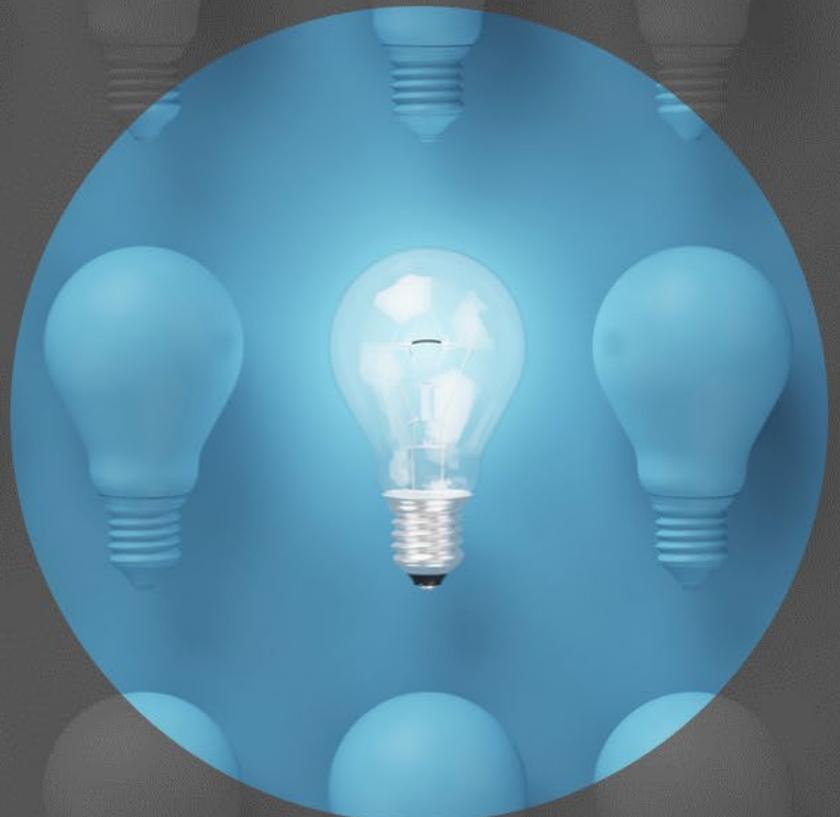




An exploration of people's relationship with PSB, with a particular focus on the views of young people

Qualitative Research Report

July 2020



A. Contents

| | |
|---|----|
| 1. Executive Summary | 4 |
| 1.1. Background & approach | 4 |
| 1.2. Summary of key findings..... | 5 |
| 2. Background, objectives, research approach and sample structure | 12 |
| 2.1. Background | 12 |
| 2.1.1 Public Service Broadcasting (PSB) system | 12 |
| 2.1.2 Small Screen: Big Debate | 13 |
| 2.2. Objectives..... | 14 |
| 2.3 Research approach and sample structure..... | 16 |
| 3. Context: The media landscape | 18 |
| 3.1 Audience types..... | 18 |
| 3.2. States of media consumption..... | 19 |
| 3.3. Changing media consumption..... | 20 |
| 3.4. What makes a media brand feel relevant | 22 |
| 3.4.1. Most relevant brands by audience segment | 23 |
| 4. The current use and relevance of PSB master and channel brands | 27 |
| 4.1 Radio Listening..... | 32 |
| 4.2. The PSB brands | 34 |
| 4.2.1. PSB master brands | 34 |
| 4.2.2. PSB channel brands | 36 |
| 4.2.3. PSB on-demand services..... | 37 |
| 5. The role and value of PSB | 39 |
| 5.1 A lack of perceived value for some audiences..... | 45 |
| 5.2. The societal value of PSBs | 47 |
| 5.3. The future role for PSB | 50 |
| 5.4. The licence fee | 51 |
| 6. Requirements for PSB in the future | 55 |
| 6.1 Gen Z audience | 55 |
| 6.2 The 25yrs+ audiences..... | 56 |
| 6.3 Conclusion..... | 58 |
| 7. Appendix | 60 |
| 7.1 Pre-tasks | 60 |
| 7.2 Extended focus groups | 61 |
| 7.3 In-home ‘immersion’ Interviews | 62 |
| 7.4. Stimuli63 | |



7.5. Sample 64

7.6. Young people: profiles 64

7.7. 25+ Audience profiles 65

7.8. Focus groups – younger people 67

7.9. Focus groups – 25+ audiences..... 68

7.10. In-home depth interviews – younger people 69

7.11. Discussion guide 71

1. Executive Summary

1.1. Background & approach

The Public Service Broadcasting ('PSB') system has helped deliver high quality TV content to UK audiences over many decades. The system is based on a set of benefits which are offered to designated PSB institutions (PSBs) in return for a set of obligations. The obligations were designed to deliver different public goals which government has deemed valuable for society. Examples include providing accurate and impartial news services; producing religious, arts and documentary programmes; and making high quality UK drama and comedy.

Ofcom has a responsibility to review the PSB system every five years. To help set public service broadcasting's future Ofcom needs to consider if the traditional goals remain relevant, if not, what audiences believe is important instead and in either case how they can be best achieved over the next five to ten years.

The current review is important as it comes at a time when BARB consumption data shows that on average people are watching less broadcast TV than they used to, including less PSB content. For those aged 16-24, the fall in viewing has become more pronounced, with large drops in the amount of TV viewed (70 mins in 2019 from 169 mins in 2010).

Jigsaw Research was commissioned to conduct a programme of qualitative research to feed into the review. The research aims to understand audiences' relationship with PSB; including their use of PSB content and its relevance to them, the role and value of PSB in their lives and how their requirements from PSB may evolve in the future.¹

There are two key components to this research, conducted sequentially:

- The first stage of the research canvassed the opinions of young audiences aged 16-24, through a mix of 13 mini-group discussions (with each group comprising 6 people) and 19 in-home in-depth interview sessions (with each session comprising 1-2 people)
- The second stage expanded the scope of the research to include audiences aged 25 and over and comprised 10 face-to-face group discussions (with each group comprising 7-8 people), two online mini groups (among the 45-59-year-old audience) and telephone depth interviews (among the 60+ audience).

¹ This fieldwork for this research was conducted pre-lockdown, from January to March 2020.

Full details of the research approach including a description of the different interviewing methods adopted are provided in section 2.

1.2. Summary of key findings

In exploring media habits and attitudes, it is apparent that consumption behaviours differ across the generations.

As is to be expected, the research found evidence of different viewing and listening habits based on age and life stage, and specifically based on the following three cohort groups:



GEN Z
'Emerging'

Split between the youngest audiences (16-18) who are still living at home and the slightly older (19-24) audiences who are starting to become more independent and may be living or studying away from home.



GEN Y/TECH
FORWARDS GEN X
'Evolving'

Typically, mid 20s through to 40s, although they can be older. This group has typically left home and are living as a couple/with friends and sometimes with children.

The Gen X in this group are more tech savvy/keen to adopt new ways of viewing than the more 'established' Gen X.



BOOMERS/MORE
TRADITIONAL GEN X
'Established'

This group is typically a combination of older audiences (50s +) and more traditional viewing audiences (in their 40s).

They have grown up watching broadcast TV and are more driven by the TV schedule.

The findings are therefore broken down between these different generational groups.

The key findings from the research are as follows:

Media consumption habits have changed in response to the expanding range of options available:

Except for Gen Z, all audiences acknowledge that their viewing habits have changed over the years.

The Gen Z audience are the exception because they have grown up with media streaming services and perceive these to be very much 'their services' and 'of their generation'. More on

the media changes from the perspective of a 16 year old can be found in the following link <https://www.smallscreenbigdebate.co.uk/research>.

For this age group, Netflix or YouTube are typically the first port of call when looking for something to watch, and Spotify or Apple Music when looking for something to listen to. Those Gen Z audiences still living at home are predominantly watching and listening to content in their bedroom, where they have total control over what to consume.

The Gen Y and tech-forward Gen X audience cite the most significant changes in their viewing habits over the years and admit to watching considerably more content on-demand using catch-up and streaming services than when they were younger. They have welcomed and embraced the increase in choice and the resulting ability to find content to suit the specific mood / occasion. However, many also claim to miss the shared family viewing facilitated by broadcast TV and PSB content and the sense of anticipation and collective experience of everyone watching shows at the same time.

The behaviour of the Boomers and traditional Gen X audience has typically shifted less significantly, and they are still consuming much of their media content around the TV and radio schedules. This audience are more likely to place a lot of value on the TV schedule as a means of curating and structuring their days. The ability to series-record and watch on-demand is often a welcome addition to their media habits, enabling them greater control over when and what to watch.

The use and relevance of PSB also varies by generation

Younger audiences tend to feel they are using streaming services more than PSB, with some claiming to use PSB services rarely. Furthermore, younger people tend to recall the content they watch and listen to via streaming services more readily. However, analysis of media diaries suggests that the amount of PSB content being consumed can often be significantly underestimated, in part due to young people often watching more active, lean-in, 'hero' content using the streaming services, which tends to be recalled more. 'Hero' content refers to programming that is particularly noteworthy and talked about; shows that grab and hold the collective attention, for example at the time of the research; *Peaky Blinders*, *Power*, *You*, *Sex Education* and *13 Reasons Why*. In addition, there is low awareness that some of the content being watched through a streaming service was originally produced by a PSB, with a number of their favoured shows originating on PSB channels, e.g. *Peaky Blinders* which was commonly watched on Netflix rather than through the BBC. Credit tends to be given to the service that delivers them the content that they want to watch in a user-friendly manner, with little thought as to the brand responsible for the content's production.

Ultimately, through their algorithms and slick user interfaces, Netflix and other streaming services tend to be experienced as offering a more continuous stream of appealing content that seems tailored to them. As a result, they frequently occupy a more prominent place in the minds and habits of younger audiences and tend to be viewed as a brand for them/their generation, including often being the source of their PSB content.

While younger generations may only recall watching one or two PSB shows at any given time, they do acknowledge that these shows are often highly valued. The shows they watch on PSB tend to be those that are not available from other providers: soaps, competition-based reality shows, sports, or a small number of must-watch dramas and documentaries that are very well-respected and become part of the social 'buzz' among this audience. Many young people visit the PSB channels or their on-demand services to seek out these programmes but tend not to browse or expend effort seeking out other potentially appealing content while they are there.

Among the Boomer/traditional Gen X audiences, PSB channels are often the first port of call. The majority of those aged 60+ years discussed how they headed straight to a show they know is on at a certain time, or if they are watching on catch-up services (including the PSB on-demand services) or making use of the series record functionality on their DVR, they might head directly to a show they have missed.

Boomer/traditional Gen X audiences are typically watching a much broader range of PSB content than the younger audiences. This content includes both highly valued (must see) shows, which at the time of conducting the research included shows such as the soaps, high quality dramas, *Match of the Day* or *The Repair Shop* and more 'in the background' content such as *Dinner Date*, *Homes Under the Hammer* and the *Great Interior Design Show*. The content consumed by this audience also covers a wide variety of genres, including the types of show not typically found on the streaming services (such as lifestyle shows, reality TV and the soaps) as well as more widely available content (such as dramas and documentaries).

For all audiences, PSB content can be consumed with others or alone. However, for younger audiences PSB content is often seen to work best when watching with others, and particularly for family viewing as the content can be relied upon to be safe and appropriate for all audiences; *Silent Witness*, *Love Island*, *The Chase* or are commonly cited in this respect. Broadcast content also works well for 'appointment viewing' as a family. These shared family moments are seen to be increasingly rare in households and as such are highly valued by younger and older audiences alike.

The PSB master brands have a clearer identity than the channel brands

The PSB master brands, i.e. BBC, ITV/STV, C4 and C5 are seen to have distinct identities across all age groups; all can describe their characteristics relative to one another. However, except for the radio brands, the sub-brands or channel brands, i.e. BBC Two, ITV3, More4 often lack distinct identity, particularly among younger audiences. The younger audiences can struggle to articulate the logic or differences between the channel brands and are rarely able to identify shows you would find on each channel. The key exception to this is ITV2, which is seen as the home for younger audiences. In part, this lack of understanding is due to the way younger audiences seek out programmes to watch; the Boomer and more traditional Gen X audiences tend to make greater use of the TV schedule and/or TV electronic programme guide, while Gen Z and Gen Y audiences tend to go to the on-demand service (BBC iPlayer, ITV Hub, etc) to watch content where the sub-brand distinction is less obvious. This means that for younger audiences, due to the way they watch content, the iPlayer tends to sit at the heart of their relationship with the BBC rather than any of the individual sub-brands.

The PSB on-demand services are more likely to be used as catch-up services than for discovery

Overall, the PSB on-demand services are more commonly associated with being catch-up services than destinations to browse for new content. In terms of functionality they are not seen as rivalling the perceived best-in-class, Netflix, particularly when it comes to locating and finding content through navigation and personalisation.



“They should just copy Netflix. On iPlayer and ITV Hub it is alphabetised and that is so much harder to find new things to watch, you do not go on there to browse. You would go on there to find something you already know about and you have to know the name, or you won’t find it...”

Female, 25-39, Aberystwyth

To get the best out of the PSB on-demand services it was felt that you need to be broadly familiar with what is on broadcast TV to be able to search for and easily find content. As a result, those who are more familiar with the broadcast TV schedules see the PSB on-demand services as valuable tools to help them get more out of the current services and ensure that content is not missed. Without knowledge of the schedules and the shows promoted on broadcast TV however, viewers can find it quite hard to use the services as you quickly lose track of the content available.

Therefore, while on-demand services are typically the preferred means of accessing content among younger audiences, the PSB services do not tend to work as well for them as a means of effective discovery. This is exacerbated by the perception among many of this audience that these services will not have the same breadth of content aimed at them as they would find on either Netflix or YouTube, meaning less effort is put into seeking new content out.

One of the challenges that all the PSB on-demand services present to many viewers is having to visit multiple platforms to access relevant content. By contrast, they can visit Netflix and all content is under one roof, including what they feel is the best of the PSB content. Furthermore, younger generations tend to have less confidence in the content recommendations from the PSB services than those they receive from Netflix or other streaming sites.

All audiences can identify a distinct role and value in PSB

Among many of the Boomer/traditional Gen X audiences, PSBs are very much an integral part of their lives and viewing habits. It is not that this audience thinks PSB is perfect, but they do tend to see it as the most trusted source of news (despite some questions over impartiality) and as offering high profile and hero content. They are typically seen to provide some of their own, and the nation's, most notable viewing experiences. As such, PSB tends to be thought of as having important cultural, as well as personal, impact.

The younger audiences, especially Gen Z, typically do not have the same depth of relationship with PSBs - they simply have not grown up relying on PSB to entertain, educate and inform them in the same way as older audiences have. Despite this the majority do acknowledge getting some value from these channels; although for some this was not 'top of mind' and was only recognised after some discussion and consideration.

Upon consideration, for all audiences there are certain overarching values and types of content that are provided by PSB that, while not front of mind, tend to be highly valued. The most valued elements are outlined below:

'Britishness': The PSBs are acknowledged to be the home of this type of content. British TV, and TV set in the area in which people live and portraying the lives of people 'like them', often makes content more relatable than shows set in other countries. In order to achieve this, it is important that the content feels like an authentic portrayal of British lives. Shows made by a UK broadcaster, filmed in the UK with British actors can be seen to have a more genuinely British feel than shows merely set in the UK. For example, *This Country* or *The Inbetweeners* feel more authentically British than shows like *Sex Education* which is set in the UK but is developed to have international appeal. Viewers can also display genuine pride in seeing their own area portrayed on TV.

Communal and family ‘cohesion’: Across all age groups, in the home PSB content is often used for communal, family viewing. Some recognise that these bonding moments are a key feature of PSBs that they would miss if these channels were no longer available. The wider societal cohesion provided by PSB content also has intrinsic value in that the universality of PSB content enables conversations between different groups and cohorts in a way that on-demand content does not.

Unique content: There is a belief across all audiences that PSBs provide a range of programming that is not easily replicated by other providers. This programming includes shows that people prefer to watch as they are broadcast, such as reality TV, high profile dramas, soaps, big national events and sporting occasions. It is also seen to be required to provide an impartial and independent news service and ensure that national sporting events and lesser-watched sports are available to all. Much of this content, importantly, portrays and reflects life in the UK in a way that can often feel more authentic than shows made by other providers.

There are certain groups in society for which PSB is often considered particularly important, namely:

- Families with young children: which benefit from the British educational programming.
- Minority groups (including LGBT+, ethnic and religious minority groups): through the ability to show a range of shows without the same commercial pressures as other services, including those that authentically portray the lives of a community
- Those in rural areas/the regions: where local news and shows that accurately and positively reflect where they live can be more important.
- Vulnerable audiences: including those that are housebound, disabled and/or on low incomes and may not have access to additional media services.
- Older audiences aged 65+: this is group that is most front of mind when thinking about the societal value of PSB because they are widely considered to be the most reliant on PSB and others can believe that they would be ‘lost’ without it.

People generally feel that PSB has an important role to play going forward

Despite wide variations in people’s relationship with PSB content and means of accessing this content, people of all ages and backgrounds generally feel that there is an important role for PSB in the future.

Only a minority feel that PSB is no longer relevant, or that it could be significantly slimmed-down. This latter group tend to be those with a more active or ‘moral dislike’ of PSB and the BBC more particularly. These viewers tend to come from lower socio-economic groups, a minority from the nations, and a small minority of the Gen Z audiences; they tend not to value

PSB and BBC in particular for themselves and can be reluctant to admit to its having value for others.

Across all audiences the research sought to identify what different audiences see as the main priority for PSBs going forward. In this regard there is broad consensus across the age groups. The table below outlines these priorities

| HIGH/TOP PRIORITY | MEDIUM PRIORITY | LOWER PRIORITY |
|--|--|--|
| <p>High quality TV that entertains</p> <p>Content that conveys what is going on in the UK and how the UK fits in with the wider world</p> <p>Services that are available to all</p> <p>Content that genuinely reflect people like them and where they live (and therefore portray the full range of UK cultures and viewpoints)</p> <p>Trustworthy and accurate news and current affairs</p> | <p>Content that make viewers stop and think and/or help them understand other points of view</p> <p>Content that offer a shared experience with others</p> <p>Content with new ideas and different approaches</p> <p>Local and regional news (although this is high priority for some)</p> | <p>Specialist contents about history, science, religion or the arts</p> <p>A wide range of high-quality content for children made in the UK (higher priority for people with children)</p> |

While some aspects of PSB are highly valued by younger audiences, it is the content and not loyalty to any PSB brand that tends to matter to them. They simply do not have the same depth of relationship with PSB that the Boomer/traditional Gen X audiences have. They would typically therefore like to see PSBs produce more of the high-quality, original content that is relevant and appealing to them.

Younger audiences also often need to find ways of more easily discovering relevant content, away from the channel brands and TV schedules which are no longer the signifier they once were. In addition to the challenges navigating the PSB on-demand services noted previously, there is a widely held belief that PSB shows are not promoted as heavily on social media as shows from other services. As a result, it can be harder for content to achieve the all-important social 'buzz' that would encourage young people to seek it out.

Among the Boomer/traditional Gen X audiences, especially those who favour broadcast TV and use PSBs more, the priorities are different and reflect the fact that they already see value in what they are getting today. Essentially, they are looking to improve what they already have, rather than changing it significantly.

Overall some audiences, who tend to be younger, have lost touch with PSB brands and with the tangible benefits that high quality British-made content and universally available content can bring. However, the research clearly demonstrates that most people, once they are reminded of this, genuinely value these benefits and are keen to see PSB continue to play a role in the future.

2. Background, objectives, research approach and sample structure

2.1. Background

2.1.1 Public Service Broadcasting (PSB) system

The Public Service Broadcasting ('PSB') system has helped deliver high quality TV content to UK audiences over many decades. The system is based on a set of benefits that are offered to designated PSB institutions in return for a set of obligations. The obligations were designed to deliver against various public goals that government has deemed valuable for society.

Examples include providing accurate and impartial news services; producing religious, arts and documentary programmes; and making high quality UK drama and comedy.

Ofcom has a responsibility to review the PSB system every five years.

PSB is recognised to have weathered various market changes over its history by adapting. However, the recent changes in audience behaviours and in the wider audio-visual market have heightened the importance of the scale and nature of that adaptation over the coming years.

Viewing behaviour plays a central role in determining how effective PSB can be. In short, it can only sustain itself and deliver its goals if people are watching. BARB² consumption data shows that on average, people (viewers aged 4+) are watching less broadcast TV than they used to, including less PSB content:

- Average viewing time for broadcast TV dropped by 9 minutes year on year between 2018 and 2019 (to 183 minutes per day in 2019) and by 59 minutes from 2010 to 2018

² Broadcasters' Audience Research Board (BARB), a nationally representative panel of approximately 5,300 homes across the UK providing the official broadcast TV measurement for the industry.

- For those aged 16-24, the decline in viewing is particularly pronounced (from 169 mins in 2010, to 70 mins in 2019). There are also differences within age groups..

Ofcom total audio visual modelling data using BARB, TouchPoints and Comscore data reveals that people tend to watch a similar amount of audio-visual (AV) content on average (just under 5 hours per day) over the last few years, but look to a wider range of platforms and providers for this content than the PSBs alone, including sources such as SVoD (subscription video on-demand) services (e.g. Netflix, Amazon Prime Video) and YouTube, among others. Having grown up with more options, young people appear to be less attached to broadcast TV as a medium and to the PSB institution. The concern is that if this trend continues without wider reform, the role of PSB could become increasingly less relevant.

In order to set PSB's future, there is a need to review whether the original goals of the system remain relevant, and if not, what audiences believe is more important. In either case there is also a need to determine how best the goals can be achieved over the next five to ten years. In order to help build a framework that reflects audience views, Ofcom is keen to understand what audiences want and expect. While the findings from the research described in this report canvassed the opinions of all age ranges, understanding media attitudes of younger audiences (aged 16-24 yrs.) was particularly important given this is the age group where PSB viewing is declining most rapidly.

2.1.2 Small Screen: Big Debate

In 2019 Ofcom launched a national debate on the future of public service broadcasting called Small Screen: Big Debate. Further details on this can be found here: <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2019/new-future-for-public-service-broadcasting>

This wide-ranging debate involves broadcasters, production companies, governments and Parliaments across England and the devolved nations, industry bodies, viewers' groups and national and regional representatives. To help inform the debate, Ofcom is drawing on a range of views and evidence bases including the findings from this research.

There are two key components to this research, conducted sequentially:

- a) The first stage of the research canvassed the opinions of young audiences aged 16-24
- b) The second stage expanded the scope of the research to include audiences aged 25+.

Both stages of the research were designed to fulfil the same information objectives and adopted similar approaches. However, the fact that many of the 25+ audiences are responsible for paying for the licence fee allowed for a more detailed exploration of this topic in the second stage.

2.2. Objectives

The main objective of this research was to understand what audiences' relationship with PSB is, what it achieves for them currently, which parts matter most to them and what they think it should be for.

More specifically, the research looked at:

General media consumption and habits

- Understanding and comparing the consumption and habits of young people with those in other age groups
- What are they consuming? How are they consuming it? And why are they making the choices they do?
- What has changed in their consumption habits?
- What, if anything, do they miss?
- What do they think of different media – what do they like/dislike about them?
 - What do they think of different media brands?

Current relationships with PSB

- Understanding and comparing the current relationship that young people have with PSB, with that of other audiences
- What are their current levels of awareness, knowledge and associations?
- What role does PSB play in their lives? How important/ relevant is it? What is seen to be its purpose and value? What aspects matter to them?

- What PSB content is being consumed? Why and how?
- How well does PSB currently deliver what audiences want?
- If they are not watching PSB content, what are they watching instead? Is it Netflix, Amazon Prime, YouTube or all of these?
- What are the reasons for using these alternatives? Are they delivering any aspects of PSB?

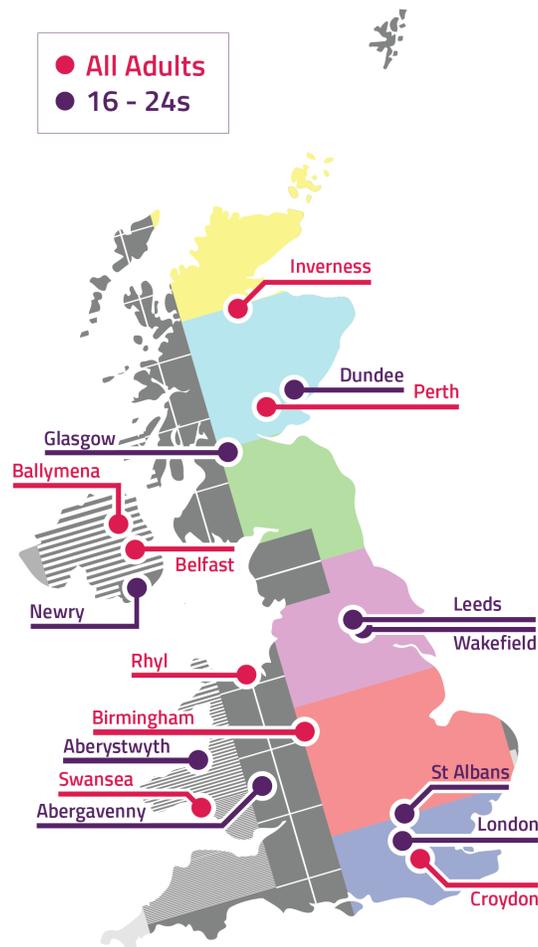
PSB in the future and if/how traditional goals need to evolve

- Understanding and comparing what young people want from the PSB in the future with what older adults want.
- What would they like media to deliver for them going forward? And how does/could PSB content fit into this?
- What should PSB be doing more/less of? What else could it be doing in society?
- What are audience priorities within the current and potential objectives of PSB? What trade-offs are they willing to make?
- ³What is the top-of-mind perception of the licence fee and alternative funding models among the older audiences?
- What do people currently pay for and what makes them willing to, or choose not to, pay?

³ This objective was explored in less depth than the others, as time restrictions within the groups and in-depth interviews precluded a full and detailed examination of what is a complex issue. It was not covered at all among younger audiences as they are not typically responsible for paying the licence fee.

2.3 Research approach and sample structure

A qualitative approach was adopted, canvassing the opinions of a wide range of consumer audiences across the UK:



The research was conducted in two phases:

- **Young people:** The first stage of research was conducted among young people aged 16-24 years. This stage comprised 12 extended mini-groups and 19 in-home immersion interviews. The in-home immersion interviews were intended to explore media consumption habits of this audience in more depth and in-situ.
- **Other audiences:** This stage followed sequentially, expanding the audience to those aged 25+ years. The intention was to conduct 12 extended full-focus groups with these

audiences. However, as a result of the restrictions imposed by the government in response to Covid-19, the last two groups were converted into telephone in-depth interviews (for those aged 60+) and mini video conferencing groups (for 25-59s). The discussions followed a similar topic guide and used similar stimuli as those for the research with the young people in the first stage, adapted slightly to reflect the 25yrs+ audience. Additional questions on the licence fee and the preferred method of funding were included for this audience, given that they were more likely to be paying household bills.

Quotas were placed on media consumption habits (including a range of PSB consumption), age, socio-economic group and life stage in order to ensure a broad representation of participants and reasonably homogenous groups. The sessions were evenly split across the four nations, with fieldwork being conducted in four or five locations within each nation.

In the week before attending the sessions, participants were asked to complete a pre-task exercise, recording and reflecting on their media consumption.

This report details the combined feedback from both stages of fieldwork.

Full details of the methodology and sample structure can be found in the appendix.

3. Context: The media landscape

There are certain contextual factors that are important for understanding the range of opinions.

3.1 Audience types

As is to be expected, the research found evidence of different viewing and listening habits based on age and life stage, and specifically based on the following three cohort groups:



GEN Z
'Emerging'

Split between the youngest audiences (16-18) who are still living at home and the slightly older (19-24) audiences who are starting to become more independent and may be living or studying away from home.



GEN Y/TECH
FORWARDS GEN X
'Evolving'

Typically, mid 20s through to 40s, although they can be older. This group has typically left home and are living as a couple/with friends and sometimes with children.

The Gen X in this group are more tech savvy/keen to adopt new ways of viewing than the more 'established' Gen X.



BOOMERS/MORE
TRADITIONAL GEN X
'Established'

This group is typically a combination of older audiences (50s +) and more traditional viewing audiences (in their 40s).

They have grown up watching broadcast TV and are more driven by the TV schedule.

The 'Emerging' Gen Z audience tend to be living at home, or at least living at home in the holidays when back from studying. They tend to consume a lot of their media either on the move (when out and about) or in their bedroom, and do not need to compromise their viewing very much. They are digitally native, having grown up with Netflix, Spotify, YouTube and other streaming services. However, their habits are not necessarily entrenched, and could well evolve as they move away from home and start building an independent life.

At the other extreme is an 'Established' audience of Boomers and the more traditional Gen X, who have grown up watching broadcast TV. Their habits are more entrenched, and while they may be adopting elements of the newer forms of media consumption to suit their needs, they are still predominantly focused on broadcast TV and the TV schedule.

In the middle is an 'Evolving' audience, which encompasses Gen Y and the more tech-forward Gen X. This group straddles the older and younger generations. They have grown up with broadcast TV but have typically embraced streaming services and the newer forms of media consumption that are available. They are living independently, so while attitudinally they may be similar to the Gen Z audiences, behaviourally they tend to have less time for media consumption and need to compromise more on their viewing because they are watching with their family, partner or housemates.

3.2. States of media consumption

There are three key states of media consumption identified in the research:



PASSIVE

Media consumption is in the background, an accompaniment to other more dominant activities, with both the TV and radio being used to fill the silence



SEMI-ACTIVE

Media consumption is more than merely background in that audiences are 'half watching'. It may involve more active 'lean in' moments but the viewer or listener will often be multi-screening or talking at the same time. This necessitates easy watching content that doesn't require too much attention or concentration to consume.



ACTIVE

Lean-in content describes media consumption where time is set aside to view the content. It is important content and effort will therefore be invested in finding the 'right' shows to fit the occasion or mood. Active content is often consumed by younger generations in their own private 'bubble', in their bedroom, while older generations may set a time to sit down and watch this type of content (for example nine o' clock once the family is in bed, or at the weekend).

It is apparent from both the media consumption diaries and from discussions that while much media consumption is passive or semi-active, a lot of what is recalled is the more active, 'hero' type content where there is greater investment on the part of the audience. This means that

while the more passive and semi-active content has an important role to play it is initially under-represented in discussions.

3.3. Changing media consumption

Except for Gen Z, all audiences acknowledge that their viewing habits have changed over the years.

The Gen Z audience are the exception because they have grown up with media streaming services and perceive these to be very much 'their services' and 'of their generation'. For this age group, Netflix or YouTube are typically the first port of call when looking for something to watch, and Spotify or Apple Music when looking for something to listen to. They tend to trust these platforms to provide recommendations on content but also often rely on personal recommendations from peers, as well as discovering the 'must watch' shows via social media.



“Netflix is easy, and it is quick, and you know it is going to be decent. The main channels you have the older and classic, homey shows but they can’t come out with shows as quickly and frequently as Netflix – they value quality over quantity.” Female, 19-21, London



“With Netflix you’ve got the choice of everything ... whatever mood you are in ... Netflix has got the answer.” Male, 22-24, Glasgow



“It’s (on-demand) more convenient, when you are busy working and socialising and you’ve got an hour to watch something, you want it to be something you enjoy ... if you chose live TV it could be rubbish.” Male, 22-24, Aberystwyth

The Gen Y and tech-forward Gen X audience tended to show the most significant changes in their viewing habits over the years, with the majority admitting to watching considerably more content on demand, using catch-up and streaming services, than when they were younger.



“My viewing habits have definitely changed over the years... y’know with the likes of Netflix and whatnot in the last 5 years or so... I watch a lot of more stuff on-demand or on catch-up. It’s watching stuff when you want to, rather than when it’s on.” Male, 40-59, Belfast

They have typically welcomed and embraced the increase in choice and the resulting ability to find content to suit the specific mood or occasion. However, many of those with children or who are still living at home (or spending regular time at home) with their parents also miss the shared family viewing facilitated by broadcast TV, and PSB content more specifically. Those ‘fireside’ moments of gathering around the TV set as a family do still happen in many of these households but they are typically felt to happen less often than they used to.

Some also acknowledge missing the shared conversation that broadcast TV and PSB used to facilitate, both inside and outside the home. Older age groups within the Gen Y and tech-forward Gen X segment also miss the structure of the broadcast TV schedule; some become quite nostalgic about the days when they used to sit down to watch shows at a certain time of day.



“The downside with how things are now, is that it makes people anti-social. The kids are off in their bedrooms, watching stuff on their iPad... not downstairs.” Female, 40-59, Birmingham

The behaviour of the Boomers and traditional Gen X audience has typically shifted less significantly, and many are still consuming much of their media content around the TV and radio schedules. This group tend to place a lot of value on the TV schedule as a means of curating and structuring their days.



“I watch the main channels all the time. I love the soaps and I really like to watch them live when I can. I’m just used to doing that, it’s a habit.” Female, 60+ Ballymena



“The main channels are such a big part of my life. I’d be devastated – I would miss great dramas and series and amazing nature shows.” Female, 60+, Perth



“You know what is going to be on week to week or day to day and you look forward to it.” Female, 60+, Perth

The main change in behaviour in this group is the increased flexibility that many display when it comes to when they watch their preferred programmes, now using a combination of series record functionality on their DVR, catch-up services and the +1 channels. Some are also adopting streaming services, such as Netflix and Amazon Prime, embracing them as a valued means of supplementing their viewing. Others are ‘piggybacking’ on their grown-up children’s accounts and are principally watching the content as a means of keeping in the loop of shared conversation with their children.



“I don’t tend to watch anything live other than the news and sport. I can record anything I want to watch and skip adverts or binge dramas.” Male, 60+, Swansea



“You would plan your whole week around programmes and now you have catch up, you don’t need to even think about TV anymore.” Male, 40-59, Rhyl

Those with children still living at home can also miss the shared family viewing experience facilitated by broadcast TV and PSB content.

3.4. What makes a media brand feel relevant

Regardless of generation, there are certain factors that typically make a media brand feel relevant to consumers and help determine what their first choice/’go to’ will be.

These factors are as follows:

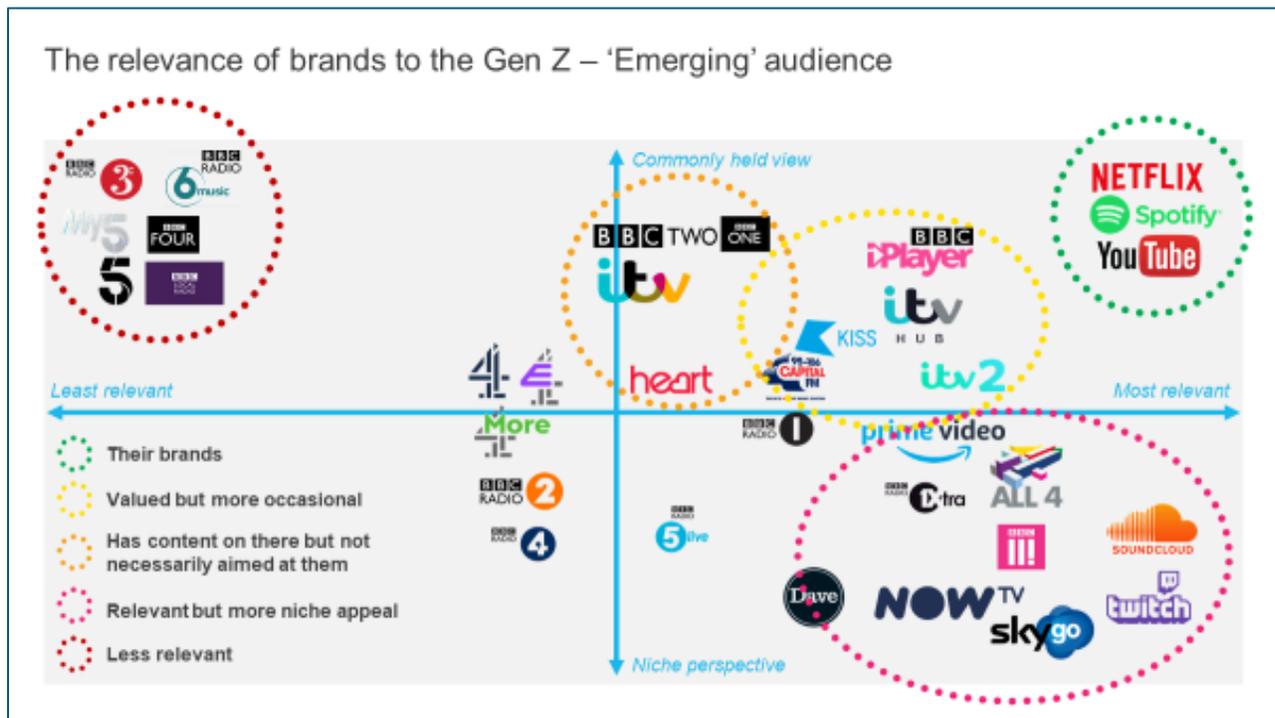
- a) **Habit, and the rule of least effort or an easy win:** people typically have very clear and established routines in terms of where they go first for content, and where they go next if their first port of call fails to deliver.
- b) **Brand relevance:** certain media and content brands tend to be more familiar, and therefore more likely to spring to mind first. These brands are more often those that are seen to be 'of their generation' and are therefore trusted to deliver content.
- c) **Choice and control:** people seek choice of content, as well as control over how and when to watch this content. How this is achieved differs by age; younger generations typically achieve it by streaming services, the Boomer/traditional Gen X generations by recording content on their DVRs and watching it when they want.
- d) **Content for children:** for families with younger children, having good and appropriate content for their children is important, although this is also often driven by the children's own preferences within certain suitability boundaries.
- e) ***Hero status and social acceptability:** while this exists across all generations, it is much more prevalent among the younger generation.

*'Hero' status refers to the consistent provision of programming that that is particularly noteworthy and talked about; shows that grab and hold the collective attention.

3.4.1. Most relevant brands by audience segment

The relevance of brands to the different generational segments is, as you would expect, quite different.

The diagram below illustrates how media and content brands are typically perceived within the Gen Z audience, plotted against two axes: the 'relevance' of the brand and the 'prevalence' of the opinion (versus a brand that might be highly relevant to some but is more niche in its appeal). The brands are a combination of those that were provided to the research participants as part of a sort card exercise and those that emerged spontaneously.

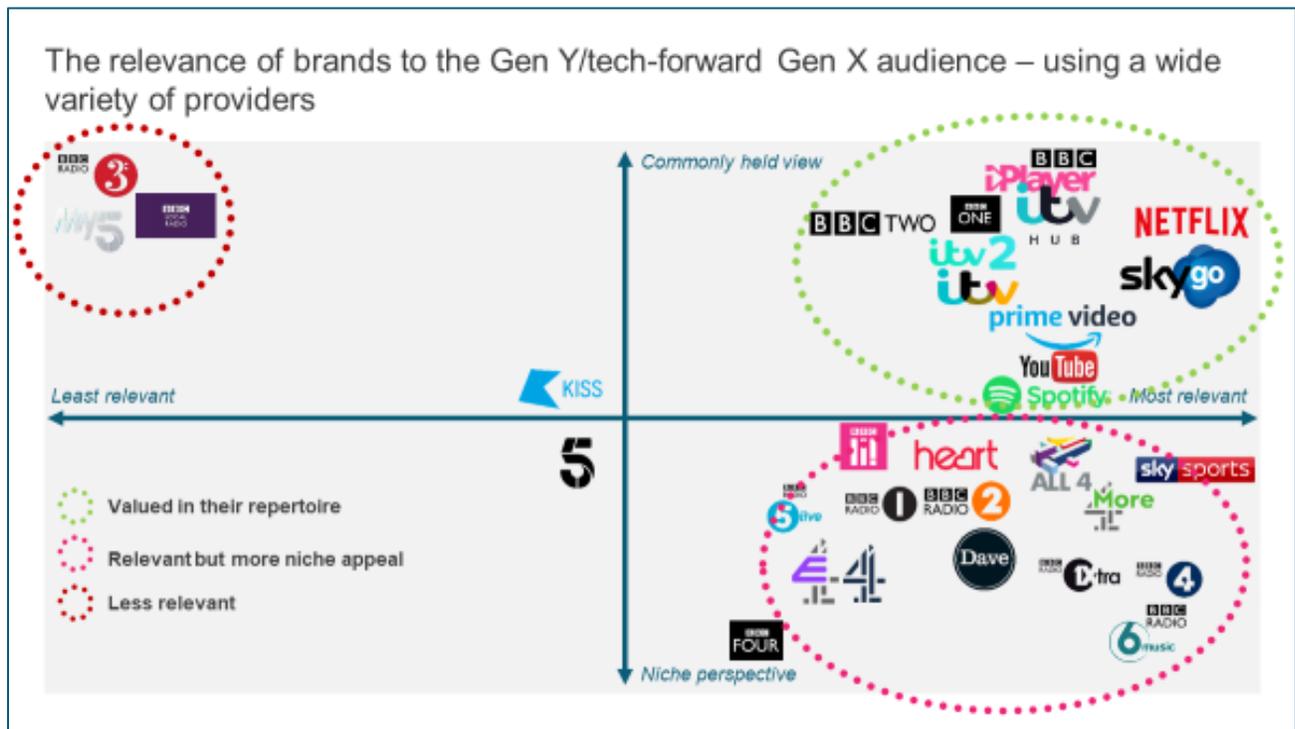


The Gen Z audience displays the greatest degree of polarisation in terms of brand relevance. For this audience, Netflix, Spotify and YouTube are the brands most likely to be valued as ‘their brands’. The PSB on-demand services, and ITV2, can also feel relevant and have content that many value, but their use and the occurrence of such content is more occasional.

Among the radio brands, some of the commercial radio stations such as Kiss and Capital also fall into the category of being seen as relevant although their use is more occasional; it is more likely to be limited to the car, among those we spoke to.

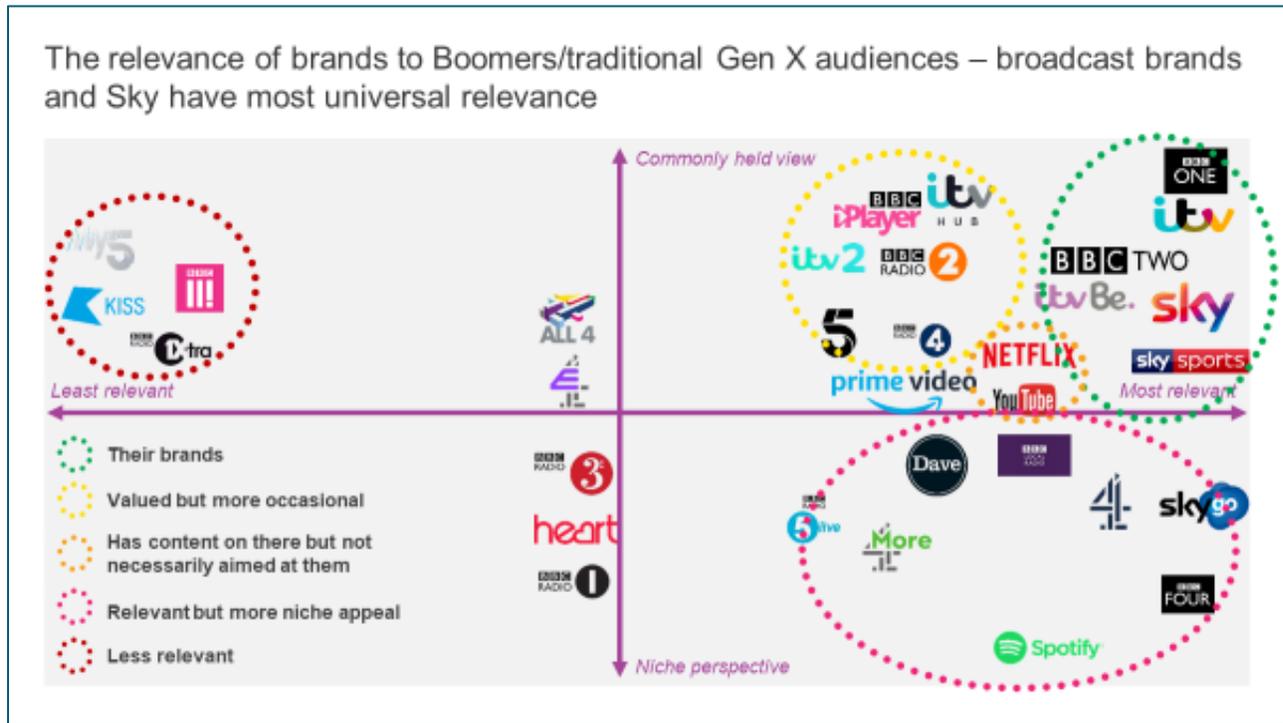
On the bottom right is a series of brands that some value and feel are highly relevant, but which are more niche: not everybody is accessing this content. The brands at top left (including several of the BBC radio stations and Channel 5) tend to be less relevant. The on-demand radio and audio content services such as BBC Sounds and TuneIn radio did not emerge spontaneously in the discussions.

The diagram below plots these same brands for the Gen Y/tech-forward Gen X audience. Perhaps reflecting the way in which they straddle newer and more traditional ways of consuming media, this audience uses a much wider variety of providers, with little universal sense of brands that feel like ‘their brands’.



Netflix and Sky Go are among the most relevant brands for this audience, closely followed by the PSB on-demand services and then the PSB channels. The other key difference for this group is Amazon Prime Video, which is more universally relevant among the Gen Z audiences. The Gen Z audiences often resent paying extra for their desired content and prefer the freedom of Netflix or Spotify where they can consume whatever they want for a fixed fee. The Gen Y/Gen X audiences are more likely to be paying for Amazon Prime for their deliveries already, so being able to access video content feels more like a value-added bonus. Amazon Prime Video is also seen as better for films than Netflix, even if viewers have to pay extra for them, as they provide highly valued content that works for the all-important family viewing occasions.

The diagram below plots these same brands for the Boomer/traditional Gen X audiences. Among these audiences the broadcast PSB brands and Sky are commonly cited as the most relevant brands and are either, watched live or recorded and watched later.



The PSB on-demand services often have a valued role for this cohort but tend to be less relevant than the broadcast brands. Some of the streaming services, including Netflix, are also cited, although their relevance is less universal than among both the younger segments. YouTube is also highly valued by some, but it tends to be used differently among the Boomer/traditional Gen X audiences, namely for looking up specific 'how to' information or for specialist content (e.g. documentaries). Gen Z audiences are more likely to use YouTube for broader media consumption and for some it can be their go-to source for content.

4. The current use and relevance of PSB master and channel brands

The research highlights some key differences in how the PSBs are typically used by each generation, particularly when comparing the younger audiences (including the more tech-forward Gen X) with the Boomer/traditional Gen X audiences.

Use of PSB

Younger audiences tend to feel they are using streaming services more than PSB, with some claiming to use PSB services rarely. Furthermore, younger people tend to recall more readily the content they watch and listen to via streaming services. However, there are several reasons to believe that the amount of PSB content consumed is being under-estimated:

- A) The greater recall of content from streaming services stems at least in part from the fact that these audiences are watching more active, lean-in, talked-about content using these services – and tend to watching alone or at a time when they can concentrate, allowing this content to be more front of mind. Analysing participants’ media diaries reveals that younger audiences are typically watching more PSB content than they initially recall, particularly when it comes to more passive and semi-active usage occasions. They are tending to watch more repeats in this mode, which require lower levels of attention, therefore this content is typically spontaneously recalled only through repeated exposure.
- B) People do not automatically associate the PSB on-demand services or their online services more generally (e.g. news sites or apps) with the PSBs themselves. These are sometimes seen as quite separate brands, and this can mean that the relevance of the PSB to the individual is initially under-estimated.
- C) We had clear evidence of misattribution of PSB content when it is consumed via a streaming service, with low awareness that some of the content being watched through a streaming service was originally produced by a PSB. As a result, when shown images of PSB content, younger audiences can be surprised that they consume more than they realise, having watched the content on their streaming service (Netflix or YouTube). An example of this is *Peaky Blinders* which was commonly watched on Netflix rather than through the BBC. This is in part due to a lack of understanding of the role the PSB plays in creating content, but also because credit tends to be given to the service that delivers

the content in a way that is easy to access and find, with little thought as to the brand responsible for the content's production.



“I realised [by prompting with programmes images] that my favourite programmes, the ones I really love, are actually on one of these channels (PSB) ... Stacey Dooley or Louis Theroux” Female, 22-24, Aberystwyth

Ultimately, through their algorithms and slick user interfaces, Netflix and other streaming services tend to be experienced at offering a continuous stream of appealing content that appears to be tailored to their audience. As a result, they frequently occupy a more prominent place in the minds and habits of younger audiences and tend to be viewed as the brand for them/their generation, including often being the source of their PSB content.

In comparison, the Boomer/traditional Gen X audiences claim to be consuming considerably more PSB content, as well as more broadcast TV and radio generally. This is backed up by their media diaries. Televised content is typically consumed as it is broadcast or by using DVRs as catch-up services. The PSBs' own on-demand services are also used to catch up, although this is often in third place, after broadcast and pre-recorded content. The high volume of content watched via series record functionality can create its own issues with attribution of content: viewers know it came from one of the 'main channels' but they may not remember which one.



“90% of what I watch is from when I sit down with the Radio Times and just record it all for the week ahead and watch these.” Male, 60+, Swansea



“You can record it or watch it on catch up so if you have three good programmes all on at the same time on different channels you have the choice.” Female, 60+, Croydon

The Boomer and Gen X audiences tend to be more aware that they are watching PSB content on the streaming services; some may still choose to watch them in this way as they see streaming services as having a deeper library of previous series and episodes.

PSB as first choice

Among most younger audiences, PSBs are increasingly unlikely to be the first choice when they are deciding what to watch: they are more likely to go to one of the streaming services.



“The live TV channels I’d very rarely use now, I’d go on-demand more.”
Female, 22-24, Aberystwyth

PSB channels and on-demand services tend to be more likely to be used when viewers cannot find anything on their first port of call and/or if there is something specific they are keen to watch.



“So, if I want to watch something, I will go to Netflix, and normally it is the hype of what people are talking about, and I’ll search for that. Or Netflix has ‘recommended for you’, and most of the time that works for me. But if there is nothing new, and I am caught up, then I’ll go to BBC iPlayer and there’s like stupid things like ‘Eating with my ex’ that I’ll put on in the background.” Female, 18-21, Abergavenny

The challenge with PSB on-demand services being a destination for specific programmes, rather than a place to browse, is that viewers can quickly become unfamiliar with the available content if they are disconnected from the TV schedule.



“I don’t associate anything on TV with a day or time anymore.” Male, 22-24, Aberystwyth

Even for children’s TV, streaming services such as Netflix and Disney may be the first port of call for some families. This is because children are often watching on-demand rather than scheduled broadcast TV, and some parents associate the PSB channels with the latter rather than the former.

Across the board, when research participants are reminded of the range of content available on PSB channels it typically triggers memories of shows they used to watch but have lost track of, or of shows they have forgotten they watch just because they have lost touch with their content. In addition, when reflecting on content for children, some parents acknowledge that they are concerned about their children being exposed to American rather than British content and the impact this can have on their language development. In this context, the decline in PSB consumption, both for themselves and their children, can be felt as a loss.

Among the Boomers/traditional Gen X audiences, PSB channels are often the first port of call. Many report heading straight to a show that they know is on at a certain time, or if they are watching on PSB on-demand services or via their DVR, they might head directly to a show they have missed. Some report starting at BBC One on the EPG and working their way through until something catches their eye, only looking elsewhere if they fail to find anything. While the younger generations tend to underestimate the amount of PSB video content they consume, the Boomers/traditional Gen X audiences tend to be more aware that they are watching this content in reasonable amounts. However, they display a tendency to overestimate how much content they are watching on series record compared to browsing and watching whilst broadcast. As with younger audiences, content viewed in a more passive or semi-active need state is less likely to be recalled as it has lower absolute value.

Number of PSB shows watched

Younger generations tend to watch only one or two PSB shows at any given time, but these shows are often highly valued. This is demonstrated by the fact that viewers often have to go out of their way to watch PSB shows, given that the PSB channels are not their first port of call for browsing content. The shows they watch tend to be those that are not available from other providers: soaps, competition-based reality shows, sports, or a small number of must-watch dramas and documentaries that are very well-respected and have become part of the social 'buzz' among this audience.



'BBC has some really good series, like Line of Duty and The Fall... and the Bodyguard. Those big Sunday night dramas.' Female, 25-39, Belfast



“(On BBC) There are some really good shows... like Line of Duty I loved, Luther I’m loving right now. And recently I watched some of the new Doctor Who just because that was my favourite when I was a kid and I wanted to see what it was like now... When I open Netflix, I will see like 10 shows I could be like ‘I’ll watch that right now’. Whereas when I go on BBC iPlayer, I am going there because I know that one show on there. The rest is like white noise to me... I am never flicking around. I go on and I type in like ‘Luther’ because I know it’s there and I want to watch it.” Male, 18-21, Dundee

In comparison, Boomer/traditional Gen X audiences are typically watching a much broader range of PSB content, including both highly valued (must-see) shows and more ‘in the background’ content. The media diaries reveal that while Boomer/traditional Gen X audiences may complain about the number of repeats/repeat format shows available on PSB channels, they are still watching quite a lot of this long-running content. The content consumed by these audiences covers a wide range of genres, including the types of show that are not typically found on the purely streaming services (such as lifestyle shows, reality TV and the soaps) as well as more widely available content (such as dramas and documentaries).

Modes of PSB consumption

Among all audiences, PSB content tends to be viewed across all three modes of consumption or ‘need states’: active, semi-active, and passive.

Among the younger audiences, active consumption typically occurs only for certain ‘hero’ shows, i.e. the one or two shows they are following and typically think very highly of. For semi-active occasions, PSB content features highly for those who watch soaps and competition-based reality TV, and among shows that are watched with others in the household. For more passive viewing, PSBs are somewhat losing their place as the ‘go-to’ for this audience. Whereas channel-surfing broadcast PSB content used to be a popular way of fulfilling the more background consumption occasion, among all age groups, younger people may now also seek out long-running repeat content (e.g. ‘Friends’) on the streaming services to fulfil this need. They will take comfort from repeat-watching the same shows again and again, no longer needing to pay much attention but having it on in the background with ‘lean-in’ moments.

In contrast, the PSB content for Boomer/traditional Gen X audiences is more likely to be seen to work across all modes of viewing, including the actively consumed ‘hero’ shows, the everyday semi-active shows that are watched regularly, and the background TV occasions (including daytime watching).

PSB content – consumed alone or with others

For all audiences, PSB content can be consumed with others or alone. However, for younger audiences PSB content is often seen to work particularly well for occasions when watching with others, and particularly for family viewing as the content can be relied upon to be safe and appropriate for all audiences. Broadcast content also works well for ‘appointment viewing’ as a family. Across all age groups, shared family moments are often seen to be increasingly rare in households and as such are highly valued.



“If we were to lose these channels, I genuinely don’t think I would spend as much time with my family. If I am sat watching TV with my family, these channels are one. If they were to take away these British channels that all four members of my family can relate to then I would spend a lot more time in my room watching Netflix.” Male, 22-24, Abergavenny



“It might sound cheesy, but it does kind of bring us together, as a family, or as a country, whatever shows are on there. Me and my sister, my Mum and Dad were sitting down watching the TV, and I put Netflix on, I don’t think there will be anything that pleases all of us like, most of the time. I think that on these channels there’s always something that all four of us can watch... there’s more things that are British that we can relate to. Spotify and the Netflix kind of thing-they’re so relevant to our age group, but I rarely put on a Netflix series when my whole family are sitting together, it’s always one of these channels on.” Male, 22-24, St Albans

4.1 Radio Listening

Radio typically has more relevance among the 25+ audiences generally.

While Gen Z audiences listen to radio in the car or at work, they often prefer to listen to audio using on-demand services such as Spotify or Apple Music. The benefits of these on-demand services are the control that they afford and the degree of personalisation possible, creating the sense of it being ‘their’ music collection.



“Usually the first thing is radio in the car, on the way to work, I love Tay FM, so that’s my morning ritual. I don’t really listen or watch anything before I leave the house...Then usually Tay FM or Spotify on my way home from work.” Male, 22-24, Dundee

Only a minority are now using radio for music discovery. Discovery is more likely to be accomplished via shared playlists among peers or the recommended playlists provided by on-demand services. Some audiences are listening to a select number of podcasts as a replacement for radio, or when they are looking for something more distracting than music alone, although this is less prevalent than in the slightly older cohort.

Among Gen Y/tech-forward Gen X audiences, interest and engagement with music can start to wane and tends to become more variable. As they get older, music may become a less intrinsic part of their cultural identity (compared to Gen Z in particular). However, podcasts are emerging as an important category for some in this generational cohort, particularly as an alternative to visual media for semi-active media occasions. Some in this audience are more engaged with radio listening not in the car, although this is more likely at certain times of day (e.g. breakfast radio) or Radio 4 for those more engaged with news and current affairs. Those listening to podcasts are typically using one of the phone-based podcast services (e.g. Apple Podcasts), YouTube or Spotify to find content.

For some of the Boomers/traditional Gen X audience, radio can be more important and is listened to more regularly, at least in part because it has an important role in providing background ‘silence filler’/company in the home.



“It’s company for me because I am on my own.” Male, 60+, Swansea

Heavier radio listeners within this group are more likely to become familiar with radio schedules, listening to both talk and music-based stations. This audience tends to listen to more PSB radio and may have certain shows and presenters that they tune into throughout the day. Given that this group tends to be listening for longer periods, the reduced volume of adverts on BBC stations is more likely to become an important differentiator. This can be overlooked by younger

audiences who may only be using radio to accompany them on short journeys in the car and can therefore welcome the easy-listening nature of commercial radio stations.

Among the retired Boomer audience, local radio can also play a valued role, including, but not necessarily limited to the BBC local radio stations. Some are also listening to a variety of more hyper local stations that can be seen to better reflect where they live (particularly in more rural locations) or align better with political points of view in places such as Northern Ireland.

Across all age groups, few mention audio radio players (such as BBC Sounds or TuneIn) as a source of audio content.

4.2. The PSB brands

4.2.1. PSB master brands

The PSB master brands are typically seen to have a distinct identity among all audiences:

- **The BBC** is generally known for high quality stand-out dramas, iconic comedies and coverage of big national events. It also tends to be associated with authority (it is a generally trusted news source) and British heritage. On the other hand, it can also be thought of somewhat safe, censored and hard work to consume - lacking the more edgy or fun family content that other brands do well. Although the BBC is generally seen as 'for everyone', which is part of what can make it feel safe, some audiences feel it is not as focused on them specifically (in particular the younger and lower socio-economic group audiences).



“I think BBC are quite pioneering - with the iPlayer, and the radio channels. And they are good with feature pieces - dramas, documentaries” Male, 40-59, Belfast



“BBC apologises for everything...if the presenter used a minor swear word even though no one cares. Whereas Channel 4 wouldn't.” Female, 25-39, Belfast

- **ITV** is typically seen to offer a lighter and complementary alternative to the BBC. The content is generally seen as mainstream, with lighter, easy-watching shows that are good for families, some long-running soaps and hero-status reality content, and content

that is often felt to be less hard work than the BBC. However, audiences tend to dislike the adverts and some feel that the overall quality of the content is not as high as the BBC, except for some of the individual dramas. Like the BBC, ITV is generally trusted for its news and current affairs.



“My opinion is that ITV has lower production value; it just tends to be poor compared to BBC.” Male, 40-59, Belfast



“I think ITV is full of soaps... ITV allows you to just switch off... with BBC you have to tune in but with ITV you can relax and watch something with Bradley Walsh and have a cup of tea.” Female, 25-39, Belfast

- **Channel 4** can be less familiar overall but is often associated with being more edgy in its offering. The Gen X audiences tend to be the most familiar with it, recalling the iconic status of E4 when they were growing up and the quirky alternative side of the channel. It is still associated with more youthful content, with pushing boundaries in comedy and documentaries, and offering an alternative take on classic formulas (e.g. reality shows).



“With Channel 4, every now and again there are some flecks of gold on there... like I really like the Undateables... and they have some weird out-there stuff too like Naked attraction.” Female, 25-39, Belfast



“I think that BBC and Channel 4 do a lot of stuff that we’d miss - stuff that’s more innovative. They do stuff that might not appeal to a huge mass of people. They take more risks.” Male, 40-59, Belfast

- **Channel 5** content is something audiences are less familiar with, particularly younger audiences. Some Boomers, typically retired, do value the daytime TV offering of Channel 5, while others question the quality and value of the content provided.



“I wouldn’t put Channel 5 in the same category as the others... it always seems like it’s American stuff re-packaged rather than new stuff... it’s

where the stuff that doesn't quite make the other channels goes to die."
Female, 25-39, Belfast

4.2.2. PSB channel brands

The sub-brands, or channel brands, for all the PSBs can lack a clear identity, especially among the younger audiences.

For the BBC, participants comment that the channels seem to become less relevant as they move down the programme guide. Among those watching broadcast TV more regularly, BBC Two can be seen to have lost the 'edgier' identity it once had and can now be viewed as a test launch for content that gets moved to BBC One if it does well.

Those in their mid-20s to 30s sometimes fondly recall BBC Three being on TV and remember it for its younger and edgier content. However, it has lost that identity among many of the youngest audiences, who can overlook it or fail to understand what it represents if it can only be viewed on the iPlayer.



"(On BBC) I think they're a wee bit behind... in comparison to Netflix... they're still catering for an older audience rather than a younger one. They cut BBC Three which was like the one for younger people and moved it to BBC iPlayer... which made me stop watching live TV..." Male, 18-21, Dundee

The iPlayer itself has a stronger identity as a result of it being the main point of access to the BBC for many of the younger audiences. The BBC radio brands also tend to have clearer and more distinct identities.



"I think it's more important to have the catch-up services for me than the actual live ones because the live ones, you can only watch at a certain time whereas you can watch them whenever after they've happened on iPlayer and the ITV Hub. So, you have much larger timeframe." Female, 18-21, St Albans

For ITV, ITV2 has a stronger identity as the home of younger audiences' favoured reality style and light entertainment shows. The shows on ITV2 can be good for semi-active viewing occasions. Fans are keen to watch a number of these shows (particularly those that involve

voting) as they do not want to miss out on the conversation and buzz that surrounds them. ITV3 and ITV4 are perceived to be like each other. These latter channels tend to be valued among some Boomer/traditional Gen X audiences for detective shows and films, but have little meaning or relevance among younger audiences. ITVBe is mentioned on occasion among Gen X women as more of a destination for their age group.

For Channel 4, E4 can have a distinct identity among the Gen X audience that remembers it with nostalgia from when they were growing up. It tends to be less well understood as a current brand, and the same is true for all the other Channel 4 brands.

4.2.3. PSB on-demand services

The PSB on-demand services are more commonly associated with catch-up services than as destinations to browse for new content.

In terms of functionality they are typically not seen as rivalling the perceived best in class, Netflix, particularly for locating and finding content.

Those who are more familiar with the broadcast TV schedules see the PSB on-demand services as a useful way to help them get more out of the current services and ensure that they don't miss content. Viewers generally feel that to get the best out of these services they need to be broadly familiar with what is on broadcast TV to be able to search for and easily locate content. Without this knowledge, they can find it quite hard to use the services.

Among those most familiar with it, iPlayer is seen as an extensive (and now improved) library of good content. However, for those who are less familiar with it, the 'for everyone' feel of the home page can make it harder to find something to watch. For younger Gen Z audiences who tend to assume that there will not be much relevant content, this can be off-putting. They rarely notice or understand the BBC Three section, and the various categories of content can be confusing. This is possibly because Netflix is their frame of reference, so they expect the categories and means of navigation to be similar.

In addition to these navigational issues, there is a perception among some users that content does not remain as long on iPlayer as it does on other best-in-class services. In addition, it can be frustrating to those viewers who are looking to binge-watch to find that series are not always released as a full box-set.

All 4 and ITV Hub receive similar feedback, although they tend to be used less frequently than iPlayer. Some feel that ITV Hub has recently improved and is now more like Netflix in its

appearance and navigation, while others feel it has less content available overall. Although familiarity with All 4 is lower, there is some awareness of it having a deeper library of box-set content. The main frustration with ITV and All 4 is the adverts. Advertising is generally accepted as a means of funding, but the frequency of the ads can be felt to be disruptive to viewing. Boomer/traditional Gen X audiences often prefer to record content as a series so that they can skip the ads.

One of the challenges for viewers that all the PSB on-demand services present is that they have to visit multiple platforms to access the content they want. If they are not familiar with the available content they must search through each platform, each with its own navigation layout, to find what they are looking for. By contrast, they can visit Netflix and all the content is under one roof, including what they feel is the best of the PSB content.

Furthermore, younger generations often have less confidence in the content recommendations from the PSB services than those they receive from Netflix or other streaming sites. This is probably in part because they are using these services less frequently, but it might also be because they feel they have less content that is tailored to them as an audience. In addition, lower frequency of use then means that the PSBs' on-demand services are not as front-of-mind or even as easy to access as their favoured streaming sites, particularly if they have a remote with a Netflix or YouTube button enabling single-click access.



“I would say Netflix is quite easy to use, it’s simple, you can search easily. Whereas I think, sometimes, some of the catch-up services, they’re quite difficult...Say you don’t know the name of something, you could go the genres on Netflix, but on catch-up you’re searching for something you’re not going to find.” Female, 22-24, Dundee

5. The role and value of PSB

As identified earlier in this report, it is apparent that the PSBs, or the ‘main channels’ as they tend to be called, have more day-to-day value to the Boomer and Gen X audiences. The depth of relationship is not there in the same way for the younger, especially Gen Z, audiences, even if they admit to getting some value from these channels; although for some this is not ‘top of mind’ and is only recognised after some discussion and consideration.

However, there are aspects that for many in the younger audiences, mask the value of PSBs, in particular:

- The issue of misattribution, when audiences are not aware that some of the content they are watching on Netflix or YouTube may originate on a PSB.
- The value audiences get from PSBs tends to be more grounded and ‘everyday’, so it doesn’t have the spectacular, glitzy, chatted-about, aspirational value that they get from some other providers.
- Services such as the news websites and PSB on-demand services are not always part of their consideration of the PSBs.

For many of the Boomer/traditional Gen X audiences, PSBs are very much an integral part of their lives and viewing habits. They watched these channels growing up, they represent shared experiences with their children, and they see PSB as linked to the identity of the nation. It’s not that these audiences think PSB is perfect, but the majority do see it as the most trusted source of news (despite gripes) and offering high profile and hero content – providing some of their own, and the nation’s, seminal viewing experiences. As such it is seen as having important cultural as well as personal impact.

There are certain overarching values and types of content provided by PSBs that, while not front of mind are, on reflection, valued by all audiences. The most valued elements are outlined below.

‘Britishness’: There is a recognition that the media we consume helps to define who we are as people and our place in the world. It is therefore felt to be important by the majority that at least some of the content we consume is genuinely British, i.e. content that is written and created in Britain and that genuinely reflects life in the UK. The PSBs are acknowledged to be the home of this type of content. British content on streaming services such as Netflix does not really feel British to these audiences, even if it has British actors – it could be based anywhere.



“I think we’d be missing a lot of the Britishness if we didn’t have these (PSB)... we’d miss something British, not Americanised.” Female, 22-24, Aberystwyth



“It’s always nice to watch a British programme rather than American programme because obviously it’s different views. So, watching White House Farm on the ITV player... it’s something that happened in Britain not particularly far away from where I live... when something I watch on Netflix could have happened in Florida....” Male, 22-24, Abergavenny



“I think BBC and ITV are better than everyone else for local content.” Female, 25-39, Belfast

British TV, and TV set in the areas in which people live and portraying the lives of people ‘like them’, makes content more relatable than shows set in other countries. Many viewers also display genuine pride in seeing their own area portrayed on TV.

In order to achieve this, it is important that the content feels like an authentic portrayal of British lives. Shows made by a UK broadcaster, filmed in the UK with British actors, can be seen to have a more genuinely British feel than shows merely set in the UK. For example, *This Country* or *The Inbetweeners* feel more authentically British than shows like *Sex Education*, which is set in the UK, but is developed to have international appeal. Viewers can also display genuine pride in seeing their own area portrayed on TV.



“You get a snapshot of British life in the documentaries on these channels (PSB) ... it’s nice to see your own life reflected in what you are watching ... knowing how other people in the country are living.” Female, 22-24, Aberystwyth



“It is always nice to watch a British programme because they are close to home and they are from a different point of view that you can relate to.” Male, 22-24, Leeds



“I am more likely to go and watch something if it is based in Wales. It is a sense of pride and it is exciting to see and be like ‘oh it is where I am from!’ and this is what I want to watch” Female, 25-39, Swansea

There are some types of content where genuinely British content is seen as particularly important, namely:

- comedy;
- gritty documentaries (particularly for Gen Z) helping to explain issues;
- Dramas featuring places they know/people like them
- coverage of important national events; and
- children’s television in British English.



“Netflix wouldn’t focus on Scottish humour or culture and we want to be able to see shows that would show these and explore them.” Female, 18-21, Dundee

Communal and family ‘cohesion’: Among all audiences, in the home PSB content is often used for communal viewing, for watching as a family but also with housemates. Some recognise that these bonding moments are a key feature of PSBs that they would miss if these channels were no longer available.



“I would really, really miss it...there’s so much stuff here... things like university challenge, we watch that as a family... not because we’re any good at it, but we just like to laugh at some of the questions.. I would miss that stuff.” Female, 40-59, Birmingham



“At Christmas time these (PSB) are the best channels ... they have all the seasonal stuff ... and everyone is watching the same at that time.” Female, 22-24, Aberystwyth



“At the moment because Love Island is out at 9, I usually watch that with my friends because I have that on my computer, on ITV Hub... it’s quite funny to watch in a group... you pick up on little things and laugh about it.” Male, 16-18, St Albans

The wider societal cohesion provided by PSB content also has intrinsic value in that the universality of PSB content enables conversations between different groups and cohorts, including in the workplace, in a way that on-demand content does not.



“These channels can educate you, and they can bring people together... because you discuss programmes with people, don’t you?” Female, 40-59, Birmingham



“I think the element of people watching the same thing and talking about it would go ... these (PSB) are the unifying channels that everyone watches.” Female, 22-24, Aberystwyth

There is a sense of everyone watching the ‘must see’ shows at the same time, facilitating a national conversation.



“Live TV feels more like home. Like, for example, when Gavin and Stacey the new episode came out. It was kind of like watching it with everybody else. The settings were familiar and the same kind of banter and things like that. So, I felt more homey. But it is like I don’t know; you get sucked into the whole social media thing because the end of the night I want to go on Instagram or Twitter and talk about it. You feel a bit left out when people talk about all the time if you have missed something when it is first on. So, it’s kind of just like to exist socially you have to keep up.” Female, 18-21, St Albans



“So, it’s like a conversation starter as well. If there’s an old person having lunch and I’d like something to say, or if, like, I went to volunteer at care home, it’s something to talk about because everybody’s watching it and, you know, it connects us. Like Love Island, people watch it every night.” Female, 22-24, Aberystwyth



“I think it’s maybe it is a sense of community again, like talking about all these things in work or with friends, or even like strangers like you’ve got something in common straightaway, whether it’s like the Apprentice or Love Island or something, you know, is this everyone’s heard of it something because it’s like everywhere.” Female, 22-24, Glasgow

Unique content: There is a belief among all audiences that PSBs provide programming that is not, and sometimes could not, be replicated by other providers, namely:

- Broadcast TV: There are types of shows that all age groups prefer to watch as they are broadcast, including: reality TV, high profile and talked-about dramas, soaps (particularly, but by no means exclusively, the Boomer/traditional Gen X audiences), big national events and sporting occasions.



“There’s just something nice about watching it live...because everyone is watching it. And you look forward to it more. I don’t get that excited about watching a series on Netflix because I can watch it any time” Female, 25-39, Belfast



“At Christmas time these (PSB) are the best channels ... they have all the seasonal stuff ... and everyone is watching the same at that time.” Female, 22-24, Aberystwyth



“But the seasonal ones, like Love Island ... when it’s on I watch it every night at 9 o’clock or when Bake Off is on I watch it, Tuesday at 8 o’clock.” Female, 22-24, Aberystwyth



“The only thing we really watch live... is things like I’m a Celebrity or Bake off or the news. Other than the news, everything else is available on catch up. I think the news is quite good to see live because it’s right here right now, sort of thing.” Male, 22-24, Dundee

- News - both UK and regional: This has high importance to all audiences, reflecting a deeply-held belief that a national broadcaster is needed to report on the news and keep the public informed as to what is going on.



“News is the big one – political shows or anything political that happens. They can tell you what is going on locally in your area. You don’t get that from anywhere else.” Male, 18-21, Glasgow



“Having a non-biased broadcaster is so important and we don’t want to be in a country where you are being pedalled out lies. Female, 22-24, Abergavenny

- Sports available to all: Those who follow sport feel that this is particularly important for national games and events, and for coverage of local teams and lesser-watched sports that are only found on PSB.



“The big thing would be the sport. That is usually on BBC. That is a good thing, it is on there for everyone, and not on the subscription channels” Male, 40-59, Belfast

However, some aspects that were formerly the traditional territory of the PSBs are now acknowledged to be covered elsewhere. Thinking about minority ethnic and minority group representation, streaming services such as YouTube and Netflix can compete, given the wide range of content available, and are sometimes even felt to do better. There are still some minority audiences, such as people with disabilities, where there is a general feeling across all age groups that the PSBs are still better at representing these audiences.



“Channel 4 does a lot about diversity, with the Paralympic games, and with shows like The Last leg which tackles disability. They do that well and I’m not sure other services do that” Male, 40-59, ABC1, Belfast



“They did a documentary about domestic abuse against men on BBC Three, and that was hugely valuable as a learning tool and to just bring it to the people.... because they did it so well, and it is telling you about something you would not expect” Female, 40-59, Birmingham

However, from the perspective of those who are part of a minority group, it is not simply representation that matters. The important thing is whether shows genuinely reflect what it is like to live the life of someone who identifies as being in that group. Where the PSBs do this well, and where it feels like an authentic portrayal of life in Britain for this group, this is seen as a real strength. However, if it feels like a tick-box exercise, with minority groups being cast as

actors in a show or represented in the content overall, but lacking an authentic portrayal of the audience, the PSBs lose the advantage.

Reflecting special interests that may not be commercially viable used to be a function of the PSB, but this now tends to be associated more with YouTube, even among Boomer/traditional Gen X audiences.



“YouTube can give you an education ... you can go back years and years ... if I want to research something then I go to YouTube.” Male, 22-24, Glasgow



“You can find anything [on YouTube], if you want to find out how to put together a piece of technology, how to do something on a computer, how to find a programme that I haven’t seen for years it’s always there....Also if I’m teaching I can always find a simple explanations that I couldn’t possibly put together.” Male, 60+, Swansea

5.1 A lack of perceived value for some audiences

While some viewers highly value the PSBs, particularly among Boomer/traditional Gen X audiences, other audiences do not value them as highly for two reasons: either lack of use, which results in more of a lukewarm feeling, or a more keenly-felt moral dislike.

Lack of use: This is primarily driven by perceptions that most of the content lacks personal relevance. Lack of control over how the content can be consumed on broadcast TV is also a factor, as is the perception that the PSB on-demand services are not as good as the best in class, failing to offer the same depth and breadth of back catalogue content. People who do not use PBS very often are more ambivalent towards it. They feel that they get some value (and acknowledge that this fluctuates depending on what is currently on the schedule), and can see that others get value, but they do not have a strong connection with PSB.



“For me, there’s not that much that I actually watch. So, it would not be so bad for me [if PSB ceased to exist] ... but I can still see it works for others” Female, 25-39, Belfast



“People pay for Netflix and they watch maybe 20% of what is on there and they don’t even blink but people pay the licence fee and complain that they don’t watch everything or need that much or it isn’t directed at them but it is the same thing at the end of the day and we are lucky to get what we do out of the licence fee” Male, 40-59, Rhyl

Despite this ambivalence, this audience is often reluctant to lose PSB, because they recognise that there is valuable and enjoyable content available, some of which is unique and not available elsewhere. They also tend to see the PSBs as a generally reliable source of news.

Moral dislike: A minority have a stronger dislike of PSB, more particularly the BBC, and this can extend into being a ‘moral dislike’. This is driven by a combination of factors including their perception of the BBC, a dislike of the licence fee, resentment that over-75s are now having to pay, and their perception that the brand is irrelevant to them. These viewers tend to be from lower socio-economic groups, with a minority in the devolved nations.

There is also a small group of Gen Z viewers who have a more hostile attitude towards the BBC and PSBs in general, although due to their lower levels of engagement with PSB, this generational cohort is more likely to be indifferent than hostile.

Those who have this stronger dislike do not see value for themselves and may only grudgingly see value for other audiences (primarily the more vulnerable 75+ audiences who are now being asked to pay). Not only do they feel that the BBC lacks relevant content for their cohort, or that there is bias in the news, they can also actually feel that the brand is actively uninterested in them and is instead targeting other people. Overall, there is little sense of shared values or identity.



“I’m not that hot on paying the licence, because I just feel like the BBC doesn’t give you enough for the money they get.” Female, 50+, Croydon



“The BBC needs to become more streamlined and prioritise what is popular rather than just putting out rubbish that a few people might like.” Male, 30-45, Croydon



“So I pay £12.50 a month or whatever it is for a TV licence that I’m not particularly using, and that I don’t have to use because I can watch Love Island at 10pm when it comes on the streaming platform. I don’t have to watch it live so I don’t feel the need to have a TV licence” Male, 22-24, Abergavenny



“You flick through a lot of these [PSB] shows and it’s a lot of middle-aged people talking to me.” Male, 22-24, St Albans

5.2. The societal value of PSBs

The research explored which groups in society for whom PSBs are most important. The diagram below details the societal groups for whom PSB are deemed particularly important, with reliance on the PSBs increasing from left to right.



Families with young children: PSBs continue to be seen as more important among those with young children, even though the educational aspects are beginning to be covered by streaming services such as YouTube, and despite the fact that the entertainment aspects are well catered for elsewhere. British-based content and programmes in British English are felt to be important for children growing up, and it is acknowledged that PSBs do still have this educational remit, although it is no longer unique to them.



“The BBC is an incredible resource – you can use it for education, entertainment and just about anything. People talk about the NHS being the pinnacle of Britishness and I believe the BBC is also.” Male, 60+, Swansea

Minority groups (including LGBT+, ethnic and religious minority groups): There are certain shows, like for example ‘*Man Like Mobeen*’ or ‘*Murdered By My Father*’, that many people suspect would not be shown by commercial brands. These shows are seen to work because they feel authentic to the communities in Britain that they portray, whether that be through raising important issues in drama or through humour in a comedy.



“These were so good... ‘Murdered for being different’ and ‘Murdered by my dad’.... they are good because they are showing you what happens in real life. It was gripping but it was also informative... it raises awareness about something you might not know about” Female, 40-59, Birmingham

Regions and rural locations: Local TV news is seen as a relatively unique territory of the PSBs and is important for that reason. Shows that accurately and positively reflect the devolved nations to the rest of the UK and/or are set in a local area are felt by the majority to be an important aspect of PSB. There is a positive buzz around shows where people see a location they recognise, or hear familiar local accents. Creating this sense of shared community and pride is an important element of PSB. Furthermore, in Wales, Welsh language content is valued by a minority.



“Netflix wouldn’t focus on Scottish humour or culture and we want to be able to see shows that would show these and explore them.” Female, 18-21, Dundee

Vulnerable audiences: This group includes those who are housebound, disabled and/or on low incomes or unemployed. PSB is seen as important to vulnerable audiences such as these because they potentially lack the finances to pay for additional services and/or have challenges using alternative technology. From a practical point of view, signing and other accessibility measures are felt to be less likely from commercial brands.



“People who use sign-language would miss out I think - because I can’t imagine Netflix would bother with that... and audio description for the blind.” Female, 25-39, C2DE, Belfast

The older (65+ audiences): This is the group that comes first to mind when thinking about the societal value of PSB, because they are felt to be the most reliant on PSB and would be ‘lost’ without it. People can reflect here on their own experiences with older parents or grandparents. In particular there is an appreciation that the older generation have ingrained habits that are harder to change, that they value the content and the routine that the schedules bring, may struggle with newer technology or be unable to pay for other services.



“We are all of a certain age we are less inclined to accept change than maybe a younger generation and I would be inclined to keep things as they are.” Male, 60+, Swansea



“For the older generations it would be very isolating ... working in a bank I see the older people coming in and as everything goes online and digital, they are getting left behind so without these channels (PSB) they would be a bit lost.” Female, 22-24, Aberystwyth



“Everything is moving online and become digitised – if we lost these main channels it would really isolate and leave behind an older group of people.” Female, 22-24, Leeds



“To change all these services from BBC down to Channel 5 would be a tremendous wrench to a large part of the viewing population. Spotify and Netflix yes they are very good, but they still only target the minority at the minute not so much our age.” Male, 60+, Swansea



“It’s the older generation [that would miss out the most], who are just used to watching programmes that are on at the scheduled times.” Male, 40-59, Belfast

5.3. The future role for PSB

As noted previously, most people feel that there is a role for PSB going forward, and this is true across all ages and backgrounds. A minority feel that PSB is no longer relevant, or that it could be significantly slimmed down, but this is not the majority view.

This is felt most strongly among Boomers and Gen X audiences, who tend to see PSB as meeting both personal and societal needs. They are keen to retain a service that is broadly the same as what they have now, with the familiar, high-quality and broad-ranging content that they have become accustomed to. They also appreciate that the content is delivered in a way that they like and can navigate easily.



“I’ve used it for education, I’ve used it for entertainment, I use it for information. Oh, it is an incredible thing. You talk about the National Health Service as being the pinnacle of what being British is – I think the BBC is.” Male, 60+, Swansea



“Mystery drama and series and fantastic nature programmes [on PSB]. I feel very unsure of how to watch anything else, yes, and definitely a comfort, so you know what’s going to be on and you look forward to it.” Female, 40-59, St Albans



“If all these channels disappeared, would we end up in a crazy American, Fox News kind of scenario where it’s just propaganda? That’s frightening!” Female, 25-39, Belfast

The Gen Z audience also feel, although not as strongly as older audiences, that PSB needs to exist. These younger groups feel that retaining PSB can protect British content that reflects British lives and values, and value the fact that PSB offers content that brings everyone together and creates a sense of universality, as well as being the trusted source of news. They also acknowledge that PSB offers valuable content that they really value, even if it is not their go-to source. The best content on PSB is acknowledged to be high quality and original.

The research also identified what different audiences see as the main priority for PSBs going forward. In this regard there is broad consensus across the age groups around the top, medium and lower priorities. It is also noteworthy that participants found it hard to differentiate between elements, seeing all aspects as being important and demonstrating the high expectations they have for PSB.

| HIGH/TOP PRIORITY | MEDIUM PRIORITY | LOWER PRIORITY |
|--|--|--|
| <p>High quality TV that entertains</p> <p>Content that conveys what is going on in the UK and how the UK fits in with the wider world</p> <p>Services that are available to all</p> <p>Content that genuinely reflect people like them and where they live (and therefore portray the full range of UK cultures and viewpoints)</p> <p>Trustworthy and accurate news and current affairs</p> | <p>Content that make viewers stop and think and/or help them understand other points of view</p> <p>Content that offer a shared experience with others</p> <p>Content with new ideas and different approaches</p> <p>Local and regional news (although this is high priority for some)</p> | <p>Specialist contents about history, science, religion or the arts</p> <p>A wide range of high-quality content for children made in the UK (higher priority for people with children)</p> |

5.4. The licence fee

Opinions around the licence fee and alternative methods of funding were not explored in depth given the limited time available. They were covered exclusively in the second phase of research, among those aged 25+ who were more likely to be paying the fee.

Overall, there are a range of views on the value and fairness of the licence fee, ranging from those who feel it is excellent value for money and feel they get a lot back for what they pay in.



“I disagree, I don’t mind because the benefits outweigh the costs... it’s only £12 per month.” Female, 25-39, Belfast



“For me there’s no question that it’s value for money... if I look at how much I watch on BBC One, Channel 4 and so forth, it’s worth it.” Male, 40-59, Belfast



“The licence is a bargain! If it were not, I would remember how much it was and it is more than worth the content we get for it.” Female, 60+, Croydon

However, at the other end of the spectrum a minority express anger about being forced to pay (and can get quite emotional on the topic).



“The TV licence is a hundred odd quid and do we really need 12 BBC TV and radio channels, 9 of which I can’t even tell you what is on them – the BBC is bloated now and losing relevancy.” Male, 40-50, Rhyll

Between these two extremes, people across all age groups can see the fee as expensive when compared to streaming services but do not tend to feel particularly strongly about this as an issue and only raise it when prompted.

The key issues expressed are:

The lack of choice: The fact that people have no choice about whether to pay the licence fee can cause resentment. Among the more negative groups it is viewed as an additional tax. They can post-rationalise paying a lot more for other services, such as Sky, since they have invested in that decision and have control over it.



“I think one of the problems is that way it’s pitched... if you have a TV you have to pay it, or you’ll go to court!” Male, 40-59, Belfast

The lack of use: The feeling that they are not using PSB as much as other services they are paying for or, on occasion, that the content is not as highly valued. This perception is exacerbated by poor levels of recall/awareness as it relates to the amount of broadcast content that they are consuming.



“It irritates me. Because I only really watch BBC and I would rather have adverts than pay the money... and it keeps going up and up and up.”

Female, 25-39, Belfast

Confusion over what they are paying for: It can be harder to assess the value of services such as the BBC, in part because there is confusion over what is included in the licence fee, but also because it is harder to assess the value and cost of producing news.

The sense of fairness: It does not feel like a level playing field and can feel unfair that the BBC gets the (majority of) the money when other PSB channels must also rely on funding from advertising revenue.

None were aware that the licence fee funded other PSBs, and even when this was revealed, it had little overall impact on their perceived value because the BBC still got most of the money.



“The assumption is that the BBC gets all of it... or most of it... because they don’t have adverts.” Male, 40-59, Belfast

Despite some sense of unfairness and even, on occasion, anger about the licence fee, there is little agreement on what the payment method could be instead. A number are happy to carry on paying at the current rate and in the current manner, while others want to see some changes. However, when changes are proposed, there are acknowledged to be issues with all alternative options:

- **Subscription.** Some believe subscription would be a fairer alternative and more in line with other services, but this raises concerns about the reduction in funds going to the BBC which could in turn negatively affect content quality. This approach is also anticipated to be hard to implement and manage, particularly for areas such as radio and news – but neither did having some pay and others use the service for free feel fair.
- **A lower licence fee plus advertising:** Assuming it would make the fee considerably cheaper, this alternative is welcomed by some audiences, particularly the lighter users. However, it tends not to work for the minority that are ideologically opposed to being forced to pay a fee. It is also recognised as taking away one of the key benefits of the BBC, and in so doing could make it even harder for the BBC to compete with streaming services.
- **Subscription and advertising** (whereby people could choose either to access the service with or without the ads, like the Spotify model): This approach has some appeal

because it offers a lower-cost option for those that want it. However, people recognise the risk that this ends up representing the worst of both worlds.

- **Sponsorship at the start or the end of a show:** This option can appeal as it would help fund the service but would not be as disruptive as advertising. It assumes that there could then be a heavily discounted licence fee, given the additional source of funding.
- **A means-tested licence fee** (based on the number of people per household using the service): This seems fair, but some feel it would be difficult to implement.

All in all, no clear consensus emerged across the sessions in the limited time available for discussion.



“I think people would be happier if they had adverts rather than charging a licence fee or even just reducing the licence fee.” Female, 25-39, Swansea



“It should be means tested, if you have millions then you should pay for those that struggle” Female, 60+, Croydon



“I would absolutely hate to see adverts on the BBC.” Female, 60+, Croydon

6. Requirements for PSB in the future

6.1 Gen Z audience

Types of programmes

To encourage them to make more use of PSB, the majority of Gen Z would need to find dramas and comedies that are more appealing to their age group. This would give them high quality and original content that represents their cohort and could become the ‘must-watch’ and most-talked-about shows among their peers. Almost all in this group value diversity and innovation in any content, including a mix of lighter and more serious shows that work across both semi-active and more active occasions. The majority are also looking for educational documentaries; first-person narratives, real-life issues, true-crime shows, and programmes that show history from different angles. Finally, many are keen for PSB to continue as a source of impartial news, including news that focuses on issues that are important for younger people such as climate change, knife crime and human-interest stories.

The most important criteria

Gen Z are keen to see PSB:

- cover a wide range of social and political issues while also addressing current events;
- include shows that represent all nationalities, genders, cultures, ages, nations and backgrounds – and in so doing help normalise different real-life situations and help people understand each other better;
- retain broadcast services, since these are good for family viewing and live TV also helps you feel part of the action (particularly for certain events) and facilitates conversation;
- retain their on-demand services for easy watching and because these tends to be their preferred means of viewing; and.
- retain radio, although some feel the number of stations could be reduced.

Things to do differently

Gen Z audiences feel that the PSBs should make more of the high-quality content that is relevant for their age cohort. Almost all this audience feel that there is not enough of this type of content at present to keep them coming back without prompting from their peers or through something they see. They even talk about rebranding or changing the reputation to make it more appealing to the younger population.

The majority feel that the profile of the content aimed at them should be raised through a combination of marketing on social media and improved navigation and personalisation on the PSB on-demand services.

On the marketing side, they do not see the same amount of promotion on social media for PSB content as they see for Netflix shows, for example. This serves to reinforce the notion that PSBs are not aiming at them in the same way as the streaming services are. Given that this audience is not connected with the TV schedule, they find it hard to know what content is available that is aimed at them and would welcome this type of awareness-raising activity.

On the ease of use side, the majority would like the PSB on-demand services to improve their functionality and personalisation on the homepage so it is easier to find the shows they might be interested in. This would also help to make the content feel more immediately relevant to them.



“The five main channels need to look at the way they introduce their stuff to us and how-to bring people back from the streaming services” Female, 25-39, Swansea

They are also keen to include sign language and subtitles where possible for more vulnerable audiences.

6.2 The 25yrs+ audiences

The younger end of this age spectrum, especially those Gen Y audiences who are not currently using much PSB content, are similar in their future needs to the Gen Z audiences.

At the Boomer/traditional Gen X end of the spectrum, especially those who are currently using PSBs more, the priorities are different and reflect the fact that they already value what they are getting today. Essentially, the majority are looking to improve what they already have rather than changing it significantly.

Types of programmes

Those who are currently using PSBs regularly are keen to maintain the range of shows they have now, with some modifications:

- Introduce more of the high quality and more innovative programmes – dramas, comedies and documentaries. In other words, do more of what PSB is currently seen to do best.

- Ensure that the news is perceived to be unbiased because a sense of impartial news is critical to overall perceptions of the PSBs. This includes focusing on the issues that are important to them, thereby avoiding any perception of bias by omission.
- Fewer repeats and formulaic shows (shows that follow very similar lines to previous shows e.g. formulaic detective shows or formulaic reality-type shows). This includes reducing the amount of what is deemed low quality, ‘filler’ content – although it should be noted that this type of content is still being consumed, based on the media diaries.
- Keep producing programmes (and ideally have more of them) that are a talking point for the nation.

The most important criteria

Like Gen Z, these audiences are keen to see PSB:

- retain the broadcasting and on-demand services;
- include a wide range of social and political issues, while also addressing current events;
- reflect a wide range of audience types, helping to normalise real life situations and bring the nation together;
- include shows that make them think, but also lighter shows that purely entertain. This mix is very important as they are looking for entertainment and do not always want to have to work hard or consume exclusively/overly worthy content; and
- maintain radio and audio, including podcasts.



“They are the key channels for everyone, the range of programming and the quality is something different to other services.” Female, 60+, Croydon



“They should be kept because they are accessible to everyone and you can really rely on them” Female, 60+, Croydon

Things to do differently

Boomers and more traditional Gen X audiences are quite different from younger audiences in that they tend to be less able to think of things that they would like PSB to do differently. The main areas that emerged include:

- fewer repeats;
- better on-demand services; and
- a review of the licence fee for some; both the total amount and the mechanics of who pays what.



“I think we should keep the main channels because I enjoy the Britishness of them and there’s some really good quality series on there. Moving forward, potentially, just the consistency of the programmes, making sure there’s a good continuation throughout the year, and not just points of the year when the quality is really good.” Female, 40-48, Birmingham

6.3 Conclusion

There is clearly a role for PSB in the future, even though its day-to-day influence and relevance seems to be declining among younger audiences. Even these audiences are typically keen to retain PSB for the sense of societal glue that it brings, the universality and the shared national understanding, and the high-quality British content and news.

All except the most engaged audiences feel that the PSBs need to work harder to serve relevant content for people who seek it out, and to make it as easy as possible to access for all generations.

The younger audiences, and those in lower socio-economic groups, are often looking for more relevant content. They generally acknowledge that the PSBs produces some ‘must-watch’ shows, but they do not feel there are enough of them to keep them coming back on a regular basis.

Except in radio, channel brands are no longer the signifier they once were. Online platforms therefore need to move away from channel brands as a way of serving up content if they are to retain their relevance and deliver it more intuitively to different generations. Navigation and personalisation of PSB on-demand services need to improve in order to meet expectations set by the best in class providers in this area such as Netflix.

The PSBs also need to reach out to promote their content to people who have become disconnected from broadcast TV and the schedules. For younger audiences this inevitably means marketing on social media.

Research participants acknowledge that it is hard for any one PSB brand to compete with the depth and breadth of content served up by streaming services. It can be off-putting for younger audiences to go to multiple places to find content that would be served on one platform on

services such as Netflix or YouTube. In addition, for younger audiences there is greater confidence that the streaming services will have content aimed at them.

Some audiences have lost touch with the PSB brands and need to be reminded of the tangible benefits that high quality British-made content and universal content can bring. The research clearly demonstrates that once people are reminded of this, they genuinely value these benefits and are keen to see PSB continue to play a role in the future.



“I’m very happy to pay the licence fee because when you break it down, it’s very little per week. On keeping the diary, I realised how much I missed those main channels. I struggled to find any other channel in the morning that would interest me when I could not have the BBC. I love the radio, and so I’d just be lost without it.” Female, 60+, Ballymena

7. Appendix

A qualitative approach was taken among audiences across the UK. There were two different elements to the research; the core of the project was extended focus group sessions; these were supplemented by in home 'immersion' sessions among the younger audiences (16-24) given that less is known about their media habits overall.

Most of the research required participants to take a personal viewpoint, although occasionally in the group sessions we asked them to think on a wider, more societal, basis. It should be noted that many participants, particularly younger audiences, found it hard to do this outside their own experience i.e. elderly relatives, or if they self-identified as part of a minority group.

It is also worth noting that the PSB channels were not referred to as public service broadcasters or PSBs throughout the discussion in part because of the low awareness of this term (especially among younger audiences) but also because we did not want to lead people into thinking from a 'public service' perspective, rather than a personal or more entertainment based point of view.

7.1 Pre-tasks

Group participants were asked to complete a pre-task exercise prior to attending the face-to-face sessions. This consisted of keeping a WhatsApp based media diary over five days, followed by a behavioural change exercise for two days.

The diary task was intended to get people thinking about their media consumption prior to attending the group sessions. This idea behind this was to enable them to talk about their behaviours in a more considered way within the group sessions. It also helps us to understand the individual behaviours and attitudes as they happen, rather than relying on subsequent recall which would not be as reliable.

The behavioural change exercise required participants to change their usual media behaviour, those that were watching considerable amounts of PSB content were asked to find alternatives for two days where possible and those consuming little PSB content were asked to watch and listen to predominantly PSB content for two days. The idea behind the behavioural change task is that it helps shine a light on our habitual and non-conscious motivations and behaviours. Changing our behaviour makes us realise both what we miss but also what we gain in making the change. It is also a good opportunity to refresh the memories of those who are no longer consuming as much PSB content about what is available.

The in-home immersion participants conducted a more reflective pre-task, asking them start thinking about their media habits in advance of the in-depth interview. Participants were required to comment on their viewing habits each day using WhatsApp based questions, over a four-day period prior to their in-home session.

7.2 Extended focus groups

The extended focus group sessions were conducted across the UK from January to March 2020. The young people's research was conducted first, followed by research among those aged 25 or over.

The approach differed slightly for the youngest and 25+ audiences, as outlined below.

Young people (16-24 years)

Twelve extended mini-groups were conducted with participants aged between 16 to 24, split into narrower age bands to ensure more homogenous groups. Mini-groups were selected for the younger audiences, in order to give each participant more 'airtime' to express their views and create a less intimidating environment.

Each group consisted of between four and six participants, with most sessions being at the upper end of this; precise numbers per group are detailed in section 10.3.3. Participants were recruited to ensure a mix of media consumption types (ranging from heavier to lighter users of PSB content), with quotas being set on age, gender, ethnicity and socio-economic group. This ensured the research encompassed a wide range of participant demographics across the sessions.

The workshops were conducted across a range of urban and more rural locations as follows:

- England: Leeds and St Albans
- Scotland: Dundee and Glasgow
- Wales: Abergavenny and Aberystwyth
- Northern Ireland: Belfast and Newry

25+ years audiences

Among the 25+ audiences we conducted standard sized extended focus groups, with approximately seven or eight participants per session. The initial intention was to conduct 12 focus groups, mirroring the Young People research, however in Perth (due to Government restrictions over Coronavirus) the final two focus groups were converted into two online mini groups (among the 45-59-year-old audience) and tele-depths among the 60+ audience.

As with the younger audiences, participants were recruited to ensure a mix of media consumption types (ranging from heavier to lighter users of PSB content), with quotas being set on age, gender, ethnicity and socio-economic group.

The workshops were conducted across a range of urban and rural locations, with several different locations being selected from the Young People work to ensure a wider geographic spread:

- England: Croydon and Birmingham
- Scotland: Perth and Inverness
- Wales: Swansea and Rhyl
- Northern Ireland: Belfast and Ballymena

Focus groups for both audiences were two hours in length and followed an agreed topic guide, a copy of which is appended. The topic guide for all audiences was very similar, although more questions were added about the licence fee and the future funding of PSB for the 25+ audience sessions.

An additional young people's extended group took place in London as a pilot session to test the guide and stimuli before the approach was rolled out across the rest of the research.

7.3 In-home 'immersion' Interviews

In parallel with the young people's mini-groups we conducted 19 one-and-a-quarter hour in-home depth interviews among the young people (16-24 yrs.) audience. These interviews were carried out in either the same or nearby locations to the extended mini group sessions; with depths being spread across the locations as follows:

- England: Wakefield and St Albans
- Scotland: Dundee and Glasgow
- Wales: Abergavenny and Aberystwyth
- Northern Ireland: Lisbon and Newry

Quotas were set to mirror those used for the group discussions, again ensuring a spread of ages, genders, social economic group and media consumption behaviour.

No in-home interviews were conducted among the 25+ audiences, as more is known about the consumption habits of these age groups.

As well as talking to participants, during the in-home interviews we also asked people to show us their media services; for example, their Netflix or Spotify home screen and how they watched

and found PSB content. This enabled participants to demonstrate first-hand what they were talking about as well as acting as further stimulus for discussion.

7.4. Stimuli

In preparation for the sessions, stimuli were developed in conjunction with Ofcom. Stimuli for the sessions included:

- Sort-cards detailing a wide range of PSB and non-PSB media brands.
- A list of TV genres, to try to encourage people to think more broadly than just drama and news.
- A slide showing all the PSB brands – both master and channel brands (including BBC radio stations).
- Programme images for each of the PSB channel brands. Programmes were selected across a range of genres based on BARB data of most frequently watched shows. Separate stimuli were developed for the young people's and 25+ audiences, with some common programme content and other content selected based on viewing figures for the relevant age group.
- A slide showing different societal groups e.g. elderly, a range of ethnicities, different nations/locations, vulnerable and minority groups. This was designed to try to help people think more broadly about wider societal groups on the occasions where participants were asked to think from a wider societal rather than personal perspective.
- Sort-cards showing the potential criteria for a PSB to meet, taken from Ofcom's quantitative tracking survey.
- A brief overview of the role of PSB channels, entitled 'Requirements of Main Channels'
- A list of questions for the co-creation exercise.

Stimuli were tailored to each nation to reflect nation-specific brand and media content.

7.5. Sample

Below is a detailed overview of the sample structure.

7.6. Young people: profiles

Groups were recruited to ensure a range of media use by setting the following participant quotas:

- In each group **everyone** was required to watch some form of TV (be that live/broadcast TV, catch up or streaming services) at least 1-2 times a week.
- At least one per group to watch no live TV/TV as it was broadcast.
- Minimum of three participants per group to watch some form of TV live or catch up TV at least 2-3 times a week.
- Minimum of three participants per group to watch some form of purely on-demand TV at least 2-3 times a week.
- Minimum of three participants per group to listen to the radio at least 2-3 times a week.
- Minimum of one participant per group to listen to podcasts at least 1-2 times a week.

Quotas were also set to ensure that a range of platforms were used to watch TV, ensuring a good mix across the session. More specifically:

- At least two per group were required to be watching each of Netflix, Amazon Prime or YouTube 1-2 times a week or more.

Participants were required to be consuming media using a range of devices including smartphones, games consoles, tablets, laptops, radios and TV sets.

Across the groups we also recruited a mix of PSB usage levels per group. We defined PSB use as:

- **Light users:** across the week **less than a quarter** of all their TV viewing is spent watching the main terrestrial channels (all BBC, ITV, Channel 4 and Channel 5).
- **Medium users:** across the week **a quarter to a half** of all their TV viewing is spent watching the main terrestrial channels (all BBC, ITV, Channel 4 and Channel 5).
- **Heavy users:** across the week **more than half** of all their TV viewing is spent watching the main terrestrial channels (all BBC, ITV, Channel 4 and Channel 5).

In each of the focus group sessions there was a spread of gender.

Quotas were set to ensure a representative mix of BME participants per location. In Northern Ireland we recruited a mix of Unionists and Nationalists, dependent on the location.

Quotas were also set based on whether participants were studying or employed, living at home or had left home, and a minority were required to have children. Further details on the quota breakdown per group can be found in the subsequent sections.

7.7. 25+ Audience profiles

For 25+ users, while the definitions of the various audience groups remained the same as for the young people, the precise quotas were amended slightly to better reflect their viewing habits and behaviours.

The media consumption quotas for the 25+ audiences are as follows:

- In each group **everyone** was required to watch some form of TV (whether live/broadcast TV, catch-up or streaming services) at least 1-2 times a week.
- A minimum of four participants per group had to watch some form of TV live or catch-up TV at least 2-3 times a week.
- A minimum of three participants per group had to watch some form of purely on-demand TV at least 2-3 times a week.
- A minimum of three participants per group had to listen to the radio at least 2-3 times a week.
- A minimum of one participant per group had to listen to podcasts at least 1-2 times a week.

As with younger audiences, quotas were set to ensure that a range of platforms were used to watch TV, ensuring a good mix across the session. More specifically:

- At least two per group were required to be watching Netflix 1-2 times a week or more.
- At least two were required to be watching sky 1-2 times a week or more.
- At least two were required to be watching Amazon Prime 1-2 times a week or more.

All groups were recruited to ensure a mix of levels of PSB consumption – light, medium and heavy, with the definitions as for the young people's audience.

The 25+ groups were separated by gender. Additional quotas were set by life stage, including age of children/whether they had children living at home. All participants were required to be either working, stay-at-home parents or retired.

Quotas were set to ensure a representative mix of BME participants per location. In Northern Ireland we recruited a mix of Unionists and Nationalists, dependent on the location.

7.8. Focus groups – younger people

Outlined below is a table detailing the detailed structure of the extended mini focus groups among Young People.

| | REGION | LOCATION | URBAN/ RURAL | DATE | NO. OF PARTICIPANTS | QUOTAS |
|----|------------|----------------|-----------------|------------------|------------------------|--|
| 1 | England | London (pilot) | Urban | 17 December 2019 | 7 | Age 19-21 C1C2D Employed/ Apprenticeship |
| 2 | England | Leeds | Urban | 14 January 2020 | 6 | Age 18-21 Employed/ Apprenticeship |
| 3 | Wales | Abergavenny | Rural | 15 January 2020 | 5 | Age 16-18 ABC1 Students |
| 4 | Wales | Abergavenny | Rural | 15 January 2020 | 5 | Age 18-21 Employed/ Apprenticeship |
| 5 | Wales | Aberystwyth | Rural | 15 January 2020 | 6 | Age 22-24 ABC1 Employed |
| 6 | Scotland | Dundee | | 20 January 2020 | 6 | Age 18-21 Students |
| 7 | N. Ireland | Belfast | Urban | 21 January 2020 | 5 | Age 16-18 C2DE Students |
| 8 | N. Ireland | Belfast | Urban | 21 January 2020 | 5 | Age 18-21 Students |
| 9 | N. Ireland | Newry | Rural | 22 January 2020 | 6 | Age 22-24 Employed |
| 10 | Scotland | Glasgow | Urban | 23 January 2020 | 4 | Age 16-18 C2DE Students |
| 11 | Scotland | Glasgow | Urban | 23 January 2020 | 4 | Age 22-24 Employed With kids |
| 12 | England | St Albans | Rural | 28 January 2020 | 4 | Age 16-18 ABC1 Students |
| 13 | England | St Albans | Rural | 28 January 2020 | 6 | Age 22-24 C2DE Employed |

7.9. Focus groups – 25+ audiences

Outlined below is a table detailing the detailed structure of the extended focus groups among Older People.

| | REGION | LOCATION | URBAN/ RURAL | DATE | NO. OF PARTICIPANTS | QUOTAS |
|----|------------|------------|-----------------|---------------|---------------------------------|---------------------------|
| 1 | England | Croydon | Urban | 4 March 2020 | 7 | Age 60+ ABC1 Females |
| 2 | England | Croydon | Urban | 4 March 2020 | 7 | Age 25-39 ABC1 Male |
| 3 | N. Ireland | Belfast | Urban | 9 March 2020 | 8 | Age 25-39 C2DE Female |
| 4 | N. Ireland | Belfast | Urban | 9 March 2020 | 8 | Age 40-59 ABC1 Male |
| 5 | N. Ireland | Ballymena | Rural | 10 March 2020 | 3 + 3 follow-up depths | Age 60+ C2DE Females |
| 6 | Wales | Swansea | Urban | 11 March 2020 | 8 | Age 60+ ABC1 Males |
| 7 | Wales | Swansea | Urban | 11 March 2020 | 8 | Age 25-39 ABC1 Females |
| 8 | England | Birmingham | Urban | 12 March 2020 | 8 | Age 40-59 C2DE Females |
| 9 | Scotland | Inverness | Rural | 16 March 2020 | 8 | Age 25-39 C2DE Male |
| 10 | Wales | Rhyl | Rural | 16 March 2020 | 8 | Age 40-59 C2DE Male |
| 11 | Scotland | *Perth | Urban | 17 March 2020 | 6 telephone depths | Age 60+ C2DE Males |
| 12 | Scotland | *Perth | Urban | 17 March 2020 | 2 mini-groups 8 participants | Age 40-59 ABC1 Female |

** NB. These groups were converted into mini groups and telephone depth due to Government restrictions imposed as a result of Covid-19*

7.10. In-home depth interviews – younger people

Outlined below is a table detailing the detailed structure of the in-home immersion interviews among Young People.

| | REGION | LOCATION | URBAN/ RURAL | DATE | QUOTAS |
|----|------------|--------------|-----------------|-----------------|--|
| 1 | England | Wakefield | | 14 January 2020 | Age 18-21 Student |
| 2 | England | Wakefield | | 14 January 2020 | Age 22-24 Employed |
| 3 | England | Wakefield | | 14 January 2020 | Age 16-18 Student |
| 4 | Scotland | Dundee | Urban | 21 January 2020 | Age 22-24 ABC1 Employed |
| 5 | Scotland | Dundee | Urban | 21 January 2020 | Age 18-21 Employed/ apprenticeship |
| 6 | Scotland | Dundee | Urban | 21 January 2020 | Age 22-24 Employed With kids |
| 7 | Scotland | Glasgow | | 22 January 2020 | Age 22-24 Employed |
| 8 | Scotland | Glasgow | | 22 January 2020 | Age 16-18 Students (Paired) |
| 9 | N. Ireland | Lisbon/Newry | Rural | 23 January 2020 | Age 16-18 C2DE Students (Paired) |
| 10 | N. Ireland | Lisbon/Newry | Rural | 23 January 2020 | Age 18-21 Employed |
| 11 | N. Ireland | Lisbon/Newry | Rural | 23 January 2020 | Age 22-24 C2DE Employed |
| 12 | England | St Albans | Rural | 27 January 2020 | Age 18-21 Students |

| | | | | | |
|----|---------|-------------|-------|-----------------|--------------------------------------|
| 13 | England | St Albans | Rural | 27 January 2020 | Age 16-18 ABC1 Students (Paired) |
| 14 | England | St Albans | Rural | 27 January 2020 | Age 18-21 Employed |
| 15 | England | St Albans | Rural | 28 January 2020 | Age 16-18 C2DE Student |
| 16 | Wales | Abergavenny | Rural | 29 January 2020 | Age 22-24 ABC1 Employed |
| 17 | Wales | Abergavenny | Rural | 29 January 2020 | Age 22-24 Employed – with kids |
| 18 | Wales | Abergavenny | Rural | 29 January 2020 | Age 22-24 Employed |

7.11. Discussion guide

Overleaf is the discussion guide used for the second 25yrs + audience. The discussion guide for the younger cohort was very similar, although it did not include the section on the licence fee.

The in-depth interview guide focused more on media consumption habits.

Ofcom PSB 25yrs+ audiences – group discussion guide

1. INTRODUCTION (10 MINS)

Researcher introduction (5 mins)

- **EXPLAIN:** Today we are going to be talking about media content, by which we mean broadcast TV programmes and films, radio shows, programmes & films on catch-up services (e.g. iPlayer, 4OD, ITV Hub), programmes on video on demand services (e.g. Amazon Prime, Netflix), video content on video sharing platforms like YouTube and video content on social media. So things you watch, read or listen to on TV, radio, online, on mobile phone apps, etc.
 - But today is also for thinking about how this might look different in future given the changes in technology and how people consume shows or programmes online, via websites, catch-up services, mobile apps etc.
 - As you know the research is on behalf of Ofcom, the communications regulator, which also includes media programmes you watch or listen to. In developing regulation and guidelines for our media in the future it is really important that they fully understand the needs of people like yourselves – which is why we are here today.
 - Mostly we are asking you to talk from your own perspective but now and then we might ask you to put your ‘citizen hat’ on and think about wider society – everyone including the elderly, families and children – and more minority groups.
- *Ground rules and reassurances:*
 - There are no right or wrong answers to any of this, your opinions count, so please do be open and honest about how you feel and what you think
 - Not trying to sell anything and there will be no follow-up
 - Views and opinions will be held in strictest confidence
 - Sessions will be audio and video recorded – ensure they all completed the permission slip in advance

Respondent introductions (5 mins)

- Thanks a lot for completing the diary exercise in advance – explain have looked at your pre-tasks and will be using this as the background to a lot of our discussions today.
- First name, where you live and who with
- What do you do?
- Favourite programmes have been watching (or streaming) recently?

- What is your favourite radio programme or podcast?

2. CURRENT BEHAVIOUR (25 MINS)

STIMULUS A: BRAND CARDS

Give cards to respondents to sort. Ask to sort range of channels/brands/services according to how relevant these brands feel to you – which do you feel are most relevant/relatable to you as individuals, which do you feel are somewhat relevant/relatable and which do you feel are less relevant/relatable. (ENSURE SORT ON RELEVANCE TO THEM NOT ON AWARENESS). AS GO THROUGH DISCARD ANY HAVE NOT HEARD OF FROM SORT.

Moderator to manage task.

Ask to explain logic/explore relevance

- What makes them feel more or less relevant/relatable:
 - What are the key factors that make a channel/brand feel relevant/relatable to you?
 - What are the key factors that makes a channel/brand feel closer to you?
 - What is the impact of your choice, 'must watch/listen' shows?
 - Why do you choose certain one(s) over another?
- Are there any brands you feel are relevant you don't watch/listen to as much? Why?
 - Are there any that are less relevant that you still watch/listen to? Why?
 - What types of programme/categories of show might you watch these for?

Explore consumption of the same set of brands:

- Of these brands which ones do you watch or listen to the most?
 - What makes these the ones you watch or listen to the most?
 - What do you watch or listen to on them on them?
 - **IF MENTION NETFLIX/AMAZON PRIME ASK: What proportion of the shows that you watch on these channels are British made programmes (i.e. originated form one of ITV, BBC, C4 or C5) versus their own originals or programmes from channels overseas?**

STIMULUS B: LIST OF GENRES

- What types of programmes do you like to watch or listen to and why? Probe; news/current affairs, documentaries, history/science/arts, comedy, sport, drama, soaps, films, reality shows, celebrity/talent/variety shows, quiz shows, chat shows, music shows?

- What about on the radio – what types of programmes/shows do you listen to?

IF they mention sport, we need to understand if they view this scheduled TV and probe for this as a potential reason for choosing this

Thinking back to the programmes/radio you're watching/listening to at the moment (from the intro)...

- What makes these your favourites?
 - Probe fully why these are their favourites

How does this vary by:

- Categories/genres/types SHOW GENRE STIMULUS: What makes for a good experience in this genre (probe for those watched)?
- Radio vs. TV shows or programmes: What makes for a good experience in radio or audio shows or programmes? What are you looking for here?
- How have your watching habits changed over the last few years?
- Probe for:
 - Balance of on-demand/streaming vs linear/live watching
 - Providers used (esp increase in Netflix, Amazon Prime, Spotify and decrease in PSBs)
 - Screens used (phone vs TV vs laptop, etc)
 - Solo vs shared viewing
- For each mentioned
 - Why has this changed? What was the main reason?
 - Probe for: influence of their kids, friends, family, new kit (e.g. smart TV)
- What do you think is better now? What have you gained?
 - What is worse? What have you lost?
- REPEAT FOR CHANGES TO LISTENING HABITS

3. PSB EXPLORATION (60 mins)

EXPLAIN: We have discussed lots of different providers but for this part our focus is on the following broadcasters; BBC TV and BBC radio stations, ITV, Channel 4 and Channel 5.

This can be watching or listening to as it is broadcast or using their catch-up/on demands services: iPlayer, Sounds and 4OD, ITV Hub, My5

- How would you describe this group of broadcasters?

STIMULUS C: BRANDS

Thinking about these channels/brands/services, what types of (programmes do you watch or listen to at the moment from them? Probe:

- Genres/categories/types (REFER THEM TO STIMULUS B)
- Favourite/stand out shows
- Sub brands (i.e. channel brands of ITV and BBC)
- Broadcast vs. on demand
- For each channel/brand/service:
 - What /categories/types of programmes are they particularly good for?
 - Where are they less strong? Who does this genre/category better?
 - Are some of their channels/services stronger and more relevant to you than others? (e.g. BBC One vs BBC Four, etc. – to get a nuanced view of channel brands vs. master brand)
 - Are there differences in how you see their catch-up services vs. the broadcast services e.g. ITV Hub, All4 or BBC iPlayer vs their broadcast channels) (i.e. do the same strengths and weaknesses apply)

STIMULUS D: PROGRAMME BY CHANNEL LIST

Please take a minute to a look at the list of just some examples of the shows or programmes on these brands as a reminder of what they offer. How would you feel if all TV and radio services from these channels disappeared tomorrow?

- What would you miss the most?
- You mentioned earlier - finding shows or programmes from one of the TV channels we have been discussing being shown on other services such as Netflix, Amazon Prime or YouTube. How would you feel if this type of British made shows or programmes was no longer available to watch on these other platforms?
- What would we lose if these channels **and the programmes they make** didn't exist in their current form? Probe;
 - The range of programming on offer across these channels (i.e. the range of different genres of programming)

- Programming made in the UK reflecting UK culture for UK audiences ('Britishness')
 - Programming that reflects and portrays people like me and where I live
 - High quality trustworthy news and current affairs
 - Programming that reflects what is happening in the UK/issues facing people who live in the UK – including the full range of different cultures and viewpoints
 - Having niche and specialist programming (e.g. history, science, religious programming)
 - High quality children's programming
 - The shared viewing experience – i.e. everyone watching or listening at the same time (scheduled programming or live events)
- What types of shows do you get on these channels that you simply don't get elsewhere or are not quite the same elsewhere?
 - Why do you think that is?
 - Who are these channels/brands aimed at? Do they make programmes for people like you? Why/Why not?
 - Are some of their channels/services more relevant for you than others? (e.g. probe on BBC One vs other BBC Four, Channel 4 vs E4 etc. – to get a nuanced view of channel brands vs. master brand)
 - IF REPLY WITH HOW MARKETED FOLLOW UP WITH: How good a job do you feel they are doing on delivering for/aiming at people of your age?
 - How, if at all, does their shows or programmes differ from that which we were talking about earlier on things like Netflix and Amazon Prime or that you find on YouTube?
- What about their **on-demand** services? Do you use them? If so how – catch up vs. box sets vs. to seek out new shows or programmes
 - Why/why not?
 - PROBE: Functionality vs. shows or programmes issues
 - You mentioned earlier certain shows that you like to watch or listen to on **scheduled/broadcast TV or radio** by which we mean you are watching it as it is aired on the TV or radio rather than on catch up later, are there any others we have missed (probe: News, reality shows, 'must watch' dramas)?
 - What does watching or listening to **scheduled/broadcast** TV and radio bring that catch-up or streaming services don't? (e.g. Gavin and Stacey on Christmas Day, the Strictly final - LISTEN OUT FOR IDEA OF BRINGING PEOPLE TOGETHER)

- What about TV events that are broadcast live e.g. sports matches, news bulletins, Royal Weddings? What does watching live bring?
- What about if **scheduled/broadcast** TV and radio disappeared? How would you feel?
 - What, if anything, would you miss?

[Listen out for issues relating to the issues below but don't overtly probe:

Listen out for issues relating to the questions below but don't overtly ask:

- If you don't, what might encourage you to watch these types of channels more/what might make them feel more relevant? (if they aren't already). Probe:
 - Content; appeal, breadth, choice
 - Navigation
 - Ease of finding what you want/functionality
 - Ease of finding things that feel aimed at you
- And from the point of view of radio stations, what might make you listen more either to the radio or to BBC Sounds?
 - Content; appeal, breadth, choice
 - Ease of finding what you want/functionality
- What do services like Amazon Prime, Netflix or YouTube do to help you find new shows or programmes that these services could learn from?

STIMULUS E: REPRESENTATION OF BROADER SOCIETY

Thinking more broadly and considering the needs and wants of the different types of people on this sheet ...

- Please refer back to the pre-task we asked you to complete
- Attempt to cover each group in turn – NB this is to ensure full consideration, rather than detailed needs and issues for each group
- What might these groups want from TV and radio that differ from your own needs?
 - PROBE:
 - How does this vary by genre or category of programme?
 - How about on-demand vs broadcast?
 - TV vs radio?
- Do BBC, ITV, C4 and C5 do anything for these groups that other providers don't? what?

- What do other providers do for these audiences that BBC, ITV, C4 and C5 don't?
- Which of these would be more or less affected if all TV and radio services from these BBC, ITV, C4 and C5 disappeared tomorrow? Which would be more? Which would be less? Why do you say that?
- And what about if the original UK shows or programmes made by these types of channels is no longer available on Netflix, Amazon Prime and YouTube – what impact would losing these sorts of shows have on wider society? Who would be most affected? Why?
(IMPORTANT TO EXPLORE THE VALUE OF BRITISHNESS – I.E. ORIGINAL UK CONTENT)

STIMULUS F: TOP PRIORITY CRITERIA POINTS ALLOCATION GAME

Explain that these are all possible elements that the channels we have been talking about – BBC TV and BBC Radio, ITV, C4 and C5 – might be required to build into their programming.

- Trustworthy and accurate news and current affairs
- Programmes that help me to understand what is going on in the UK and the world today
- Local and regional news
- Programmes I want to watch and that I can relate to
- Specialist programmes about history, science, religion or the arts
- A wide range of high-quality programmes for children made in the UK
- Programmes that reflect and portray people like me and where I live
- Programming that reflect the full range of cultures and viewpoints of the people of the UK
- Programmes with new ideas and different approaches
- A range of high-quality programmes
- Programmes that make me stop and think and help me to understand points of view that are different from my own
- Programmes that offer a shared experience with others
- Services which are available to everyone

We would now like you to imagine that you could decide which of these you personally would want to ensure were provided by these channels and stations. There is a limited budget and so you can't have everything – you need to prioritise some things over others.

You've got 13 statements can you please sort them into **three** groups according to which you see as top priority, medium priority and lower priority. You can have a maximum of 5 statements/priorities in each group.

ALLOW GROUP TO COMPLETE THE TASK AND DECIDE WHICH SHOULD GO INTO EACH GROUPING

ONCE DONE ASK THEM TO TALK THROUGH THEIR RATIONALE.

NEXT: Ask to pick their **TOP THREE PRIORITIES** from the 'top priority' pile.

ALLOW GROUP TO COMPLETE THE TASK. ONCE DONE ASK THEM TO EXPLAIN THEIR RATIONALE How easy or difficult did you find this? Are there any elements you didn't get to put in the top priority pile that you would have like to have done?

ASK GROUP TO CONSIDER WHAT THEY MIGHT HAVE DONE DIFFERENTLY IF THEY WERE THINKING ABOUT ALL THE DIFFERENT TYPES OF PEOPLE IN SOCIETY (REFER TO STIM E)

- What elements would be more of less of a priority to some of these other groups? What elements? Which groups?
 - If you were going to move THREE elements (up or down) which ones would you choose?
 - How might you change things thinking with this wider society point of view?
 - What might others need or be missing for some of these audiences?

FOCUSSING ON THE ELEMENTS THAT THEY HAVE IN THEIR TOP PRIORITY PILE, IE. THE IMPORTANT ONES TO THEM ...

- Which of these do you feel are currently being met by one or more of the TV broadcasters we talked about earlier – BBC, C4, C5, ITV?
- Which ones? In what way? By whom? Can you give some examples?
 - Is this for all groups or just for people like you? How does it differ?
- And which, if any, do you feel are currently being met **by BBC radio stations or BBC Sounds?**
 - Is this for all groups or just for people like you? How does it differ?
- And which of these do you feel are NOT currently being met by one or more of the broadcasters we talked about earlier – BBC, C4, C5, ITV?
 - Which ones? Why do you say that? For which groups?

- Thinking about these high priority criteria, are there any other providers outside BBC, C4, C5, ITV who are providing programmes/shows that do meet these criteria?
 - Which ones? Why do you say that?
 - Who? In what way? Can you give me some examples? Probe; Amazon Prime, Netflix, YouTube, Others?
- And are there any of these that are not being met by any provider?
 - Which ones? Why do you say that?
- Have you heard of the phrase **Public Service Broadcasting?** (LISTEN OUT FOR MENTION OF THIS BUT ONLY PROBE IF EMERGES SPONTANEOUSLY.
 - PLEASE WRITE DOWN INDIVIDUALLY THE FIRST THREE WORDS THAT COME TO MIND - share as a group
 - What does this mean to you?
 - What do you think it's there to do?

STIMULUS G: THE ROLE OF THE MAIN CHANNELS

Hand out to everyone individually and ask them to write down their initial thoughts.

- Any questions or clarifications?
- What are your thoughts on this?
- What do you think are the benefits of having these requirements in place for the main in today's media world
 - To you personally?
 - To other types of people in society (REFER TO STIM J)?
- Do your views differ depending on which provider you are thinking of e.g. BBC, ITV, C4, C5? Why?
- Do your views differ depending on the type of programme, e.g. news, documentary, drama, regional shows or programmes? Why?
- Who in society do you feel this might be particularly important for? **Probe for each group**
 - What would others in society miss? (REFER TO STIM E)

4. CO-CREATION EXERCISE (20 mins)

- We are now going to ask you to work with us to help develop main channels and their programmes in the future. I would like you to pretend that you are in charge of ensuring that the main channels are kept up to date with the changing times. You work for the Government and are in charge of all media and communications decisions in the UK.

- Explain that one group is going to do the task thinking about their own personal needs and wants and that the other group is going to do the task thinking about the needs of wider society (**REFER TO STIM E**).

DIVIDE INTO TWO GROUPS

STIMULUS H: CO-CREATION QUESTIONS

- Please can you answer the following questions:
 - What types of programmes/shows, would you include within the main channels? (e.g. news, documentaries, dramas, sport, comedy,)
 - And what sorts of things would its programmes or shows need to include to ensure they meet the criteria you said were important earlier? (e.g. representation of different regions, cultures, ways of life)
 - Would radio/audio (live, news and podcasts) be part of the mix?
 - What are the main things you would do differently from now? (e.g. including any new requirements to meet current gaps that you might include)
- **PRESENT BACK TO WIDER GROUP**
- Probe and discuss
- Which groups in society could lose out in this new world you have identified?
 - What would you do to ensure that vulnerable audiences were not disadvantaged?
 - Probe for each audience
- And after all this, would you watch/listen to this shows or programmes?

5. WILLINGNESS TO PAY AND THE LICENCE FEE (5-10 mins)

- Refer back to any services/providers mentioned earlier
- Are there any services that you/your household pay for? Probe; SKY, Virgin, Amazon Prime, Netflix, Spotify, Apple Music
- **What makes you willing to pay for these services?**
- How much do you think it costs? **ASK TO WRITE DOWN INDIVIDUALLY FOR EACH SERVICE**
 - Are these value for money? Why?
- How much does the TV Licence fee cost? **WRITE DOWN**

- What is your understanding of what this covers? (Listen out for mentions of BBC TV, BBC Radio, BBC Sounds and iPlayer – don't probe)
- How do you feel about the licence fee? Is it value for money? Why/why not?
- What is your understanding of how ITV, C4 and C5 are funded? Where do they get their income from? Probe; advertising, the licence fee

EXPLAIN: The TV licence fee is used to fund the BBC (including TV, Radio, iPlayer, online and Apps) and also partly to fund ITV, C4 and C5

- How do you feel about this? Are you surprised? Does it make you feel any differently about ITV, C4 or C5?
 - PROMPT: Don't forget this includes any programmes you watch via Netflix, Podcast apps or Amazon Prime that originally was made by these channels? What if it wasn't available on these services and you could only get it from the original broadcasters?
- Thinking about these different methods ...
 - Licence fee
 - Licence fee and advertising
 - Monthly voluntary subscription payments (e.g. Netflix and Spotify)
 - Platform's own services (e.g. Sky, Virgin)
- Which is your preferred method of paying for these services?
- What are the advantages and downsides of each?
- If the BBC and other channels were funded by a voluntary subscription would you pay for it?
- Revisiting what you came up with (the co-creation) – how would you ideally charge for this? How would the cost of this compare to what you pay now?

6.TO END (5 MINS)

- Go around the room and ask everyone to say individually (so we can film them)
 - If they would keep the PSBs and why – and the main changes they would make to them in the future
 - And (if time) the one key purpose that the PSB would need to have in place to meet future needs