. A fifth of UK adults (20%) disagreed with the licence fee being used to fund this service with 45% agreeing and 36% neutral. This could be interpreted as eight-in-ten UK adults not objecting to the licence fee being used to fund the service. Support for this use of the licence fee is consistent across age, sex and social grade.

Another set of two questions was included to test the public’s view on whether the service should be launched. We asked how important it was for the BBC to launch the service firstly ‘to you personally’ and secondly ‘when thinking about the needs of society as a whole’ (participants gave an answer between 1 and 10 where 1 was not at all important and 10 was very important). Generally the service was considered more important for society as a whole rather than people individually; 43% of UK adults feel it is important to them personally (score 7 – 10) that the service is launched whilst 59% believe it is important to society as a whole that the service is launched. About one in eight (14%) felt the service was unimportant, even for society as a whole which is a similar figure to the number who felt the licence fee should not fund the service.

6.3 Key drivers of decision to use the new service

The research identified the quality of coverage of stories and regular updates of news stories as being the most important factors influencing a decision to use the service or not. It is also important that the service is easy to access and that a wide range of topics are covered. Less emphasis was placed on the need for the service to be different to existing sources of local information but all other factors measured were considered important.
Chart 17: Factors influencing use of the proposed BBC service

Factors influencing use of the BBC service

Q: “How important or unimportant would each of the following be in influencing your decision whether to use the service” Base: All adults aged 16+ (1036). Mean score in () for each factor which was calculated using the following scale: Very important (4), Quite important (3), Not very important (2), Not at all important (1).
7 Impact of the new BBC Local service on local commercial media is likely to be small

While there are high levels of interest in the BBC’s service it is not at the expense of commercial local media. As illustrated in the table below we do not see a decrease in likelihood to use any of the commercial media sources as a result of the BBC launching a Local video service. There is also still likely to be a high level of multiple platform use with three-quarters (73%) of UK adults claiming they would use 4 or more commercial sources for local information if the BBC Local service was launched. Only 3% of respondents would not use any other source for local information if the BBC service were launched.

Table 1: Use of local media services if the BBC service is launched compared to current use of local media service

<table>
<thead>
<tr>
<th></th>
<th>Already use</th>
<th>Would use if the service is launched</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free local newspapers</td>
<td>65%</td>
<td>76%</td>
</tr>
<tr>
<td>Paid for local newspapers</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td>Local Radio</td>
<td>53%</td>
<td>63%</td>
</tr>
<tr>
<td>ITV regional TV news</td>
<td>72%</td>
<td>69%</td>
</tr>
<tr>
<td>BBC regional TV news</td>
<td>72%</td>
<td>82%</td>
</tr>
<tr>
<td>Local website via a computer</td>
<td>42%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Q "If this service was launched in your area, would you use the following media?" Base: All adults aged 16+ (1036). Q "You said you use a commercial local media source (i.e. one which carries advertising) to get information about..., which commercial local media do you ever use to find out about this?" Base: All adults aged 16+ (1036) – net of mentions of medium across any genre shown.

Use of commercial local media sources remains highest amongst those who already use each local medium. Around 8-in-10 users of each local media source would continue to use commercial local media sources if the BBC service was launched.

Table 2: Use of local media services if the BBC service is launched – comparison of all adults and those already using each local medium

<table>
<thead>
<tr>
<th></th>
<th>Would use</th>
<th>Already using and would continue to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free local newspapers</td>
<td>76%</td>
<td>87%</td>
</tr>
<tr>
<td>Paid for local newspapers</td>
<td>58%</td>
<td>80%</td>
</tr>
<tr>
<td>Local Radio</td>
<td>63%</td>
<td>84%</td>
</tr>
<tr>
<td>ITV regional TV news</td>
<td>69%</td>
<td>77%</td>
</tr>
<tr>
<td>BBC regional TV news</td>
<td>82%</td>
<td>89%</td>
</tr>
<tr>
<td>Local website via a computer</td>
<td>52%</td>
<td>82%</td>
</tr>
</tbody>
</table>

Q "If this service was launched in your area, would you use the following media?" Base: All adults aged 16+ (1036). Q "You said you use a commercial local media source (i.e. one which carries advertising) to get information about..., which commercial local media do you ever use to find out about this?" Base: Regional TV users (729) Local radio users (562) Local website users (489) Free local newspaper users (656) Paid for local newspaper users (593)
Around a fifth of the UK population claim that they would use each commercial source of information less for news alone if the BBC were to launch the Local service, and slightly fewer people would use commercial media less for any purpose. A minority would use each local media more if the BBC Local service was launched which results in a smaller ‘net effect’ as demonstrated in charts 18 and 19 below.

We see a consistent picture of this net effect being less commercial media usage than at present but the BBC Local service would not affect the commercial media consumption for the majority of UK adults be it thinking about news alone or any other purpose. Only internet websites and “other media” have 50% or less using the service the same as without the BBC Local service, this remains consistent when looking at potential users for the service i.e. existing users of commercial local media sources who already have access to a broadband internet connection (as shown in the table below). This does not indicate less use of the service as most respondents are unsure how this would affect their use of commercial local media. It is also important to note that while there are net decreases in use of 10% for news and 20% for any purpose for use of local websites amongst those with broadband access who already use this service state that they are 16% more likely to use local websites for news and 18% for any purpose if the BBC service launched. Paid for local newspapers record the biggest negative effect but as we saw earlier they will continue to provide local information that would not be covered by the BBC Local service. While there are net decreases across all existing local media we see around 1-in-10 existing users of local media with broadband access stating that they are likely to use local commercial services more, with the exception of paid for local newspaper, for any purpose if the BBC service is launched.
Q: “If this service was launched in your area, to what extent, if any, would it affect the amount you use the following services for local news alone?” Base: Regional TV user with broadband access (512) Local radio users with broadband access (412) Local website users with broadband (452) Free local newspaper users with broadband access (487) Paid for local newspaper users with broadband access (427). Average score in () for each factor which was calculated using the following scale: Use a lot less (1), Use a little less (2), Use the same amount (3), Use a little more (4), Use a lot more (5).
Chart 19: Likely changes in use of commercial media FOR ANY PURPOSE as a result of launching the BBC Local service by existing users of commercial local media sources with current broadband access

Q: “If this service was launched in your area, to what extent, if any, would it affect the amount you use the following media overall. Base: Regional TV user with broadband access (512) Local radio users with broadband access (412) Local website users with broadband (452) Free local newspaper users with broadband access (487) Paid for local newspaper users with broadband access (427). Average score in () for each factor which was calculated using the following scale: Use a lot less (1), Use a little less (2), Use the same amount (3), Use a little more (4), Use a lot more (5).

The inclusion of links to other local media sources within the BBC Local service is also likely to generate traffic for commercial services with 43% of UK adults believing that they would click through to other websites if links were provided (49% of those who currently use broadband at home), and a further 40% thinking that maybe they would. Only 13% would not use these links to access additional local content.
Appendix A

Fact sheet - Sheffield

Proposed investment in video on BBC Local

The BBC currently films a limited number of stories in the Sheffield area for BBC Look North

More stories would be filmed if our proposal was approved:

- Up to 10 news, sport and community films each day.
- The latest weather forecast for Sheffield
- An updated news bulletin – ideal for phones
- More local politics – hospitals, schools, recycling etc.

This would all be available on computers through broadband, and increasingly on mobile phones and through an internet connection to your television.

An investment in the future - finding a new and younger audience for news

No increase in licence fee - paid out of other BBC efficiencies.

To be developed alongside programmes like BBC Look North which would continue and benefit from the same investment.

This map shows the area our new team of video journalists would cover in comparison to the current regional television programme boundaries ...