

BLINC

BBC Governors' Review of Impartiality in
Business News
Integrated Qualitative and Quantitative
Research Report

January 2007

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1. Introduction

Introduction to the project

The BBC Governors regularly commission impartiality reviews.

This research project was commissioned as part of wider review of the BBC's business output and concerns commentary on events as diverse as multinational conglomerates and local business trends.

To ensure a holistic view, other aspects of the review were concerned with content analysis and expert witness feedback.

The research focussed on audiences and how well served they are, building on previous research and evolving the insights gained into what impartiality means in relation to business coverage and how this can best be achieved.

We addressed this research challenge with a qualitative exploration of the pertinent issues, followed by a quantitative scaling and definition of the dynamics at play.

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2. Executive summary

- 1) Overall BBC Business news is highly valued by audiences.
- 2) Our predominantly business - interested sample revealed three levels of engagement with business coverage: Passive, Active and Proactive.
- 3) These user types were quite different from each other in terms of demographics, behaviour, needs and media preferences and perceptions.
- 4) The BBC portfolio offers multiple access points to business stories, from coverage within mainstream output to more specialist business segments.
- 5) This enables the BBC to meet the multiple needs and preferences of the audience and gives it an advantage over competitive business news providers including Sky News, ITV and Channel 4.
- 6) Overall, impartiality is a term and concept that most viewers do not reference directly.
- 7) It is more likely to be expressed as a desire for trustworthy reporting and thoroughness as opposed to neutrality.
- 8) Neither is it a spontaneously salient issue for audiences - because it is not perceived to be in jeopardy.
- 9) Crucially respondents believe in the BBC's ability to produce business news output that resonates with them and is accurate.
- 10) It is this accuracy of factual reporting and resonance that are the key drivers of the audience's belief in the BBC's impartiality.
- 11) When explored in detail, impartiality is deemed an important measure when assessing business news output but it has varying degrees of saliency when applied to different content.
- 12) There is a tacit understanding that some shows / presenters will be more 'partial' than others because that is their remit E.g: to uncover the 'truth' behind a story or to fight the consumer's corner.
- 13) Ultimately impartiality as an issue is subjective, influenced by the audience's own confidence with the subject and knowledge.
- 14) The overall perspective is that, in a cynical age, no single business news provider is assumed to be wholly impartial, although the most impartial reporting is attributed to the BBC.
- 15) Audience trust in the BBC overall, coupled with its range of output , means that it is regarded as pre-eminent in accurate, balanced business news coverage that resonates across a wide spectrum of consumer needs.

3. Research Objectives

This research was required to understand how audiences perceive the impartiality of the BBC's business output, across platforms and in all its programme formats, from business stories in mainstream output to more specialist business coverage.

More specifically, the research aimed to explore:

- Current consumption of business coverage/information
- Understanding of the relevant competitive set for different audiences
- What impartiality means to audiences
 - Access
 - Relevancy
 - Fairness
 - On my side (impartial in my view)
 - Dimensionalised presentation of content etc.
- How audiences decode impartiality and value it
- How the BBC (and the competitive set) is perceived to perform in terms of impartiality
- How this impacts on audience consumption of BBC business content

4. Summary of methodology and approach

The research was designed in two phases.

Phase 1: qualitative

This consisted of a qualitative exploration of audience perceptions with an emphasis on content-centric discussions to unpick viewer interpretation and understanding of 'impartiality' in relation to business news needs.

The sample was designed to deliver a core of respondents 'pre-disposed to business news' as this segment comprises a breadth of business perspectives which impacts on their attitude to impartiality.

We also talked to four 'experts', but as a complementary audience. The panel will draw on expert witnesses as a separate process.

However, given one of the key objectives was to look at business news within mainstream coverage, it was also important to examine issues around accessibility and any impact on perceived impartiality, thereby taking into account the views of the business interested, but less engaged consumer.

All were asked to view specific programme content prior to the groups, ranging from the mainstream to the more specialised. Content included: The BBC Ten O'Clock News, ITV News, Channel 4 News, The Today Programme, The 5 Live Breakfast Show with Nicky Campbell, and Working Lunch on BBC TWO

Phase 2: quantitative

We conducted an online survey to scale and inform the areas of key interest identified in Phase 1 relating to perceptions of impartiality in the BBC's business coverage. The 'mainstream consumer' made up the main sample, complemented by a 'professionally business engaged' sample.

Full detail of the sample and approach for both phases is contained in the Appendix, including the discussion guides and recruitment screeners for each

5. The Research Findings

Interest in and engagement with business news

It is important to remember that to ensure a reasonably informed response, our findings are drawn from an interested sample – both qualitative and quantitative phases skewed towards those who were pre-disposed to business news.

However interest in business stories cannot be assumed, even amongst this sample: it is on the radar, but not necessarily at the forefront of their minds.

Business news registered a below average mean score of 5.5 out of 10 in comparison to other subjects such as Politics (6), Environment (7) and Current Affairs (7.6), although arguably, business can be seen as at the core of many of these subjects.

Audiences also tend to filter business news according to mindset:

- How might it affect me?
(There was a strong sense from respondents that many business stories are decoded on a personal finance level Eg: 'A rise in fuel prices means BA will pay more for their fuel, will this mean more expensive tickets for me?')
- How might it affect my business?
(Eg: 'If there is a rise in fuel prices and petrol goes up, I'll have to pay more for my deliveries, but there's not really a choice is there?')
- How might it affect the wider business world?
(Eg: What are the wider and international implications of a fuel price hike?)

While relevance can make a business news story a priority, entertaining presentation can also make a business news item worth consuming. In fact, we found that presenters and the particular tone of voice of the programme, can improve engagement levels and even widen access to a story or issue for a broader audience.

Three types of business news user

From our broad sample base, the most business engaged are more likely to be AB social class, male and aged 45-54 years old.

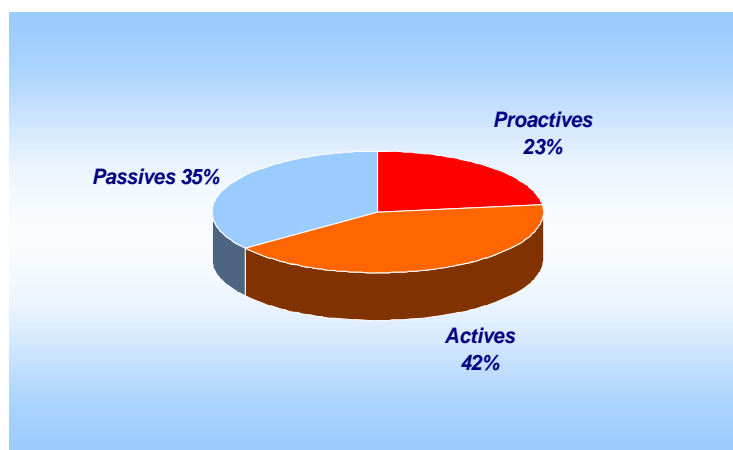
When rating their interest on a scale of 1 to 10, 26% of men scored in the top 3 boxes, which is significantly more than women at 11%.

Those who declared low interest (scoring in the bottom 3 boxes for the same question), were more likely to be young (18-24 years), female (26% not interested) and C1C2 (25% not interested).

The quantitative research also revealed that usage tends to reflect patterns of interest. Only 10% of the sample are heavy users, with 35% light consumers of business news output. The demographic group who tends to consume most are 25-34 year old men.

We have identified three specific types of business news consumer. These typologies are drawn from the quantitative correlation between usage and interest, and the qualitative exploration of needs and expectations of business media.

The three user types are: Proactives (23% of sample), Actives (42%) and Passives (35%)



Proactives

This group are interested in a fully dimensionalised business news experience, with multiple viewpoints to fuel their own opinions. These needs come from a confidence in their own ability to interpret a business story, based on a wide knowledge of the business world.

In the quantitative research, this group were significantly more interested in business news than the sample average. They are typically AB, married businessmen, average age 45. Most are currently in middle management roles, with 12% in senior management.

Heavily engaged consumers

Proactives are heavily engaged business news consumers, predominantly using television and the internet, which is often their first port of call. They tend to watch all business news programmes but specialist output has particular value for them, including The Money Programme and World Business Report.

Complementary sources of business news are broadsheet titles, both in online and print form, and trade press.

Specific needs: accuracy, depth and breadth

The key differentiator is their need for analytical presentation of business news. They have high standards and expect a lot of detail, accurately presented, as well as a discursive and challenging point of view.

This is borne out in their consumption patterns, as well as an explicit preference for a thorough briefing on all topical issues; in essence, they require both depth and breadth.

Strong advocates of the BBC

As those with the most exacting standards and range of demands from business output, this group are also the strongest advocates of the BBC, in terms of approval, perceived business news provision and impartiality.

Experts

Our four business spokespeople ('experts') sit within the Proactive segment, sharing many characteristics, and exhibiting knowledge of and demand for the broader context. Often what was notable about this segment was how intertwined business is in terms of their general media consumption.

Each of our experts had an agenda specific to their particular interest and the impartiality or otherwise of the BBC's business news was in effect perceived and judged against this. Therefore impartiality became a very subjective issue here.

Actives

This group are looking for context and understanding - help interpreting business stories and direction in terms of what the ramifications might be.

They are moderately interested and engaged by the business world, but are not as self-confident in their knowledge and point of view as the Proactives.

This is the largest group within the sample and tends to comprise of men and women in their late 40s, covering a broad social spectrum, with jobs in middle or junior management.

Moderate to heavy users looking to increase understanding

Actives are looking for a regular, thorough briefing on topical business issues and use newspapers as their first reference point. This allows them to consume business news from a trusted and familiar source which offers context and summary. They are also monthly/weekend users of most other mainstream sources.

In particular, radio is a key medium, particularly BBC Local Radio and BBC Radio 5 Live. These platforms offer a discursive, relatively informal forum for understanding business news in context and the implications on a more tangible, consumer level.

Specific needs: accuracy, context and entertainment

Actives' distinguishing needs are impartiality (often expressed as a need for trustworthy, thorough reporting on business stories), accuracy and entertainment. (a desire to be engaged by the output).

Rate the BBC highly

Actives rate the BBC highly on all measures relative to other media providers, showing how satisfied they feel in terms of the BBC's business news provision.

Passives

Business news is on the radar for this group, but it takes a high degree of personal relevance or tonal engagement, for it to become a priority.

They seek advice on how business stories might affect *them* – what the consumer emphasis is, rather than the national or global cause and effect.

Passives tend to be from social economic grade C1C2, and are more likely to be women (though a sizeable chunk of men at 42% do exist in this group).

The average age for this group is 50, with junior management jobs prevalent.

Lighter users needing to be engaged

This is evident in their use of platforms and sources.

There is a clear preference for television as the primary and most valued platform. Passives tend to 'graze' business sources for stories in a detached way.

Low internet use for business use

The internet, one of the most involving, 'lean forward' platforms, is not frequently used for business news by Passives, and this is a significant finding on the online survey given the sample's ease of interaction with the internet.

Specific needs: resonance as a consumer and trust in the provider

The necessity to be able to relate to a business story as a consumer strongly differentiates the Passives.

They have a good grasp of the information they need to know and don't want to be drawn into a more textured analysis of the business world, though they rate accuracy and neutrality highly.

Relatively high approval for the BBC

Both Passives and Actives pick up on cues which allow them to trust a media source for business news or not.

Whilst Passives rate Channel 4 as impartial as the BBC in terms of business news, they favour the BBC for accurate coverage and reporting and show fairly high approval.

Platforms and sources of business news

The behaviour of each group is consistent with their first reference point for business news:

- Proactives use the internet (38% versus 33% of Actives, and 23% of Passives)
- Actives go to newspapers (25% versus 24% of Passives and 20% of Proactives)
- Passives prefer television news bulletins (23% versus 7% of Proactives and 13% of Actives).

Frequency of referencing these sources for business news is also key.

On average Proactives look at most sources every day, more than once a week or at weekends (over-indexing relative to the other user types for every source). Actives reflect a lower frequency of use - weekends or more than once a month and Passives tend to use the various sources less than once a month.

Television: the most valued and engaging platform

What is interesting (and borne out in both quantitative and qualitative research), is that the most valued source of business news for *all* user types is television: 43% of the total sample value it most highly of all possible platforms, highest for Passives at 47%.

Television scores twice as high in the quantitative survey as other platforms for its ability to engage.

This may be due to the flexibility of the medium, allowing as it does for an analytical business story on Newsnight, as well as a brief, factual summary within the BBC Ten O' Clock News.

The visual nature of the medium also helps, sound and pictures adding to engagement levels.

The impact of a presenter is also relevant. Presenters help to decode content and give clues as to how it should be consumed. Their roles are various depending on the audience: someone to help you make sense of what it means for you (Passives), to indicate why it has happened (Actives) or to speculate on what might happen next (Proactives).

The preference that audiences display for televised business news may explain the perception that the BBC gives the highest priority to business news. Not only is the BBC a first choice channel option for many, it offers dedicated business news programmes across the channel portfolio, as well as headlining major business news stories in the main news bulletins.

Radio: a breadth of emphasis for the engaged to the less engaged

Those who value radio as their key business news platform (9% of the total sample) perceive a breadth of business news provision, which ranges from the heavy hitting (The Today Programme) to softer, consumer driven shows (BBC Radio 5 Live Breakfast show).

As a very personal medium, it is perceived as a good source for detail, context and personalised information.

Radio 4 was spontaneously mentioned by many respondents in the qualitative research phase as a key source for business news for Actives and Proactives.

Online: valued highly for depth, breadth and timeliness by the most engaged

Online is valued as the most important platform by 22% of the total sample, with Proactives significantly higher at 31%.

As the internet is increasingly used for everything - 'work' completed at home and domestic tasks completed online at work, we anticipate a growth in the value of this medium for a wider audience. This will be accelerated by on demand viewing and the ability to patch together the benefits of two platforms (online and television).

BBC.co.uk is an important web presence for the mainstream online user and was praised for its business news content. It also plays an important role for Proactives in establishing a 360 degree position of knowledge.

Newspapers: valued for a trusted analytical context

Newspapers are valued across the sample (21%), but are most valued by Actives at 26%.

They provide international / national / local analysis, summary and context from a trusted brand voice.

Platforms in detail

The BBC, newspapers and the internet are perceived to give almost equal priority to business news (by Proactives in particular).

On a scale of 1 to 10, when asked to indicate the priority they felt was given to business news, BBC was rated 6.5, newspapers 6.1 and the internet, 6.

ITV, Channel 4 and Sky score significantly lower at 5.2, 5.2 and 4.9 respectively.

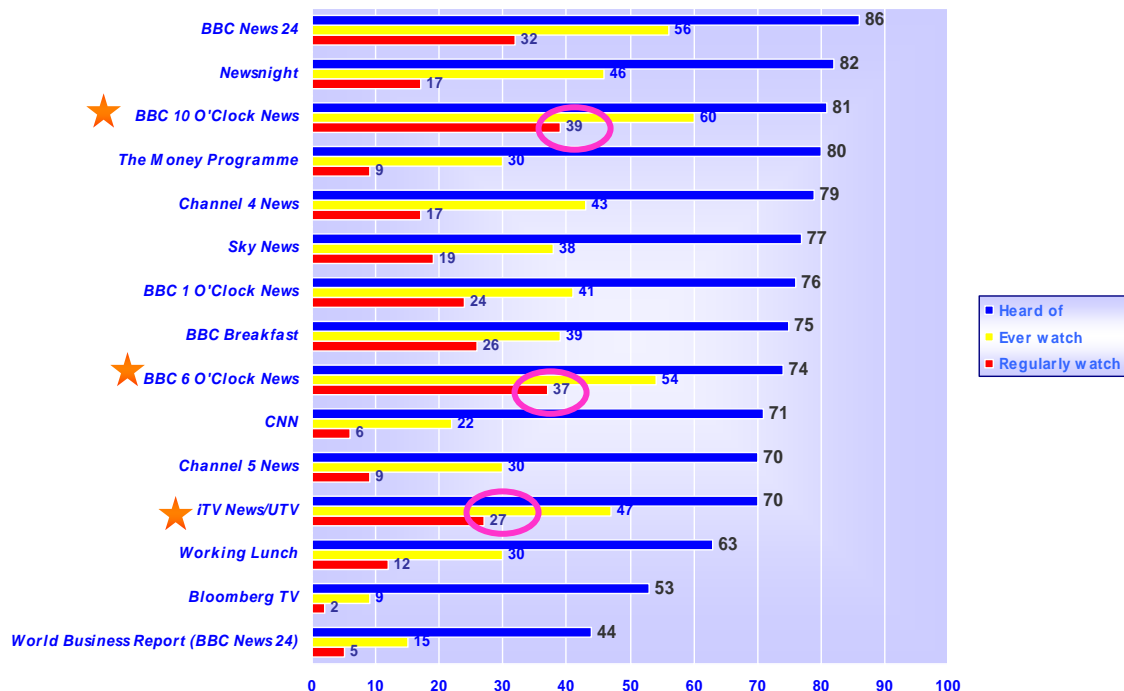
This may be due to the range and variety of business news across the BBC portfolio, and the brand halo of the BBC as an authoritative news provider.

Television

There is very strong awareness of almost all TV business news output, reflecting engagement in business news via television.

From a comprehensive list of programmes and dedicated new channels, BBC News 24 scored highest for awareness at 86%, followed by Newsnight at 82% and the BBC News at Ten O'Clock at 81%.

Awareness (blue), ever watched (yellow) and watch regularly (red) for total sample:



Audience experience (ever watch and regularly watch) of business content is highest in relation to the mainstream news programmes on the BBC and ITV (highlighted here by the pink circles).

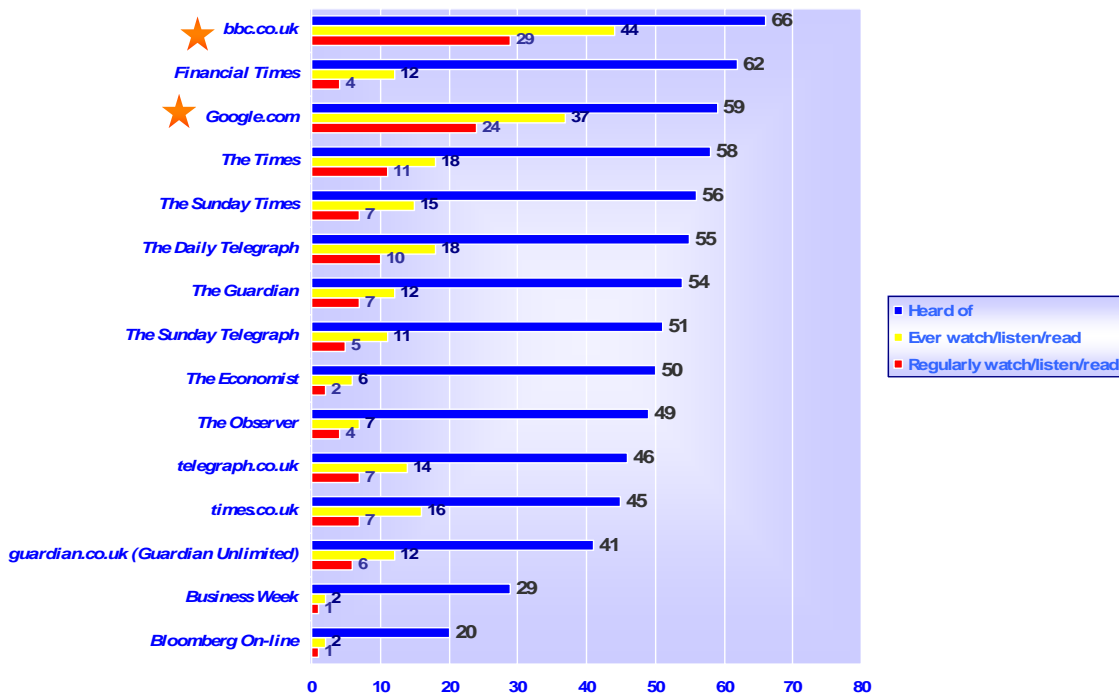
Proactives over-index relative to the total on 'ever watch' quite frequently Eg: 66% of them have ever watched BBC News 24, and 49% have ever watched BBC Breakfast, demonstrating their broad knowledge of business news access points.

Interestingly, whilst awareness is high for most of the TV offerings across the sample, actual usage is not always in line with this. It suggests that the audiences we spoke to feel more business information could be accessed if they desired it, but in reality need a story to be relevant and/or engaging to tune in.

Online and Newspapers

Equally, for online and newspapers, awareness is fairly high for all sources, but actual usage and experience is markedly lower for all but bbc.co.uk and Google.

As the sites forming a central part of the online media experience, bbc.co.uk and Google allow users to access a wealth of resources and offer immediate orientation and access to content.



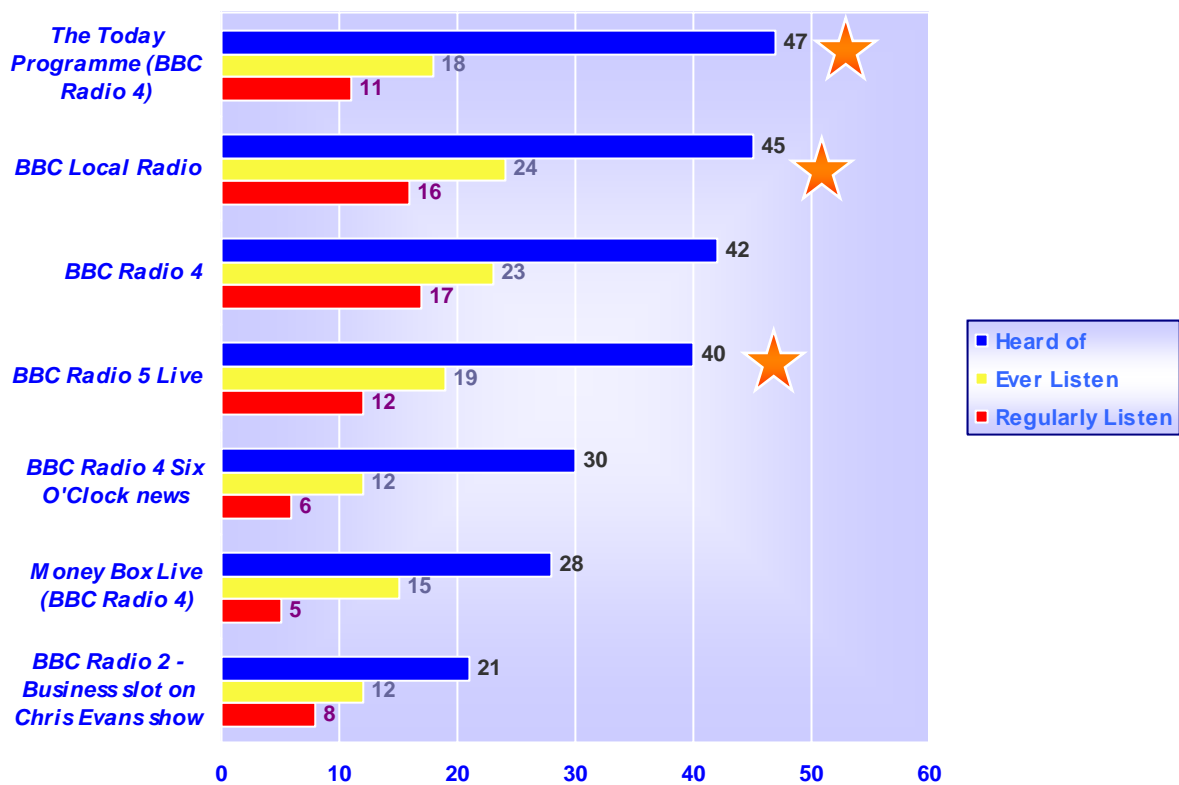
Again, it is useful to note that Proactives over-index relative to the total when it comes to bbc.co.uk, *The Times* (newspaper) and *The Daily Telegraph* (newspaper and online).

Radio

The pattern of engagement is similar for all programmes except for the business slot on the Chris Evans Show.

It makes sense that this slot, as part of a more entertainment based show, has lower awareness, but greater uptake from those who *are* aware, as one might continue listening rather than turn on for the segment.

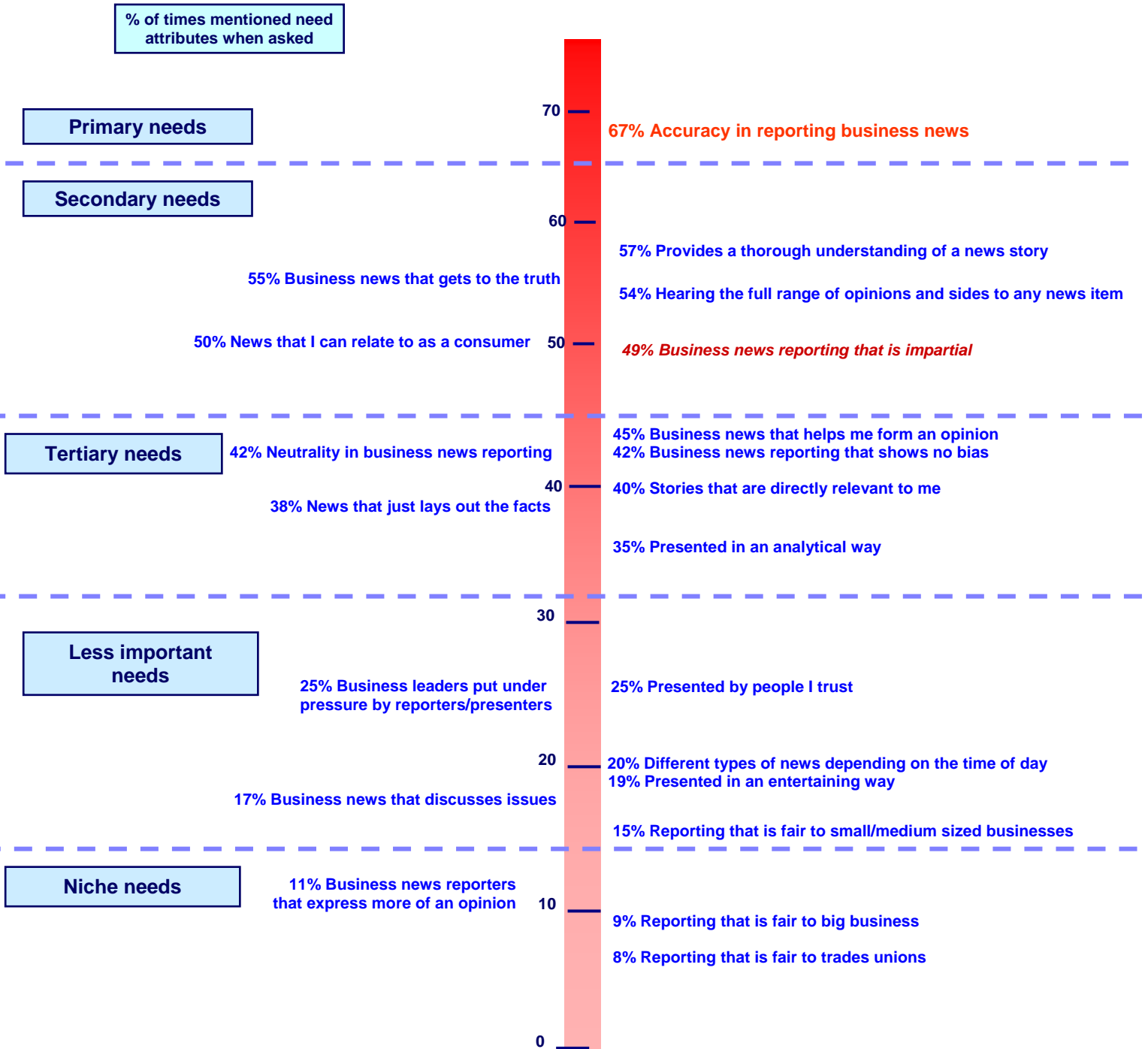
Local radio vies strongly for awareness with The Today Programme, perhaps because both provide a sense of community for their audiences which engenders significant loyalty, and business news is given greater meaning and context within that environment.



Actives over-index relative to the total for BBC Local radio and BBC Radio 5 Live in terms of usage, showing their preference for the medium.

Specific audience needs from Business News output

This 'thermometer' diagram shows the range, breadth and priority of audience needs in relation to business news. Whilst some needs have greater importance than others, it is worth noting that even those lower down the scale are of significant value, and that these are not mutually exclusive.



Primary and secondary needs

The top response identifies 'accuracy in reporting' as being the priority by far and in many respects this is a table stake for this market.

Secondary needs are focussed around truth, understanding and impartiality.

Tertiary and less important needs

Neutrality, showing no bias and purely factual reporting is less relevant to most people for most of the time. But this relevance is more likely (than primary needs) to vary by viewer/user types, providing potential platforms for differentiation

Niche needs

Niche needs suggest that fairness to particular parties has limited importance to most but may be highly relevant for minority user/interest groups in relation to specifics (Eg: attitudes to trade unions).

A recap on the method

The hierarchy of needs was derived from a question in the online study where (in random order) possible important attributes appeared in groups of three, and participants were asked to choose the most important of the three.

This approach allows us to get under the skin of what is truly important to audiences in terms of business news, by forcing them to trade-off factors, without seeing the hierarchy they are thereby creating.

Essentially, we were able to derive a hierarchy of drivers and importantly measure the difference between each one.

The balance of needs

In the qualitative stage, respondents found it difficult to pinpoint what they were seeking in terms of business news. Audiences were able to tell us about their need for factual information, and their reluctance to wholly trust any media provider. But it became increasingly clear that entertaining presentation was also required, particularly for Passives.

The quantitative research confirmed this very broad hierarchy of importance, demonstrated by the stretch of the needs from 67% to 8%. It shows how multi-dimensional the experience of business news is, and ironically, how crucial it is to find the right 'balance' of elements: the balance which enables audience engagement, satisfaction *and* impartial business news reporting.

Accuracy and Resonance

Accuracy in reporting is the most important need by far for audiences.

Accuracy is an objective quality; a reliable attribute and one that by definition doesn't require judgement or input from the consumer (something either is, or isn't accurate, whereas relevance is more subjective).

This fits with the way audiences talk about media providers, and their desire to be able to trust them.

Resonance was also a key need revealed in the qualitative research.

Audiences tend to engage or not depending on the level of resonance a story or style of presentation has for them. This seeps into the hierarchy of needs, as indicated by 'news that I can relate to as a consumer' at 50%, 'stories that are directly relevant to me' at 40%, 'business news that gets to the truth' at 55% and 'business news that helps me form an opinion' at 45%.

We would argue that accuracy and resonance are key needs across audience types, and explain the way that consumers use and appreciate business news output and providers

Audiences want to be able to trust the source of their business news and expect that detail will be correct (accuracy).

But at the same time, consumers of business news need to feel a personal connection and reason to view. They will then connect what they have seen or heard with their own knowledge and experience (degree of resonance) to ascertain its impact.

Most pertinently though, the importance of these two factors helps us to understand how consumers decode impartiality.

Specific audience needs: Impartiality

The issue of impartiality is given clarity in the hierarchy of needs – we can observe where it is placed, and how often (as it may be deemed an inherent part of many of the factors listed here). It appears to be most strongly associated with ‘truth’ and ‘thoroughness’ rather than ‘neutrality’ and ‘bias’.

‘Business news reporting that is impartial’ is placed at 49%.

Certainly salient, but not the most important quality for audiences?

There are a number of issues worth mentioning here to understand this better:

- Impartiality as a concept was rarely mentioned by respondents in our qualitative discussions. Once prompted, participants would attribute great importance to impartiality, but in reality, consumer language tends to touch more easily upon the dimensions of the concept rather than the sum total
- Audiences have clear expectations of specific programmes and presenters – even to the extent that they may acceptably embrace ‘bias’ or partiality E.g. ‘getting to the truth’ (55%)
- It is this awareness, coupled with the breadth of business news content available (particularly across the BBC portfolio) that allows the concept of impartiality to slip down the scale

However, the closeness of impartiality on the scale to truth and thoroughness rather than neutrality and bias suggests the importance of the individual’s interpretation.

The different user groups show important variations across the range of needs which align closely with their other characteristics as business consumers.

The needs that differentiate Proactives

These are ‘analytical presentation’, ‘discursive’, ‘presentation by trustworthy people’ and ‘opinion influencing’.

In addition we see greater appreciation given to more specialist business interests (trade unions, big business etc) at the bottom end of the scale. This reflects their self-confident attitude to business media and a desire to be challenged.



The needs that differentiate Actives

For the most part Actives reflect the profile of the total sample.

Where they differ is in issues of 'fairness to small/medium sized businesses', 'impartiality', 'accuracy' and 'entertaining presentation'.

This demonstrates their need to be guided, and to feel they can trust their business news provider, as well as a need to be engaged.

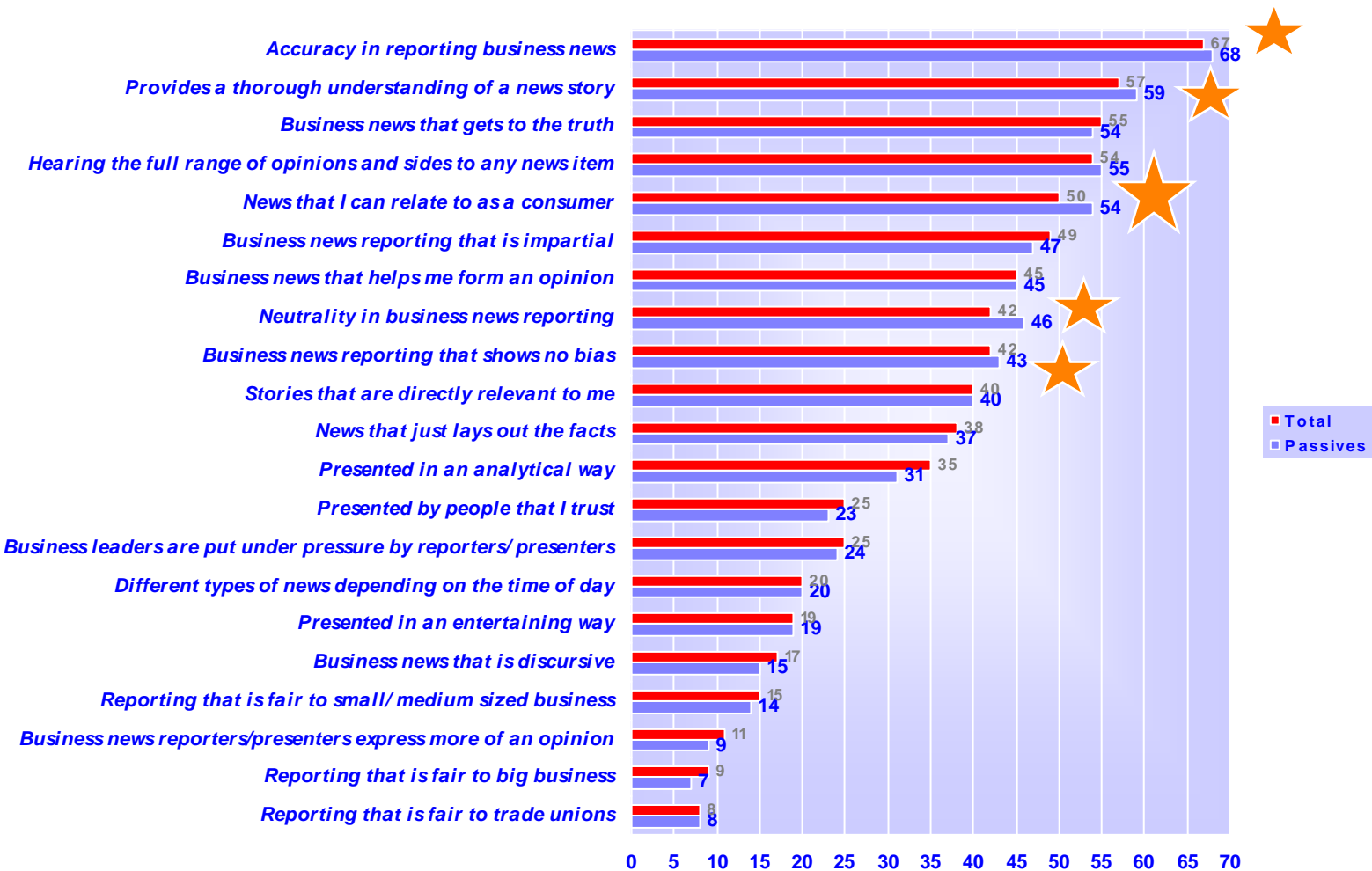


The needs that differentiate Passives

Passives show a much greater need to ‘relate to business news as a consumer’ and for ‘business news to show no bias’.

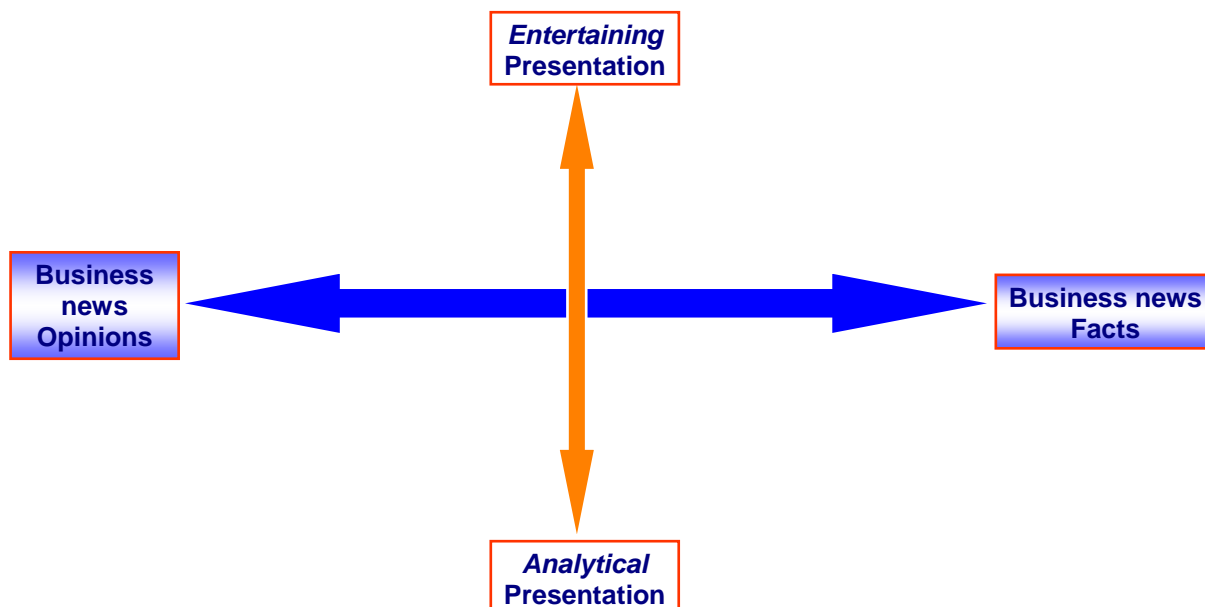
It is also important for them to be provided with a ‘thorough understanding of a business news story’.

These significant differences point to their particular requirements for business news to be clear and to help unlock understanding, be from reliable sources they can trust, and tell them how it might affect their pocket.



Provision of business news: BBC vs. competitors

We developed a correspondence map to map the perceptions of the different news programmes relative to one another. Key attributes have been used to define the axes.



Perceptions of different business news providers were measured on a scale of 1 to 5, where 1 indicated Disagree Strongly and 5 Agree Strongly.

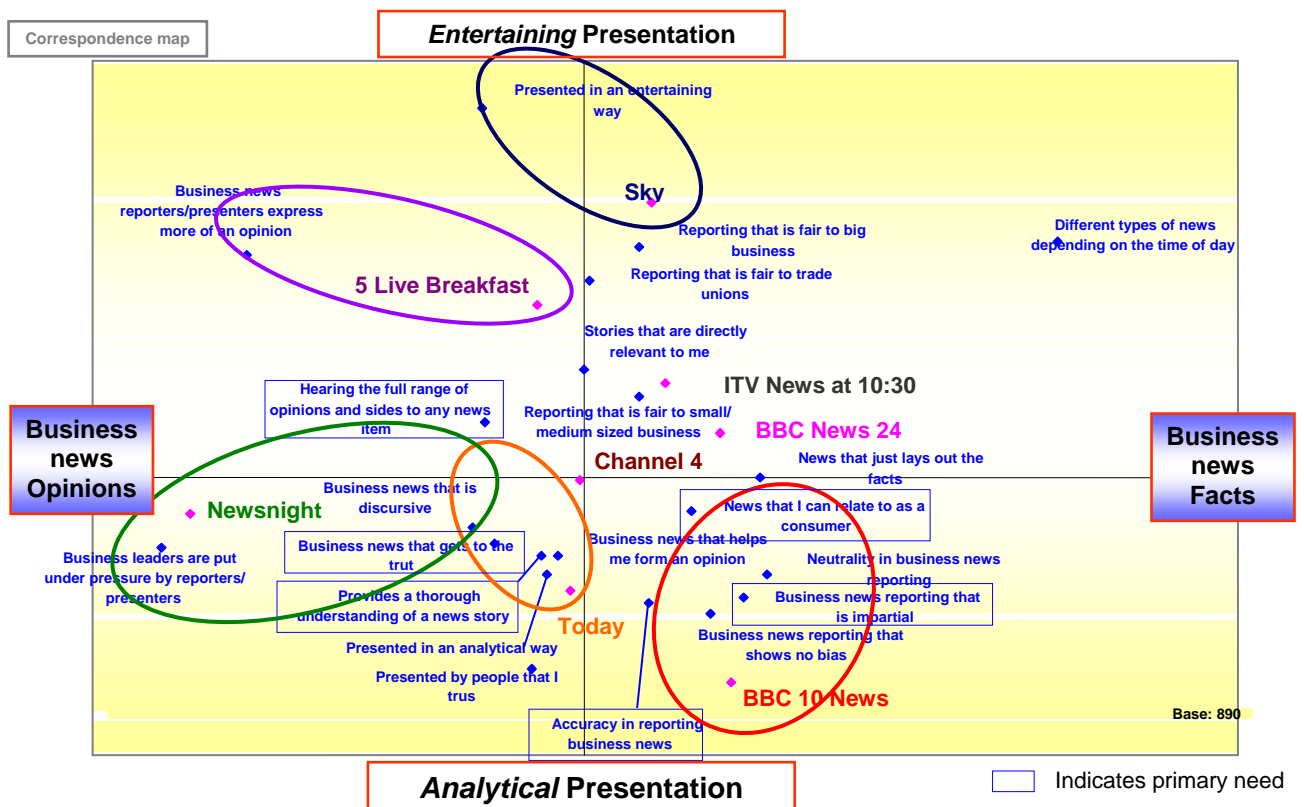
Agreement was based on the same list of factors from which we identified the hierarchy of audience needs.

Mapping the Business News Providers

Relative to one another, news programmes differentiate on the basis of perceptions.

Newsnight and Sky News are the most polarised, pulled to the outer areas of the map.

The centre of the map is the territory of the least differentiated news programmes, with Channel 4 news, ITV News (at 10.30) and BBC News 24 all sitting here. In addition, the BBC News at Ten O'Clock dominates the lower right quadrant where impartiality is most explicitly featured as a criteria.



We can see from this map how diverse the BBC programme portfolio is in its provision of different access points for business news.

This enables the BBC to meet a wide range of audience priorities and provide an advantage over the competition.

Delivery on business news needs: specific programmes in detail

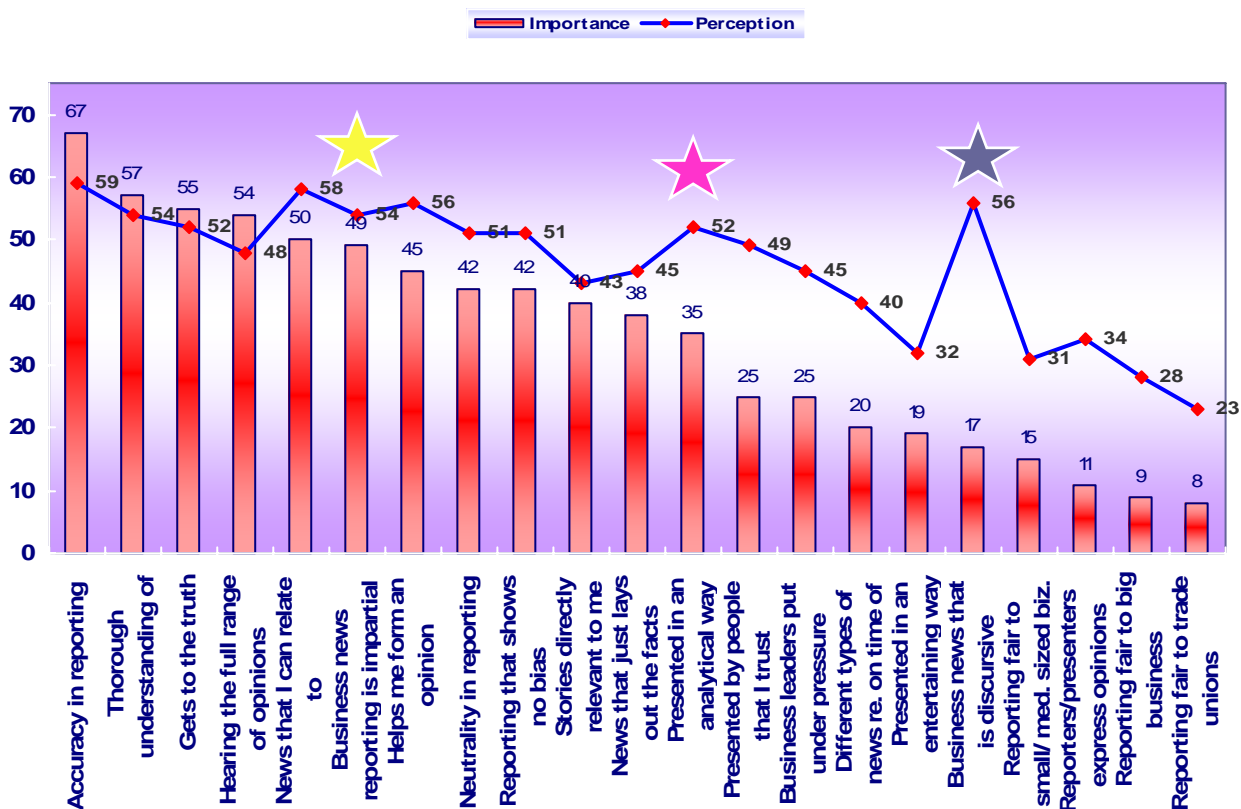
Delivery on business news needs was rated by everyone who took part in the online survey, not just those who had experience of the specific programme output. This allowed us to gauge how the BBC and its competitors are perceived.

BBC News at Ten O'Clock

The business output in the mainstream news closely matches or over delivers on all aspects of importance to respondents except accuracy.

The dips on the most important criteria may be explained by the higher expectations here versus expectations of less important elements (towards the lower end of the hierarchy).

Across the sample, this programme has presence and authority. Indeed, we would argue that the high regard for the BBC News at Ten O'Clock (and the other mainstream BBC news bulletins), gives the BBC some leeway to present business news in different, perhaps less 'neutral' ways within other programmes and platforms.

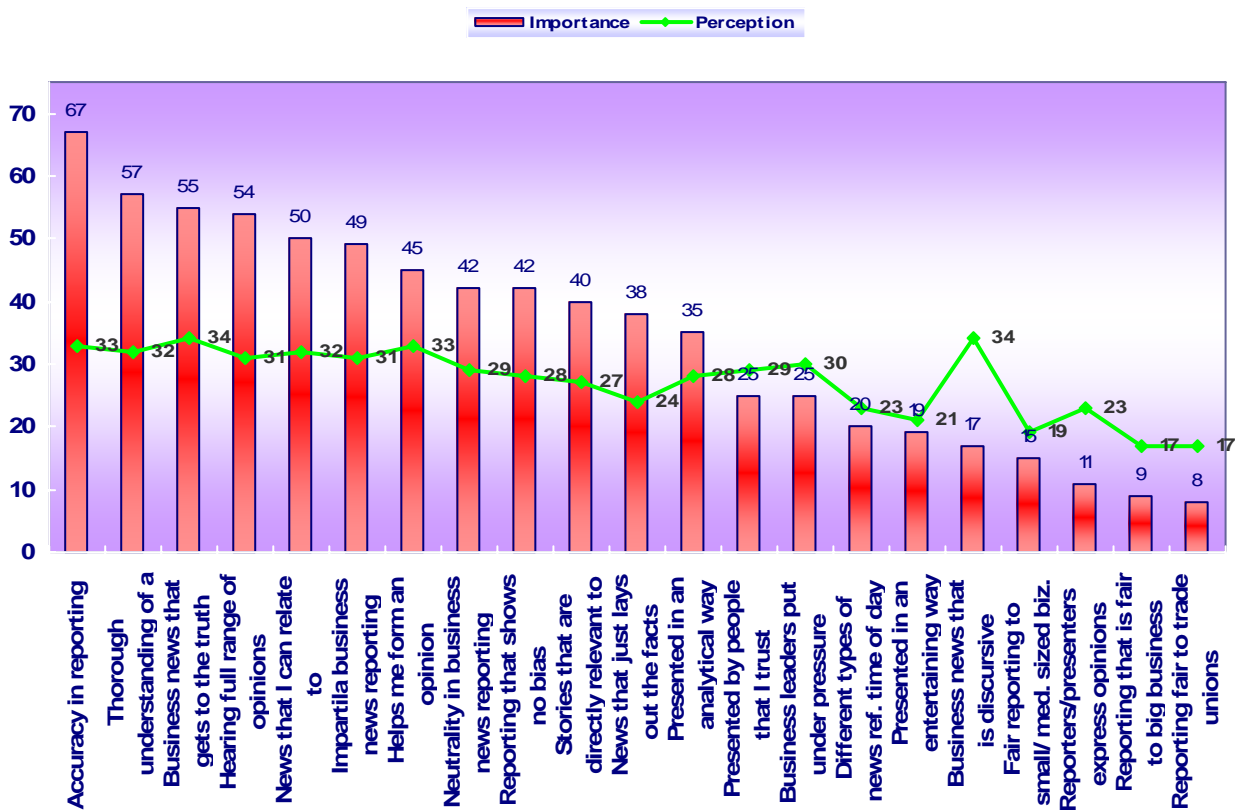


Interestingly, all television business media tested over delivers on ‘business news that is discursive’, perhaps because of the nature of the medium and the dynamic between presenter and viewer.

The Today Programme on BBC Radio 4

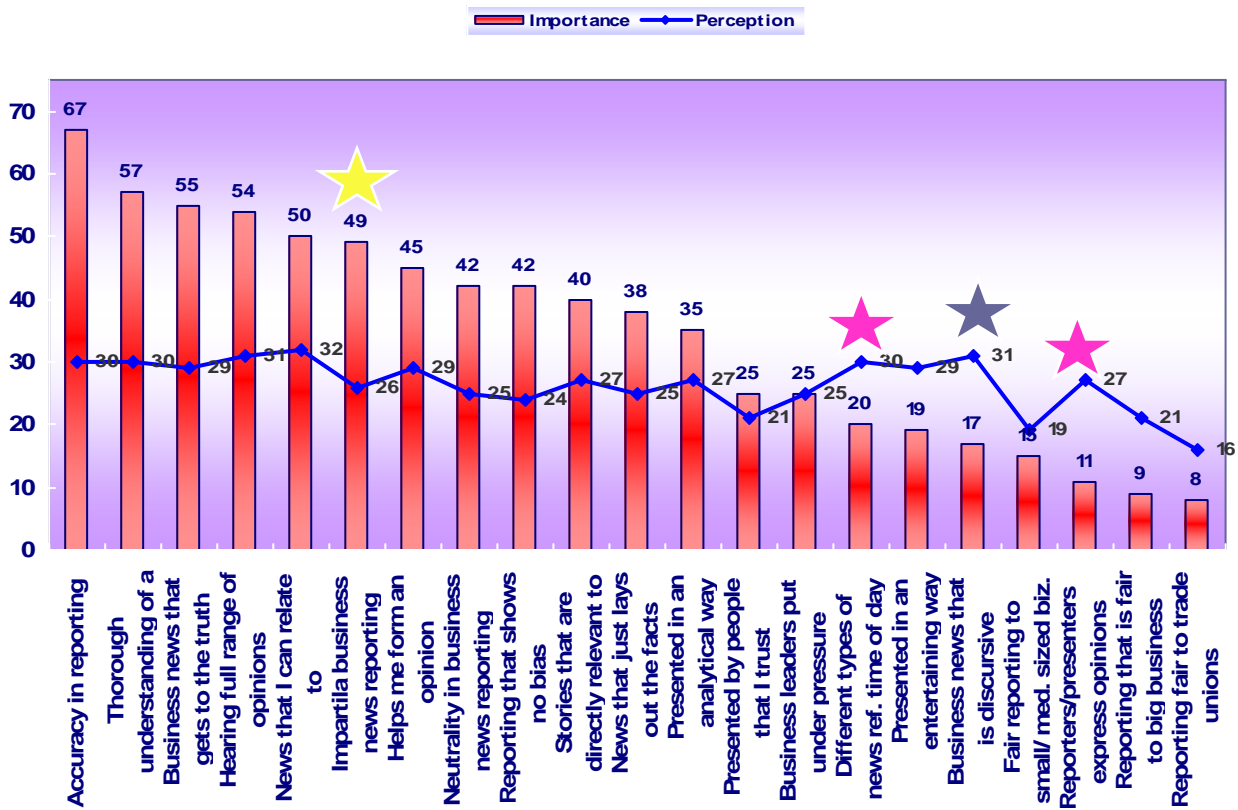
The Today Programme was praised highly by Actives, Proactives and Experts in the qualitative phase. In particular, it is perceived to present the facts well, with multiple points of view. Together with the main BBC news bulletins, it serves a valued role for audiences, embodying BBC heritage, traditional news values, quality, trusted journalism and expertise.

The Today Programme is also highly valued for its ability to ‘get at the truth’. It is perceived as tough, uncompromising and intellectually rigorous, and allows the BBC to show a sense of commitment to justice; John Humphrys in particular embodies the listeners’ right to really know what is going on.



Sky News

Sky News is differentiated by the perception that it provides different types of news at different times of the day (rolling news values), with entertaining, opinionated and discursive presentation. Whilst this can appeal to audiences, we see that the perceived impartiality takes a dip at 26%. There may also be a 'Murdoch' factor here; this came out in some of the qualitative groups.

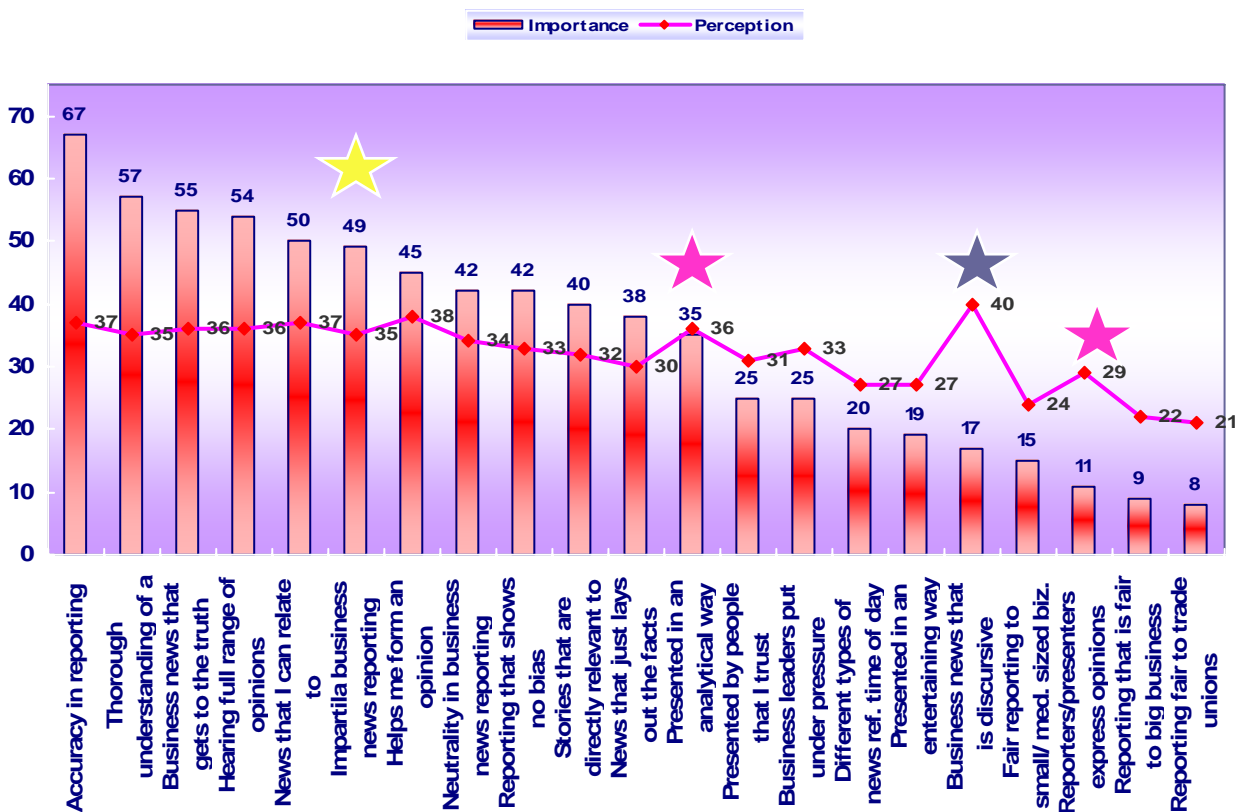


Channel 4 News

A news programme that gives time to business issues is the key differentiator for Channel 4 News, scoring highly on discursive coverage. It is also perceived to be analytical in its presentation with reporters/presenters who express opinions.

Channel 4 News was well received in both qualitative and quantitative research phases.

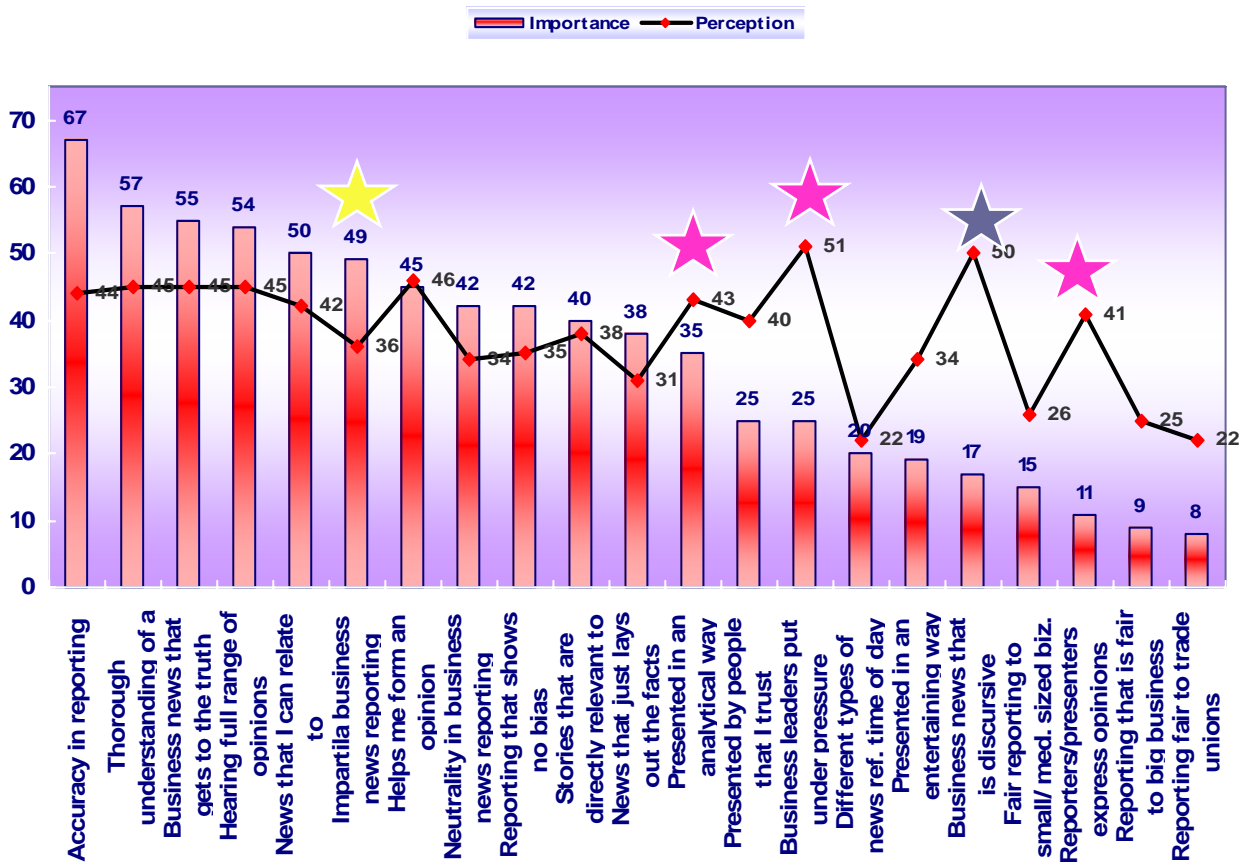
While it does not perhaps have the status of the main BBC news bulletins, its analytical tone and perceived ability to put business leaders under pressure, mean it is cited as a valuable source for business news.



Newsnight

Newsnight delivers highly in terms of its analytical presentation, discussion of business news issues, opinions of presenters/reporters and fairness in reporting.

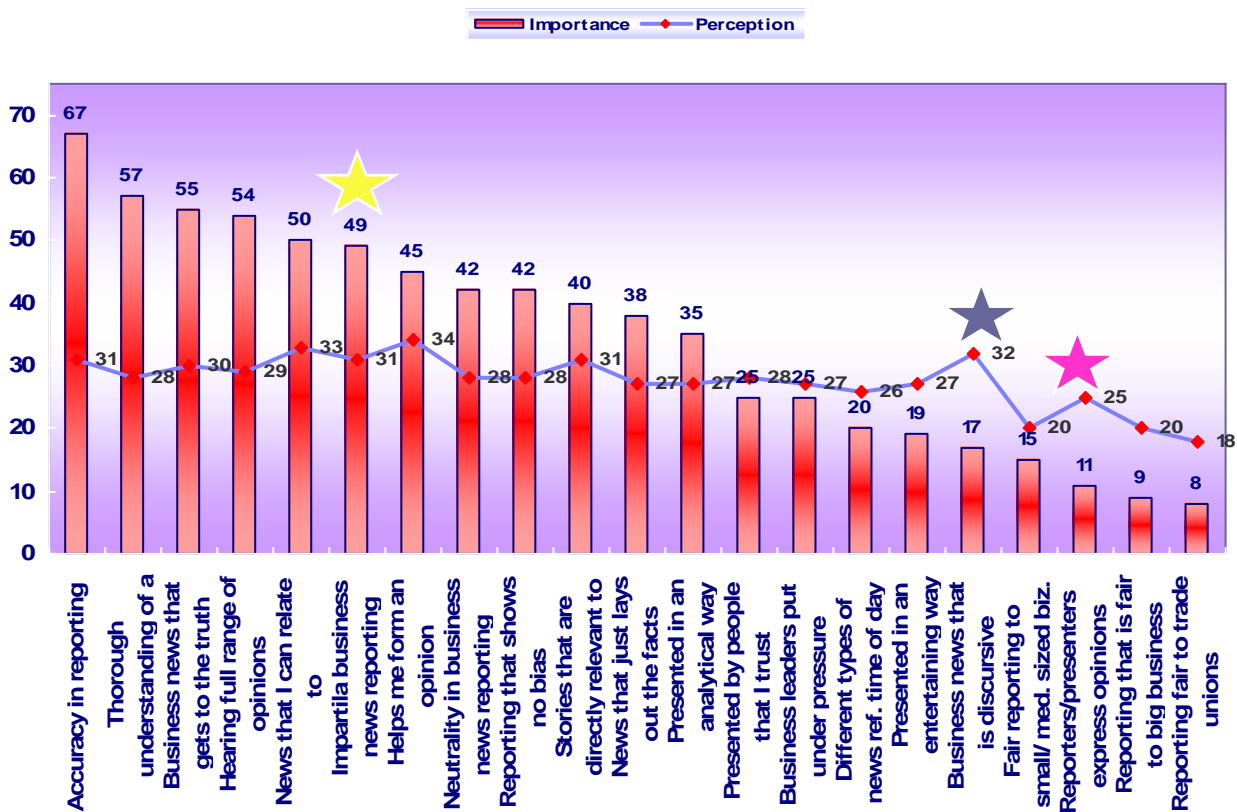
As a key attribute, putting business leaders under pressure is a core element of the Newsnight proposition, and arguably this level of dynamism is quite unique. As with John Humphrys, the role of Jeremy Paxman in this context is crucial. Perception of him as a presenter enables opinion (and even partiality) to count as a relevant and appreciated part of the programme.



ITV News at 10.30pm

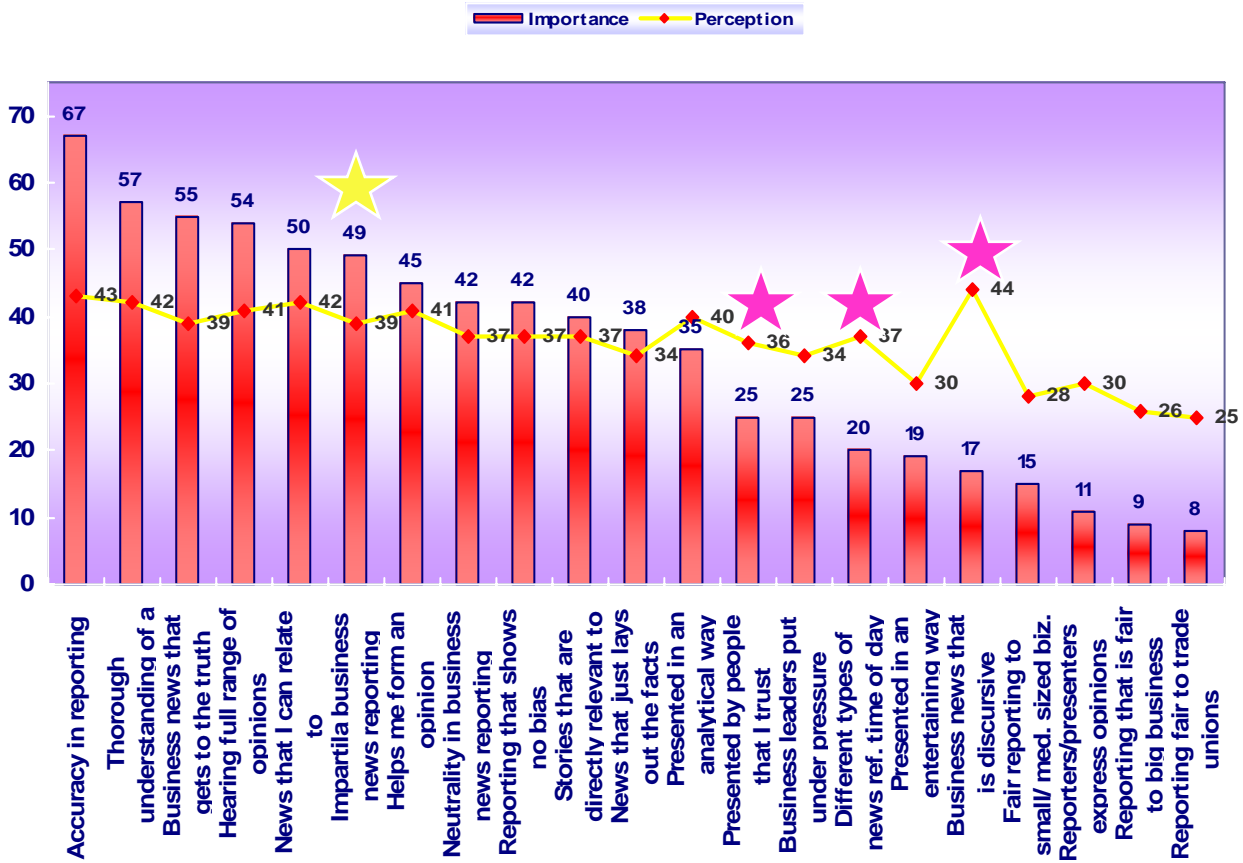
This programme over delivers on aspects of business news that are rated as least important - and at a fairly low level.

We found that Passives and those in the low-level interest focus groups were quite warm to this programme, as it offers an easy summary of business stories with a perceived consumer emphasis.



BBC News 24

BBC News 24 delivers strongly against discussion of business news issues, providing different news at different times of day and for being presented by people who are trusted.



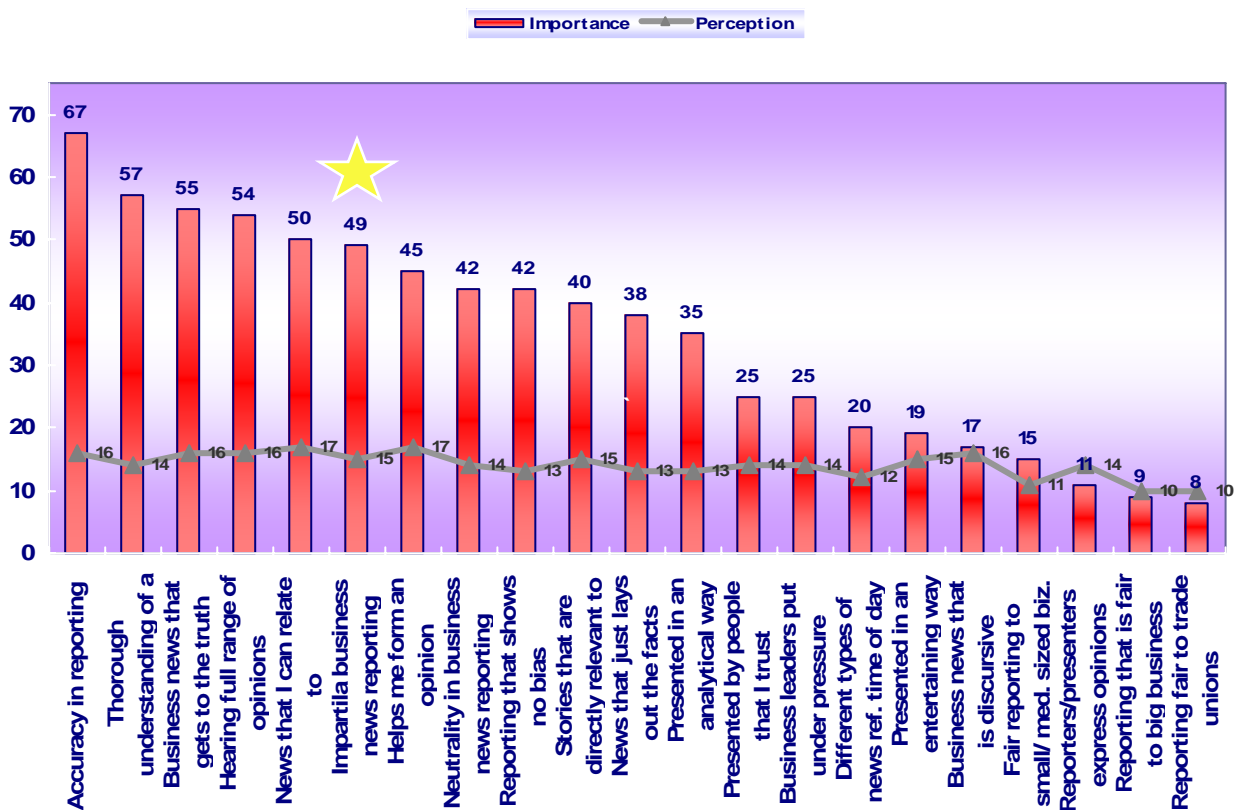
BBC Radio 5 Live Breakfast Show

Radio 5 Live Breakfast with Nicky Campbell reflects the least distinctive profile of all the programmes in the quantitative study. It shows the lowest ratings for all aspects.

However, this may be due to business news being a less well known element of the station's output, as all were asked to rate each programme, regardless of exposure to it.

In addition, the feedback to the content in the qualitative phase was relatively strong, with a preference among Passives for its light touch, perceived consumer partiality (vs. big business in the British Gas excerpt played) and accessible tone.

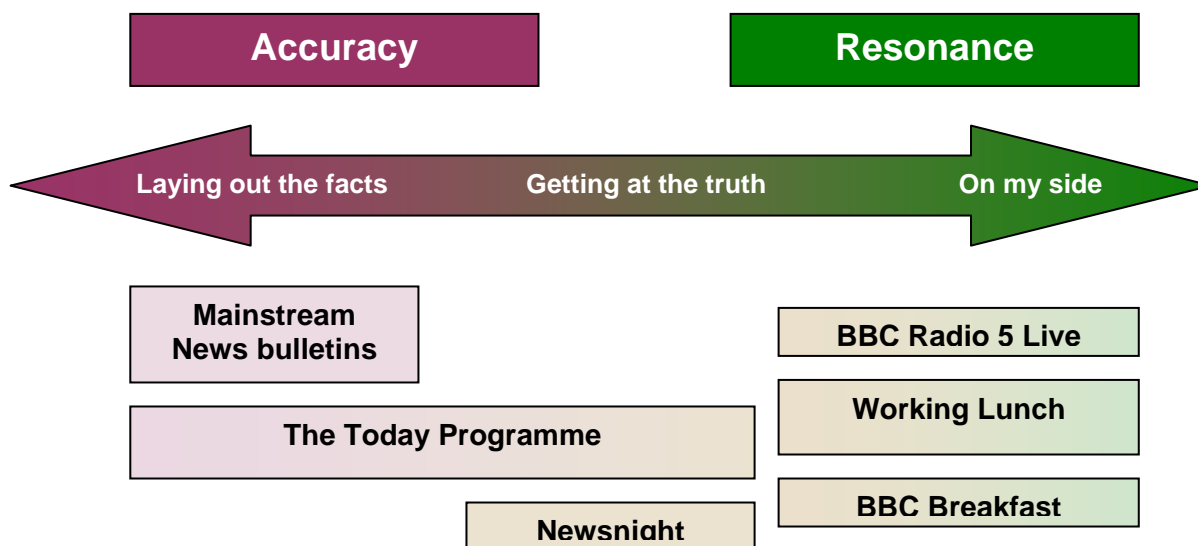
The appreciation of Radio 5 Live content at one end of the spectrum and Newsnight or The Today Programme at the other, is illustrative of the range that the BBC portfolio can leverage to meet the needs of different audiences.



Role of the BBC business news portfolio

When we consider the key audience needs (accuracy and resonance) from business news, it is clear to see why respondents favour the breadth they can access from the BBC portfolio.

This balance of accuracy and resonance is evident in differing degrees across the BBC's output.



Awareness and its impact on perceived Impartiality

Unsurprisingly, the main news bulletins have high awareness. Their status reassures audiences that the BBC maintains a tradition of trustworthy and accurate journalism and that impartiality is likely to be a bi-product of this. This filters down from news reporting to business news reporting.

At the very least for respondents, impartiality means that audiences will hear both sides of the story from the BBC.

Different user types from Passives to Proactives then require increasing levels of depth and debate around a story for business news to feel more impartial. This reflects the different levels of awareness of and interest in what the various perspectives to a single story might be.

An Active or Proactive viewer is likely to be more aware of what might be missing from a story, which may impact on perceived impartiality.

Tone of voice and the role of presenters

There is a tacit understanding that some shows and / or presenters will be more 'partial' than others because that is their remit.

Audiences across all three typologies appreciate that shows which deliver business news in a dynamic, textured, and occasionally even biased way (via a trusted presenter or programme brand) can be more engaging - thereby achieving greater resonance.

Business output via mainstream news bulletins is perceived to be accurate, concise and informative and as such provides an authoritative backdrop against which other shows can take more risks. But this can have a flipside for respondents: it is sometimes perceived as dry, stats heavy and can appear unduly negative ('bad news' story).

Delivered by a news anchor / reporter, the emphasis is on the factual and when elements are included which allow audiences to see some context (what it could mean for 'real' people), they are warmly received.

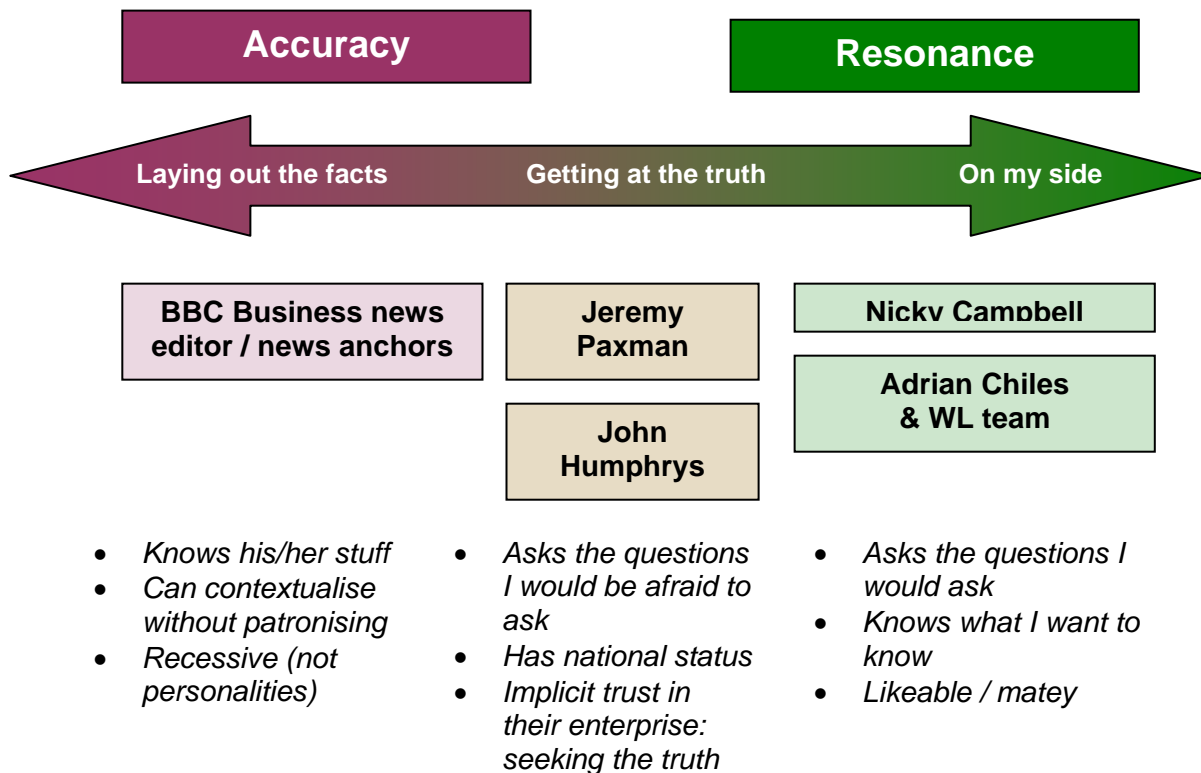
Working Lunch and BBC Breakfast have more flexibility in the audiences' eyes to present business news in a more informal, consumer-friendly way.

Working Lunch achieves a warmth and liveliness from a combination of informality, discursive debate and presenter appeal.

Audiences also appreciate a sense of heat around a good debate (e.g. Nicky Campbell on the BBC Radio 5 Live Breakfast show) and yet that debate might not be deemed truly impartial.

What the different presenters add

A sense of empathy with certain presenters taps into the audience process of decoding business information that is 'resonant to me'. Combined with accuracy of factual reporting, resonance drives the audience's belief in the BBC's impartiality.



Only one of the above presenter types is expected to be transparently impartial; those in the middle and to the right of the spectrum are allowed 'slant' (or partiality) because audiences perceive that this enables them to pursue the truth and act on behalf of the audience.

Measures of impartiality and approval across business news providers

When asked directly in a qualitative context, audiences describe and define impartiality as: fair, honest, clean, truthful, scientific, balanced, measured, tested, unbiased, neutral, balanced, having no agenda.

What is interesting is that impartiality is a concept which audiences see as a blend of other factors or attributes leveraged against their own experience and knowledge i.e. accuracy plus resonance.

The BBC's overall Impartiality rating

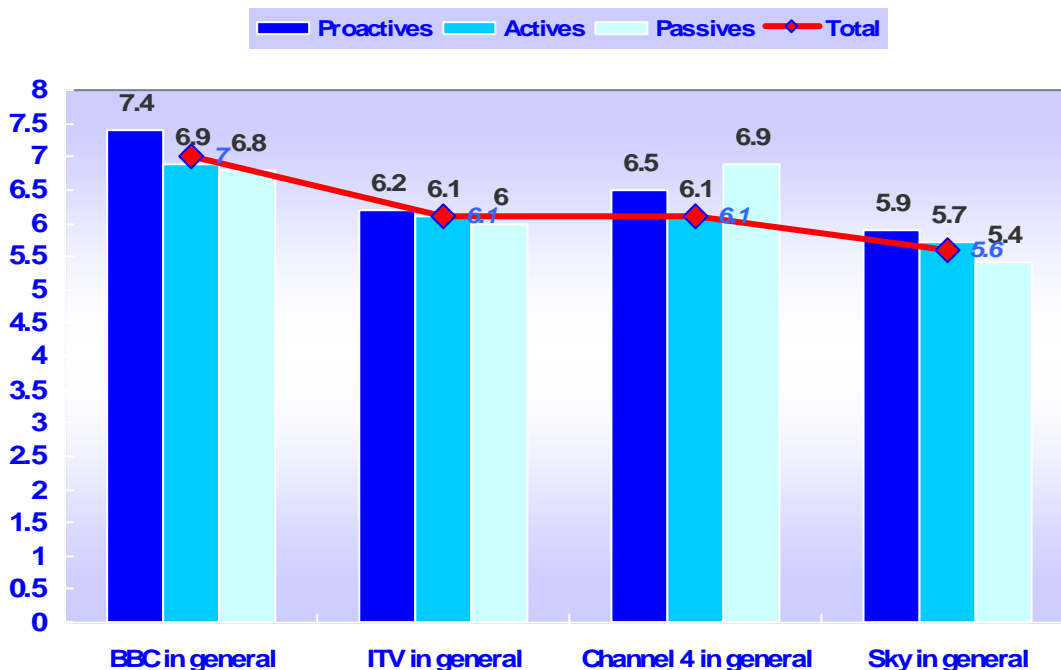
Whilst the BBC is by no means deemed 100% impartial, it is the source which most audiences are most inclined to trust for business news.

Business news is seen to be fairly impartial at an overall level (mean of = 6.2).

But the BBC is perceived as significantly more impartial than its competitors by all user groups, with the exception of Passives for Channel 4.

How impartial would you say (the business news provider) is in general?

Mean scores (1-10)



Having asked audiences to rate the BBC and competitors on the degree of impartiality in reporting business news, we used an open-ended question to understand the reason behind the scores. A full list of results can be found in the quantitative PowerPoint debrief.

In essence though, the BBC's impartiality ratings appear to be driven by a strong sense of fairness, neutrality and trust in the organisation as a whole.

ITV's overall Impartiality rating

By contrast, ITV is regarded as fair in its business reporting but its impartiality is perceived (particularly amongst Proactives) to be compromised by ties to advertisers and its commercial requirements.

Channel 4's overall Impartiality rating

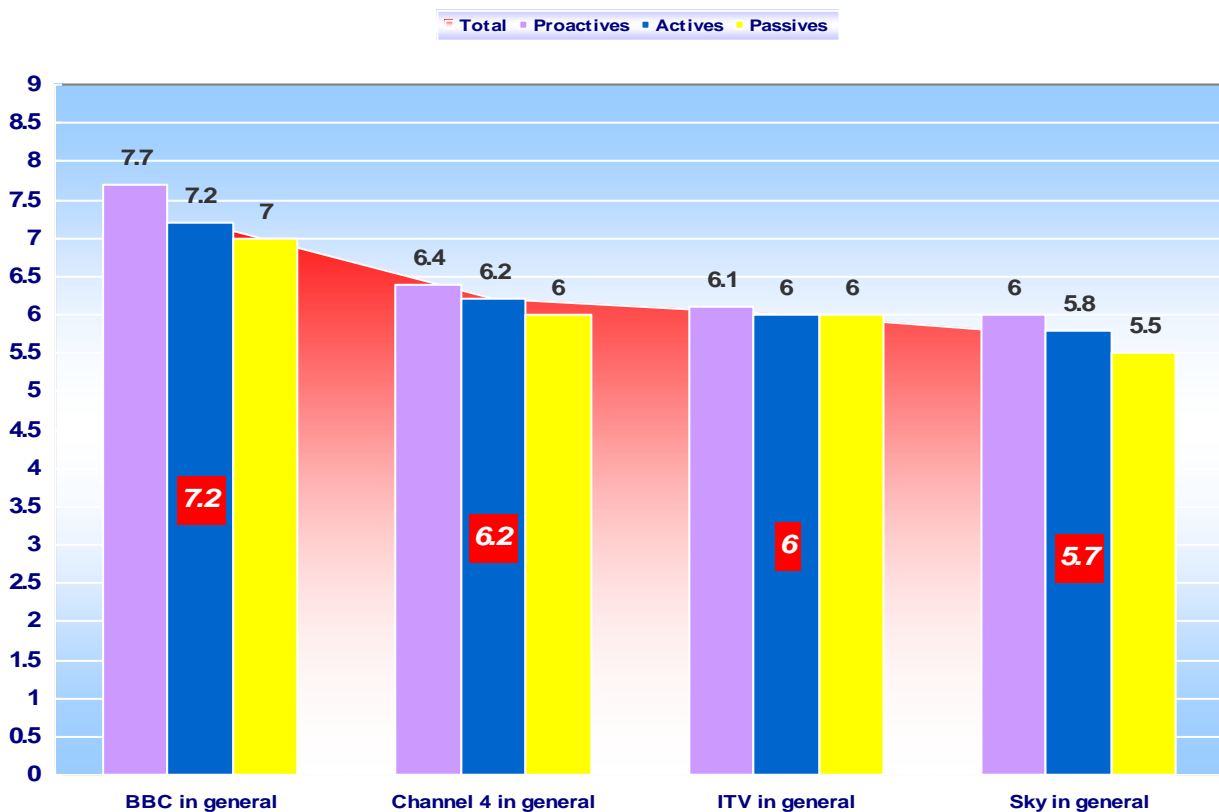
Channel 4 tends to be watched less overall, hence fewer comments . It is seen as fair and neutral in its reporting but is also perceived to be middle of the road on the impartiality scale.

Sky News's overall Impartiality rating

Sky News has the lowest impartiality rating which is influenced by a perceived bias towards big business, and suspicions of the Murdoch empire in general.

Overall Impartiality scores by audience type

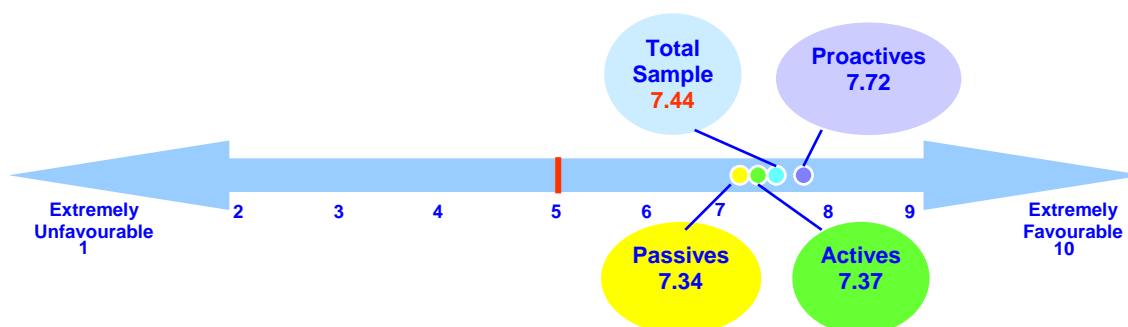
In terms of credible coverage and reporting of business news in general, the BBC performs well for all user groups. C4, ITV and Sky are seen to be very similar. Sky receives slightly less credibility amongst Actives and Passives.



Approval scores

The BBC is held in relatively high regard overall, which accounts for its high performance in terms of reporting, coverage and priority.

Interestingly, Proactives are the most complimentary, with Actives and Passives providing almost exactly the same score.



The overall rating is higher than seen in other surveys conducted this year using the same question.

The cynical consumer

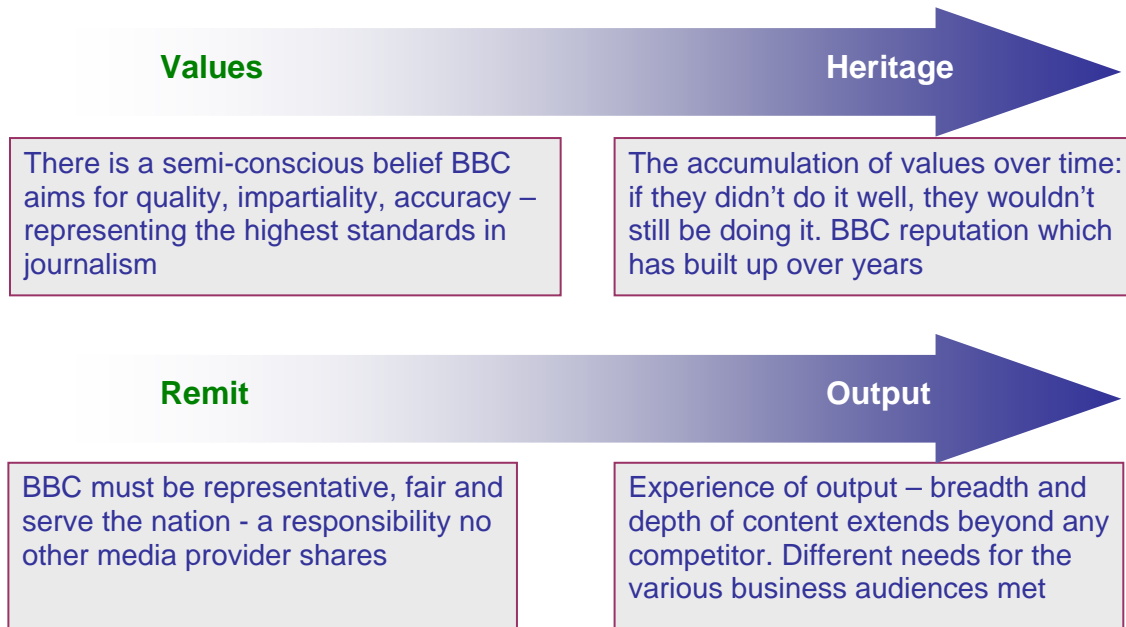
Cynicism is almost expected from consumers in the current climate. We would be surprised to hear unfailing trust of business expressed in a focus group. Audiences feel that *not* to doubt, would make them appear naïve.

They understand that whilst impartiality should be the ultimate goal, they are not inclined to award that standard 100% to any media provider.

They suggest that a journalist might be looking for an angle to make a good story, the presenter of the show might want to make a name for themselves, the business owners and spokespeople want to retain the good image of their company or organisation.

Belief in BBC brand values drives trust

Despite audience cynicism, the BBC performs very well.



The trust and faith audiences have in the BBC's overall brand values coupled with its range of output, ensures that it is regarded as pre-eminent in accurate, balanced business news coverage vs. its competitors.

6. Conclusions

- This research study explored audience perceptions of BBC Business news, ranging from output within mainstream news to more specialist shows.
- Business news from the BBC is well received across the sample though typologies exist across a spectrum ranging from less (Passives), to more engaged (Actives and Proactives).
- Audiences are seeking accuracy from business news coverage, but also need it to resonate. Presentation and tone is integral to this.
- All user groups need to be engaged and entertained (especially the Active and Passive users; the majority of the sample).
- The BBC performs well vs. competitors, providing a range of access points across the portfolio.
- Business news as a consistent element of the main news bulletins (especially the BBC News at Ten O'Clock) is the mainstay of the output. As such its remit is grounded in accuracy and factual reporting.
- Other content (Newsnight, Nicky Campbell on BBC Radio 5 Live Breakfast, The Today Programme and BBC TWO's Working Lunch) has more flexibility to take risks, provoke opinion and add dimension to business news output.
- Impartiality (or lack of it) is not spontaneously a particularly salient issue for most respondents, although it is considered an important measure alongside accurate and insightful business news reporting.
- Most providers of business news are considered impartial to a greater or lesser extent.
- Impartiality has varying degrees of resonance when applied to different output.

- The role and reputation of the main news bulletins dictates a rigorous approach to factual reporting and accuracy and this extends to expectations of impartiality in their business news segments.
- Other programming can be accepted as more 'partial' particularly if the presenter is perceived by audiences to be acting on their behalf to expose the truth and grow understanding (eg: Jeremy Paxman and Newsnight, John Humphrys on The Today Programme).
- Many Proactives (including our four experts) decode impartiality on a personal level; 'what I know from experience and what I believe'. This, by implication means that the issue of impartiality frequently becomes subjective.
- However, for those who are less confident in their knowledge (all but Proactives) they acknowledge that by measuring a programme's impartiality against what they know to be true, may well leave important gaps. This need for guidance and information and to be able to trust their media provider is central audience confidence.
- In this role, the BBC is deemed to be the most trusted of the business news providers. The range of its output also means that for major stories at least, it is pre-eminent in business coverage within broadcast media.

Appendix

- Research methodology in detail
- Qualitative
 - Recruitment screeners
 - Discussion guides
- Quantitative
 - Online questionnaire

Research Methodology in detail

Qualitative exploration of the issues

Rationale

As the objectives necessitated both an exploratory and definitive approach, qualitative and quantitative methodologies were used.

Beginning with qualitative research was imperative to understand the terms in which audiences define impartiality in business news. It was also beneficial to be able to speak to a range of different audience types to understand the level of engagement and satisfaction with BBC business media.

Our qualitative methodology was:

1. Focus on general audience 'pre-disposed to business news'	10 x 1.5hr MINI GROUPS (4-5 people in each)
2. Representation from general audience with 'low-level interest in business news'	4 x 1.5hr REGULAR GROUPS (8 people in each)
3. 'Business spokespeople' i.e. those with vested interests or informed perspectives from the business community	4 x 1hr DEPTH INTERVIEWS (individual sessions)

General audience – ‘Pre-disposed to business news’

The qualitative research placed emphasis on speaking to those who had some interest in business news already. As a potentially dry subject for discussion, coupled with the desire to understand the BBC’s competitive set, such a pre-disposed audience were crucial to eliciting lively and generative debate, to best understand how BBC business output currently performs.

South Swindon	North Manchester	Wales Cardiff	Scotland E'burgh	NI Belfast
Male Medium Business Owners	Male Small Business Owners (2 x C1)	Male Medium Business Owners	Female Small Business Owners	Male Small Business Owners (2 x C1)
Female Automotive 25-40yrs BC1(C2)	Male Manufacturing 40+yrs BC1(C2)	Male Financial 40+yrs BC1(C2)	Male Service 25-40yrs BC1(C2)	Female Property 35+yrs BC1(C2)

Mini-groups of 4-5 respondents

These were chosen as the most appropriate environment for discursive, yet detailed sessions about usage and preferences.

- Sample detail:
 - Interest in business news
 - Determined through a series of questions (recruitment screener can be found in the Appendix) which asked about their interest in the subject, their level of engagement with business news, the specific subject areas they have interest in e.g. corporate, union issues etc, and their usage of business media across platforms

- Location and sector
 - With this research we needed to give opportunity for regional differences to emerge
 - However, we were also sensitive to regional bias from traditional affiliations between sector and location
- Employee level
 - To understand how audiences feel the BBC is performing in terms of providing impartial business news it was important to respect different viewpoints, from business owners to employees
- SEG/age
 - We focussed on BC1C2 as the core audience, with nuance gained from observing employment level, split into appropriate age breaks
- Gender
 - We split groups by gender to gauge how men and women decode business media differently

General audience – ‘Low-level interest in business news’

The ‘pre-disposed’ was the core of our sample, but it was important for the research to reference a wider audience as well. In particular, it was critical to illuminate any issues around accessibility.

This required the inclusion in the sample of those who might be interested in business coverage, but are currently less engaged.

Regular focus groups of an hour and a half were selected to allow for a broad, discursive debate.

The breakdown of groups for this low-level interest in business news was:

Cardiff	Belfast	Edinburgh	London
Post-Family	Young family	Mature family	Pre-family

- Lifestage rather than age
 - Often more indicative than age, grouping samples by life stage allows for a sympathetic discussion of particular issues and concerns which may influence interest and engagement
- Location
 - Designed to maintain a regional spread

Respondents' pre-group discussion homework

All respondents were asked to complete a short exercise prior to attending the groups. This focussed the discussion on *actual* business news output (rather than recalled and perhaps incomplete perceptions). It also enabled us to familiarise all respondents with a broad selection of content before the groups, for parity and to maximise the quality of feedback.

Respondents watched a DVD of TV and radio clips of BBC and competitor business output. The 5 minute excerpts were all broadcast on July 27th 2006, the day a price rise from British Gas was announced. This story was chosen due to its reach in terms of consumer concern, and because of the quantity of coverage given to it across platforms and broadcasters. The clips sought to represent the tonal range the BBC offers across its portfolio, as well as giving respondents some key competitors as contrast and context.

The content was as follows:

- BBC Radio 5 Live, Breakfast with Nicky Campbell
- BBC Radio 4, The Today Programme
- BBC TWO, Working Lunch
- Channel 4 News at 7pm
- BBC ONE News at 10pm
- ITV1 News at 10.30pm

Respondents recorded their impressions on a worksheet. Within this, we asked them to visit BBC online, The Times online and another site of their choice to evaluate online presentation of the story.

Discussion Structure for general audience research

The full discussion guides for the mini-groups and groups can be found later in the Appendix.

Business spokespeople: depth interviews

Whilst this research was designed to complement the rest of the impartiality review programme conducted by the BBC (in which a number of expert witnesses are to be called by the panel), we felt that including a few business experts would help to contextualise the consumer response.

We sought spokespeople who we felt could offer the most defined and discrete perspectives, and used contacts to gain interviews.

The most appropriate methodology was a 1 hour individual depth interview, convenient for participants and a discreet environment for them to air their perceptions of BBC business output.

Breakdown of our business spokespeople depths below:

George Monbiot	Nigel Stanley	Stephen Alambritis	Rodney Fitch
<i>Columnist, polemicist, environmentalist, anti-big business campaigner</i>	<i>Head of Communication Strategy, Trades Union Congress</i>	<i>Head of Parliamentary Affairs, Federation of Small Business</i>	<i>CEO of Fitch Design company (special interest in retail design)</i>

Discussion Structure for Business spokespeople

Full discussion guide can be accessed later in the Appendix.

Quantitative scaling and definition of the dynamics at play

Rationale

Having explored the territory, usage and application of impartiality by a broad audience in the qualitative phase of research, it was necessary to use quantitative methodology to scale the findings and provide a robust measurement of how well the BBC is performing.

Online quantitative research

This methodology was selected because it offers access to a large, nationally representative sample in a cost-effective, reliable and time efficient manner.

We used the largest representative internet panel in the UK (c.3 million) in terms of scale and depth. This methodology also enabled us to monitor data collection closely via a special link on an hour-by-hour basis.

A 15 minute survey of closed questions and one open-ended question was designed, building on the findings from the qualitative research phase. The shape that the first phase of research gave to the second was both broad and specific – from evolving the research objectives, to the specific design of the questionnaire.

Evolved research objectives:

- To measure attitudes towards impartiality in the context of Business (drawing on learnings regarding the nature and interpretation of impartiality)
- To assess the perceptions of the impartiality of the BBC relative to alternative media channels
- To quantify the factors that drive perceived impartiality
- To profile the above relative to the typologies identified in the qualitative research in terms of behavioural dynamics (awareness, salience, impact of Business and Finance)

Questionnaire design in summary

The full version can be found in the Appendix of this document:

- Initial screening questions
- Level of interest in business news
- Usage of business media
- First place of reference (platform) for business news
- Frequency of use of platforms for business news
- Specific sources of business news (awareness, ever use, regular users of)
- Most valued platform for business news
- Importance of the way in which business news is reported
(trade-off exercise using triads of elements)
- Delivery by providers of business media on those elements
- Rating BBC as an impartial provider of business news, followed by an open-end question exploring reasons for rating
- Rating of other providers as impartial sources for business news
- Rating of BBC and other providers for coverage and reporting of business news
- BBC approval rating

There were a number of considerations taken into account during the design of the online survey:

- We needed to ensure that a sufficient portion of the sample had an interest in and usage of business media to gain an informed perspective on the BBC relative to other providers of business media
- It was also important to allow participants to rate and measure all relevant providers of business media, across platforms
- We were required to use consumer language when describing the various elements of impartiality, and make sure of the nuance of phrasing

- Importantly, we had to ensure respondents were unable to 'second-guess' the rating of the different elements of impartiality, to unearth a genuine response. To this end we used a 'triad' questioning method. Triads are a simple approach for generating a hierarchy of needs by asking respondents to trade off attributes against each other. Respondents are asked to look at the viewing attributes in sets of three (in random order) and decide which of the three is the most important to them in the context of business news - e.g.



The questionnaire was then scripted and tested before the web-based link was set up for the panelists to access and complete the survey.

Data collection took place from 27th November to 11th December 2007.

Sample and quotas set

To address some of the challenges, we set some quotas in place to ensure we controlled the sample appropriately:

- Our sample size was 850 to be robust enough for close analysis by different group types
- The panel is closely representative of the UK population in terms of age, gender, socio-demographics and location
- Quotas were imposed as follows:

		Quota	Achieved
Locations:	England	300	335
	Wales	200	200
	Scotland	200	198
	Nth. Ireland	150	157
Heavy Business Media Usage:		100	312
Overall:		850	890

All were required to have some level of interest in business news on a scale of 1-10 and all were ABC1C2.

Qualitative recruitment screener

PROJECT NAME: Business

JOB NUMBER: 271

Date of Interview/Group: _____

Time of Interview/Group: _____

Attended Interview/Group: _____

Group NO: _____

RECRUITMENT SCREENER

NAME: _____

AGE OF RESPONDENT: _____
 (Check quota & write in)

Address: _____

AGE Mini Groups 25-60yrs even spread, please check Quota controls.

Postcode: _____

Groups – as it falls.

Tel NO: (incl. STD code) _____

SEX: Male 1 Check
 Female 2
 Quota

Work: _____

Home: _____

MARITAL STATUS: Single 1 Please
 Married/cohabit 2
 Check
 Divorced/widowed 3 Quota

OCCUPATION OF RESPONDENT/CHIEF WAGE EARNER:
 (Probe for skills, responsibilities etc.)
 TITLE: _____

PRESENCE OF CHILDREN AT HOME: No children 1 Please
 Children under 10 2 Check
 Children 11-16 3
 Quota
 Children aged 16+ 4
 Controls

BUSINESS/INDUSTRY: _____

QUALIFICATIONS: _____

NO OF PERSONS RESPONSIBLE FOR: _____

SOCIAL GRADES: A 1Please
 B 2 Check
 C1 3 Quota
 C2 4 Req'd
 D 5 Closed

INTERVIEW DECLARATION:

I have carried out an interview within the Market Research Code of Conduct. The respondent is not a relative or friend of mine.

Interviewers Signature: _____

Date: _____

We are carrying out a market research survey and are looking for people representing various occupations. I need to ask you a few questions to establish if you are amongst the type of people we need to talk to.

Q1. Firstly, do you or any members of your family or close friends work in any of the following occupations, either now or in the past?

	YES	NO
Advertising	1	1
Design	2	2
Journalism	3	3
Market Research	4	4
Marketing	5	5
Public Relations	6	6
Media (TV)	7	7

IF YES TO ANY OF THE ABOVE - CLOSE INTERVIEW

Q2a. Have you ever attended a Market Research group discussion?

Yes	1 Ask Q2b & Q2c
No	2 Go to Q2d

Q2b. What was the discussion about?

--

IF ON A SIMILAR SUBJECT AS THIS SURVEY - CLOSE INTERVIEW

Q2c. How long ago did you attend a Market Research group discussion?

In the last 6 months	1 Close interview
Longer ago than 6 months	2

Q2d. Would you be willing to be re-contacted in the future?

Yes	1
No	2

Q3. From the following age brackets, which do you fall into?

24yrs or under	1
25-30yrs	2
31-35yrs	3
36-40yrs	4
41-45yrs	5
46-50yrs	6
51-55yrs	7
56-60yrs	8
61+yrs	9

Mini Groups 1-5 & Groups 1-4

All respondents to be aged between 25-60yrs please aim for an even spread of ages.

Mini Groups 6 & 8

All respondents to be aged between 25-40yrs (i.e. all to code No's 2 or 3 or 4)

Mini Group 7 & 10

All respondents to be aged between 41 - 60yrs (i.e. all to code any from No's 5-8)

Mini Group 9

All respondents to be between aged 36 - 60yrs (i.e. all to code any from No's 4-8)

Q4. When you are watching news programmes, please rate these areas in terms of interest. 1 = being the most interesting to you and 9 the less interesting?

Politics	1	2	3	4	5	6	7	8	9
Current Affairs	1	2	3	4	5	6	7	8	9
Foreign Affairs	1	2	3	4	5	6	7	8	9
Business	1	2	3	4	5	6	7	8	9
Personal Finance	1	2	3	4	5	6	7	8	9
Environment	1	2	3	4	5	6	7	8	9
Sport	1	2	3	4	5	6	7	8	9
Culture	1	2	3	4	5	6	7	8	9
Celebrity	1	2	3	4	5	6	7	8	9

All Mini Groups

All respondents must include Business and rate it no lower than 4

All Groups

All respondents must include Business and Personal Finance, rating both no lower than 6

Q5 Which of following statements best reflects your opinion?

Keeping up to date about what's going on the business world is very important to me.	1
I like to be informed about what's going on in the business world	2
A business-related story has to be relevant to me before I'll pay attention	3
I rarely pay attention to the business world unless it's a really big story	4
The business world doesn't interest me at all.	5

All Mini Groups

Half of the respondents per mini group to code statement 1 or 2

All Groups

Half of the respondents per group to code statement 3 or 4

All Mini Groups & All Groups

None to code statement 5

Q6 Thinking about hearing a business story about each of the following areas, in each case would you be very interested, interested or not interested?

Interests	Very Interested	Interested	Not Interested
Manufacturing			
Property & Personal Finance (house prices, mortgages, Savings, ISAs)			
Corporate (company profits, mergers etc)			
Workplace / union issues			
Retail (High street spending, big store profits/losses M&S, Gap etc)			
Service (Leisure and travel, airlines etc)			
Automotive (car prices, car plants)			
Technology (computing, internet)			

All Mini Groups

All to code at least 'Very Interested' once and 'Interested' twice.

All Groups

All to code 'Interested' two to four times.

Q7 From the following which do you watch / listen to:

TV	Regularly (4 times a week)	Occasionally (once a week)	Less than once a week / Never
BBC One O'clock News			
BBC Six O'clock News			
BBC Ten O'clock News			
BBC News 24			
ITV News			
Channel 4 News			
Channel 5 News			
Sky News			
RADIO			
The Today Programme			
The World at One			
PM			
The Six O'Clock News on Radio 4			

All Mini Groups

All respondents to code 1 BBC news from the TV section regularly and 1 BBC from the Radio section occasionally.

All Groups

All respondents to code 1 of BBC news from TV section regularly.

Q8 Have you visited the BBC.co.uk website?

YES	1Go to Q8a & b
NO	2

All Mini Groups & All Groups

Half of the respondents per mini group and groups to have visited BBC Website (i.e. Half to code No.1)

Q8a How often do you use this website?

1-2 times a week or more frequently	1
Once a month	2
Less than once a month	3

All Mini groups & All Groups

Half of the respondents to be using the website 1- 2 times a week or more frequently (i.e. half to code No.1)

Q8b Thinking about those occasions when you are on the site, which specific areas do you tend to visit?

Areas	Regularly (1-2 week)	Occasionally (1 month)	Never visited
Children			
Entertainment			
Health			
History			
Business & Money			
Learning			
Lifestyle			
Music			
News			
Science & Nature			
Society & Culture			
Sport			
Other			

All Mini Groups & All Groups

**At least 1 per group to have visited Business & Money
Occasionally.**

Regularly /

NOTE TO RECRUITER:

PLEASE EXPLAIN THAT RESPONDENTS WILL BE REQUIRED TO WATCH A DVD BEFORE ATTENDING GROUPS WHICH THEY WILL RECEIVE SHORTLY, AND THAT THEY WILL BE COMPENSATED FOR DOING THIS (FOR THE AGREED AMOUNT). WHILST WATCHING THEY WILL NEED TO COMPLETE A SIMPLE WORKSHEET WHICH WILL BE DISTRIBUTED WITH THE DVDS.

CLASSIFICATION

- All 1.5 hour per group
- Mini groups – 4 respondents per group
- Groups – 8 respondents per group
- Ethnicity to fallout
 - but min 2 BMEs per mini groups in Manchester and Cardiff
 - and min 2 BMEs per group in England (pre-family) and Wales (post-family)

South	North	Scotland	NI	Wales
Swindon	Manchester	E'burgh	Belfast	Cardiff
Sophie – 26th Sept	Lizzy – 28th Sept	Neil – 27th Sept	Lizzy – 3rd October	Neil – 3rd Oct
Mini Group 1	Mini Group 2	Mini Group 3	Mini group 4	Mini group 5
Male	Male	Female	Male	Male
Medium	Small Business	Small	Small Business	Medium Business
Business	Owners	Business	Owners	Owners
Owners	<i>(2 respondents to be C1's)</i>	Owners	<i>(2 respondents to be C1's)</i>	
Mini Group 6	Mini Group 7	Mini Group 8	Mini Group 9	Mini Group 10
Female	Male	Male	Female	Male
Automotive	Manufacturing	Service	Property	Financial
25-40yrs	40+yrs	25-40yrs	35+yrs	40+yrs
BC1(C2)	BC1(C2)	BC1(C2)	BC1(C2)	BC1(C2)
Low-level interest in business news				
	London	Belfast	Edinburgh	Cardiff
	Lizzy – 5th Oct	Lizzy – 4th Oct	Neil – 28th Sept	Neil – 4th Oct
“Personal Finance”	Group 1	Group 2	Group 3	Group 4
	Pre-family	Young family	Mature family	Post-Family

Qualitative discussion guide: pre-disposed to business news

Warm up and introduction 10 mins

- Moderator introduction
- Reassurance about confidentiality
- Purpose of today and the research
- Need to speak on behalf of self, and welcome variety of opinion
- Need to be honest, but constructive
- Video / audio recording
- Introduction of respondents – names, ages, occupations, family

First impressions 20 mins

Thanks for completing viewing homework, request respondents refer to worksheet notes as appropriate

Moderator to invite spontaneous impressions of viewing reel and record on flipchart in spider diagram, to allow us to capture response and begin to reveal immediate responses.

Allow respondents to organically feedback, but if they get stuck prompt on the following:

- Level of engagement
- Level of understanding
- Tone of voice
- How the sources might be compared to each other
- Level of impact

Business and Financial media – general impressions 25 mins

- Are these sources (on the DVD) ones you are familiar with and use?
 - How often?
 - Probe general impressions of each
 - Moderator to note terminology used to measure value to them
- What impact do they have on you?
 - How you feel about companies / organisations / brands?
 - How you feel as an individual with a job?
 - How you feel as an individual who consumes stuff?
- Where else do you hear about business or financial stories?
 - Probe TV, radio, online, WOM, marketing
 - Moderator to probe for specifics...i.e. what drives consumption? Is it the presenter, the show or the media provider?
 - Moderator to note sources on flip chart
 - Which of these are the major sources?
 - What do they have in common?
 - Why are these attributes important?
 - Moderator to drill down i.e. what does 'you can trust them' mean exactly?
 - Develop hierarchy of attributes with group – what are the key important attributes for a business / financial provider to display?

Mapping (if time permits)

- Using the sources / reference points described by group as valuable to them, ask them to map these on axis of their choice
- Explore mapping and rationale for this
- Where would BBC sit (if not mentioned already)? Why?
- What typifies BBC business and financial output?
 - Is BBC doing anything unique in this field?
- If we had to break this down into a number of areas what would they be?

Defining impartiality 25 mins

If mentioned earlier in any form of expression probe around meaning and importance, and allow respondents to define what it means to them.

However, at this point in the discussion moderator to make the focus of the debate explicit and explain that we are interesting in understanding what this means to you...

- First impressions, what do you think impartiality means to you?
- Why hasn't this come up earlier in our discussion? (when relevant)

Moderator to explain...we would like to use a few examples from TV and radio and play these and just get your feedback with this in mind...i.e. how impartial is this coverage of business and financial news?

Moderator to hand out individual sheets of paper for notes during the playing of the DVD

Play DVD, one story at a time and pool group thoughts after each.

ROTATE ACROSS GROUPS TO SUIT TIME ALLOCATED AND SAMPLE PRE-DISPOSITION

CLIP 1 – Regular slot – Declan Curry, Breakfast news business slot

CLIP 2 – Regular slot – Greg Wood, Today programme business slot

CLIP 3 – A typical news story on main BBC news about job losses

CLIP 4 – A selection of clips from Newsnight, longer, intellectual

Develop territory of impartiality with the group

- What's important to consider with impartiality?
 - Drill down to specifics to discover exactly what respondents mean
 - Allow discussion to develop organically, but probe on the following if not mentioned:
 - Accuracy
 - Presence of personal opinion
 - Level of engagement
 - Tone of voice

- Level of subjectivity / objectivity in presentation
 - Level of engagement
 - Well rounded perspective vs. omission of facts
- Level of importance of these factors
- How are all of these expressed by BBC / competitors?
- How does this compare to when you viewed the British Gas stories (moderator to make sure issues are not overplayed)?
- How does this impact on you as an employee / individual / consumer?
- How does this story perform in context of other sources from the same provider i.e. working lunch from BBC, and BBC news bulletin?
 - i.e. Does a portfolio allow for different approaches / levels of impartiality?

Moving forward

10 mins

- Revisit hierarchy of needs for business and financial
 - What are the key important attributes for a business / financial provider to display?
 - Which of these are requisite on a story by story basis?
 - How far is BBC performing on this by piece of output, across platforms?
 - What should BBC's business and financial manifesto be for the next 5 years?

Paragraph from the Neil Report

Impartiality and Diversity of Opinion

For the BBC impartiality is a legal requirement.

BBC journalists will report the facts first, understand and explain their context, provide professional judgements where appropriate, but never promote their own personal opinions.

Openness and independence of mind is at the heart of practising impartiality.

We will strive to be fair and open minded by reflecting all significant strands of opinion, and by exploring the range and conflict of views.

Testing a wide range of views with the evidence is essential if we are to give our audiences the greatest possible opportunity to decide for themselves on the issues of the day.

Read it out for respondents are get feedback...

- Does it feel right for BBC
- What are the benefits of such a requirement
- Do they feel the BBC reaches this standard, generally, in their opinion

Qualitative discussion guide: low level interest in business news

Warm up and introduction 10 mins

- Moderator introduction
- Reassurance about confidentiality
- Purpose of today and the research
- Need to speak on behalf of self, and welcome variety of opinion
- Need to be honest, but constructive
- Video / audio recording
- Introduction of respondents – names, ages, occupations, family

Personal finance perspective 15 mins

- What personal finance decisions are you making at this stage in your life? Pool all thoughts
- Is personal finance something that you think about much day to day?
 - What prompts it?
 - Probe changes in circumstance, friends (WOM), media
- When making a decision, what sources do you consult / use / trust?
- What's valuable about these sources, what's important?

Business and Financial media – general impressions 25 mins

Thanks for completing viewing homework, request respondents refer to worksheet notes as appropriate

Moderator to invite spontaneous impressions of viewing reel and record on flipchart in spider diagram, to allow us to capture response and begin to reveal immediate responses.

Allow respondents to organically feedback, but if they get stuck prompt on the following:

- Level of interest and nature – from what angle do they approach the subject?
- Level of understanding
- Level of engagement
- Tone of voice
- How the sources might be compared to each other
- Level of impact

- How would you describe the shows / programmes depicted on the reel?
- Are these sources (on the DVD) ones you are familiar with and use at all?
 - How often?
 - Probe general impressions of each, including...
 - What are your particular preconceptions?
 - Moderator to explore implicit and explicit barriers
 - What specifically puts you off?
 - What could engage you more?
- Where possible explore impact on individual
 - In terms of personal decision making
 - Impressions of companies / organisations / brands
 - As an employee
 - As a parent / son / grandparent etc
 - As a consumer
- Where else might you hear about business or financial stories?
 - Probe TV, radio, online, WOM, marketing
 - Moderator to note sources on flip chart
 - Which of these are the major sources?
 - Explore positives and negatives (in terms of preconceptions)
 - Moderator to drill down i.e. what does 'you can trust them' mean exactly?

Mapping (if time permits)

- Using the sources / reference points mentioned by group and ask them to map these on axis of their choice

- Explore mapping and rationale for this
- Where would BBC sit (if not mentioned already)? Why?
- What typifies BBC business and financial output?
 - Fully explore positive and negative preconceptions
 - Is BBC doing anything unique in this field?
- If we had to break this down into a number of areas what would they be?
- Probe level of engagement if not mentioned

Defining impartiality 25 mins

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However, at this point in the discussion moderator to make the focus of the debate explicit and explain that we are interesting in understanding what this means to you...

- First impressions, what do you think impartiality means to you?
- Why hasn't this come up earlier in our discussion? (when relevant)
- How important is it?

Moderator to explain...we would like to use a few examples from TV and radio and play these and just get your feedback with this in mind...i.e. how impartial is this coverage of business and financial news?

Moderator to hand out individual sheets of paper for notes during the playing of the DVD

Play DVD, one story at a time and pool group thoughts after each.

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 - Level of engagement
 - Tone of voice
 - Level of subjectivity / objectivity in presentation
 - Well rounded perspective vs. omission of facts
 - Level of importance of these factors
 - How are all of these expressed by BBC / competitors?
- How does this compare to when you viewed the British Gas stories [to make sure issues are not overplayed]?
- How does this impact on you as an employee / individual / consumer / parent / decision maker?
- How does this story perform in context of other sources from the same provider i.e. working lunch from BBC, and BBC news bulletin?
 - i.e. Does a portfolio allow for different approaches / levels of impartiality?

Moving forward 15 mins

- What are the key important attributes for a business / financial provider to display when communicating with you?
 - Which of these are requisite on a story by story basis?
 - How far is BBC performing on this by piece of output, across platforms?
- What should BBC's business and financial manifesto be for the next 5 years?
- How can BBC engage with you more on this subject?

Paragraph from the Neil Report

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Read it out for respondents are get feedback...

- Does it feel right for BBC
- What are the benefits of such a requirement
- Do they feel the BBC reaches this standard, generally, in their opinion

Qualitative discussion guide: business experts

Warm up and introduction 10 mins

- Moderator introduction
- Purpose of today and scale of the research project
- Video / audio recording
- Interviewee introduce themselves, brief synopsis of their career and motivations for the job they do

Business and Financial media consumed - general 15 mins

- Sources consumed regularly?
 - Probe TV, radio, online, print, and for specific programmes / shows / elements
 - Top of mind positives, negatives
 - Why those sources?
 - What's important to you in using sources?
 - Is anything missing from available sources?

BBC Business and Financial Media 15 mins

- Moderator to mention that we are completing a study for BBC
- How would you describe the BBC's business and financial output?
- Why isn't it one of the sources you use? (probe as appropriate for TV, radio, online)
- Broadly speaking what are the key strengths or weaknesses
- Who are its main competitors? What are the respective strengths and weaknesses
 - For you
 - For informed public

- For uninformed public
- What kind of relationship does BBC have with the business community?
 - Probe interviewee's area of expertise
 - How has this changed over the last 5 years?
 - How would you hope it might improve over the next 5 years?

Discussing Impartiality

15 mins

- Once mentioned, continue to probe around how interviewee defines this concept
- If not mentioned, probe at this point:
 - You have not mentioned impartiality (explicitly), why is this?
 - What does this mean to you? Probe
 - Access
 - Relevancy
 - Fairness
 - On my side (impartial in my view)
 - Dimensionalised presentation of content etc.
 - Accuracy
 - Presence of personal opinion
 - Level of engagement
 - Tone of voice
 - Level of subjectivity / objectivity in presentation
 - Well rounded perspective vs. omission of facts
 - Probe by media provider (i.e. BBC)
 - Probe in terms of single programme show (i.e. Today, Working Lunch)
 - Probe in terms of BBC Business and Impartilaity portfolio
- How important is it? Discuss fully

Moving forward 5 mins

- What does BBC need to do to ensure they provide a useful / meaningful perspective in terms of business and financial news?
- How should they exact a sense of impartiality with what they do?

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- What are the benefits of such a requirement
- Do they feel the BBC reaches this standard, generally, in their opinion

Quantitative online survey

Screening

S1 Do you or any member of your household work in any of the following occupations?

Financial Services	1	Construction	8
IT	2	Manufacturing	9
Wholesale	3	Energy / Utilities	10
Media / Publishing	4	Television or TV programme making	[CLOSE]
Business Services	5	Market Research	[CLOSE]
Entertainment / Culture / Sport	6	None of the above	96 [Always
Broadcasting	[CLOSE]	the last option]	
Transport / Distribution	7		

S2 Are you... ?[SC]

Male	1
Female	2

S3 Please type in your age: _____

RECODE S3 INTO STANDARD AGE BREAKS:

HidS3

Under 16.....	[CLOSE]
16 - 17.....	1
18 - 24.....	2
25 - 34.....	3
35 - 44.....	4
45 - 54.....	5
55 - 64.....	6
65 +.....	7

EXCLUDE ANYONE BELOW 16;

SQ4. What is your ethnic group?

White

Scottish
Welsh
Other British
Irish
Any other white background

Caribbean

African

Any other black background

Other ethnic background

Mixed

Any mixed background
Asian
Indian

Pakistani

Bangladeshi

Chinese

Other Asian background

