



Communications Consumer Panel and ACOD response to the BBC Charter Review Public Consultation

The Communications Consumer Panel (the Panel) and the Advisory Committee on Older and Disabled People (ACOD) welcome the opportunity to the public consultation on the BBC Charter Review. The Panel works to protect and promote people's interests in the communications sector, including the postal sector. We are an independent statutory body set up under the Communications Act 2003. The Panel carries out research, provides advice and encourages Ofcom, governments, the EU, industry and others to look at issues through the eyes of consumers, citizens and microbusinesses.

The Panel pays particular attention to the needs of older people and people with disabilities, the needs of people in rural areas and people on low incomes, and the needs of micro businesses, which have many of the same problems as individual consumers.

Four members of the Panel also represent the interests of consumers in England, Northern Ireland, Scotland and Wales respectively. They liaise with the key stakeholders in the Nations to understand the perspectives of consumers in all parts of the UK and input these perspectives to the Panel's consideration of issues. Following the alignment of ACOD with the Panel, the Panel is more alert than ever to the interests of older and disabled consumers and citizens.

The Panel is an independent policy advisory body on consumer interests in telecommunications, broadcasting and spectrum markets but with the exception of content issues. ACOD's remit, on behalf of the constituency that it represents, includes providing specific advice on matters relating to television, radio and other content made available via services regulated by Ofcom. The following response reflects that distinction between the remits of the two bodies.

Response

The BBC has a worldwide reputation for quality programming. That programming is, on the whole, accessible to almost all UK citizens and is an important part of UK culture. We believe that it should remain so. The rapidly changing content market requires the BBC to set a very high standard in order to stay viable in a market where the choices available to consumers expand rapidly.

Any move to reduce the scope of the BBC in UK broadcasting means running the risk that competitors invest less in original, high quality content - and less in content that is reflective of the full spectrum of the UK audience.

Public Purposes

The six 'Public Purposes' set out in the current Royal Charter and Agreement¹ include 'sustaining citizenship and civil society', 'representing the UK, its nations, regions and communities' and 'delivering to the public the benefit of emerging communications technology and services'. Between them, these Purposes guide the BBC towards providing services that are suitable for all audiences, including older and disabled people. We would urge that any redefinition of these Purposes continues to spur the BBC on to achieve this aim. Developments in technology mean that the way people receive content may change, but the content should remain trusted, affordable, relevant and inclusive.

While the advantages of online connectivity apply to all groups in the community, they are especially relevant to disabled people and older people, many of whom may be less mobile than younger people. And yet we know that the take-up of the digital world is unequal amongst the population, with older people more likely to be excluded.

Building on our [Consumer Framework for Digital Participation](http://www.communicationsconsumerpanel.org.uk/the-consumer-framework-for-digital-participation/the-consumer-framework-for-digital-participation-1)² and informed by our 2012 [Bridging the Gap: Sustaining Online Engagement](http://www.communicationsconsumerpanel.org.uk/bridging-the-gap-sustaining-online-engagement/bridging-the-gap-sustaining-online-engagement-2)³ research, the Panel identified a number of areas for strategic focus and made a series of recommendations for Governments, policy makers and those delivering on the ground. The Panel has continued to press a range of stakeholders working in digital participation to address the needs of all consumers and citizens.

We now live in an era in which we are seeing many government services become "digital by default" and where being online is becoming more and more a necessity of life and less and less of an optional extra. Whilst solutions may be complex, the issue itself is straightforward: approximately 21% of the UK population lack basic digital literacy skills. The potential consequences of this exclusion are serious: for individuals, especially those who are more vulnerable; for society; for business; and for the UK economy.

Those people still functionally offline will be at an increasing disadvantage and risk being left behind in terms of ease, convenience, inclusion, speed and cost. It remains our belief that unless fundamental action is taken, the digital divide risks becoming an ever greater digital gulf as the distance increases between those who are online and those who remain firmly anchored in the offline world. Digital literacy, especially on security matters, is going to be critical. The BBC - in partnership with others - has already made a substantial contribution to digital literacy, stimulating digital engagement through its websites. We believe this contribution should be able to continue.

¹ <http://www.bbc.co.uk/corporate2/insidethebbc/whoweare/publicpurposes>

² <http://www.communicationsconsumerpanel.org.uk/the-consumer-framework-for-digital-participation/the-consumer-framework-for-digital-participation-1>

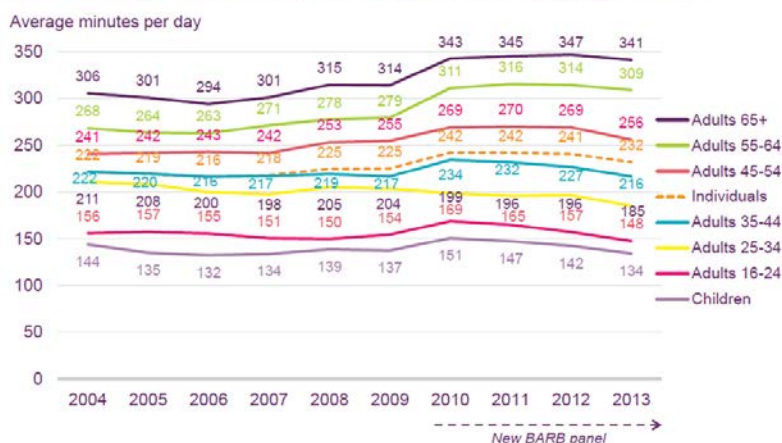
³ <http://www.communicationsconsumerpanel.org.uk/bridging-the-gap-sustaining-online-engagement/bridging-the-gap-sustaining-online-engagement-2>

We also believe that it is vital that the BBC continues to be a standard bearer for inclusivity and accessibility in UK broadcasting.

Content preferences

As noted in the last census, the population of the UK aged 65 and over was 11.1 million (17.4% of the UK population) in mid-2013. The number of people in this age group is growing and has increased by 17.3% since 2003. We note that the Ipsos MORI research conducted for Ofcom's PSB Review *An Investigation into Changing Audience Needs in a Connected World*⁴ that PSB remains very important to older consumers, who often use PSB channels as background content or as company. Older people watch more TV than any other group. As illustrated in the chart below from Ofcom's consultation *Public Service Content in a Connected Society: Ofcom's third review of public service broadcasting*⁵, people aged 65+ on average watch television for 341 minutes daily. It is also worth noting that older people's levels of television viewing have remained much more constant between 2010 and 2013 than the general population. Whilst there has been a decrease of 10 minutes (-4.3%) in all individuals' TV viewing per day between 2010 and 2013, the decrease is much less marked amongst older people: a decrease of two minutes per day (-0.7%) amongst 55-64 year olds and a decrease of two minutes (-0.5%) amongst those aged over 65. It is, we believe, reasonable to expect this situation to endure - at least in the near future - and the needs and expectations of the older audience should be taken fully into account when considering the content of the BBC's output.

Figure 8: average minutes of daily TV viewing, all channels, by age, 2004-2013



Source: BARB, Network

Note: new BARB panel introduced 1 Jan 2010; as a result pre- and post-panel change data must be treated with caution

⁴ <http://stakeholders.ofcom.org.uk/binaries/broadcast/reviews-investigations/psb-review/psb3/psb-review-ipsos-mori.PDF>

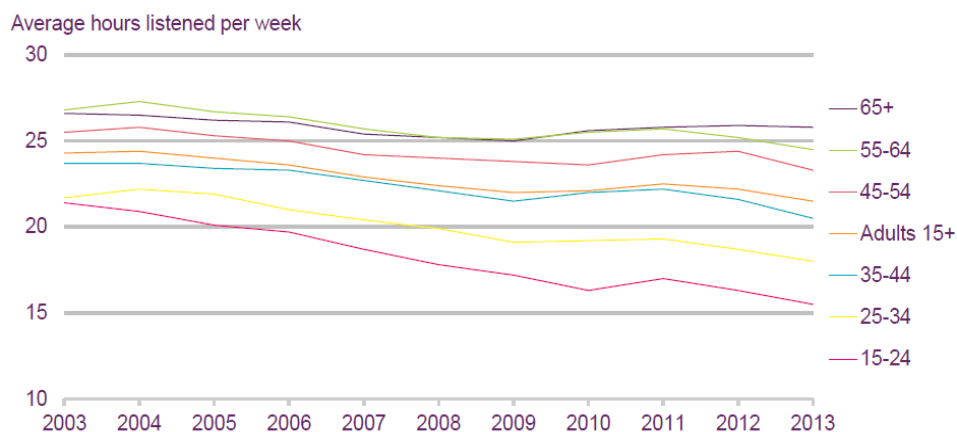
⁵ <http://stakeholders.ofcom.org.uk/binaries/consultations/psb-review-3/summary/PSBR-3.pdf>



The Ipsos MORI research highlighted that, in contrast to younger participants, TV remains the most important source for relaxing and entertainment for 'traditionalists' aged 55+, though they increasingly appreciate the role of the internet for society as a whole. Older traditionalists (65-74s) are the group most likely to want to see a range of programming on the main channels. This group remains highly reliant on TV listings and there is an outright preference for a world which broadcasts scheduled TV only, with some concerned about the negative impact of online services on other members of society.

The research noted that the average weekly reach of radio remains high among all ages and, although the amount of time spent listening amongst all adults has fallen, levels amongst older people again remain more consistent with previous years. The proportion of total 'audio listening time' spent with radio is also much higher amongst older people - at 86% amongst those aged 65+.

Figure 13: Weekly radio listening hours, by age group: 2003-2013



Source: RAJAR

Note: average weekly listening per listener

We note that the audience research suggests older audiences in Scotland, Wales and Northern Ireland feel that more could be done to ensure that programmes reflect their local and national identities. Taking into account information relating to the supply side of content, this could suggest that such attitudes are not necessarily just the result of a generation gap but also a potential gap in provision.

The 2011 census found that the proportion of people in Wales able to speak Welsh increases gradually by age from those aged 45-49, reaching 19.1 per cent for the over 85s⁶. We are concerned that there is a paucity of alternative Welsh language sources of national and international news other than the BBC Cymru and S4C provision. It is particularly important that these Welsh news services are available for older Welsh-speaking consumers. Similarly, due to funding constraints, there is no Gaelic news

⁶ <http://gov.wales/docs/statistics/2012/121211sb1182012en.pdf>

provision at weekends on BBC Alba. News is the service most highly valued by the core Gaelic-speaking audience (in which reach is highest among the 45+ age group). We feel it is also important that BBC Alba continues to have a prominent place in the EPG.

Representation, portrayal and participation

Viewers and listeners need to see themselves, their communities and wider society represented in content.

Nations and regions

Care should be taken to ensure adequate portrayal of the Nations and Regions in network programming. Network commissioning of programmes made in or about Northern Ireland, Scotland and Wales have only recently reached their targets. A new Charter should replace voluntary targets with new minimum levels for nations' and regions commissioning, ensuring they are represented widely on the network. Irish Gaelic, Scottish Gaelic and Welsh should continue to be represented on the BBC's output.

People with disabilities or mental illness

The status of the BBC in mainstream broadcasting means it is also in a prime position to raise awareness of issues facing parts of its audience and challenge stigma. But we believe the BBC could do still more.

Ofcom's recent research into diversity in PSB⁷ found that 51% of people with a disability think that there are too few people with disabilities on the five main PSB channels. The UK population overall agrees, as 48% of all PSB viewers believe there are too few people with disabilities on screen. When asked to consider whether people with disabilities had been featured positively, 39% of disabled people said they thought that disabled people had been featured 'very positively' or 'positively', compared to 43% of all PSB viewers.

We recognise the positive steps being taken by the BBC in increasing the representation of disabled people - an example being the recent 'Defying the Label' series, which followed the everyday experiences faced by a number of individuals with disabilities, impairments and facial disfigurement.

We would also encourage further work to tackle stigmas around mental illness, and increase understanding of cognitive or learning impairments, where it has been shown that the effects of the stigma can be as damaging to the individual as the effects of the illness or impairment⁸.

⁷ http://stakeholders.ofcom.org.uk/binaries/consultations/psb-review-3/statement/PSB_Diversity_Report.pdf

⁸ <http://www.mentalhealth.org.uk/help-information/mental-health-a-z/s/stigma-discrimination/>



A recent event held by the Business Disability Forum looked at the portrayal of disabled people on TV. Discussion at the event included concerns that people with disabilities were often depicted as 'scroungers' or 'heroes'. We would encourage the BBC to introduce more content featuring disabled characters, actors and presenters in mainstream programming, focusing on the storyline, characters and general subject matter, rather than their impairment.

We would stress that the participation of older and disabled people in programmes, and their accurate portrayal are central pillars to maintaining audiences' confidence and engagement with broadcast content.

Accessibility

The BBC's provision of access services allows disabled people to enjoy mainstream programming and provides programming via a range of platforms, so that people can watch, listen and participate in high quality entertainment of their choice, regardless of their household income.

Given the higher levels of television viewing amongst older and disabled people, in addition to the appeal of PSB content, it is extremely important that the BBC continues to provide excellent levels of accessibility -in its broadest sense - to content to ensure that, as far as practicable, users can enjoy equivalent access. It is vital that on-demand or catch-up services should always be subject to the same standards, especially in terms of accessibility, as the linear channels. Given the BBC's position, we would strongly urge the publication of the percentage of programming output (both linear and online) that is provided with access services.

We comment below on potential ways to increase the wider accessibility of broadcast content via the iPlayer format.

Device use, applications and services and infrastructure

Broadband penetration now stands at 80% of all households, and over a quarter of all fixed broadband connections are now superfast. 4G mobile services were launched in 2012 and are now available from all four national mobile network operators (MNOs), allowing faster access to internet-delivered content on the move. Improvement in connectivity, new devices such as smartphones, tablets, smart TVs and broadband-connected set-top boxes have all achieved high levels of take-up. The Ipsos MORI research referred to earlier has highlighted however that many older people continue to watch television exclusively on a TV set. As much research shows, not everyone has internet access nor does everyone go online, and this is more likely amongst older and disabled people. Indeed, Ofcom's 2015



report *Disabled consumers' ownership of communications services*⁹ found that while 88% of UK adults have internet access at home, this dropped to 65% of UK adult disabled people and only 49% where disabled adults had multiple impairments. Personal internet access anywhere for disabled people aged 65+ who lived in a lower income household was 23%. Smartphone ownership also differs greatly by age and disability - only 19% of disabled people over 65 own a smartphone, compared to 75% of non-disabled people under 65.

The biggest difference in take-up where a higher proportion of disabled people chose a communication service than non-disabled people was free-to-air TV, with 65% of people with multiple disabilities taking this, against only 50% of non-disabled people. In addition, the Ipsos MORI research highlighted that far fewer older people have used a website or app provided alongside TV programmes than the general population. Whilst iPlayer is the best known and most widely used catch-up or on demand service amongst the traditionalists group, there was some confusion as some people thought iPlayer was the main catch-up/on demand service; and some thought it was the only catch-up provider available.

The Panel would therefore encourage the development of an open-standard catch-up/on-demand player which would avoid consumers having to learn to use a number of different interfaces, with varying degrees of accessibility and make it easier for other broadcasters to deliver access services as part of their programming.

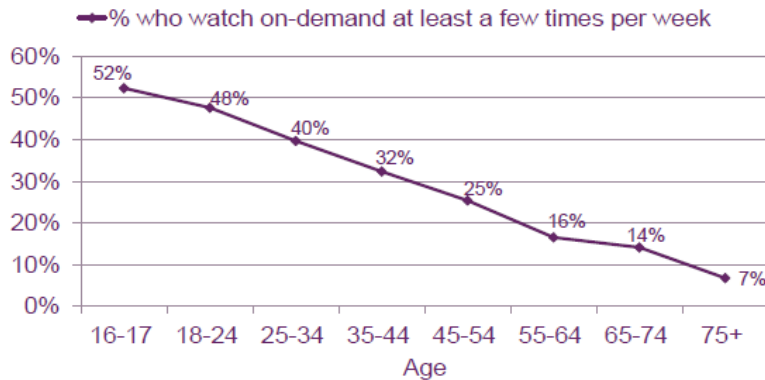
We note that others in the research had no desire to use on demand or catch up services. While some in this group were familiar with time-shifted viewing, few were used to accessing content whenever they wanted it. This variance by age is illustrated in the chart

⁹ http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/1515282/Disabled_consumers_use_of_communications_services.pdf



below, from Ofcom's PSB consultation.

Figure 3.3 – Percentages of viewers, by age, who use on-demand services frequently



Source: Question TO12.
Base: All respondents (2,026) Interviews with 2,026 UK adults aged 16+, July – Aug 2014
Q: How often, if at all, do you watch television programmes of films online through an 'on-demand' service?

We also note that patterns of news consumption vary significantly by age. Six in ten (60%) of 16-24s say they use the internet for news, compared to 21% of those aged 55+. Ninety per cent of those over 55 say they watch news on TV, compared to 56% of 16-24s.

In term of infrastructure capability, broadband speeds are variable across the UK, with an estimated 3% of UK households unable to receive even 2mbps. In our view, access to services such as catch up and VOD is dependent on a good broadband service, certainly greater than 2mbps and probably more in the region of 10mbps. Furthermore, although 4G has brought significantly higher mobile internet speeds to some areas of the country, other areas still struggle to receive a 2G voice signal.

Future delivery

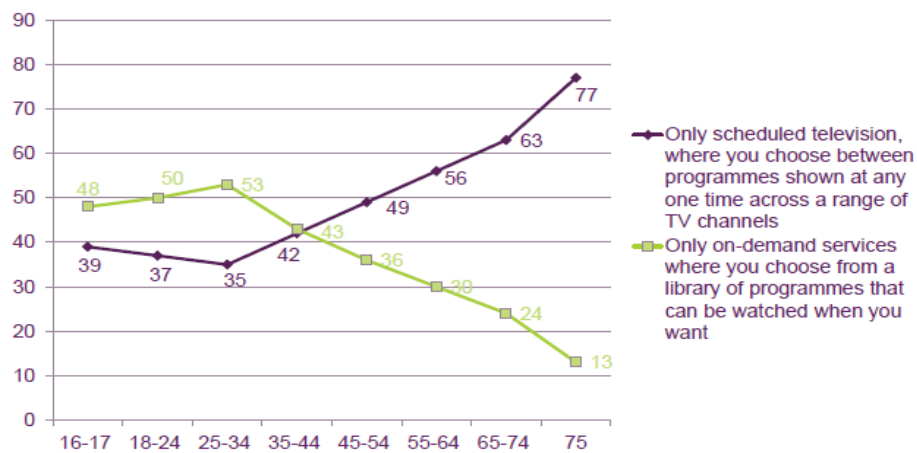
The BBC has evolved to adapt to the changing needs of its radio, TV and online consumers and must be able to continue to evolve as needs continue to change. We recognise that there are significant differences in opinion, attitude and habits towards PSB and television more generally between younger and older audiences. While younger audiences have always watched less television than older audiences, the audience research suggests that the 'connected generation' are watching increasingly less linear television, and that they may be taking these habits with them as they age.

However, for the reasons expressed above, we would have concerns about a bias towards content being delivered online.

We note that the Ipsos MORI research highlighted that, for traditionalists, moving PSB to on-demand would at best be seen as an inconvenience, while others felt they would miss out entirely as they did not have the ability to access on demand content (and had little interest in doing so).

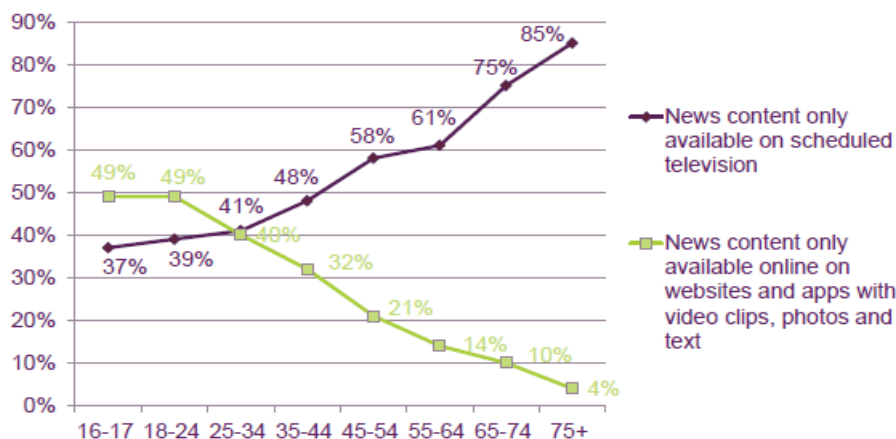
The charts below from Ofcom's PSB consultation illustrate the clear preference amongst older people for scheduled television, as opposed to on-demand content. This preference is even more pronounced in the case of news programming.

Figure 7.5 – Preferences for on demand or scheduled content: by age



Source: Question HCP2.
Base: All respondents (2,026) Interviews with 2,026 UK adults aged 16+, July – Aug 2014
Q: What would you most like to see?

Figure 7.6 – Preferences for on demand or scheduled news content: by age



Source: Question HCP4.
Base: All respondents (2,026) Interviews with 2,026 UK adults aged 16+, July – Aug 2014
Q: What would you most like to see?

The research and consultation draw attention to the fact that, although across the population generally many people feel comfortable with the idea of accessing content in new ways (such as on demand and additional online content), there was a concern that “older or more vulnerable people” might lose access to content because it is increasingly available only online. Age and/or disability does not necessarily confer vulnerability but, as has been seen, older and disabled people most rely on traditional TV viewing and are most likely to experience detriment if access to high quality PSB content becomes less easy. This concern extends to harder-to-reach groups such as rural communities with limited access to broadband, where everyone is disadvantaged, irrespective of age.

We noted that the Ipsos Mori research also highlighted a perception among the more technologically aware that services relying on an internet connection may be less reliable - for example, because of patchy connections; and that even those with access to an internet connection may simply not want to make use of these services because they like the routine of watching the television.

Value for money

In order to maintain value for money, the BBC must continue delivering high-quality content that is relevant to its viewers, listeners and online users. Reducing the scope of the BBC could mean driving people to pay for content elsewhere. This is not always an option for people on lower incomes, including disabled and older people and would negate the benefit of a free licence to those who are eligible if the content available to them is not relevant or accessible to them.

The BBC’s success - in partnership with other broadcasters - in bringing Freeview to the general public, has helped it fulfil its ‘Public Purpose’ to ‘Deliver to the public the benefit of emerging communications technology’. The BBC iPlayer has also been a technological development that has been extremely well-received by audiences. In order to maintain value for money, in providing a service that can be appreciated by all, as noted above, we would encourage the BBC to make the iPlayer format accessible to other broadcasting manufacturers.

The BBC should continue to provide high quality, value-for-money entertainment to the UK population and to inform and educate audiences, by making them aware of issues affecting parts of the audience. In addition to this it should ensure that all audience groups that watch, listen, or participate are able to receive content that is relevant to them, in a format that is straightforward, accessible and affordable.

Summary

Members of the audience, and particularly older and disabled people should be able to have access to content by their preferred method; and they should have equal opportunity to consume and enjoy a range of high quality content.

- The number of people in the UK aged 65 and over is growing. PSB remains very important to older consumers, who often use PSB channels as background content or as company. Older people watch more TV than any other group.
- The needs and expectations of the older audience should be taken fully into account when considering the future of BBC content.
- The participation of older and disabled people in programmes, and their accurate portrayal are central pillars to maintaining audiences' confidence and engagement with broadcast content.
- It is extremely important that the BBC provides excellent levels of accessibility - in its broadest sense - to content to ensure that, as far as practicable, users can enjoy equivalent access.
- The Ipsos MORI research has highlighted however that many older people continue to watch television exclusively on a TV set. Not everyone has internet access nor does everyone go online, and this is more likely amongst older and disabled people.
- The Panel would encourage the development of an open-standard catch-up/on-demand player which would avoid consumers having to learn a number of different interfaces, with varying degrees of accessibility, in accordance with Government Digital Service guidelines on building for inclusion¹⁰.

¹⁰ <https://www.gov.uk/design-principles>