BBC Trust 2014 Service licence review

Review of BBC One, BBC Two, BBC Three and BBC Four

April 2014
1 Introduction

1.1 Background

The BBC Trust is required to review each of the BBC’s services in depth against its service licence once every five years. These service reviews look at how well the services are performing, as well as looking to the future to consider whether any changes should be made in order to respond to audience needs.

This qualitative research is part of a broader 2014 review of BBC One, BBC Two, BBC Three and BBC Four. It constitutes the audience voice within the review, alongside a public consultation and analysis of audience data.

The research explores audience views on the four BBC TV services’ performance against the commitments in their service licences, and against the audience’s own experiences, perceptions and expectations, in a changing TV environment.

In summary, the remits of the respective services are as follows:

- **BBC One:** to be the BBC’s most popular mixed-genre television service across the UK, offering a wide range of high quality programmes. It should be the BBC’s primary outlet for major UK and international events and it should reflect the whole of the UK in its output. A very high proportion of its programmes should be original productions.

- **BBC Two:** to be a mixed-genre channel appealing to a broad adult audience with programmes of depth and substance. It should carry the greatest amount and range of knowledge-building programming of any BBC television channel, complemented by distinctive comedy, drama and arts programming.

- **BBC Three:** to bring younger audiences to high quality public service broadcasting through a mixed-genre schedule of innovative UK content featuring new UK talent. The channel should use the full range of digital platforms to deliver its content and to build an interactive relationship with its audience. The channel’s target audience is 16-34 year olds.

- **BBC Four:** to reflect a range of UK and international arts, music and culture. It should provide an ambitious range of innovative, high quality programming that is intellectually and culturally enriching, taking an expert and in-depth approach to a wide range of subjects.

1.2 Objectives

There were three central objectives for this study:

1. **Performance of the four channels versus current service licences:** how well do audiences feel that BBC One, BBC Two, BBC Three and BBC Four are performing?

2. **Delivering what matters:** to what extent do audiences feel that BBC One, BBC Two, BBC Three and BBC Four are delivering what really matters to them?
3. **Changing behaviours and expectations**: how are audience viewing habits changing in the current climate, what are their expectations for each of the four BBC TV services and how well placed do they feel BBC One, BBC Two, BBC Three and BBC Four are to meet these changes and expectations?

### 1.3 Research rationale and sample

The research was designed with these considerations in mind:

- An audience-centric approach, framing discussion of the BBC channels' performances in audience language, and filtering channel evaluation through their priorities from TV today
- Grounding perceptions of channels in audiences’ considered real-world behaviour – rather than stereotypes or top-of-mind thoughts
- Building on accessible BBC data (e.g. Pulse, BARB) and wider market information (through a stage of desk research)
- Providing a wider context to the performance of the BBC’s channels, by recruiting respondents ‘blind’ to the purpose of the research and looking at BBC channels amongst their relevant competitor sets
- Recognising the different roles that audiences adopt when talking about the BBC (especially ‘citizens’ vs. ‘consumers’)

The research consisted of three main elements:

- **TV landscape desk review**

  Before speaking to audiences, MTM conducted a review of audience and channel data and expert opinion, with the aim of:
  - Understanding changing patterns in TV consumption (e.g. platforms, channels, viewing behaviour, second screening)
  - Identifying trends in audiences’ content preferences and needs (e.g. live or shared viewing experiences, or the evolution of programme formats within different genres), considering how the wider social and economic climate can influence TV programme expectations and appeal
  - Highlighting competitor channel and content success stories
  - Generating thinking around future challenges for the BBC’s channels, and identify areas to explore with audiences

- **Extended pre-task (completed over 2 weeks)**

  Before attending the group discussions, each respondent took part in a two-week pre-task, consisting of three elements:
Part 1: Personal online blog entries (video and text) around the overall question of what matters most from TV channels and programmes today – allowing audiences to define what matters most to them in an open, uninfluenced way

Part 2: Real-world viewing diary, requiring respondents to record details of their TV viewing consumption (e.g. channels, content, platforms, live vs. time-shifted, viewing context, viewing satisfaction) over a 7 day period, grounding the research in an understanding of respondents’ own real-world behaviour

Part 3: Retrospective review, prompting respondents to consider their viewing behaviour in relation to specific statements designed to reflect the BBC Trust’s current performance measures

- 16 x extended group discussions (2 hours long, with 6-7 respondents in each)

  Each group focused on:

  - Understanding how TV consumption is changing: mapping changes in TV consumption, identifying common themes in changing viewer needs, and exploring which channels and brands (e.g. BBC, Sky, YouTube) are delivering most effectively on audience needs today
  - Mapping audience priorities: ranking what audiences want from TV channels today by importance, and mapping channels (BBC and competitors) against these priorities
  - Evaluating individual BBC channels: focused review of the BBC channels and their genres, first as an open exploration and then evaluating channel performance against service licence statements, reworded to reflect audience language (each group evaluated a maximum of three channels)
  - Assessing channels’ contribution to the BBC Public Purposes: exploring perceptions of the channels’ contribution to the BBC’s public purposes – both as individual channels and as a whole
  - Exploring audience expectations for the future: understanding audience priorities in the context of potential future scenarios, and identifying key future challenges for each of the BBC’s channels

Sample

The groups were chosen to reflect the TV-viewing population, rather than simply the target audience of each channel, as this would have limited our ability to identify where specific channels are potentially underserving certain audiences. Within the sample, we recruited:

- A balanced gender mix
- A wide range of ages (from 16 to 75)
- Audiences in several locations across the UK, including urban and rural, and including Wales, Scotland and Northern Ireland
- A broad socio-economic mix, with groups divided between ABC1 and C2DE audiences
- A mix of ethnic backgrounds, especially in urban areas
- A mix of viewing of the BBC channels (including a mix of approval ratings), with groups divided by heavier and lighter viewers of specific BBC channels
- A mix of viewing of competitor channels, different TV genres, and daytime and peak
- A mix of viewing of ‘opt out’ (vs. networking) programmes in the nations
- A representative mix of main household TV platforms.

Our sample was structured as follows:

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**Location key:**
- England
- Northern Ireland
- Wales
- Scotland
2 Management summary

The research explored audience views on the four BBC TV services’ performance against the commitments in their service licences, and against the audience’s own experiences, perceptions and expectations, in a changing TV environment.

Each BBC channel was evaluated against the different areas of its remit with the specific terms of the service licences translated into more audience-relevant language and experiences.

**BBC One** was perceived as delivering strongly against its remit in terms of consistently producing high quality content - particularly in drama and landmark factual content (both of which were highly regarded and valued across audiences) - promoting education and learning across a wide range of programming (from factual through to scripted), and being the main destination for events that bring the nation together (sporting and cultural).

There were more mixed reactions to BBC One’s role in delivering original, innovative and ground-breaking programming. Whilst audiences identified high profile examples of this in series such as *Sherlock, Luther* and *Africa*, there were wide audience perceptions of the channel being too reliant on familiar titles and tending to ‘play it safe’ with programming and scheduling. Negative attitudes towards BBC One’s delivery on this area of its remit were stronger amongst lighter viewers of the channel.

BBC One was felt to offer a range of different comedy formats (i.e. panel shows, stand-up, chat shows, sitcoms), but lacked quality family sitcoms - reflecting a perceived broader issue across TV channels. Panel shows on BBC One could create more negative attitudes (compared to other channels, including BBC Two) due to higher audience expectations of seeing original sitcoms on the channel.

BBC One’s Saturday night and (to a lesser extent) daytime offer were impacting negatively on perceptions of entertainment on the channel amongst lighter viewers, who felt that these parts of the schedule needed to be freshened up.

The channel was strongly associated with quality, established talent, but there were some perceptions of an over-reliance on familiar faces, rather than giving opportunities to fresh talent.

Audiences generally felt that BBC One was performing well in reflecting the UK’s nations and regions (with some variation in specific nations based on mixed attitudes to the quality of opt-out programming). However, it was not generally perceived to be representing different groups in society and reflecting diversity in the UK – with a feeling that there was a lower amount, and quality, of portrayal of ethnic minorities and people in lower social grades.

**BBC Two** was strongly associated with programming that increases audiences’ knowledge and understanding (driven by documentaries, but applicable to a range of genres on the channel) and was also felt to cover art, culture and music well (through both regular programming like *Later with Jools Holland* and *The Culture Show* and comprehensive coverage of events like *The Proms*).

BBC Two was perceived as offering a range of high quality and distinctive drama programming and some original and experimental comedy series (e.g. *The Trip*) - although panel shows tended to be the top of mind association in relation to comedy on the channel.
Whilst there were perceptions of BBC2 delivering on its remit for original content, the channel was also associated with long running series across genres (e.g. Top Gear, University Challenge, QI) and there was some feeling that BBC2 could take more risks with programming.

As with BBC One, BBC Two was felt to show programmes that represent different parts of the UK, but was not generally perceived as reflecting or exploring diversity in the UK.

At an overall level, there was a lack of clarity over how BBC Two is distinct from BBC One, with wider audiences (beyond heavier BBC Two viewers) struggling to explain the role and offer of the channel. This was reflected in some misattribution and confusion over why certain programmes are shown on BBC Two, rather than BBC One (e.g. Line of Duty, Mock the Week) and leading to some distinct areas of BBC Two’s remit (e.g. being challenging and experimental) not cutting through. It also meant that there was a lack of appreciation of BBC Two’s role in delivering quality mainstream programming (e.g. Top Gear, Dragon’s Den).

**BBC Three** was widely recognised as being aimed at younger audiences and perceived as offering something different to other BBC channels on this basis.

BBC Three was highly valued by a minority of viewers, who were more passionate about and engaged with the channel’s role in educating, as well as entertaining younger audiences, and being a ‘testing ground’ for the BBC. However, across the majority of 16-34 audiences, BBC Three’s role was much lower key and it was predominantly seen as a destination for easy entertainment (e.g. Family Guy, Sun, Sex and Suspicious Parents, Don’t Tell the Bride). Although this type of immediate and typically lower involvement entertainment programming had appeal amongst younger audiences, they also limited overall value associations with the channel.

Across this wider audience, BBC Three also generally lacked the strong brand engagement of some commercial TV channel and online brands, such as YouTube, E4 and Channel 4 and Netflix.

BBC Three was associated with experimentation, launching new programmes and promoting fresh talent, however, the best recent examples of this (e.g. Him and Her) often struggled to cut through against other content on the channel (e.g. Family Guy). Associations with original programming were also reduced by the perceived volume of repeats on BBC Three. Whilst expected and enjoyed to a certain extent (e.g. Family Guy – because of the strong appeal of programme and later evening scheduling fit with viewer need states), the channel’s association with repeats (often of lower costs entertainment formats), was impacting on overall quality and value perceptions.

The channel was not associated with covering cultural events that are relevant to youth audiences or using online platforms in an innovative or experimental way.

BBC Three was perceived as having some knowledge-building value across its programming (e.g. 60 Seconds news bulletins, youth focused documentaries), but this was a low profile and even unrecognised aspect of the channel’s offer for many.

BBC Three was felt to represent different groups in society (e.g. based on ethnicity, sexuality, social grade) and represent diversity in the UK more naturally and authentically than other BBC channels.
**BBC Four** was felt to deliver programmes of exceptionally high quality, with heavier viewers especially positive about the channel. It was seen as unique in comparison to mainstream channels, through being demanding of its audience and showing programmes that would not be found elsewhere.

Its European drama was highly valued for its quality (in terms of writing, acting and production), and was seen to represent the rest of the world in a natural and nuanced way. Its factual content was seen as being ambitious in its range (showing specific topics alongside wider subjects, and local coverage alongside global), and offering depth and context, as well as approaching familiar topics from fresh angles (e.g. popular music documentaries). The channel was seen to be performing well in reflecting the UK’s cultural activity, especially with music (through its documentaries and live recordings).

Comedy content on the channel was more low-key, with some programmes such as *Ever Decreasing Circles* valued but not seen as original, and the channel’s more contemporary titles (e.g. *Parks and Recreations*) often not featuring on audience’s radars.

While archive footage on the channel did uncover hidden gems for some audiences, others found that it took away from its reputation for being ground-breaking.

Beyond its music content, the channel was seen as having a fairly niche appeal, and was perceived as less accessible among non-viewers (particularly among those in lower socio-economic grades – although this was not exclusively the case).

**The four BBC channels** overall were seen to be performing different roles, although there was a lack of clarity over BBC Two’s primary purpose. For some, its brand perceptions (serious, intellectual, challenging, old-fashioned) did not fit with its more entertainment-focused and mainstream content offer (e.g. *Top Gear, Great British Bake Off, Mock the Week*). BBC One was associated with quality and inclusive entertainment, drama and documentaries, and for showing events of national importance; BBC Three’s role was seen as being the youth channel, with comedy, entertainment and documentaries shown in an experimental and informal way; BBC Four’s role was seen as being high-brow and educational, through its factual programming, music content and European drama.

There was a lack of clarity over how the channels relate to each other – for example when a repeat is shown on a different channel or a series is moved to a new channel. In particular, some found it hard to understand the relationship between BBC One and BBC Two, and there was low awareness of any connection between BBC Two and BBC Four.
3 Overview of desk research

3.1 Consumption behaviour patterns

The study began with a period of desk research, intended to frame the attitudes of our respondents with recent data around the viewing habits of UK audiences. Where not otherwise indicated, the data has been sourced from Ofcom’s Communications Market Report (August 2013).

Despite the increasing accessibility of a number of different entertainment sources, the UK remains a TV-loving nation. In 2012, driven by high viewing figures for the London 2012 Olympic Games, TV viewing was at a record high, with an average of over 4 hours of daily viewing per person. This figure has increased for all age groups since 2004 except for 16-34s.

This viewing still takes place overwhelmingly live, and on a TV set: of total viewing, 87% takes place on a TV set, and 88.5% of that is live (with 9% time-shifted via DVR). The proportion of single-set homes has risen over the past ten years, and in 2012 over half of TVs sold were 33” or more – indicating the enduring appeal of high-quality, and often shared, viewing experiences.

Increasingly, families are gathering in the living room to watch TV just as they were in the 1950s – but now delivered on bigger, wider and more sophisticated sets...

Ofcom

The trend towards families watching TV together on one set has also been influenced by the broader economic climate, with high youth unemployment and rising property prices leading to 3.3 million (25%) of 20-34 year olds living with their parents in 2013.¹

However, this live TV viewing is becoming increasingly supplemented by viewing on different devices. Mobile devices continue to proliferate – the IAB predicts that the penetration of tablets in the UK will reach 50% in 2014², driven by affordable models such as Tesco’s Hudl, and smartphone penetration is set to reach 75%. The TV set itself is also undergoing changes – 7% of UK households had a Smart TV in Q1 2013, with a further 27% using internet-enabled set-top boxes, such as TiVo or Xbox, to allow users to access new online services from their TV.

One of the implications of the rise in access to connected devices is an increase in non-linear TV viewing. In 2012, 11.5% of all viewing was either time-shifted via DVR (9%) or via VOD (2%). TVs have now overtaken PCs as having the highest share of long-form VOD viewing.

These changes in device ownership and access to content have led to a proliferation of viewing norms, leading to different situations, such as:

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¹ UN, Trends in International Migrant Stock (2013); ONS, Young Adults Living With Parents (Jan 2014); Parliamentary Briefing Papers, The Ageing Population (2010)
² http://www.marketingmagazine.co.uk/article/1216797/iab-engage-smartphone-penetration-reach-75-2014
• **Out-of-home viewing:** With 74% of smartphone users (and 54% of tablet users) now watching audio-visual content out-of-home, the number of people using iPlayer on mobile devices is now roughly equal to the number who use it on desktops. Out-of-home viewing has become a significant proportion of overall viewing. Increasingly, this is not just limited to time-shifted viewing, with live events such as 2013’s Wimbledon final proving popular on mobile devices.

• **Non-peak TV viewing:** The increase of out-of-home viewing on mobile devices also means that there are more opportunities to watch TV outside of traditional peak hours, with a single piece of content increasingly being watched in different locations over a period of time.

• **Time-shifted viewing for certain genres:** While news (97%) and sport (92%) are most likely to be watched live, drama (66%), soaps (70%) and films (80%) are most likely to be watched time-shifted.

These different viewing situations are accompanied by a proliferation in new viewing mind states:

• **Different mind states for different devices:** Giving ‘I missed it when it was on TV’ as a reason for watching VOD is more common for TV than other platforms (PC, smartphone, tablet), while watching VOD ‘just to pass the time / relax’ is more commonly given as a reason for other platforms than TV.

• **Less focused viewing:** The increase of smart mobile devices means that the audience’s attention is often less focused on TV than before. Just over half (53%) of UK adults are regular multi-taskers while watching TV, with one quarter (25%) regularly interacting with or communicating about the content they’re watching, and half (49%) regularly conducting media tasks unrelated to what they’re watching.

Alongside these changes in viewing norms, the channels available to UK viewers have also shifted significantly since the last service licence review:

• **Multichannels:** Multichannels continue to grow their share of viewing (especially among young audiences), with nearly half (48%) of all viewing now coming from non-terrestrial channels, albeit driven by the increase of PSB portfolio channels. This is reflected by their content spend, which is increasing faster than for terrestrial channels.

• **Subscription services:** Netflix reached an estimated 1.5m UK subscribers in the UK last summer, allowing users to stream high-quality original content such as *House of Cards* and *Orange is the New Black*, with all episodes available at once.

• **Free streaming services:** Websites such as YouTube (19m monthly unique visitors in 2013)\(^3\) and Vube (2.2m monthly unique visitors), continue to grow as a proportion of viewing time. Among younger viewers especially, the perceptions of them as original, experimental and democratic are shaping expectations for their wider TV viewing.

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3.2 **Content trends**

Data from the BBC’s Pulse panel shows that, between 2007 and 2012, since the last service licence review, AI (appreciation index) scores increased for each terrestrial channel. When speaking to audiences, this seems to have been influenced by:

- The increased choice of drama series across the channels, which are strongly linked with perceptions of quality
- The control that VOD and PVR services give to audiences, meaning that they spend more time watching what they actually want to watch
- Improved technology on TV sets and other devices (such as tablets), which have enhanced viewing experiences (e.g. HD quality, increased screen sizes).

However, since 2012, after 6 years of steady growth in the audiences’ overall perceptions of the quality of BBC Television, in 2013 average AIs declined for all the channels except BBC Two. This is reflective of a wider industry trend, which could partly be explained by a lessening of the impact that improved technology (HD, increased screen sizes) is having on the viewing experience.

Ofcom’s annual tracker, which measures whether audiences feel that TV today has improved, got worse or stayed the same, shows that more people think TV has got worse (31%) than improved (13%) – a scenario which has been steady for several years. Understanding audience attitudes indicates that this dichotomy may have emerged from:

- The increased volume of repeats across all channels
- The higher number of channels (meaning quality is more thinly spread across them)
- A lack of genuinely new, rather than derivative, programming.

There’s more rubbish, but there’s more quality as well, and you’ve got more choice over what to watch

30-54, C2D, London

It’s almost like you’re surfing the net – there’s so much crap, there’s only a certain amount of good channels

18-29, ABC1, London

Our desk research, pre-task analysis and workshop discussions helped to identify several overarching themes about audience attitudes to TV today:

- **A high volume of reality TV can drive low-quality perceptions:** While audiences across the age spectrum enjoyed reality TV, it was also often associated with derivative or low-budget formats. There was increasing appetite across all ages for reality TV where ‘you can learn something’ – e.g. social documentaries like *Educating Yorkshire* or *The Tube*
• **There is a perceived dominance of panel shows and a lack of fresh comedy:** Many audiences pointed out the high volume of comedy panel shows, with some of them described as ‘tired’ in terms of the format, talent and style of humour, and even newer shows tending to often feel derivative. People pointed to a lack of fresh sitcoms that cater to the whole family, while remembering a wealth of popular British shows from previous eras.

• **Non-peak programming is important:** The disparity in quality and options between programming during peak-time and during daytime and night-time was pointed out by a range of people, across age groups. It was observed that the multichannels are better at serving audiences at these times – offering the reliability of high-quality repeats (often US content for younger audiences).

• **Shared viewing experiences are valued:** In an increasingly fragmented viewing landscape, audiences value stand-out programming which brings people together either around the TV or in conversation – often fuelled by buzz on Twitter and Facebook.

• **There is appetite for TV to address contemporary issues:** Audiences, especially younger (aged 16-34), were looking to TV programmes to address controversial and hotly debated contemporary topics in an accessible and relatable way. Programmes such as Channel 4’s Benefits Street (and the debate which surrounded it), or Hayley Cropper’s suicide on Coronation Street were identified as examples of this. The rise of social media as an integral part of the viewing experience for many young viewers has contributed to the role of TV in addressing topics that encourage debate.
4 BBC One: detailed findings

4.1 Overview

Audience perceptions of BBC One’s overall contribution to the four relevant purposes for this review were as follows:

- **Stimulating creativity and cultural excellence**
- **Promoting education and learning**
- **Representing the UK’s nations, regions and communities**
- **Bringing the UK to the world and the world to the UK**

BBC One was perceived as contributing most strongly to ‘Promoting education and learning’, through a wide range of programming on the channel (driven by landmark natural history documentaries, but applicable to other genres, such as drama). It was felt to perform well in ‘Bringing the UK to the world and the world to the UK’, through factual programming and coverage of international events, as well as exporting high successful programme brands. BBC One was perceived as contributing well to representing the nations and regions of the UK, but not the different groups in society (e.g. in terms of ethnicity and social grade). The channel was perceived as contributing least on ‘Stimulating creativity and cultural excellence’, often due to perceptions of an over-reliance on established programming.
Audience evaluation of BBC One against the different areas of its service licence highlighted perceived strengths and weaknesses in the channel's performance:

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<tr>
<th>Strong performance</th>
<th>Mixed performance</th>
<th>Poor performance</th>
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<tr>
<td>Delivering high quality programming</td>
<td>Offering something different to other channels</td>
<td>Reflecting and exploring the diversity of UK society</td>
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<td>Bringing people together with coverage of major sporting, cultural, entertainment and other events</td>
<td>Delivering original, innovative or ground-breaking programmes</td>
<td>Offering a broad range of entertainment programmes</td>
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<td>← Mixed performance amongst Heavier BBC One viewers</td>
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<td>Promoting education and learning</td>
<td>Offering a broad range of comedy programmes</td>
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<tr>
<td>Showing high quality landmark factual programmes</td>
<td>Bringing arts and culture to mainstream audiences</td>
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<td>Offering a broad range of drama programmes</td>
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<td>→ Poor performance amongst Younger BBC One viewers</td>
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4.2 BBC One’s role in stimulating creativity and cultural excellence

BBC One was seen as delivering some original, innovative and ground-breaking programming.

Key drivers and examples of this were:

- Drama series which were perceived as different in their production or tone (e.g. *Sherlock*, *Luther*)
- Landmark factual programming, which was perceived as ground-breaking (e.g. David Attenborough natural history documentaries)
- Programming that provides a fresh spin on an established format (e.g. *Mrs Brown’s Boys* was seen as a traditional comedy format, but also as being original and unpredictable)
for deliberately breaking the fourth wall; The Voice was felt to offer a fresh spin on talent shows amongst younger viewers because of its blind audition process)

- The lack of repeats on BBC One (at peak).

David Attenborough’s documentaries are ground-breaking...you never see anything like that anywhere else

30-54, ABC1, Gloucestershire rural

I’d say Luther is really original and different to what I’d expect on BBC1

18-29, C2D, Gloucestershire rural

However, there were wide audience perceptions of BBC One being over reliant on familiar titles and tending to ‘play it safe’ with programming and scheduling.

BBC One’s association with original programming was stronger amongst heavier viewers, with lighter viewers feeling that there were only occasional examples of this. There was a sense, particularly amongst lighter viewers, that BBC One predominantly shows long-running programmes (e.g. EastEnders, Casualty, Antiques Roadshow) and sticks to established formats, talent and scheduling. This can create a lack of engagement and lead to more original and positively perceived programming struggling to cut through and impact on attitudes to the channel.

More broadly, there can be perceptions that BBC One avoids taking risks as a channel, for example in terms of experimenting with new types of programming, less predictable scheduling or addressing controversial topics and creating debate.

I think generally you always know what programmes are on BBC1 – it’s quite predictable. With other channels you’re more likely to come across something unpredictable

30-54, C2D, Cardiff

It’s conservative...but I think we all pay the licence fee, so why shouldn’t they be a bit more daring?

30-54, C2D, Cardiff

BBC One was perceived as offering a broad range of quality drama programming.

The channel is strongly associated with original British drama and delivering high quality production, writing and acting (generally recognised talent). A number of high profile series were highlighted as reflecting these values, including Sherlock, Luther, Call the Midwife and Death in Paradise.
There was some disappointment regarding the frequency and length of BBC One drama series favourites such as *Sherlock*. This was particularly evident amongst 16-34s who made comparisons with their experiences of US drama, which have much longer and typically more frequent seasons.

Whilst BBC One drama had a strong reputation across different audiences, there was some negativity amongst lighter viewers regarding the volume of returning and long running series on the channel, with *Silent Witness*, *Waterloo Road* and *Casualty* amongst the examples cited. This led to some perceptions of BBC One competitors, such as ITV and Sky, offering more variety in their drama programming.

**BBC One was perceived as offering a broad range of comedy programming, although lacking depth in terms of quality family sitcoms.**

The channel was associated with different comedy programme formats due to the awareness and appeal of at least one or two high profile examples of each – for example:

- Sitcoms (e.g. *Mrs Brown’s Boys*, *Miranda*)
- Panel shows (e.g. *Have I Got News For You*, *Would I Lie To You*)
- Stand-up (e.g. *Live at the Apollo*)
- Comedy chat shows (e.g. *The Graham Norton Show*)

However, there was some criticism of the range of sitcoms on BBC One, with family lifestage audiences highlighting the lack of scripted comedy that could be shared as a family. There were also comments amongst lower social grade audiences that BBC One comedy, with the exception of *Mrs Brown’s Boys*, could feel quite ‘middle class’ in focus and target audience (with *Miranda* cited as an example of this).

**BBC One was felt to offer less breadth across its entertainment programming, with issues around the channel’s Saturday night schedule significantly influencing perceptions.**

Whilst some BBC One entertainment programmes had broad appeal (e.g. *The Voice*, *Dr Who*) and the scheduling familiarity was valued by older, heavier viewers, there was a strong sense that the channel’s Saturday night offer needs freshening up. This focused on what was perceived as predictable scheduling and familiar, long-running programmes (e.g. *Casualty*).

Amongst lower social grade, family lifestage audiences, ITV was identified as having a more appealing Saturday night schedule (with audiences referencing Ant and Dec’s *Saturday Night...*
Take Away, X Factor, Britain’s Got Talent, Splash, and The Jonathan Ross Show). This was identified as being due to:

- Perceptions of consistency and variety across ITV’s schedule on Saturday nights (i.e. the family can watch the channel together across a number of programmes, from early evening onwards)
- Perceptions of consistency and variety of Saturday night programming on ITV across the year (BBC One’s appeal in this timeslot was felt to be more dependent on when specific programmes were airing – e.g. The Voice)
- An attitude that ITV Saturday night programming was more accessible and inclusive overall than BBC One shows (e.g. despite broad appeal, Strictly Come Dancing was highlighted as feeling very middle class)

BBC One’s daytime offer was also impacting negatively on some audience perceptions of entertainment on the channel.

Whilst there was strong appeal for specific programmes across BBC One’s offer (e.g. The Sheriff’s Are Coming, WPC 56 and Pointless), there was some feeling that the schedule was predictable and uninspiring - particularly amongst younger and lower social grade audiences.

Where this was felt, BBC One’s daytime entertainment offer was perceived as lacking:

- A sense of being contemporary and of the moment
- Accessibility and relevance (to younger and lower social grade audiences)
- Variety.

Through live broadcast magazine and chat shows, involving a range of topics and guests, ITV was perceived as delivering more on these areas (e.g. This Morning, Loose Women and The Alan Titchmarsh Show).

BBC One programming was perceived as featuring high quality established talent, although there were some perceptions of an over-reliance on familiar faces.

BBC One was associated with respected, trusted and in some instances loved talent such as Sir David Attenborough, David Dimbleby, Huw Edwards, Gary Lineker and Miranda Hart.
The channel was also identified as the place where audiences had first been introduced to new, and now established, talent such as Benedict Cumberbatch (Sherlock), Idris Elba (Luther) and Brendan O’Carroll (Mrs Brown’s Boys).

However, there were more limited associations between BBC One and younger or female talent with some perceptions of programming tending to often feature older, established, male personalities (e.g. Bruce Forsyth, John Craven).

A lack of development and ownership of younger talent on BBC One was an issue highlighted across age groups (although more so by 16-34s), with perceptions of younger talent being brought in from competitors (e.g. Emma Willis and Holly Willoughby on The Voice) influencing attitude.

4.3 BBC One’s role in promoting education and learning

BBC One was strongly associated with being educational and enabling learning in audiences.

The channel was perceived as promoting learning through a variety of different programmes. Landmark factual programmes (e.g. Frozen Planet, Africa) were a key driver of perceptions, due to their:

- High quality and even ground-breaking production
- Engaging and knowledgeable talent (e.g. Sir David Attenborough)
- Entertaining and accessible approach
- Fit with shared family viewing, creating TV events and generating discussion.

A wide range of factual entertainment programming on BBC One was also highlighted as delivering educational value across the schedule, for example:

- Countryfile: learning about different parts of the UK
- The One Show: accessible learning across a wide range of topics
- Masterchef: learning new recipes and practical cooking skills
- Fake or Fortune: learning about art and forgery
- Bargain Hunt: learning about antiques.
Some of the drama content on BBC One was also felt to have educational value, with viewers citing *The Village* (learning about life in Britain in the early 20th century), *Call the Midwife* (learning about life and midwifery in the 1950s) and *Holby City* (learning about medicine today) as examples. This was perceived as a point of difference of BBC One compared to some other channels, where drama was perceived as more purely entertainment orientated.

**4.4 BBC One’s role in reflecting the UK’s nations, regions and communities**

BBC One was widely perceived and valued as the place where audiences come together to share in national and international events.

Across audiences, BBC One was recognised as the main destination for events that unify people across the UK, covering sport (e.g. The Olympics, Wimbledon), music (e.g. Glastonbury) and royal/state occasions.

The channel was valued for its coverage of these events, which was described as reassuring, trusted and quality (e.g. high production values, established and knowledgeable talent, intelligent approach). The lack of adverts on BBC One and, therefore, minimal interruption of coverage of events on the channel was also a significant benefit over commercial competitors for many.

However, whilst BBC One was generally positively perceived for the nature of its coverage of national and international events, for some viewers [mainly from lower social groups], ITV was perceived as offering a more informal and accessible approach when both channels offered coverage (e.g. The Royal Wedding).

**BBC One’s retention of major sporting events was perceived as important in the context of an increasingly fragmented and expensive TV sports landscape.**

Audiences highlighted the impact of pay TV providers contesting and sharing sports rights (e.g. Sky and BT) as ultimately leading to increasing costs and fewer opportunities to view. Therefore, BBC One’s coverage of live sport (e.g. The World Cup, The Six Nations, Wimbledon) and highlights (e.g. *Match of the Day*) was both expected and valued. This was a particularly important area for younger and lower social grade audiences, where sport can be the main relationship that they have with BBC One.

There were mixed attitudes to how well BBC One was performing in offering a range of national and international sporting events. There was negativity around the loss of F1 from BBC One,
although some awareness of live FA Cup coverage returning to the channel in 2014-15 season
to counter this.

Generally, the channel was felt to cover sport well, with audiences describing coverage as high
quality, knowledgeable, unifying and inspiring (e.g. The Olympics and The Six Nations). Attitudes
to football on BBC One were more mixed, with some feeling that Sky Sports’ coverage was
superior in its depth of analysis, sense of drama and excitement and use of technology.

**Audiences generally felt that BBC One reflects the UK’s nations and regions, although attitudes
were more mixed in the nations themselves.**

BBC One programmes were perceived as delivering on this area of the channel’s remit in a
number of different ways - specifically:

- Programmes featuring people and places from across the UK (e.g. *Countryfile, The One
  Show, The Voice*)
- Programmes that are set in different parts of the UK (e.g. *Mrs Brown’s Boys, Hinterland*)
- Programmes that are made in different parts of the UK - and where there is audience
  awareness of this (e.g. *Casualty, Dr Who*).

They represent different parts of the UK through *Countryfile*

18-29, C2D, Manchester

There’s programmes like *Casualty and Dr Who* that are made more locally to us

55+, ABC1, Cardiff

**BBC One was not always perceived as delivering positive and contemporary portrayal in
programming produced for each of the nations.**

There was some recognition of BBC One opt-out programming amongst audiences within each
of the nations and value attached to this, although the full range of programming being
produced was generally not fully appreciated.

Across the nations there was a sense that the quality of opt-out programming on BBC One had
a greater impact on audience satisfaction than the quantity, particularly amongst 16-34 and
lighter BBC One viewers. In this context, ‘quality’ was defined as:

- Opt-out programming that is perceived as comparable in quality to network and
  competitor channels (particularly in scripted drama and comedy)
- Opt-out programming with positive national portrayal that is shown on network
- Opt-out programming that presents a positive and contemporary representation of the
  nation (e.g. multi-cultural, avoiding “dated” stereotypes).
In this context, there were different attitudes across the nations to portrayal in BBC One programming:

- In Wales, audiences were generally more positive, citing examples such as *Hinterland*, Rhod Gilbert’s *Work Experience* (shown on BBC One Wales and BBC Two network), *The Story of Wales* and *Dr Who* (produced in Wales) as examples of BBC One representing the nation well.

- In Scotland and Northern Ireland, audience attitudes were more mixed, with some negativity regarding what was perceived as less contemporary portrayal of each nation in opt-out programming and a lack of high quality recent programming.

It should be noted that in the nations, regional news coverage often had the most influence on perceptions and tends naturally to have a more negative focus (e.g. coverage of The Troubles in Northern Ireland).

**BBC One was not generally perceived as representing different groups in society and reflecting diversity in the UK.**

There were issues highlighted around the portrayal of ethnicity on BBC One, particularly by people from different ethnic groups - these included:

- An overall lack of representation across programming on the channel.
- A sense that it can feel forced and tokenistic – e.g. *EastEnders* was seen as including one family at a time of different ethnic origins, as part of the programme’s remit.
- A feeling that it is sometimes inauthentic or stereotyped – e.g. some felt that *Citizen Khan* was not an accurate portrayal of British Muslims and relied on clichéd humour.

I don’t think that they represent people from ethnic minorities well, especially when it comes to drama and comedy; there’s not as much and it’s something I think they should do more of

30-54, C2D, Cardiff

It often feels tokenistic, like it’s a box ticking exercise. Like they’ll have one black, then one Asian family and so on in *EastEnders*

18-29, ABC1, London

There was a perception that BBC One does not represent lower social grade audiences, in terms of:

- An overall lack of programming made for this audience (i.e. comments that the channel’s content is predominantly for ‘middle class’ viewers)
- A lack of positive ‘working class’ people or characters in BBC One programming
- The channel not addressing contemporary issues that relate to this audience
Negative attitudes toward BBC One’s representation of ethnicity and social grade were more evident amongst lighter BBC One viewers, lower social grade and younger audiences. There were some positive examples of BBC One representing different groups in society cited - these included:

- *Eastenders*: which divided opinion; some viewers saw the programme as a positive example for covering areas and issues such as ethnicity, sexuality, poverty across its storylines
- *The Sheriffs are Coming*: which was identified as providing a contemporary and authentic view of some of the issues facing lower social grade audiences.

In comparison to BBC One, Channel 4 was widely identified as reflecting diversity in the UK to a much greater extent across its programming, and typically in a more natural and authentic way - examples highlighted included:

- *Benefits Street*: which provided a contemporary view of the issues facing lower social grade groups and created national discussion and debate
- *Top Boy*: which was seen as an authentic representation of gang culture and life on a London housing estate
- *The Undateables*: which was praised for its portrayal of people with disabilities.

I think Channel 4 definitely represents different groups in society better. They did *The Undateables*, which I thought was really good. It’s got a bit of humour and it’s not so serious that you don’t want to watch it, but it makes you think differently about the issues; it creates understanding. I don’t think you’d ever see a programme like that on BBC1.

30-54, C2D, Cardiff
4.5 BBC One’s role in bringing the UK to the world and the world to the UK

BBC One was perceived as bringing the world to the UK through a range of programming.

Key drivers and examples of this were:

- Natural history documentaries (e.g. Frozen Planet, Africa)
- Coverage of international sporting events (e.g. The Olympics, The World Cup)
- Drama with an international setting (e.g. Death in Paradise).

BBC One was perceived as bringing the UK to the world through the export of high profile series.

Examples highlighted by audiences included:

- Natural history documentaries (e.g. Frozen Planet, Africa)
- Drama series (e.g. Sherlock, Dr Who)
- Coverage of royal occasions (which was perceived as being seen internationally).

This was perceived as typically being landmark and quality programming (the best of British TV) and, therefore, positively portraying the UK global audiences.
5 BBC Two: detailed findings

5.1 Overview

Audience perceptions of BBC Two’s overall contribution to the four relevant purposes for this review were as follows:

- **Stimulating creativity and cultural excellence**
- **Promoting education and learning**
- **Representing the UK’s nations, regions and communities**
- **Bringing the UK to the world and the world to the UK**

BBC Two was seen as contributing strongly to ‘Promoting education and learning’ and ‘Bringing the UK to the world and the world to the UK’ through its factual programming (with documentaries on the channel a key driver of perceptions). It was perceived as contributing to ‘Stimulating creativity and cultural excellence’ through its arts and culture, drama and (to a lesser extent) comedy programming, however, a lack of clarity and distinctiveness over BBC Two’s overall offer was reducing its impact in this area. BBC Two was perceived as contributing relatively well to representing the nations and regions of the UK (although less associated with this than BBC One), but not the different groups in society (e.g. in terms of ethnicity and social grade).
Audience evaluation of BBC Two against the different areas of its remit highlighted perceived strengths and weaknesses in the channel's performance:

<table>
<thead>
<tr>
<th>Strong performance</th>
<th>Mixed performance</th>
<th>Poor performance</th>
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</thead>
<tbody>
<tr>
<td>Delivering high quality programming</td>
<td>Offering something different to other channels</td>
<td>Reflecting and exploring the diversity of UK society</td>
</tr>
<tr>
<td>Promoting education and learning</td>
<td>Delivering original, innovative or experimental programming</td>
<td>Working closely with BBC Four</td>
</tr>
<tr>
<td>Showing high quality and distinctive drama</td>
<td>Shows distinctive and experimental comedy</td>
<td></td>
</tr>
<tr>
<td>Showing a range of arts and culture programming</td>
<td>Reflecting the UK’s nations and regions</td>
<td></td>
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<tr>
<td>Bringing the world to the UK</td>
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5.2 Audience understanding of the role of BBC Two

There was a lack of clarity over how BBC Two is distinct from BBC One.

Audiences generally had difficulty explaining the role and offer of BBC Two in comparison to other BBC channels (and key competitors, such as Channel 4).

This was due to:

- A disconnect between BBC2’s brand associations (e.g. serious, intelligent, alternative, older) and programme offer (e.g. entertainment, quality mainstream)
- Misattribution of programming to BBC One (e.g. Dragon’s Den, Mock The Week, The Great British Bake-off)
- A lack of understanding over why specific programmes are shown on BBC Two rather than BBC One (e.g. Line of Duty, Top Gear, Mock the Week).
Some heavier BBC Two viewers had a clearer and more distinct view of the channel’s role, perceiving it as offering more intelligent and challenging programming:

- **It’s more for the broader minded person, for people who are looking for a programme to generate thought**
  - 55+, ABC1, Midlands rural

- **It’s more challenging…on BBC One it’s more entertaining, whereas it’s more intellectual on BBC Two; it’s programmes you wouldn’t see on BBC One**
  - 55+, ABC1, Cardiff

However, even amongst heavier viewers, there was still some confusion and misattribution of programming across BBC Two and BBC One.

Whilst this lack of clarity was not generally an issue for audiences, as they still had access to the programming they enjoyed across the two channels, it did have an impact on BBC Two brand engagement and viewing behaviour - specifically:

- Lower value associations with BBC Two as a distinct channel (e.g. some viewers describing it as an extension or repeats channel for BBC One)
- A gap in perceptions across the BBC portfolio of channels in some of the areas that fit with BBC Two’s remit (e.g. being experimental, being challenging)
- Lighter BBC Two viewers being less aware of or likely to watch some programming on BBC Two because of their channel brand associations (e.g. serious, boring, old fashioned)

In a competitor context, Channel 4 was perceived as being more distinct than BBC Two as a channel, with strong associations with being risk-taking, controversial and diverse.

- **It’s all University Challenge and Gardeners World - boring programmes. I wouldn’t watch it**
  - 55+, C2D, Watford

- **I think compared to Channel 4 you wouldn’t say it was that distinct. Channel 4 is the most different**
  - 30-54, ABC1, Belfast
5.3 **BBC Two's role in promoting education and learning**

**BBC Two had strong associations with programming that increases audiences’ knowledge and understanding.**

Perceptions were predominantly driven by documentaries on the channel, which were seen by heavier BBC Two viewers as:

- Being high quality in production
- Featuring established talent (e.g. Brian Cox, Andrew Marr, Simon Schama)
- Being intelligent, thought-provoking and challenging
- Covering a wide range of topics
- Being shown in peak schedule slots (often 9pm).

Although there was high value attached to BBC Two documentaries amongst viewers, there were some perceptions that the channel could go further in addressing challenging and controversial topics (in a non-sensationalist way) and creating debate – for example as Channel 4 was perceived to have done with Benefits Street.

Amongst lighter BBC Two viewers BBC Two documentaries were perceived as less engaging and lacking accessibility. For these audiences, Channel 4’s style of documentaries had more appeal, due to them:

- Being lighter in tone and using humour
- Addressing more interesting and relevant topics (e.g. life in contemporary Britain)
- Featuring real/everyday people and issues.

BBC2 was also associated with a wide range of other content, which was viewed as enabling learning, for example:

- Quizzes (e.g. University Challenge)
- Wildlife programming (e.g. Springwatch/Autumnwatch)
- Food programming (e.g. Hairy Bikers, Masterchef: The Professionals)
- Comedy panel shows (e.g. QI).

5.4 **BBC Two's role in stimulating creativity and cultural excellence**

**BBC Two was felt to cover arts, culture and music well.**

A range of high profile programmes were driving audiences' perceptions of the channel in this area, including:
Later With Jools Holland: high appeal across audiences and described as current, varied and credible. Also highlighted as being accessible, which was reflected in appeal amongst lighter BBC2 viewers.

The Culture Show: covers a wide range of topics and programme brand reinforces associations with arts and culture coverage on BBC2. Less accessible and appealing to lighter BBC2 viewers.

The Proms: extensive coverage of high profile event for classical music.

Glastonbury: shared coverage of high profile event for contemporary music.

Whilst BBC Two was perceived as performing well in this area, there was some sense amongst lighter viewers of the channel that Sky Arts is providing more appealing and accessible arts and culture programming for mainstream audiences – for example Parkinson: Masterclass, Playhouse and the channel’s music documentaries and live coverage.

**BBC Two was perceived as offering a range of high quality and distinctive drama.**

Characteristics of BBC Two drama highlighted by heavier viewers and driving perceptions included:

- A number of high profile series, that generated discussion (e.g. Line of Duty, The Fall)
- Being highly engaging and immersive
- More challenging material (e.g. Dancing on the Edge, The Fall)
- Intelligent writing/dialogue
- Different feeling production (e.g. slower pacing, darker tone, more stylised)
- Featuring established talent (e.g. Cillian Murphy, Chiwetel Ejiofor, Gillian Anderson, Keeley Hawes).

Amongst lighter BBC Two viewers, there was lower awareness of the channel’s drama offer (with a number of the major series on the channel passing them by) and, consequently, much less strong or positive associations.
**BBC Two** was perceived as offering quality, original comedy, although the channel was predominantly associated with panel shows by wider audiences.

Amongst some heavier BBC Two viewers, the channel had associations with alternative and intelligent comedy. Programme concepts and formats were often seen as original, and generally featuring established comedy talent, with examples cited included:

- **The Trip**
- **The Wrong Mans**
- **Twenty Twelve**

They’d do a comedy like The Trip, which other channels wouldn’t

30-54, ABC1, Gloucestershire rural

I watched that Wrong Mans with James Corden... it’s difficult to describe, it’s kind of a mix of different programmes

30-54, ABC1, Belfast

However, the strongest association with comedy on BBC Two across audiences was panel shows, particularly *QI* and *Mock the Week*, rather than scripted content (which was generally more low-key).

Although there was a sense that there are too many comedy panel shows on TV today and that this format lacks originality, there were some positive associations with specific programmes on BBC Two - due to them being perceived as:

- More intelligent and thought-provoking
- The original programme brands (that have been copied)
- New series/episodes rather than repeats (e.g. on Dave)

It has the best panel shows – the original ones

30-54, ABC1, Belfast

It does comedy well – it has a lot of the best panel shows

30-54, ABC1, Gloucestershire rural

Some audiences felt that BBC Two could take more risks with programming.

Although BBC Two was associated with original content across drama, comedy and documentaries, there was also some sense of long running series and established programme brands (e.g. *Top Gear*, *Dragons Den*, *University Challenge*, *QI*) featuring a lot across the schedule.
There were some perceptions that BBC Two’s role within the BBC portfolio of channels should be more about delivering challenging, experimental and potentially controversial content, that would not be seen on BBC One, with less focus on returning series of established programmes.

I don’t think it experiments – it tends to be fairly dyed in the wool BBC2 type programmes

55+, ABC1, Cardiff

They can take risks with things that they wouldn’t put on BBC1, show things that are more controversial. They could do more of that

30-54, C2D, London

5.5  **BBC Two’s role in reflecting the UK’s nations, regions and communities**

**BBC Two was felt to show programmes that represent different parts of the UK.**

There were perceptions of BBC Two predominantly delivering against this area of its remit through factual programming that visited different parts of the UK – examples mentioned included:

- *Springwatch/Autumnwatch*
- *Michael Portillo’s Great Railway Journeys*
- *The Hairy Bikers*
- *Bradford: City of Dreams*

There were some associations with national and regional portrayal in other programming, but these were only mentioned by a minority – examples included:

- *The Fall*: contemporary Belfast setting
- *Peaky Blinders*: historical Birmingham setting
- *The Trip*: Northern rural setting

In the nations there was generally a lower association between BBC Two (compared to BBC One) and opt-out programming.

However, in Wales, the tailored Welsh rugby coverage on BBC Two (e.g. *Scrum V*, regional rugby coverage) had impacted positively on the channel’s brand perceptions.

**BBC Two was not perceived as reflecting or exploring diversity in UK.**

As with BBC One, there were limited perceptions of BBC Two representing different groups in society. For BBC Two, this was due to:
• The channel’s brand associations and perceptions of it being intentionally targeted at older and higher SEG audiences
• A lack of high profile programmes, which reflect diversity in the UK (e.g. Bradford: City of Dreams)

They put stuff on BBC2, which doesn’t appeal to a wide section of society
30-54, C2D, London

It’s a channel for white middle class people. It doesn’t appeal to someone like me and I don’t think it’s supposed to
30-54, C2D, Cardiff

5.6 BBC Two’s role in bringing the UK to the world and the world to the UK

BBC Two was perceived as bringing the world to the UK through a range of programming.
Key drivers and examples of this were:
• Regular documentaries telling stories from around the world
• Drama with an international setting – e.g. Top of the Lake
• Programmes featuring music from around the – e.g. Later with Jools Holland

There were also some associations with BBC Two exporting key programmes to the international market, although to less of an extent than with BBC One. The main example of this referred to on BBC Two was Top Gear.
6  BBC Three: detailed findings

6.1  Overview

Audience perceptions of BBC Three’s overall contribution to the four relevant purposes for this review were as follows:

BBC Three was perceived as contributing to ‘Representing the UK’s nations, regions and communities’ by reflecting diversity amongst younger people (e.g. ethnicity, social grade, sexuality) in a natural and authentic. BBC Three was felt to contribute to ‘Stimulating creativity and cultural excellence’ through its perceived role as the BBC’s testing ground, although the reality of the channel’s content offer (i.e. often repeats of established, easy entertainment programmes) was reducing the channel’s impact in this area. BBC Three was associated with ‘Bringing the UK to the world and the world to the UK’ through its documentaries and US entertainment imports. Strong associations between the channel and easy entertainment programming meant that it was not seen as contributing to ‘Promoting education and learning’ by the majority of viewers (a minority of heavier viewers felt that BBC Three was performing more strongly in this area).
Audience evaluation of BBC Three against the different areas of its remit highlighted perceived strengths and weaknesses in the channel’s performance:

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<td></td>
<td>← Strong performance amongst some heavier BBC Three viewers</td>
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<tr>
<td></td>
<td>Deliberating original, innovative or experimental programming</td>
<td>Experiments with new digital platforms</td>
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<td>← Strong performance amongst some heavier BBC Three viewers</td>
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<td></td>
<td>Promoting education and learning</td>
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<tr>
<td></td>
<td>← Strong performance amongst some heavier BBC Three viewers</td>
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<tr>
<td></td>
<td>Covering music and cultural events that are relevant to young people</td>
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<td></td>
<td>Reflecting the UK’s nations and regions</td>
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<td>Bringing the world to the UK</td>
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6.2 The value of BBC Three amongst 16-34 audiences

BBC Three was widely recognised as being aimed at younger audiences and perceived as offering something different to other BBC TV channels.

There was a strong sense of BBC Three being for younger viewers and it was generally perceived as less serious and more relevant than other BBC channel brands.

It’s the BBC’s TV channel for young people
18-29, C2D, Manchester

It’s programmes for our sort of humour, it’s more for our age group
16-18, C2D, Belfast
**BBC3 was more highly valued by a minority of viewers**, who were more passionate about the brand and engaged with the channels:

- Focus on youth audiences
- Role in educating as well as entertaining
- Commitment to experimenting and trying new things
- Representation of different groups in society (e.g. based on ethnicity, sexuality)

However, across the majority of 16-34 audiences, BBC Three’s value was lower key and predominantly as a destination for easy entertainment.

The channel’s appeal was more focused on programming such as *Family Guy*, *Sun, Sex and Suspicious Parents* and *Don’t Tell the Bride* (with the *Eastenders* repeat also referred to by some viewers). These types of programmes are valued as reliable and immediate entertainment, which fit with younger audience need states across the day – for example:

- Winding down after school, college or work
- Low involvement background viewing whilst focus is on other platforms (e.g. activities on mobile, tablet)
- Winding down at bedtime (e.g. *Family Guy*)

However, for many, this type of content did not create high value associations for BBC Three, with programming not being perceived as strongly new, original or different (e.g. there were expectations that if *Family Guy* were not shown on BBC Three, then it would be available on another channel).
And across this wider audience, BBC Three generally lacked strong brand engagement in comparison to commercial TV channel or online brands.

A number of brands were highlighted as creating a stronger connection with younger audiences, including:

- **YouTube**: A destination for a wide range of content, with users often subscribing to a personalised set of channels. It had strong appeal amongst younger audiences (particularly 16-24s) and was perceived to be delivering more effectively on some aspects of BBC Three’s remit. YouTube was associated with:
  
  - Being original and creative: it enables and encourages content producers to experiment
  - Being authentic: content is made and uploaded by other young people
  - Showcasing new talent: it provides the opportunity for discovery
  - Creating shared experiences: users can rate, comment on and share content
  - Being interactive: users can personalise their experience and are recommended content
  - Being current and of the moment: it’s where younger audiences go to find the latest content
  - Being for youth audiences: it’s a platform tailored to the needs of young people

I think YouTube’s best for being original and daring because anyone can upload a video on YouTube – it’s open to all

*16-18, Watford, ABC1*

Even though the quality isn’t as good as TV, it’s more genuine. On TV the media portray things how they want to, but on YouTube it’s real – there’s no one editing it

*16-18, ABC1, Watford*

- **E4 and Channel 4**: had brand values (e.g. original, creative, different, risk-taking) and programming (e.g. Hollyoaks, Fresh Meat) that appealed directly to younger audiences. In particular, E4’s combination of quality US comedy (e.g. The Big Bang Theory), original British youth-orientated series (e.g. My Mad Fat Diary, Misfits) and a creative on air identity made it a more engaging channel for many 16-34s.

E4 doesn’t just show repeats, it shows new programmes as well. My Mad Fat Diary is different and new. It’s relatable for girls; it’s about music and boys and growing up. It’s about what girls go through

*16-18, C2D, Belfast*

American comedy is always a certain quality… British comedy is more hit and miss

*18-29, C2D, Gloucestershire rural*
• **Netflix**: was identified as an appealing and aspirational brand due to its association with US TV series (which were often perceived as higher quality by younger audiences) and desirable user experience (i.e. interactive, personal and flexible).

  - Netflix is really high quality even though it’s all online…it recommends shows that you might like
  - 18-29, ABC1, Glasgow
  - I’d rather watch American drama series – it seems like they have a lot more budget, so they can do more, and they have more episodes
  - 16-18, C2D, Belfast

• **Sky Sports**: which was the favourite channel brand amongst some 16-34 males, due to its exciting, innovative and comprehensive football coverage.

6.3 **BBC Three’s role in stimulating creativity and cultural excellence**

BBC Three was associated with original content and experimentation, although audiences felt that there were only limited recent programme examples reflecting this.

BBC Three was generally perceived as the BBC’s ‘testing ground’ for new content and a place where programme makers are allowed to experiment. This was predominantly associated with comedy rather than a range of different genres.

  - It’s the BBC’s testing ground isn’t it…they try out different shows and if they’re good they go on to the main channels
  - 18-29, C2D, Gloucestershire rural
  - Anything that’s risky on the BBC you can now have on BBC3 when they can’t risk having it on BBC1. It’s kind of like the 1Xtra to Radio 1
  - 18-29, ABC1, London
  - It doesn’t really have big shows; it’s more about trying stuff out
  - 18-29, C2D, Manchester

Programming that was identified as delivering on this area of BBC Three’s remit included:

• **Bad Education**: the most widely recognised example and had strong appeal due to its school setting and talent (particularly Jack Whitehall)

• **Some Girls**: high appeal amongst some 16-18s females for relatable storylines and friendship between characters

• **Him and Her**: perceived as an original format for comedy

• **Live at the Electric**: promoting more experimental comedy
However, awareness of these programmes (with the exception of Bad Education) was generally low and audiences often associated original content on BBC Three with older, high profile break-through series such as Gavin and Stacey and Little Britain.

As detailed (in section 6.1), YouTube was more strongly and consistently associated with encouraging experimentation by 16-34 audiences.

**BBC Three was associated with promoting new talent, although Channel and E4 were perceived by many to do this more successfully.**

Examples of BBC Three’s delivery on this area of its remit focused on:

- Being introduced to younger talent for the first time through content on the channel (e.g. the cast of Some Girls, Stacey Dooley)
- Some ownership of young talent across different series (e.g. Stacey Dooley)
- A perception of young writers being given an opportunity on the channel

However, audiences also struggled to identify a range of examples of new talent, who had launched their careers and been developed through content on BBC Three.

Channel 4 and E4 were generally felt to have a stronger reputation in this area, with examples mentioned including:

- The cast of Fresh Meat featuring in a wider range of programming on Channel 4 and other channels (including Jack Whitehall going on to appear in Bad Education on BBC Three - i.e. there were limited perceptions of him being developed by BBC Three)
- The cast of The Inbetweeners featuring in other programming and moving from a TV series to a successful film
- The casts of Skins, Misfits and This is England going on to feature in other TV programming and films.

**BBC Three was widely associated with repeats of established entertainment programmes.**

There was a sense that original and creative programming was not currently central to BBC Three’s offer and that the channel’s schedule was more focused on repeats of established (and appealing) entertainment programmes, such as Family Guy, Sun, Sex and Suspicious Parents and Don’t Tell The Bride.
Repeats were expected and accepted to a certain degree on a youth-orientated multichannel, fitting with the need for lower engagement and easy viewing, and not perceived as a unique attribute of BBC3 (e.g. compared to Dave). However, an association with repeats was impacting on perceptions of the channel’s delivery on other areas of its remit (particularly original programming) and overall value associations.

Specific types of repeats were perceived more negatively:

- Repeats of older series that had been aired recently on BBC Three or another channel and/or seen multiple times already
- Repeats of older or newer series that were shown on multiple occasions on the same channel across a 7 day period
- Repeats of programming perceived as being lower quality – e.g. a repeat of Snog, Marry Avoid? was less acceptable than a repeat of Family Guy.

Audiences also highlighted that the nature of some repeated programmes on BBC Three can undermine the sense of a cohesive brand identity and/or affect value associations – for example:

- EastEnders: reinforces perceptions of BBC Three being a repeats or catch-up channel
- Total Wipeout: reinforced perceptions of the channel being a ‘dumping ground’ and having a ‘random’ mix of programmes.

**BBC Three programming was felt to be inconsistent in quality.**

There was some expectation and acceptance of finding a mix of quality of programming on BBC Three, due to its perceived role as a ‘testing ground’ for new programming.
However, audience perceptions of lower quality programming were impacting on value associations with BBC Three. This related to both some new programmes (e.g. individual attitudes towards acting, writing, production quality) and a perception of lower cost formats being prevalent across the schedule.

It’s not high quality. I watched Pramface and it had below average acting. I’d expect it to be better
16-18, C2D, Belfast

A lot of the shows feel quite cheap...like Sun, Sex and Suspicious Parents and Don’t Tell The Bride…I enjoy them, but they seem like they’re made cheaply
18-29, C2D, Gloucestershire rural

**BBC Three was associated with live music festivals, but was not perceived as covering a wider range of events that are relevant to younger audiences.**

Audiences were generally aware of BBC Three providing coverage from Glastonbury and T in the Park, which had strong youth associations.

There was no awareness of BBC Three showing other youth arts and culture content and some feelings that the channel could be doing more to showcase events and encourage participation.

I think it could be doing more to tell you about cultural events that are for young people...like where they are, how you can get to them; encourage people to get involved more
16-18, ABC1, Watford

Audience interest tended to be focused more on finding out about youth-related culture events at a more local level, which would be more challenging to cover on a linear TV channel (e.g. may be better suited to alternative platforms like online).

**BBC Three was not associated with using online platforms in an innovative or experimental way.**

There was strong appeal amongst younger audiences for iPlayer, but this was associated with the BBC overall, rather than BBC Three.

Audiences were unable to cite examples of where BBC Three had used online in an interesting or experimental way, and it was seen as lagging behind other brands, such as Netflix, YouTube and iTunes in terms of the innovative and creative use of digital platforms (see section 6.1).
6.4 BBC Three’s role in promoting education and learning

BBC Three was perceived as having some knowledge-building value across a range of programmes.

Examples of this included:

- **60 Seconds** news bulletins: this was the most widely recognised example of BBC Three delivering on this area of its remit and had appeal for their concise and accessible coverage of the main news stories.

- **Youth-orientated documentaries**: examples referenced included *Tough Young Teachers*, *Our War: Back on the Frontline*, and *Stacey Dooley Investigates*. These were valued amongst viewers for their different perspective (i.e. typically focusing on the experiences of younger people) and style, which was described as more accessible and engaging than documentaries on other channels.

- **Entertainment programming which is also informative**: *Russell Howard’s Good News* was highlighted as an example of this – providing insights into news stories alongside comedy.

However, promoting education and learning was often not recognised as being an aspect of BBC Three’s overall content offer.

For many, this area of BBC Three’s remit was very low-key and some struggled to reconcile it with their experience of the channel. The main reasons for this were:

- The channel was felt to mainly show repeats of established entertainment programming (e.g. *Family Guy*, *Don’t Tell The Bride*, *Sun, Sex and Suspicious Parents*)

- There was lower awareness of documentaries on the channel, particularly amongst lighter BBC Three viewers. There were perceptions that these were lower in volume and profile across the schedule (e.g. shown in later evening timeslots).

- There were low expectations of knowledge building on BBC Three, compared to other channels (e.g. Channel 4, which was much more strongly associated with this area).
6.5 BBC Three’s role in reflecting the UK’s nations, regions and communities

BBC Three was felt to represent different groups in society and represent diversity in the UK. There was a perception that BBC Three covered areas such as ethnicity, sexuality, social grade and different youth tribes in a natural and authentic way.

Examples of this mentioned included:

- Reggie Yates: Teen Gangs
- Transsexual Teen, Beauty Queen:
- Sun, Sex and Suspicious Parents
- Snog, Marry or Avoid

In comparison to BBC One (see section 4.4) and BBC Two (see section 5.4), the representation of diversity on BBC Three was not perceived as contrived or tokenistic, but rather occurring more naturally across programming.
6.6 **BBC Three’s role in bringing the UK to the world and the world to the UK**

BBC Three was felt to bring the world to the UK through some of its factual programming, although awareness of this was limited amongst the majority.

Heavier BBC Three viewers felt that the channel effectively showed audiences what was happening around the world, with a focus on the experiences of young people and contemporary issues and topics.

Examples referenced included:

- *India: A Dangerous Place To Be A Woman*
- *Our War: Back On The Frontline*
- *Stacy Dooley Investigates* (e.g. *Sex Trafficking in Cambodia*)

It opens your mind to what’s happening in other places around the world – it doesn’t just show Britain. It has documentaries set in different parts of the world.

7 **BBC Four: Detailed findings**

7.1 **Overview**

Audience perceptions of BBC Four’s overall contribution to the four relevant purposes for this review were as follows:
Amongst viewers, BBC Four was strongly associated with ‘Promoting education and learning’ through its distinct and diverse range of documentaries. It was also seen as contributing to ‘Bringing the UK to the world and the world to the UK’ through high-quality European drama and international documentaries. BBC Three was perceived as contributing to ‘Stimulating creativity and cultural excellence’ through its range of music programming, creative use of archive content and original European drama. The channel was not generally perceived as ‘Representing the UK’s nations, regions and communities’.

Audience evaluation of BBC Four against the different areas of its remit highlighted perceived strengths and weaknesses in the channel’s performance:

<table>
<thead>
<tr>
<th>Strong performance</th>
<th>Mixed performance</th>
<th>Poor performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivering high quality programming</td>
<td>Experimenting with new comedy and exploring new forms of storytelling</td>
<td>Reflecting the diversity of the UK and representing different groups in society</td>
</tr>
<tr>
<td>Offering programming that mainstream channels find difficult</td>
<td>Working closely with BBC Two in factual and arts output</td>
<td></td>
</tr>
<tr>
<td>Promoting education and learning by offering greater context and depth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reflecting the diversity of cultural activity in the UK and offering a diverse musical agenda</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offering factual programming with an ambitious range of subject matter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Showing the best international and foreign language feature films, programming and documentaries</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7.2 BBC Four’s role in stimulating creativity and cultural excellence

BBC Four was felt to cover music well, with its distinct programming cutting through to a range of audiences.
Music documentaries and live music were drivers to view for both heavy and lighter viewers, with the following types of programmes associated with the channel:

- **Documentaries about specific artists**: high quality documentaries about music artists (e.g. Blondie, David Bowie, ABBA) led associations of the channel for many. Audiences valued their in-depth view of each artist’s music and wider impact, for example looking at them from interesting and different perspectives (such as a social, cultural or political angle)

- **Documentaries about music genres**: documentaries on music genres such as Blues, Country or Disco, were seen to mark BBC Four aside from other channels, whilst still being inclusive (by covering popular music alongside classical)

- **Ballet**: for some this distinguished BBC Four as a channel which does things that others wouldn’t do, and associated it with high-brow content

- **The Proms**: for many The Proms was strongly associated with BBC Four (alongside other BBC channels), and felt to be an appropriate fit.

If you saw a documentary about ABBA on one of the other channels, it would just be like a load of back clips, films of them strung together... [on BBC Four] I ended up learning about Sweden at that time and it was dead interesting

55+, ABC1, Manchester

[Usually] I just wouldn’t watch concerts, but then I flick through and there’ll be a concert on BBC Four and it’s so beautifully filmed and the sound quality and everything’s so good, I end up listening!

55+, ABC1, Manchester

While music content led perceptions of the channel, other elements of culture (e.g. dance, theatre, film) were also felt to be well represented – although some found it difficult to cite examples.

**BBC Four was seen to be very high-quality, and, to a certain extent, ground breaking.**

BBC Four’s selection of top European drama, coupled with its unique music documentaries and challenging factual content, drove perceptions of the channel as original and high-quality (although the channel’s comedy content was much more low-profile). The channel’s reputation for quality was driven by various elements, including:

- Consistently high production values, with strong standards of writing and acting for drama, and quality footage and experts in factual content

- A reputation for high-brow and intellectual programming, across all genres

- A sense of being unique, and different from other TV channels through its unashamed commitment to demanding television.
This sense of quality was especially strong among heavier BBC Four viewers, who were fan-like in their appreciation of the channel (similar to the passion among core fans seen with Radio 6 Music).

I’d definitely say “quality” – with some of the documentaries on there, the filming of them is just lovely

55+, ABC1, Manchester

It seems to be that the programmes that they choose have some kind of screening standard. You get the impression that it has to meet certain criteria of quality for it to be put on the channel

55+, ABC1, Manchester

**BBC Four’s usage of archive content had a both positive and negative impact on perceptions.**

The volume of archive content was highlighted by BBC Four’s audiences, with *Wild China, Top of the Pops 2* and *Ever Decreasing Circles* mentioned. Whilst programmes such as these were often seen as high quality, and were especially valued by older audiences, they did little to contribute to their impression of BBC Four having original content.

It was noted that, since the channel only starts at 7pm, there is a lower threshold for repeats – these were seen as being more acceptable during off-peak slots such as during the day; during peak hours, they could detract from the channel’s otherwise strong reputation for being original and ground-breaking.

*Wild China* was wonderful, but it was on over and over again. Sometimes you’ll have almost all night, the whole night are repeated programmes

55+, ABC1, Manchester

**7. 3 BBC Four’s role in bringing the UK to the world and the world to the UK**

**BBC Four was seen to be performing very strongly in bringing the world to the UK, through high-quality European dramas and excellent international documentaries.**

European dramas (such as *Borgen, The Bridge, Wallander* and *Salamander*) drove impressions of BBC Four delivering on this area of its remit, because they were perceived as being:

- Very high-quality, through their portrayal of other countries. This was seen as highly engaging, natural, and meaningful rather than being ‘tokenistic’
• Different from other channels: compared to the perceived saturation of US content by many older audiences, airing European dramas was seen as a welcome and unique alternative
• ‘Cherry-picked’ as the best European content available.

You’ve got the opportunity to watch things like Wallander, Salamander, and it’s all very European oriented. You can watch lots and lots of other stuff from America on the other channels but I actually think they [BBC4] do that extremely well

55+, ABC1, Manchester

I would say The Bridge is one of the best programmes I’ve ever seen. You are getting the best dramas from other countries, if you can handle the subtitles they are excellent

55+, C2D, Glasgow

In addition to this European drama, a strong selection of high-quality international documentaries (e.g. Amazon, Lost Kingdoms of South America, Storyville and Wild China) also drove impressions of BBC Four’s role in bringing the world to the UK, through their considered and in-depth portrayal of other cultures and countries.

7. 4 BBC Four’s role in promoting education and learning

BBC Four was seen to offer a strong range of challenging programming that helped audiences to broaden their minds.

The channel had a strong reputation for factual and informative content, reflected in it being referred to as the ‘Radio 4 of TV’ by some. This was driven by:

• Showing a broad range of subject matter (including science, business, social issues etc.)
• Looking in-depth at certain topics, both reflecting audiences’ specific interests in certain subjects and expanding their interests
• Being seen as more thoughtful and authoritative than other channels – through its use of leading experts and a considered tone
• Covering ‘quirky’ and niche subject matters that wouldn’t be found elsewhere
• Challenging the audience’s pre-conceptions and expectations
The challenging nature of BBC Four’s factual content meant that they were watched in a focused frame of mind, with some viewers recording interesting programmes to watch later when they are more able to concentrate. For most viewers, the demanding nature of the content meant that BBC Four was not a channel that can be watched for the best part of an evening, but was instead something that can be dipped into, one show at a time.

**There was very little understanding of BBC Four’s relationship with BBC Two.**

Few viewers were aware of there being a strong connection between these two channels, with very little awareness of complementary output between the two channels during thematic seasons or around landmark programming. Whilst it was observed that BBC Four often broadcasts repeats, there was little awareness that there was any pre-planned link-up with BBC Two in this regard.

However, some viewers (particularly those older than 30) suspected that BBC Four was taking on BBC Two’s mantle in providing intelligent and thought-provoking factual content. Some thought that while BBC Two had become more similar to BBC One, BBC Four was broadcasting some of the content that would have been aired on BBC Two in the past.

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### Quotes

- **The documentaries shown on BBC Four are more in-depth and more different than other channels – they’re definitely challenging.**
  30-54, ABC1, Gloucestershire

- **Some of the documentaries are a bit quirky – still high quality, but slightly different.**
  30-54, ABC1, Belfast

- **I think it [BBC Four] has got a stronger identity than BBC Two… but I didn’t know they had a relationship.**
  30-54, ABC1, Belfast

- **I think that BBC Four actually expands BBC Two… I’m now seeing stuff on BBC Four which may have been on BBC Two in the past.**
  55+, ABC1, Manchester
7.5 BBC Four’s role in reflecting the UK’s nations, regions and communities

There were mixed opinions as to how well the channel represents the UK’s regions. The amount of in-depth factual content meant that some audiences thought that representation of the UK was strong, with programmes such as Great British Railway Journeys and The Real History of Great Britain influencing this view. However, others struggled to think of examples of programmes which represented the UK’s regions, and saw the channel as having more of an international focus – driven by its European dramas and worldwide documentaries.

BBC Four’s cultural programming was also found to provide occasions where the diversity of the UK was well represented – with cultural representation often felt to be more meaningful and valued than portrayal on geographic or natural documentaries. Audiences in Northern Ireland, for example, were complimentary about Folk Hibernia, a documentary which looked into the Irish folk revival, and were glad to see representation around a positive topic.

BBC Four was seen to be mainly serving and representing higher social grade audiences. While the channel was seen to perform very well in terms of representing cultures from around the world (through European drama and factual documentaries) and relatively well in terms of representing the UK’s regions, it was felt (especially among younger and lower social grade audiences) that the channel could benefit from a more diverse portrayal of ethnicity and lower social grades.

Among audiences of lower social grades, there was less awareness of the channel itself. Some thought it was quite inaccessible as a channel, and were put off by its demanding content. In contrast, heavier viewers of the channel valued the unashamedly highbrow nature of the content, which they described as unique in the TV channel landscape.

8. Overall attitudes to the BBC’s TV channels

Overall, the four channels were seen to be performing different roles from each other, with the exception of BBC Two.

BBC One was seen as the flagship channel and was associated primarily with quality entertainment programming. It was also strongly associated with drama, sport, covering events of national importance, nature documentaries (primarily David Attenborough programmes), and, though it was not in the scope of this research, news.

The role of BBC Two was seen to be less clear, with BBC Three and BBC Four having established themselves as the ‘alternative’ voices on the BBC. For many, especially fans of the channel, it was perceived as a high brow and intellectual alternative to BBC One. However, those who were less frequent viewers had difficulty in describing what sets it apart from BBC One. It was associated primarily with documentaries, factual, drama and comedy.
When talking about ‘the BBC’, audiences were often referring to BBC One and BBC Two collectively; in contrast, BBC Three and BBC Four appeared to be more clearly defined and were discussed separately from the two main channels. BBC Three was easily identified as the youth-focused channel. It was associated with experimental content and a relaxed tone, and was expected to produce comedy, entertainment, and documentaries.

BBC Four was the most clearly defined channel in the context of the BBC portfolio (amongst its viewers) – it was seen as high-brow and educational, and was known for broadcasting European dramas (unique in the prevailing climate of Anglo-American dramas), arts and culture programming, in-depth documentaries and music documentaries.

However, there were some misconceptions around how channels fit together in practice.

While, for the most part, viewers were able to identify the different roles of channels within the BBC’s portfolio, their relationship among themselves was less clearly understood.

BBC One and BBC Two were closely associated by audiences, to the extent that some BBC Two programmes (e.g. Top Gear, Great British Bake Off) were misattributed to BBC One. While there was an expectation of shared programming between the channels, with successful BBC Two programmes expected to move to BBC One, and some BBC One programmes expected to be shown as repeats on BBC Two, it was often not clear to audiences when this had happened in the past. In contrast, shared coverage of major events was anticipated across both channels, and past examples (e.g. Wimbledon, Glastonbury, Olympics) were easily identified.

Similarly, there was an expectation that successful BBC Three shows would move to BBC Two or One – although this was mainly driven by past examples such as Gavin & Stacey than more recent ones. It was also expected that programmes from BBC One would be repeated on BBC Three (although few could identify any examples other than EastEnders).
Most audiences did not perceive any strong relationship between BBC Four and the other BBC portfolio channels – although there was a perception amongst some viewers that BBC Four is increasingly performing the role that BBC Two used to play.

**As a portfolio, the four channels met the BBC’s public purposes with mixed success.**

Each of the four channels were discussed with reference to the specific elements of their service licences (in audience-centric language). We were then able to overlay the evaluation of each channel against the relevant BBC public purposes:

![Graphic showing the evaluation of each channel against the relevant BBC public purposes](diagram)

Out of these criteria, the BBC’s four TV channels were seen to be performing best for ‘Promoting education and learning’. This was a description that referred to a wide range of programme types – not just factual – and was associated with a range of content on the channels, from *Holby City* to *Dragons Den*. Of all the channels, BBC Three was found to perform least well on this purpose, due to a relatively high amount of programming that was not felt to offer anything that audiences could learn from (e.g. *Snog, Marry, Avoid* or *Sun, Sex, and Suspicious Parents*).

The BBC’s channels were also seen to perform well when it comes to ‘Bringing the UK to the world and the world to the UK’. This was strongly associated with factual programming on all BBC channels, especially documentaries, as well as dramas on BBC One and BBC Two (including successful British exports from both channels), and European imports on BBC Four.

A good amount of geographical portrayal from across the UK, especially on BBC One, meant that the BBC’s channels were seen to perform moderately well on ‘Representing the UK’s nations, regions and communities’. However, BBC One and BBC Two were often perceived to be either underrepresenting lower social grades and ethnic minorities, or showing them in a ‘tokenistic’ or stereotypical fashion; in contrast, BBC Three was seen as much more naturally and authentically representing diversity in the UK (across ethnicities, social grades, sexuality and youth tribes).
Of the BBC’s public purposes, its channel portfolio was seen to perform least well for ‘stimulating creativity and cultural excellence’. While audiences could point to stand-out programme examples across the channels, often driven by original drama (e.g. Sherlock, Line of Duty, Peaky Blinders, Him & Her), there remained a perception of a lack of fresh and original content across the channels, and an over-reliance on established and long-running series. Indeed, there was an overriding perception of BBC One and BBC Two as ‘playing it safe’.