



**Exploring D and E socio-economic groups' relationship with the BBC**

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**MAKE YOUR MARK**

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# 1. Executive Summary

## 1.1. Summary of key findings

The complexity of the media landscape now means audiences need to navigate their way around a seemingly limitless amount of content across a plethora of channels, platforms, and services. The BBC has an additional challenge in satisfying its public service remit while also being compared to subscription services. As such, audience satisfaction with the BBC can fluctuate.

Ofcom research has shown that achieving a high level of satisfaction is more challenging when looking at D and E groups. This research set out to understand more about the underlying factors driving the satisfaction levels of those in D and E groups.

This research has found that the **proliferation of choice** has led to two outcomes. First, D and E groups are now seeing **content which they feel is more authentic, diverse and reflects their lives**. Because it more accurately reflects their lives, there is a belief that much of this content is created *by and for* people like them, contrasting with their belief that the content on broadcast channels is created by the middle/upper classes, and is not directly aimed at D and E groups. Second, social media channels, such as YouTube or TikTok have enabled them to access content specific to their **highly personalised and individualised interests and tastes**.

In addition, D and E groups are also experiencing financially challenging times. Many are working longer hours, or for those with impairments or illness, experiencing constant pain and discomfort; all of which means that media, an essential source of escapism and comfort, **must be easy to find, be appealing and be relatable**.

Many claim that the BBC is old-fashioned, politically correct, and stuck in the past. There is certainly **scope and need for the BBC to create edgier, riskier content** which engages and **reflects the real lives** of these diverse groups. Currently, the BBC's representation of D and E groups is felt to be out of touch, either misrepresenting or missing the mark.

However, though most would like content which continuously evolves to meet their needs, it is the **brand perception of the BBC – not its content – that drives much of this negative sentiment**. The broadcaster's longevity, nostalgic value, and national significance have resulted in the overall brand reputation having more influence on perception than that of the actual content. National conversations such as presenter pay, the licence fee, and scandals feed into this. In addition, as programmes originally commissioned by the BBC are shown on a range of non-BBC services, such as Netflix, there is confusion around who is producing new, quality content that is released, diluting audience association with BBC made content.

As a result, when focusing on BBC content, much is highly regarded for its quality and breadth of appeal. It is felt to deliver strongly on **educating and informing**, aspects which participants want to see continued, improved, and expanded. Addressing this would involve the development of new content bringing the lives of D and E groups, their interests and experiences, to the fore in a fresh and innovative way. In some cases, this content already exists; audiences feel **the BBC needs to improve how it is shared**. BBC iPlayer, for example, is not seen to be as slick as other streaming platforms and participants felt that the content was often hidden away, and too difficult to find.

## 2. Background and objectives of the research

### 2.1. Background

Since it began regulating the BBC in 2017, Ofcom's research has consistently identified that those in D and E socio-economic groups report lower levels of satisfaction with the BBC when compared with other groups. The social groups D and E are defined by the Office for National Statistics (ONS) as those with a lower socio-economic status and predominantly made up of those who are older, unemployed, have a disability, or are retired with only a state pension. Ofcom seeks a clearer picture of the diversity of these groups as well as their relationship with the BBC to better understand why they report lower satisfaction levels.

The D and E groups make-up almost a quarter of the UK population, 10.6 million adults<sup>1</sup> (aged 16-64), and is, as such, highly diverse. However, historically, many organisations have found it difficult to obtain a definition of the D and E groups which adequately reflects its complex make-up due to the nature of its categorisation. This work will supplement Ofcom's understanding of D and E groups' relationship with the BBC.

Despite consuming more TV content relative to other groups, Barb data indicates that D and E groups consume the least BBC content as a proportion of their total viewing compared to other groups. This is similarly reflected in their radio listening habits (RAJAR). This research was commissioned to provide insights into what is causing more negative attitudes among D and E groups towards the BBC.

### 2.2. Research objectives

The objectives for this project centred around two clear needs – to investigate D and E groups' perceptions of the BBC and to provide a more in-depth analysis of the diversity within the groups. The research aims were as follows:

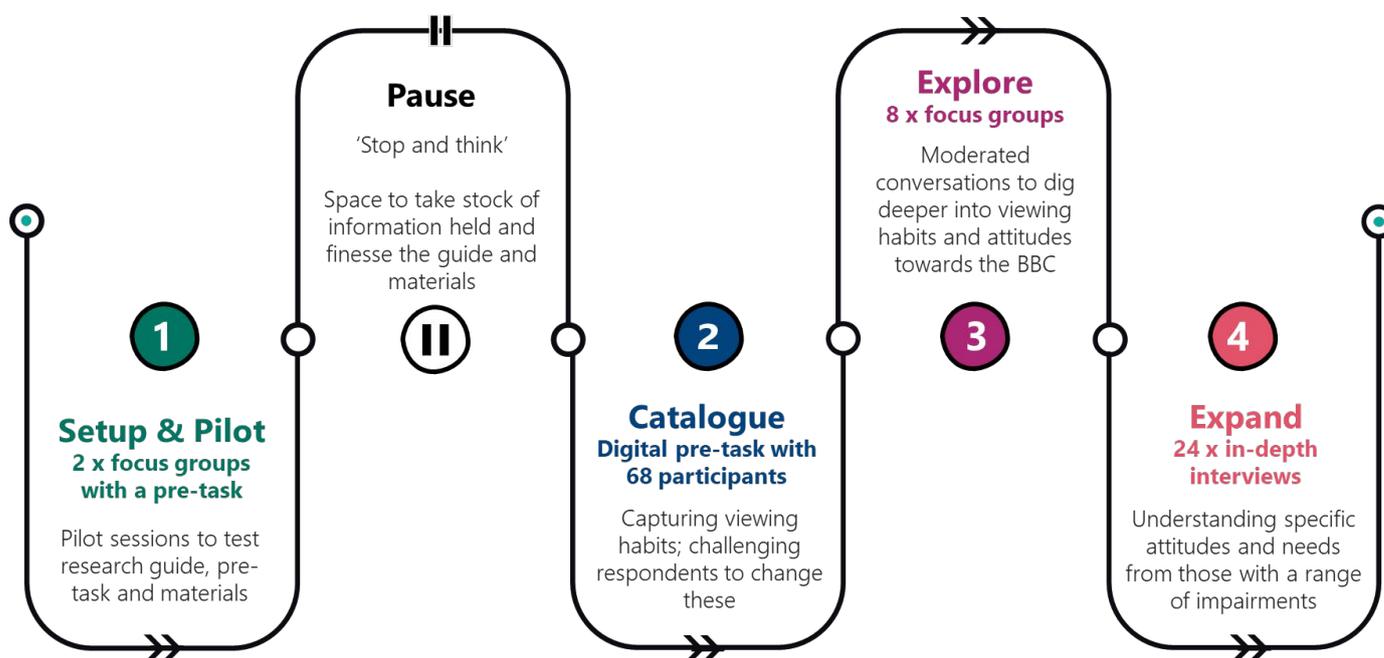
1. To investigate D and E socio-economic groups' relationship with the BBC
  - a. What are the pathways by which they engage in media, and how does the BBC compare to other media outlets?
  - b. *Why* do these groups have lower satisfaction with the BBC?
  - c. How does their emotional connection to the BBC work within the wider context of how the BBC operates?
  - d. How do the wider attitudes towards the BBC help us understand why less favourable views are held?

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<sup>1</sup> Statistic taken from the ONS: [Approximated Social Grade \(ASG\), England and Wales - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk) ASG is allocated to all 'usual' residents in a household with a Household Reference Person (HRP) aged 16-64 years old. The HRP is the person in a household who serves as the reference point to characterise a whole household, mainly based on economic activity. Estimates are based on the HRP's current or most recent occupation. For retired HRPs aged 65 years and over, this may not best reflect their career or highest status position; therefore, they are not included in ONS data, and so the overall number of SEG DEs in the UK is likely to be higher. We have included those aged 64+ in our research and reporting; more information on how we recruited these groups can be found in Appendix in section 9.

2. To provide a new way of understanding these highly diverse groups, and what drives dissatisfaction towards the BBC among some, but not others.
  - a. How do views and experiences within social groups D and E differ, and what drives those differences?
  - b. What unites these groups? Are there subgroups which could provide a more useful way to understand these groups?
  - c. How do protected characteristics as well as geography, attitudes and values unite or differentiate people's relationship with the BBC?
  - d. What social norms are at play which influences this relationship?

### 2.3. Research approach



More detail on the sample frame, sampling considerations, and locations of the research can be found in the Appendix in section 9.

### 2.4. How we reference D and E groups within the report

Socio-economic groups (SEG) are a way of classifying the population, widely used in the UK to analyse consumer attitudes. SEG is assigned to households based on the occupation of the main income earner. SEG 'D' includes semi-skilled or unskilled manual workers, and SEG 'E' encompasses housewives/ househusbands, casual workers, unemployed individuals on state benefits, and retired/long-term sick individuals on a state pension only. Together, these groups make up nearly a quarter of UK adults of typical working age (22.6% or 10.6 million).

While using socio-economic grade (SEG), it's essential to recognise the diversity within these groups, avoiding the homogenisation of varying backgrounds, work status, disabilities, and financial situations.

In this report, we've collectively referred to participants as 'D and E groups' to acknowledge shared opinions and experiences, but we've been careful not to homogenise them. We have done this by recognising that those we spoke to were individuals and not responsible for speaking for the entire D and E audience. Where appropriate, we've highlighted distinct experiences within different groups in the D and E categories, emphasising the diversity within these demographics.

## 2.5. A note on qualitative reporting

This qualitative study involved in-depth interviews and focus groups facilitated by professional moderators trained to observe and probe participants for valuable viewpoints and insights. In-depth interviews explore individuals' thoughts, needs, wants, and reasons behind their views in a less structured manner than quantitative surveys. Findings may reveal unexpected insights, and moderators ensure that client questions are addressed, and every participant has a chance to express their perspective.

It's important to acknowledge that participants may hold views based on incorrect information, and the moderator's role is to explore and report perceptions and not to necessarily correct misunderstandings. Incorrect information can still be valuable for the client to understand and address through targeted communications.

When interpreting the findings, it's important to recognise that they lack quantitative, statistical evidence. Additionally, the information in this report is based on responses during qualitative conversations, which may not always align completely with factual accuracy.

## 2.6. Attributing quotes throughout the report

Throughout the report quotes are used to illustrate research findings. Where quotes are attributed to individuals from the in-depth interviews, they are in the following format:

***[Location], [Gender], [Age], [Socio-economic group]***

Where quotes are attributed to an individual from the focus group sessions, they are in the following format:

***[Location of focus group session], [Gender], [Age group], [Socio-economic group]***

More information on the demographic breakdown of participants from both the focus group and in-depth interviews can be found in Appendix 9.

## Detailed findings

### 3. An evolving media landscape

#### 3.1 The pace of change feels increasingly fast for these groups as newer media platforms emerge

##### Newer platforms

Digital services, especially social media such as YouTube, TikTok, Facebook, and Instagram, play a significant role in shaping people's media choices. Through the pre-task, we saw that these services are heavily integrated into daily media routines. The way these groups consume content is evolving, with many opting for streaming services on various devices, even casting content onto their TVs. This leads to more immediate, diverse, and personalised media consumption.

In the digital pre-task<sup>2</sup>, many younger participants mentioned steering clear of traditional broadcast TV, favouring the flexibility provided by streaming services.

*'I find the BBC channels on TV are a bit dated. iPlayer has stuff you can pick which is better.'*

**Glasgow, Man, 25-34, E**

This range of online platforms is increasingly influencing choice. Alongside this, the ways in which people discover and discuss upcoming programming is evolving – with physical TV guides (e.g. the Radio Times) now rarely featuring for those we spoke to. Word-of-mouth, advertising, curated suggestions/ algorithms, and general conversation via social media were the key drivers of discovery.

##### Traditional platforms

Traditional ways of watching TV, like broadcast channels such as BBC, ITV, Channel 4, and Channel 5, are losing their dominance among our participants, due to these changing influences. Participants said they are no longer solely focused on broadcast channels, leading to a less unified 'national conversation' about TV events. Instead, individuals are drawn to more personalised and diverse viewing habits.

##### Audio

While most discussions revolved around visual media, some participants touched on audio. Modern audio paths, such as podcasts and streaming music are, for some, taking the place of traditional radio. The appeal lies in personalisation, the ability to curate diverse content, an immersive experience, and variety. This shift is not exclusive to Ds and Es but among those we spoke to seemed significant in empowering participants to tailor their auditory experiences precisely to their tastes, increasing engagement and satisfaction.

<sup>2</sup> The digital pre-task was conducted before the focus group sessions and consisted of two elements: first, participants were asked to catalogue their media use; second, they were split into two groups with the first tasked with avoiding all BBC content, and the second group tasked with *only* consuming BBC content. More detail on the pre-task can be found in the Appendix in section 10.

*'Interesting, despite the fact I listen to no British podcasts, the Australian podcasts "Fair Enough" and "Sunday Sessions" on Spotify feel more relatable as they are youthful and authentic. The latter being key. Also, they're guys which makes it relatable, and they are unapologetically so. Again authentic, and sincere. Spotify allows me to find and listen to music that better represents firstly how I feel, the issues/themes I care about, and also more classic representation in the form folk music - which I enjoy.'*

**Goole, Man, 18-24, D/E**

Most participants in this study used social media extensively, and believed their lives are more authentically represented through content shown on these platforms. Consequently, they are growing distant from traditional broadcasting channels.

While the research sought to understand media use across all platforms (websites, apps, radio, TV, streaming) participant responses focussed overwhelmingly on TV, streaming, and audio; BBC website and app usage was relatively low.

### 3.2 This research found that escapism and companionship were key drivers in media consumption

As mentioned previously, D and E groups are more likely to have higher levels of unemployment, mental health challenges, disability, and neurodivergence compared to other socio-economic groups<sup>3</sup>. However, these contextual factors can also heighten the emotional expectations of media.

Particularly for those individuals we spoke to, who were grappling with chronic pain, mental health issues, challenging home environments, and financial struggles, the need for companionship and escapism was significantly intensified.

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<sup>3</sup><https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/disability/articles/disabilitybyagesexanddeprivationenglandandwales/census2021>; <https://www.mentalhealth.org.uk/explore-mental-health/statistics/poverty-statistics>

## ESCAPISM

- A distraction from life's challenges
- A sense of excitement to break up routine
- Something to talk about – a source of social currency
- An opportunity to immerse themselves in a different world / mental space
- People pay more attention to it

*'Background noise makes you feel like you're not completely on your own. It's a bit of **escapism**. When you're watching and you sit there, it gets you away from all your problems for a bit. You can just zone out.'*

**Nottingham, Woman, 35-54, D**

*(Discussing the impact of streaming favourite shows like Prison Break) 'I feel a mix of nostalgia and general entertainment when watching, I still remember being in my friend's house years ago watching an episode of it and then my sisters giving me season 1 on DVD. Since then I've rewatched it at least 10 times. It's just so entertaining.'*

**Glasgow, Man, 25-34, E**

## COMPANIONSHIP

- Background noise
- A source of company
- People pay less attention to it
- This need is especially elevated for those with:
  - Chronic pain
  - Mental health problems
  - Particularly difficult home lives

*'The main reason is I mentioned I live in a bungalow... So, when I get into bed completely, you could hear a pin drop, and I don't like it. So I've got a little tiny radio that I put on as background noise.'*

**Nottingham, Woman, 35-54, D**

*'I also started watching Grey's Anatomy last year, on a streaming service (Disney+) which has become another favourite, due to the vast array of episodes available therefore it is more reliable and consistent - I know I will be able to watch a programme I know I like, and there isn't a shortage of episodes anytime soon, like a friend I can rely on.'*

**Goole, Woman, 18-24, D/E**

Content which feels risk taking, current, authentic and fresh tended to appeal more, when delivering against core needs of **escapism**. Content which is reassuring, allows for comfort-watching, or taps into a sense of nostalgia, was more aligned to the core need of **companionship**.

### 3.3 Many multi-screen throughout the day; they are 'always on'

Participants claimed to use multiple screens throughout the day<sup>4</sup>, creating widespread and diverse media habits. This varied engagement led to a scattered focus, with different sources competing for attention. Individuals reported feeling both distracted and deeply engaged as they switched between these states. In such an environment, it's challenging for content to capture and retain attention, making it hard to stand out or resonate.

*'I watch my phone rather than putting the TV on, or rather, I have my TV on in the background but I might have YouTube on my phone, and I can have that and be flicking through channels, and maybe I'll find something I might be interested in. But yeah, I suppose my phone is a bit of a barrier [to engagement].'*

**Antrim, Woman, 35-54, D**

*'I think having all the streaming services available is great but I probably would be more interested in something if we didn't have them, because there's always something on and at the same time.'*

**Dunfermline, Woman, 27, D**

We found that this fragmented focus and what is perceived to be constant competition, impacted satisfaction levels, especially for traditional media sources such as the BBC and other public service broadcasters (PSBs) which can struggle to sustain attention alongside the streaming platforms. Switching between distracted and engaged states also leads to diminishing interest in conventional media, which follows predictable patterns. Online platforms tended to leverage interactive, dynamic features that aligned with shorter attention spans, enhancing user engagement and making it easier for this type of content to resonate with and satisfy participants.

*'For me, if it's not on Facebook or on Instagram I don't really watch much of that kind of TV at all [longer programmes].'*

**Antrim, Woman, 35-54, D**

*'I like shorter series, and with the episodes [if they aren't shorter] I'll just speed them up. I'm happy when I notice they're shorter, it's easier to watch.'*

**Peterhead, Woman, 25-34, D**

*'It just resonates more, the short format. It's quick.'*

**Liverpool, Man, 18-24, D**

<sup>4</sup> In the pre-task, participants were instructed to record their media consumption habits over a span of three days using a visual graph that depicted device, channel, and platform use across these days. The task revealed substantial consumption patterns, involving a wide array of devices and entertainment sources. Given that participants self-reported their habits, it is probable that the actual engagement was either underestimated or inaccurately reported.

As a result, traditional media outlets may struggle to compete in a modern context – a context in which preferences seem to be turning towards more interactive and personalised content.

### Multi-screening and those with impairments

Participants with impairments documented a particularly high amount of screen time as part of their media diaries and were more likely to multi-screen than those who did not have impairments. They relied on shorter content that is more digestible and easier to follow even when using multiple screens at the same time.

This was particularly prevalent amongst those who are neurodivergent, i.e. with attention deficit disorder (ADD), or attention deficit hyperactivity disorder (ADHD), who at times said they preferred content which did not require too much attention or immersion.

*[On TikTok] 'You've got videos that are 3, 5, 10 seconds long, you're just looking for really fast content that doesn't take any effort to really pay attention to.'*

**Cheshire, Woman, 26, D**

In addition, many with chronic pain and ongoing illnesses said that when they are in a state of distress, quick, easy, and engaging content can help them forget their pain – even just for a moment. The ability to engage with a range of easily digestible content across multiples screens helped them to do this.

*'That's how my pain is, it's in the background, like aircon! So, if I can replace that background with something else I don't think about the pain as much. You can go in and out and you each pick up whatever you want to hear.'*

**St Mellons, Woman, 35-54, E**

### 3.4 New voices are moving into the mainstream, driving choice

User-generated content (UGC), both audio (podcasts) and visual, were referenced by our participants, including influencers such as Joe Rogan, Mr Beast, KSI, and others who seem to be shaping audience preferences. These emerging voices can not only impact available content but also seem to be shifting audience expectations towards more authenticity and more creative risk-taking. Broadcast media often fell short for our participants in providing the breadth and authenticity. Participants felt that PSBs appealed to the masses/the middle ground, rather than aiming to attract individuals and their niche interests, as these newer influencers do.

The D and E groups we spoke to in this study gravitated towards newer voices as influencers – they were seen as independent, authentic, and much more likely to closely represent and reflect their lifestyles, views, experiences and values than broadcast media.

*'I listen to a lot of podcasts – they're usually comedy based but they also will touch on topics in a way which I can't find elsewhere. You can't always believe what you hear in the mainstream media, they don't put out the truth – so podcasts can be created by people without bias who are just honestly trying to get the truth across.'*

**Antrim, Woman, 35-54, D**

## UGC and younger audience groups

The influence of newer, UGC media voices, especially those on TikTok, was particularly prevalent amongst younger participants (especially 18-24) because:

- UGC creators' relatability and authenticity resonated strongly with younger participants, reflecting diverse perspectives and experiences.
- The innovation and creativity within UGC captivated their interest as they sought fresh and engaging content.
- UGC's accessibility and inclusivity empowered aspiring, younger creators to participate.
- UGC's interactive nature fosters a sense of belonging, especially beneficial for young people living in rural/regional areas seeking a personal connection.
- UGC's diverse representation addresses the underrepresentation of rural/regional experiences in broadcast media.

*'I tend to only listen to Joe Rogan because I get everything I want from him. He's so diverse, so are the people he gets on to talk with.'*

**Liverpool, Man, 18-24, D**

*'YouTube and Twitch and Instagram and the stuff that's being put out on there, it's being put out by us, basically, so it's more authentic and it's not like they're not trying to win us over. It's just like the actual experience of being someone our age, I guess.'*

**Goole, Man, 18-24, D/E**

*'I love YouTube, I can find all sorts of things on there. It does my interests, everything I'm into I can find. There's this on guy who does mechanics and motorbikes and things and I can fix along with him.'*

**Welshpool, Man, 55+, D/E**

*'They've got really good cycling round here, and you never see any of the big players covering it. Sometimes the local news picks it up but not really. The other day, there was a massive race, and none of the news stations were there. They should have been! There were a couple of local guys filming it, maybe for their social media? That's the kind of thing we need to see more people doing!'*

**Welshpool, Man, 55+, D/E**

## 4. Proliferation of choice

### 4.1 An explosion of new services in recent years offers a plethora of choice

The proliferation of entertainment options has widened the scope for audience satisfaction and enjoyment. This choice has brought about several key shifts:

- **Quickly changing channels if dissatisfied:** Participants reported now moving quickly on from channels or content that failed to captivate them immediately.

*'I treat the platforms a bit like they're always on trial. If I get bored of the content available or I don't feel it's worth it – I'll just move on to another provider.'*

**Derry/Londonderry, Woman, 35-54, E**

- **Increased scrutiny on value for money:** Whether it's subscriptions, purchases, or any other form of financial commitment, participants said that they closely evaluate the worth in relation to the quality and content on offer and are conscious about what's affordable.

*'With iPlayer it feels like there's less available compared to other streaming services. Like, Netflix has always got new stuff coming out, and Channel Four has always got a lot of new stuff on their catch-up website.'*

**Dunfermline, Woman, 27, D**

- **Easier comparison of content across platforms:** Participants easily compared content quality, variety, and relevance due to the multitude of channels available, which elevated their expectations.

*'I've got a smart TV, so now if I want to flick between iPlayer, Netflix, Prime, it's easy enough to do. You don't really think about who's doing what, you just expect to find something on there that you'll like because there's so much!'*

**Yorkshire and Humber, Woman, 63, E**

*'Prime and Firestick, because it's linked to so many different channels, you can just subscribe to the channel like Lionsgate or Powerway Plus or whatever. It's all just through one device, and then when you don't want it, you just unsubscribe.'*

**Antrim, Woman, 35-54, D**

- **Hyper-personalisation:** Participants expected services and media providers to cater to their diverse preferences and interests; those with advanced algorithms fulfilling these expectations tended to perform better in satisfaction and engagement.

*'YouTube for me, for most of my content. When you start watching certain things, the algorithm starts throwing out similar stuff all the time. And so that's where I know to go. If I go onto my YouTube feed and start scrolling, something I'll want to watch will come up.'*

**Antrim, Woman, 35-54, D**

*'Algorithms play a significant role in shaping my viewing choices. I often come across content I want to watch but hadn't actively searched for.'*

**Goole, Man, 18-24, D/E**

*'Having hours of personalised content on my phone makes it more appealing than traditional TV where I would have to search for something of interest.'*

**Antrim, Woman, 35-54, D**

### Hyper-personalisation and more marginalised groups

Algorithms that effectively cater to those in the regions, and those who have impairments were highly valued. These algorithms learn and understand their unique behaviours, needs, and interests, presenting content that resonated with them. This difference is crucial as these groups naturally encounter content with individuals like themselves, removing the need to search for content showing 'people like them'.

*'The stuff I get on YouTube is purpose built for me and the things I'm interested in – it can be super niche stuff like the fishing channels I watch or also just more generally the football podcasts and debate shows like [on] talkSPORT.'*

**Antrim, Man, 35-54, D**

## 4.2 Media diets are eclectic, but are felt not be met by the BBC

Participants engaged in an eclectic range of media styles, types and genres. They had an expectation of having these tastes satisfied. Participants were very comfortable in their varied and often contrasting tastes and expected media providers to provide this range of content.

### More media providers

The broader media landscape was felt to satisfy these core content needs in ways that traditional broadcast media did not. Specifically, newer forms of media such as TikTok and YouTube, offered them content which felt fun, immersive, highly current, risk-taking, authentic and alternative in the points of view they championed and celebrated.

*'I like to watch a mix of different genres and shows depending on my mood.'*

**Antrim, Man, 35-54, D**

*'I think most people under 40 are more drawn to streaming services – you can get the variety you need there; you can subscribe on a flexible basis and subscribe to the one with the stuff you like the most at that time.'*

**Antrim, Man, 35-54, D**

### Traditional broadcast media

In contrast, the BBC and other broadcast channels faced challenges in meeting the diverse tastes of our participants. This was largely due to perceived specific brand identities that define their values, principles, and content style. Streaming services, with fewer restrictions, were felt to offer a broader content range, allowing for a more flexible and varied viewing experience.

This was evidenced during the deprivation task where participants were split into only consuming BBC content and services for two days, or avoiding BBC content and services for two days:

DEPRIVATION TASK: BBC ONLY	DEPRIVATION TASK: NO BBC
<ul style="list-style-type: none"> <li>• Participants generally found the BBC-only task challenging.</li> <li>• They felt limited in choices, highlighting tension with satisfying diverse tastes through a single provider.</li> <li>• One BBC-only participant reported that he felt <i>'restricted'</i> and as though his <i>'freedom and fluidity was gone.'</i></li> </ul> <p><b>Glasgow, Man, 25-34, E</b></p> <p><i>'It was a lot harder than I thought it was. It did give me a chance to catch up on a couple of programmes on iPlayer – The A Word – but I didn't discover anything new, and I missed listening to music on Heart and YouTube.'</i></p> <p><b>St Mellons, Man, 36-54, E</b></p> <p><i>'Watching the BBC only was ok, Breakfast TV is very informative, not fussed about the bargain shows later on, love Eastenders. I missed Netflix for the films, and the BBC felt very serious compared to ITV or C4.'</i></p> <p><b>St Mellons, Woman, 36-54, E</b></p>	<ul style="list-style-type: none"> <li>• Except for a few older participants, the no-BBC task was generally considered easy.</li> <li>• Participants had ample alternatives through streaming services for their diverse media preferences.</li> <li>• Some mentioned missing Eastenders and the news, but most found suitable replacements without difficulty.</li> </ul> <p><i>'It's very easy to avoid because there are plenty of other ways and means to watch programmes other than the BBC.'</i></p> <p><b>Antrim, Man, 35-54, D</b></p> <p><i>'I felt fine about not watching or listening to any content as there is other options to go to and I would rather watch podcast or documentaries on YouTube anyway.'</i></p> <p><b>Antrim, Man, 35-54, D</b></p> <p><i>'BBC might have been a staple diet for many in regards to media over the years but for me it feels like that has changed in recent times.'</i></p> <p><b>Antrim, Man, 35-54, D</b></p>

*'So much of the content I consume is not via BBC. I really missed my podcasts and just getting to look at short videos on YouTube.'*

**Glasgow, Man, 25-34, E**

*'I was a bit apprehensive at first, as we do watch a variety of apps. I found it to be ok, however I did find that it was repetitive watching some programmes I have already seen in the past. I missed having the variety, for example we like to settle down and watch a classic Disney film on a wet rainy afternoon. There was no option to do this with only being able to watch BBC. Downside of the task was that we were limited in what we could watch.'*

**St Mellons, Woman, 36-54, E**

*'There were no positives to not watching the BBC. The downsides were that I missed what I wanted to watch, and I realised how much I depend on the BBC for quite a lot of programmes.'*

**Gosport, Woman, 55+, D/E**

### 4.3 Competitors offer distinct benefits

Services such as Netflix, Spotify, TikTok, and YouTube stood out as influential content providers in our research, collectively perceived to be setting high standards and shaping expectations.

- **Netflix:** known for its personalised curation, was felt to excel at suggesting content tailored to individual preferences, enhancing satisfaction and engagement.

*'We can set up all different profiles for each person in the house, and as you watch things it gives you suggestions based on what you watch.'*

**Nottingham, Woman, 35-54, D**

- **Spotify:** Like Netflix, this platform was popular for its personalisation, enabling users to easily access content that matches their preferences. It allows for the creation of personal playlists, satisfying the need to only listen to music artists that appeal and resonate.

*'I like the way [Spotify] learns from what you listen to and builds playlists. It's really quite clever'*

**Carlisle, Man, 38, D**

- **TikTok:** was described by participants as having transformed how they consume content through short, entertaining videos, shifting preferences towards quick bursts of amusement, resulting in lower tolerance for content that doesn't immediately capture attention. Its design encourages the creation of shareable content, and its algorithm suggests highly recommended

content tailored to individual preferences, ensuring a consistent exposure to personalised content.

*'You get a blend of funny and informative stuff on TikTok. If you have had quite an intense day, it's so easy just to let your brain melt for a bit.'*

**Liverpool, Man, 18-24, D**

- **YouTube:** Offers a wide range of authentic and diverse content, including traditional media and UGC; this extensive choice covered a variety of interests leading to its wide reach.

*'You can find anything everything [on YouTube]. It's the randomness I like'*

**Hampshire, Woman, 48, E**

### BBC Sounds and BBC iPlayer

In comparison, the BBC was felt to often fall short in terms of personalisation and immediate impact. Participants felt that its approach to content delivery didn't align with the highly personalised, on-demand experiences offered by other providers. This made it less favourable for those seeking tailored and quickly engaging content. See section 5.3 for more detail on BBC iPlayer.

## 5. A focus on BBC services

### 5.1 A lack of emotional affinity with specific BBC channels

For a vast majority of our participants, the BBC, especially BBC iPlayer, was a consistent part of their media routine. BBC iPlayer was seen as the 'new' gateway to BBC services, overshadowing specific channels like BBC Two, Three, Four. This shift indicates a changing connection with the BBC, with less emotional attachment to individual channels, making it difficult for participants to distinguish between them.

#### BBC TV channels

- **BBC One** was generally associated with the news or flagship TV programmes such as *Strictly Come Dancing*, *Match of the Day*, or *EastEnders*. Very few could recall specific programmes or genres that could be found on the other BBC channels, particularly **BBC Two** or **BBC Four**.

*'I think the BBC Two shows a lot of films, doesn't it? But I can't really think, like, what programmes I watched on that channel.'*

**Liverpool, Man, 18-24, E**

- **BBC Three** used to stand out with a distinct identity, known for its comedy. It was perceived as a channel willing to take risks and offer diverse content. However, there was some confusion about its current status; some were unsure if it still exists, or who it was meant to appeal to.

*'BBC do things like the morning news really well - not too celebrity and not too high brow, I trust them more. They are familiar and trusted. If you changed it to what YouTube did, well it just wouldn't be the BBC. With BBC Three they tried that - tried to be too young and modern. That was a mistake. iPlayer is my window, I don't really think about what channels are within that now.'*

**St Mellons, Woman, 55+, D**

- There was generally very little awareness of, or engagement, in **BBC Four**. Most were unaware of its programmes, many suspecting it was more highbrow.

#### BBC radio stations

Overall, there was very little daily consumption of radio stations, including the BBC (national or local). For most, listening to any radio was generally consigned to travelling in the car and often Spotify was the preferred choice as it offered greater personalisation to listen to favourite music artists.

While **BBC Radio 1** and **BBC Radio 2** did appeal to some (many having grown up with **BBC Radio 1**) and presenters such as Zoe Ball and Vernon Kay were liked, overall, there was a low level of engagement with any radio stations – commercial (e.g., Capital, Heart) or the BBC.

Generally, as with **BBC Four**, there was also little awareness of or engagement in **BBC Radio 4**, with only a couple of participants highlighting the quality of the politics, news, or comedy on this station.

*'Radio 4, if you like your news, your politics, your comedy, great.'*

**St Mellons, Man, 35-54, E**

*'I like the curated content that Spotify has. This is the sole audio brand I use for music streaming and playlists, because the algorithm is curated for me, and I have my playlists set out and ready to go whenever I want. I also feel as though the app is accessible to use, I know where everything is. The 'Spotify wrapped' feature is also a nice touch.'*

**Dunfermline, Woman, 27, D**

*'In the car, I will just switch on the radio, tune the channel until I find a song that I like and leave it there.'*

**Goole, Woman, 18-24, D/E**

The lack of affinity to specific brands seemed to be driven by minimal live viewing/ listening. With more and more people using BBC iPlayer and BBC Sounds to access content, few people know which particular BBC TV channel or radio station is responsible for the BBC programming they consume.

*'I like the BBC Sounds. It's got really good, and because I don't have Spotify I would listen to a lot of the podcasts on that.'*

**Nottingham, Woman, 19, E**

*'BBC Sounds, I'll trust what comes on there so I'll usually listen to it. Usually if it comes through the BBC I know it'll be good quality.'*

**Yorkshire & Humber, Woman, 63, E**

## 5.2 BBC content is not always attributed back to the BBC

Participants generally enjoyed BBC content, finding it diverse and high-quality. However, not everyone associated the programmes they like with the BBC, especially with the variety of content sources available. Younger participants in particular watched BBC shows - such as *Killing Eve* and *Peaky Blinders* - on services such as Netflix, causing confusion about the origin of the content, and the BBC not receiving due credit for quality productions.

*'I really liked Killing Eve, I didn't know that was BBC, I don't know who did it, I think I watched it on Netflix? But yeah, that was a really good drama.'*

**Nottingham, Woman, 19, E**

*'You watch these programmes, and you don't notice what station you're watching on, because I knew Sherlock was BBC and I love it. I mean, I think it's one of the best things they've ever done. I didn't know Line of Duty was BBC.'*

**London, Woman, 37, E**

*'You forget, don't you? Luther? I forgot that was on it. And Sherlock, Killing Eve, I didn't know those were on the BBC. I think because a lot of them go over to Netflix, a lot more people start watching it there. And it's probably easier to find there.'*

**Nottingham, Woman, 35-54, D**

Additionally, as the BBC has been around for a long time, some participants stated its content can be taken for granted, or only attributed older BBC 'classics' to it (e.g. *Porridge, Gavin and Stacey, Holby City*), rather than its newer content. This contributed to many believing that the BBC is a little stuck in the past.

*'BBC do such good comedies like Gavin and Stacey and People Just Do Nothing, my husband and I reference those constantly.'*

**London, Woman, 37, E**

*'I think it hasn't changed its style. The presentation of things are very old, I think it's not keeping up with other channels, news channels, where they've moved on very fast and they're adapting to the new era. Everything BBC is still the same old-fashioned way they are doing things.'*

**London, Woman, 64, D**

*'They're old-fashioned, kind of set in their ways.'*

**Derry/Londonderry, Woman, 35-54, E**

Participants did not specifically choose to watch content *produced* by a particular organisation; they were more concerned with the usability of whichever platform they are engaging with, so did watch BBC content on a variety of other platforms. An impact of this was that groups appeared to rate their relationship with the BBC on its brand and values – what people say about it as an organisation – rather than its content.

*'It's more the brand that I'm using [to evaluate the BBC] than the content. It's more the picture on the carrier bag than what's actually in the bag!'*

**Hampshire, Woman, 48, E**

## Using the sensorium during discussions

During group discussions, moderators shared a sensorium with participants. The sensorium consisted of a range of images from BBC programmes over the years, though with a focus on content from the present day. See the Appendix in section 10 for more detail.

The sensorium task played a big part in breaking down the initial perceptions individuals had of BBC content and reminding them of what programmes were originally BBC. This resulted in some surprising changes of heart. This highlighted how important it is for the BBC to remind people of its content.

*'Oh, I feel ashamed of myself! Ignore everything [negative] I've said, they do some brilliant stuff. I didn't know they were Killing Eve? And Louis Theroux, Porridge, Line of Duty, Royle Family. Ru Paul? And Horrible Histories? I feel like I need to write a letter of apology to the BBC!'*  
**Hampshire, Woman, 48, E**

## 5.3 BBC iPlayer was perceived not to be as user-friendly as other providers

For many, the gateway to BBC TV content was via BBC iPlayer, and it was directly compared to other popular streaming services such as Netflix, YouTube, Amazon Prime, Disney+ and Sky. When comparing BBC iPlayer to other streaming services, it was felt to lack a more sophisticated user experience.

- **User experience:** Many found BBC iPlayer less polished compared to other platforms. There was confusion about whether it mainly housed old shows or offered new, unreleased content. Some were uncertain if it staggered series releases or made all episodes available at once, which impacted binge-watching preferences.

*'Right, so the interface is okay. They're quite good at big, nice, big pictures. I don't feel their menus when you go into them are quite as good. So, if you go into films, you can look at what their selection is, or you can go A to Z and there might be 200 and it can take you a long time to go through something rather than I don't think they break it by genre.'*

**Carlisle, Man, 38, E**

*'We go through BBC iPlayer for a lot of their backdated series.'*

**Cardiff, Woman, 48, D**

*'They all say, 'Oh, a new thing out now. Stream it on iPlayer or whatever.' And it's not new, it's been on for ages.'*

**Hampshire, Woman, 48, E**

- **Categorisation of content:** Unlike other streaming services, which were praised for clear content categorisation, BBC iPlayer was seen as relatively challenging to navigate. Participants found it harder to discover programmes due to unclear categorisation.

*'Now I think about it [iPlayer] doesn't really work... to me, it should be more structured like a streaming service, where the channels are a secondary thing. I always feel like something like Prime or Disney or Netflix, you tended to find something quicker. And I never get the impression that the iPlayer tailors to what I've watched previously very well.'*

**Carlisle, Man, 38, E**

- **Personalisation:** Participants were comfortable and familiar with the use of algorithms to provide a more personalised experience, with greater accuracy of recommendations. BBC iPlayer's algorithms were not considered to be as good or as personalised as those on other services.

*'I think obviously years ago you just had your TV, whereas now it monitors what your interests are on your phone and you've got hours' worth of what you're interested in. It makes it quicker.'*

**Antrim, Man, 35-54, D**

## 5.4 Educating and informing were the most credible BBC Public Purposes

To obtain a more detailed understanding of how participants felt about the BBC overall, a summary of the BBC's Mission and Public Purposes were shown to participants. They were asked to rate the BBC on a scale of 1-10 on how well they felt it delivered against each of the four Purposes for which Ofcom has regulatory responsibility<sup>5</sup>.

### BBC Mission:

To act in the public interest, serving all audiences through the provision of impartial, high-quality, and distinctive output and services which inform, educate, and entertain.

### BBC's Public Purposes:

- **Informing** – Impartial news and information to help people understand what is going on in the UK and the world
- **Educating** - Programmes and content that help people to learn about new things
- **Distinctiveness** - High quality and creative content
- **Representation & Portrayal** - Content that reflects the life and culture of communities throughout the UK

Overall, participants felt that the BBC delivered most effectively on 'Informing' and 'Educating', with most giving the BBC a score of 7-9. In fact, the role of the BBC to inform and educate was felt to be at the core of what the BBC stands for.

<sup>5</sup> There are five Public Purposes of the BBC with the fifth one focused on its role in representing the UK to the world, delivered primarily through the BBC World Service and global newsgathering. Ofcom has regulatory duties for the BBC's UK public services only.

Views on 'Distinctiveness' and 'Representation and Portrayal' were more mixed, with scores ranging from 1-2 to 8-9. For the most part, 'Distinctiveness', though important, was felt not to differentiate the BBC from other providers. Participants did feel that 'Representation and Portrayal' was critical for the BBC to focus on, given its unique position as a broadcaster 'acting in the public interest' and 'serving all audiences'.

#### 5.4.1 Informing

Participants easily remembered specific BBC content under the 'Informing' purpose. BBC news was highly regarded for its accuracy and seriousness. The BBC was seen as a reliable source for staying informed about significant national and international events, such as big sporting games, the Queen's Funeral, the King's Coronation and big domestic or international events (wars, climate, environmental disasters, political changes). There was some discussion, however, around its impartiality (see section 7.6 for more detail).

*'It's really important to have a reputable, reliable source of news. So, I would watch the BBC news on TV. Definitely.'*

**Liverpool, Man, 30, E**

Many participants spoke of the BBC's credible journalism, professionalism, and delivery of information in a range of different formats. For example, *Panorama* was praised as a programme which allows viewers to 'catch up' on the biggest stories and to gain a more in-depth understanding.

*'I like Panorama, it's really good because it's so easy to get overwhelmed by the news and you got updates on your phone coming through, you've got this, you've got that, you've got people going, did you see this on the news? And it just stresses you out. But if there's a particular issue where I just don't really understand what's going on, Panorama often do a whole programme on it, on the big issues, and then you're like, okay, I can get my head around this now.'*

**London, Woman, 37, E**

During the **BBC deprivation pre-task**, some reported missing the BBC news coverage and were unsure where to look for a similar quality 'reputable' news source. One participant complained of *'the continued awkwardness of not being able to use the BBC news app.'* **Antrim, Man, 35-54, D**

#### 5.4.2 Educating

Participants recognised the BBC's distinctive role in educating especially in providing quality children's TV on CBeebies and CBBC. They also highlighted online resources such as BBC Bitesize, which supported older children through exams, particularly during lockdown. While the BBC was acknowledged for quality educational content, participants noted that other services, namely Disney+ and YouTube, were also now producing quality educational content, offering more choices for today's children.

*'I give the BBC an 8 out of 10 on 'Educate' because I think there's more educational content readily available on there than there is on any of these other media outlets. That's the thing that I like about the BBC.'*

**Liverpool, Man, 18-24, D**

*'I also use BBC Bitesize because my daughter had some issues at school, so I had to home educate her. So, BBC Bitesize is brilliant for her, yeah.'*

**Nottingham, Woman, 57, E**

*'Bluey on Disney+ is good, it has some genuinely good, moving episodes where they deal with things like autism or infertility, which help the kids learn about these real world problems.'*

**St Mellons, Man, 35-54, E**

Flagship programmes with David Attenborough (e.g. *Our Planet / Blue Planet*) and factual documentaries (e.g. *Once upon a time in Iraq* and *Once upon a time in Northern Ireland*) were all referenced as evidence for the BBC's strength in helping people to learn new things. Others looked back at the BBC in terms of educating them throughout their childhood, which led to a strong sense of nostalgia.

*'I always say I learned as much as a child and as a person, as a human being from television, as I did from school. And this channel [BBC Two] was big in that. It always used to be the documentary channel.'*

**Welshpool, Man, 55+, D/E**

*'So those who have lower incomes, unfortunately, might not have the same opportunity in terms of education and therefore the only source for them most of their lives, me included, is the BBC.'*

**Liverpool, Man, 30, E**

### 5.4.3 Distinctiveness

Participants believed that the BBC has a strong reputation for delivering unique, high-quality, and creative content, especially in genres like police and crime dramas, costume dramas, nature documentaries, and news programmes. Content such as *Line of Duty*, *Happy Valley*, *Peaky Blinders*, *Match of the Day*, *Luther*, *MasterChef*, *Strictly Come Dancing*, among others were identified as markers for the solidification of its status as a producer of quality content.

*'The dance, the dancers, the choreographers, the costumes...everything about Strictly! The personalities, the celebrities who take part. It's brilliant! Then there's the Apprentice, it's so very interesting. You get to see people from all different walks of life and how they are doing, and what they've achieved. Oh my God, it was so brilliant!'*

**London, Woman, 57, E**

However, the increased availability of other providers, as mentioned earlier, has challenged the BBC's role as the 'exclusive' provider of top-tier content. With the rise of services like Apple TV, Netflix, Disney+, and Amazon Prime Video, participants did acknowledge that while the BBC maintains its commitment to quality, achieving distinctiveness is now challenging due to the larger budgets of these competitor, commercial providers. Many stated that other streaming services have elevated their offerings, meaning that creating distinctive content is no longer unique to the BBC.

*'The big international streaming companies have surpassed them in terms of quality.'*

**Glasgow, Man, 25-34, E**

*'Every channel can produce something special. The BBC tries to cover everything but someone else might make a nature programme better than them. There are channels which are specifically about nature.'*

**Welshpool, Man, 55+, D/E**

#### 5.4.4 Representation and Portrayal

'Representation and Portrayal' was the Public Purpose most contested by participants in terms of the BBC's provision. While some praised the BBC for its efforts in showcasing a variety of voices, others pointed out areas where improvement is needed. Those living in the nations were less likely to agree that the BBC scored highly on representation and portrayal.

When discussing the Public Purpose of Representation and Portrayal, it became clear that it is a core driver of satisfaction, or dissatisfaction, amongst groups. The following section explores this in more detail.

## 6. Representation and Portrayal

### 6.1 Newer content is made 'by me' so it is 'for me'

The rise of platforms like YouTube, TikTok, and Instagram Stories has brought UGC to the fore, now sitting alongside PSBs. This surge in content creation allows easy access to content from individuals with similar backgrounds. It marks a powerful shift, giving viewers the choice to select channels that resonate with their preferences. The authenticity of content on these platforms, reflecting individual perspectives, connects effortlessly with viewers, even without explicit attempts to do so.

*'I think one of my big issues with the BBC would be that a lot of the stuff that's being put out for people our age ain't [sic] being made by people our age. It's just like a very bad attempt at Gen Z humour. Get down with the kids. It's a bit cringey. Whereas YouTube, Twitch, Instagram the stuff is being put out by us so it's more authentic and it's not like they're not trying to win us over.'*

**Goole, Man, 18-34, D/E**

Though younger groups were still more likely to watch media across these newer providers than older groups, there did seem to be some shifts. Often introduced by younger relatives, older individuals said they were becoming more engaged and interested in what these newer services can offer them.

*'YouTube is really useful, I can find anything I want, if I want to watch an old clip of some band, of an old football game I can go there, and someone will have put it on. I mostly use it just to watch Cut Lloi<sup>6</sup>.'*

**Welshpool, Man, 55+, D/E**

The contrast between the BBC and this newer form of media content is stark. Without a direct comparison, viewers might not have previously considered whether the BBC represented them. However, when exposed to content created by people like them, they can see themselves represented. Consequently, they seemed more attuned to recognising situations when they are not represented.

### 6.2 BBC content is made by 'someone else'

Participants believed that BBC content is made by people with very different lives and outlooks to them. Most perceived content to be made by older, middle class, White, and often male, creators.

*'Old men in a room with suits on. It's got that business-like, archaic vibe.'*

**Nottingham, Woman, 35-54, D**

<sup>6</sup> Cut Lloi is a choir based in America that the participant had a personal connection to

This 'archaic' vibe resulted in two viewpoints, though many individuals oscillated between both:

WARM TOWARDS THE BBC	COOL TOWARDS THE BBC
<ul style="list-style-type: none"> <li>• Reflected on the BBC with endearment, akin to an older relative trying to keep up with the times.</li> <li>• Enjoyable, watchable, and familiar content, but seen as reflecting the lives and interests of 'someone else.'</li> <li>• Audience feel like a 'guest' in the BBC's space.</li> <li>• Some see attempts at representation as '<i>a bit cringe,</i>' not evoking anger but lacking resonance.</li> </ul>	<ul style="list-style-type: none"> <li>• Anger towards the BBC, viewed as a 'boys club.'</li> <li>• Perception of protecting its own and maintaining exclusivity by favouring friends or relatives for BBC jobs.</li> <li>• Scandals highlight the allowance of 'bad men' to continue working there.</li> <li>• Content depicting D and E groups negatively or disingenuously sparked annoyance and suggested to them a lack of understanding and interest in them as an audience.</li> </ul> <p><i>'It's like a little private club isn't it? They don't care about representing all sections of society. And if you don't fit, you're not getting in there. It's institutionalised, and that's what's got the BBC the way it is. And why the BBC don't seem to care. We call it the Buddy Buddy Club!'</i></p> <p><b>London, Man, 70, E</b></p>

Among both these groups, participants felt that there was a need for fresh talent who can understand, represent, and reflect life as it is.

*'That [BBC presenter], she thinks she's being so funny but she's actually rude. [Sky presenter] on Sky News, she's got a personality. Whereas the BBC presenters, they've got a job to hold your interest because they're all so bland.'*

**Gosport, Woman, 55+, D/E**

*'You don't get to see the truth; no writer or dramatists from the working class get a chance, they don't get a lot of support, and we don't encourage young people from poor areas to create their own programmes. So that's why those areas aren't represented.'*

**Welshpool, Man, 55+, D/E**

### 6.3 BBC representation of D and E groups felt mostly absent

For the most part, participants believed that the everyday struggles of normal, working lives are absent from BBC programming. The perceived lack of coverage for working-class lives raised some questions about why the BBC doesn't portray them. Some suggestions were:

- The BBC is set in its ways;
- It has a pre-defined agenda;
- It doesn't have the time to understand different groups;
- It doesn't think the lives of D and E groups are interesting, or 'worthy' for focus.

*'They're not very imaginative about Wales, it's never about the real people who are getting on. It's just fitting an agenda that's already been laid out for it, instead of going out there and finding what's going on in the community.'*

**Welshpool, Man, 55+, D/E**

*'It's almost hinting at the fact that normal lives, working-class lives, aren't interesting.'*

**Goole, Man, 18-34, D/E**

For participants who preferred debates and radio programmes encouraging audience input, there were some criticisms that when working classes are discussed, their own voices are absent. For example, 'experts' and academics are brought in to discuss the impact of the cost-of-living crisis, rather than hearing from those impacted themselves. This resulted in some feeling discussed, but not engaged, highlighting for them, that the BBC is not 'their space.'

#### Representation across England and in the nations

National and regional under-representation can drive dissatisfaction. There was a view that the BBC falls short in accurately capturing the diversity and nuances of national cultures and experiences, focussing only on the major cities within each nation.

*'There's not a lot of Northern Irish. There's not a lot of Scottish. There's not enough Welsh. Suppose when you do think about it, it's mainly England, but it's a white England middle class channel.'*

**Derry/Londonderry, Woman, 35-54, E**

Participants said that the BBC concentrated on major cities, notably Cardiff, Swansea, Edinburgh, and London. The limited representation contributed to a belief that the BBC does not genuinely care about the concerns and narratives of the various nations.

*'The two, BBC Wales and BBC UK, they both represent the southeast, the southeast of England and the southeast of Wales. They don't give a damn about anywhere else.'*

**Welshpool, Man, 55+, D/E**

Most attributed the lack of local relevance and representation to the 'other' creating content about their region. However, what was deemed 'local' representation by an external perspective is thought to be significantly different from actual local representation. This left individuals feeling overlooked or marginalised.

**Scotland:** Concerns about BBC Scotland's authenticity and representation arose from perceptions of it being more national than local. Viewers we spoke to felt a detachment, expressing that the content lacks an accurate portrayal of the unique characteristics of various communities in Scotland. Criticisms included bias, stereotypes, and political alignments. The extremes in content, from focusing on issues like crime and poverty, to portraying highland life in a 'twee' tourism-like manner, highlighted the need for a more balanced representation reflecting diversity of people living in Scotland.

*'I'd like to see more stuff made in Scotland by Scottish people who actually have an understanding of what it's like to be Scottish. By the way, we went across the whole world, invented the modern world, invented modern banking, television, radio. We could do Scottish scriptwriting too!'*

**Glasgow, Man, 25-34, E**

**Wales:** Residents in rural, northern Wales felt the BBC primarily focuses on the interests of major Welsh cities, particularly Cardiff and Swansea, leaving rural areas marginalised. Welsh speakers perceived the BBC as politically biased and not fully representative of the diverse views within the Welsh-speaking community.

*'I would be more likely to watch a programme made in Wales than one made in London. Casualty is made in Wales I think, which is great for Cardiff, but we come back to the 'south-east' point again, perhaps.'*

**Welshpool, Man, 55+, D/E**

**Northern Ireland:** BBC Radio Ulster is known, but there was a sense that it lacks a truly local or representative feel. The dominance of one major station was criticised for lacking depth and nuance, and consequently highlighted a desire for more diversified representation that captures the varied perspectives within Northern Ireland. While BBC Radio Ulster was better known, some participants mentioned that BBC television tended to portray only the 'negatives' of Northern Ireland (e.g. The Troubles) with less nuanced content. Derry Girls was highlighted as the only positive programme about the nation that came to mind.

## 6.4 When D and E lives are represented, they are idealised or sensationalised

An impact of BBC content being made by 'someone else' is that many participants felt content lacked richness and nuance, relying instead on aged stereotypes. These stereotypes can be both overly positive, idealising the lives of D and E groups, or negative, sensationalising them. Some claimed that when represented, their lives are never just the 'norm', the context, or the backdrop; they *are* the story, in a way that middle class lives are not.

## Sensationalised

Ways in which BBC programmes portray D and E groups in sensationalist ways included showing them as: extremely poor, uneducated, rude, battling addiction issues, or desperately trying to change their lives.

For example, some groups felt that **fictional programmes** such as *Eastenders* or *Waterloo Road* portray the working classes negatively:

*'I've never been to London but if I was from the East End and I saw Eastenders I'd be furious! It's not nice, the way they are, or the way they show them. I bet they're not always screaming at each other like that over there! It'd be exhausting!'*

**Welshpool, Man, 55+, D/E**

*'I watch Eastenders, I am a Londoner, and in some respects I'm an East Londoner. It was like that, but I look at it and I think, my life's not that f\*\*king bad! How many people can die in one street? So, although it does represent the East End, some of it's a bit farfetched, obviously.'*

**Gosport, Woman, 55+, D/E**

*'But the only things that you see are the working class on this list is like the Royle Family. The joke is that the people are dumb and there's not any celebration of the majority of the people in the country. You look at the storylines that EastEnders had, it's just silly. It's not real, do you know what I mean? They're basically telling working class people your lives are just not interesting. So, if we're going to make something about you, there's got to be some other secondary circumstance that makes it interesting.'*

**Goole, Man, 18-24, D/E**

*'The BBC do occasionally show working class people, but when they do it's not like they're shown in a good light. They're either being criticised or laughed at.'*

**Derry/Londonderry, Woman, 35-54, E**

Others noted how **documentaries** or **reality TV/unscripted shows** featuring some D and E groups can veer into 'poverty porn'. It is important to note, however, that many participants felt that most of the more mainstream media channels – including Channel 4 and ITV – veered into this territory and some examples of 'poverty porn' given were not BBC programming.

*'See, whenever there's a chance that they can kind of get their prejudices in, or maybe the person who's commissioned put his prejudices in, you see it and it's transparent. They will use dirty, sly, underhand tactics to do it. It's voyeurism. They're basically trivialising people's lives for entertainment. It's poverty porn.'*

**Glasgow, Man, 25-34, E**

Some participants stated how storylines featuring D and E protagonists illustrated how they can better themselves *despite* their backgrounds, which are shown as a negative as a default.

*'He was bad at the start, but then he kind of got better and he helped the community. But it never starts off well, usually it doesn't start off as he's a good person or he's capable. It's always like, oh, he's struggling, but in the end he wins. Why doesn't it start with he's already strong and he only got better. The entire plots tend to be like, oh, he's a bad person, or he's struggling, or something negative is happening and then it kind of transforms into positivity. But how about it starts being positive and then it just continues to be positive or it's more realistic.'*

**Liverpool, Man, 30, E**

Some expressed frustration that even when a character from a D or E group is portrayed positively, the storyline can still seem sensationalist, implying that the BBC may not see them as deserving of positivity or success.

*'They're [the working classes] well covered, Eastenders and Happy Valley, but it always shows the working class in a bad light, and they're always the ones who are worst off, or the ones that bad things happen to.'*

**Derry/Londonderry, Woman, 35-54, E**

## Idealised depictions

Rural and regional communities, or those living with impairments, were particularly dissatisfied with the way in which the BBC idealises them. They felt that this sends a message that only the 'acceptable' face of their communities should be shown.

For example, some stated that **documentaries** about rural communities do not show the raw, and sometimes gruesome, realities of farming life:

*'Look at Countryfile. How is that the real world? Caleb [from Clarkson's Farm on Amazon Prime Video] is good, he shows things getting burnt, stolen, wrecked on a daily basis. But Countryfile is just looking to the green agenda, grow a few poxy flowers. How is that going to feed anyone?'*

**Welshpool, Man, 55+, D/E**

Others noted how **documentaries** about the nations can feel 'twee', focusing on traditions and customs that are, for the most part, no longer relevant to the lives of the residents of those areas:

*'All you get about Wales is stuff on Male voice choirs and very little else. Sometimes Welsh language.'*

**Welshpool, Man, 55+, D/E**

*'If you're talking about [representing] cultures and communities, the only thing you hear about here is the Loch Ness Monster, something daft like that.'*

**Glasgow, Man, 25-34, E**

Fictional programmes showing D and E lives in a positive light sometimes felt insulting to participants who know that the realities are very different:

*'I love Tracy Beaker. She used to live in a children's home. Then I went to work for Hampshire County Council as a residential carer in a children's home. You don't want to live there, basically. So that message in itself is just so skewed.'*

**Hampshire, Woman, 48, E**

And presenters apparently representing D and E voices, for example Vernon Kay or Stacey Solomon, were described by some as the 'acceptable' face of the working classes; these presenters may be from lower income backgrounds, but they still speak the same, traditional, BBC vernacular, negating any representation that they might have otherwise provided.

## 6.5 BBC content doesn't reflect nuanced, individual, and real lives

Representation of D and E groups on the BBC was criticised by some participants for not fully capturing their diverse experiences, with many feeling that other providers do a better job in authentic portrayal. The narratives within BBC content were described as often stereotyping them. For example:

- Stories showing D and E groups partaking in drug or drinking cultures
- Stories showing D and E groups as constantly facing financial hardships
- Stories where D and E characters are often uneducated, or uninformed.

For most participants, this portrayal didn't resonate with their actual experiences. Many felt that their lives were comfortable and fulfilling. The disparity between the portrayal and the reality of their lives underscored the importance of more nuanced and accurate depictions in BBC content.

*'Real life. Show our real struggles and show we're mostly happy. Show her looking after the grandkids. Or her, dancing with her hubby in the kitchen. Show real life.'*

**Gosport, Woman, 55+, D/E**

## 6.6 This form of representation is perceived to be lazy and lacks authenticity

The representation of D and E groups was perceived by some participants as a checkbox exercise for the BBC, rather than a genuine effort to capture their diversity and individuality. This simplification leads to a portrayal that doesn't capture the richness and diversity of these groups accurately.

*'It's such a stereotype. They see me, they think 'Single mum? Pink hair? Piercings?' Well, she must be a party girl or a lesbian, and definitely a crap mum – no one will think my girl's getting a square meal three times a day. I personally think there's not a middle ground. So, it will be 'oh, you can be a*

*high flying businesswoman, or you can sell the Big Issue'. That's all you see on the telly.'*

**Hampshire, Woman, 48, E**

*'Are we really talking about the presence of the working classes, or about the struggles that they go through? Because we have characters from the working classes, but their struggles are not accurately shown. Or it's maybe there, but not shown to the same extent as other plots that are maybe more relevant to the middle classes.'*

**Goole, Man, 18-24, D/E**

Participants said they want to see better representation. They notice that *'people like them'* are missing from the BBC, and while this doesn't always impact their enjoyment gained from BBC content, it does result in a perception that the BBC is not 'for them', which drives dissatisfaction.

## 6.7 Lazy or disingenuous representation can do more harm than good

Some participants believed that that lack of representation was a result of the BBC simply not caring, driving dissatisfaction and, for some, even anger.

*'I feel angry that people are not being represented enough by the BBC, it isn't showing their side of their perspective of the story. That's the reason they have a less positive view overall.'*

**Goole, Woman, 18-24, D/E**

Some criticised what they termed as 'lazy' representation, highlighting the use of presenters chosen for merely sounding or looking like them. They perceived this as the broadcaster only willing to showcase an 'acceptable face' of their communities; one aligned with the BBC's political and social perspectives. By portraying a narrow and preconceived notion of what is deemed acceptable, many interpreted the message that individuals from their communities are only valued and considered worthy of representation when conforming to specific characteristics.

## Misrepresenting those with impairments

Misrepresentation doing more harm than good was particularly pertinent amongst those living with impairments. Some in these groups argued that the BBC is selective in its portrayal.

For example, one participant stated that only disabilities deemed 'fashionable' or trendy receive representation, side-lining those with less 'fashionable' disabilities. This has the negative impact of contributing to a skewed perception of disabled people.

*'So I've got anxiety, and there's a lot of talk about anxiety, I think it's having a bit of a moment, it's quite fashionable. But [my symptoms] are nothing like what you see on the TV! I'm telling you, it isn't pretty! It's really not like [what you see in the media].'*

**Cheshire, Woman, 26, D**

Another expressed some concern that their disabilities were showcased in a 'fashionable' or 'cool' manner, prioritising aesthetics over the realities. This can be seen to trivialise experiences, as the emphasis shifts from understanding and empathy amongst the general public, to presenting disabilities as accessories, perpetuating stereotypes.

*'They recently released, like, a documentary about ADHD, and I thought it was quite a biased documentary. I have ADHD and actually was diagnosed on the NHS, but I just felt like the way it was put across was like it wasn't like a fair representation. I think it might have done more damage than good.'*

**Dunfermline, Woman, 27, D**

*'For example...I've been quadriplegic since birth, and sometimes you'll see people in a wheelchair and it's good because they're fine, they're capable, but then it doesn't show the other side of things, how hard it is, when you're a bit of a mess....So the rest of society then sees them [wheelchair users] very differently to how their real life is, mostly because of how they were depicted.'*

**Liverpool, Man, 30, E**

However, it is important to note that while some wanted more authentic experiences portrayed, others with impairments pointed out that the BBC does do this better than other providers, and that many had noticed improvements.

## 6.8 Representation and appeal are not the same goal

Some, when questioned about appeal and representation in relation to BBC programming, noted an important distinction between the two concepts. They suggested that while the BBC can aim to *appeal* to D and E groups, the danger arises when it equates this goal with *representation* of these groups.

*'For something to be relevant, I might not find it appealing. So, if there's a documentary on how to live with arthritis, I'm not going to find it appealing! It'd be relevant, but not appealing. And that's probably where the BBC go. They try to be too relevant and end up not so appealing.'*

**Hampshire, Woman, 48, E**

However, to others the distinction differed; they noted that 'appeal' implies an effort to create quality content that interests them and speaks to them on their level. On the other hand, representation involves accurately reflecting their diversities and realities, and creating content that is relevant to the lives that they are living.

*'Appeal is stuff you want to see, isn't it? Stuff you want to read about or watch whatever the specific type of content is. But relevant is relevant to your particular life or circumstances. It's not always what you want to watch, though.... So, I might want to listen to a podcast about finance money saving, that's relevant. The appeal of that is that they would perhaps put the content across in an understandable and a refreshing kind of way.'*

**Antrim, Man, 35-54, D**

As a result, many participants believed the BBC only looks at surface-level characteristics in its attempt to create relevant content that appeals. When it does this, it ends up either perpetuating stereotypes and reinforcing limited narratives, or creating content that does not speak to the varied interests of these groups; most participants were clearly able to recognise when their experiences are oversimplified or inaccurately portrayed, and this leads to distrust, disconnect, and disillusionment with the broadcaster; it does not appeal, and is not relevant.

## 6.9 Representation, when done well, is hugely welcomed

However, there was a small proportion of participants who felt that they had a strong affinity with the BBC. Many had grown up with the BBC and consider it a reliable source of quality content and entertainment. For them, the BBC holds a special place in their cultural and media landscape.

These participants felt that the BBC made them feel represented, creating a strong connection and allowing them to see themselves in the content. While they appreciated this, they were aware that others might not feel as well represented. However, this awareness doesn't lessen the positive impact of feeling represented when it does happen.

There was also a clear desire among this audience to see even more diverse and inclusive representation. They recognised the power of representation in fostering a sense of belonging, and as such, they expressed a desire for the BBC to expand and improve its efforts here.

*'Total rubbish that the BBC is here for the haves, not the have nots! Perhaps 30 years ago, but not now. Look at Happy Valley, Last Tango in Halifax, Royle Family. It's for people like me – but I would like to see even more positive'*



*representation. People on benefits – not scroungers, single parents – positive role models.'*

**Gosport, Woman, 55+, D/E**

## 7. BBC: Brand and values

### 7.1 The relationship with the BBC evoked a range of emotions

The BBC brand and perceptions of the organisation evoked a mix of emotions.

Positive:

*'It's at the heart of British culture, it's part of my culture. Look at Radio 4 (extra) where do you get that type of content anywhere else in the world? You just don't. It's very English, dependable. The licence fee gives them the freedom to have great content.'*

**Yorkshire & Humber, Woman, 63, E**

And negative:

*'For me, the BBC is like a tree and it's rotten, you know what I mean? It's going to stand up, it'll stay up for a bit, but you need to cut it down. There's a rot on the inside of the BBC and its message is tainted by what went on there.'*

**Liverpool, Man, 18-24, E**

Opinions about the BBC could be felt quite intensely by those with a strong affection for, or dislike of, the organisation. However, for most, their stance tended to shift depending on different factors: the conversations they're having; the specific content or brand; ongoing scandals; what they're currently watching; who they're with, and so on.

Views on the BBC were changeable through the course of our discussions. Nevertheless, the BBC has a unique ability to evoke emotions in a way that other services don't, primarily due to its rich heritage and significance. Being held to a higher standard added to the emotional weight people attach to their opinions about the BBC.

### 7.2 The BBC evoked a strong, positive affinity for many

Those most positive towards the BBC had a strong emotional affinity towards the organisation. They felt strongly that the BBC was an important part of 'our' national identity; a dependable, safe, and familiar institution. They described how they would feel a deep sense of loss, should the BBC cease to exist in the future; the BBC for them, was an organisation that was revered around the world.

They felt that programmes such as *DIY SoS*, *Children in Need*, *Strictly Come Dancing*, *Happy Valley*, David Attenborough, coverage of Royal and national sporting events spoke to the distinctly British outlook and to the high quality of programme and content to be found across BBC channels and services.

*'I would feel poorer if the BBC did not exist, as I find enjoyment and entertainment in it. While alternative options could be found, such as podcasts, the absence of the BBC would still result in a loss.'*

**Welshpool, Man, 55+, D/E**

*'I would be upset if the BBC no longer existed due to its long-standing presence and nostalgia. I would love to see it continue. It's a real national institution. It's something that I'm kind of proud of.'*

**Goole, Woman, 18-24, D/E**

*'It would be heartbreaking if the BBC ceased to exist.'*

**Goole, Man, 18-24, D/E**

### Positive affinity amongst specific audience groups

**Age:** More likely to be over 50 years old and with a more traditional outlook on life – the safe and familiar aspect to having the BBC was important to them, a sense of holding on to the past, and to childhood familiarity.

*'The BBC has always been there, it's like an aunty. Quality, established. British Institution. Dramas to get your teeth into. Yes, its reputation is tarnished (Jimmy Savile) but not watching it would be like cutting your nose off to spite your face.'*

**Yorkshire & Humber, Woman, 63, E**

**Outlook:** Among those who held a favourable opinion of the BBC, self-descriptions often included terms like 'old fashioned', 'traditional' or 'a bit different from others like them', suggesting that in these audiences' circles, liking the BBC was a bit different from the norm. This characterisation hinted at an identity that aligns with the BBC's, suggesting that individuals who see themselves as somewhat traditional, with traditional values, find resonance with the BBC.

*'I suppose I am a bit different to most people like me. I quite like those high-brow quiz shows, like University Challenge and the Radio 4 ones.'*

**St Mellons, Man, 35-54, E**

### 7.3 Those with more negative feelings see the BBC rooted in the past

Conversely, many individuals had more negative views and opinions towards the BBC and as a result, a weaker emotional affinity. To them, the BBC was 'old fashioned' 'stuffy', 'London-centric', 'politically correct' and somewhat elitist. They felt the BBC was too rooted in the past, not the future, and as a result were less emotionally attached to it. They *could* imagine a future without the BBC, feeling that other providers would fill the void the BBC would leave.

*'Look at Bake off – that just went to Channel 4. If the BBC went, you'll just find the best stuff somewhere else.'*

**Nottingham, Woman, 35-54, D**

*'People of our age aren't going to BBC anyway anymore. It could be the most intellectual stuff in the world, but no one's paying attention.'*

**Liverpool, Man, 18-24, E**

*'It feels old... I wouldn't pay for it.'*

**Nottingham, Woman, 35-54, D**

Unsurprisingly, those holding less positive views towards the BBC were also less satisfied with the programmes and content that it offered. They thought that BBC content was dry, serious and too reliant on old formats (e.g. long-running programmes such as *MasterChef* or *Strictly Come Dancing*). Additionally, they were more critical of the BBC iPlayer interface when compared to other streaming services such as Netflix, YouTube, Amazon Prime Video. To that end, they felt that other media companies provided content which was high quality, relevant, and appealed directly to them.

*'The availability of a wide range of content and user-friendly layouts make brands like Netflix, Prime, and Disney appealing to me.'*

**Dunfermline, Woman, 27, D**

*'I feel that channels like Channel Four do a better job of catering to diverse audiences and offering more individuality compared to the BBC.'*

**London, Woman, 37, E**

## Negative affinity amongst specific audience groups

**Scotland:** While participants could mention some programming that they liked, the BBC wasn't viewed favourably in Scotland among our participants. Common words and phrases included corrupt, boys club, agenda ramming, and politically biased. Many felt the BBC didn't understand 'people like them,' perceiving bias in the news agenda influenced by the government. As licence fee payers, they desired a more stakeholder-like treatment, leading to resentment toward scandals and negative PR. They expressed a desire for a new and improved BBC that speaks to them and produces content which is relatable to them.

*'It's just corrupt, you know? It's a boy's club. That's all it is.'*

**Glasgow, Man, 25-34, E**

*'See the fact that you have to pay a TV licence makes you feel, it's a public funded broadcaster. So, it makes you think 'hey, I should get a say in this.'*

**Glasgow, Man, 25-34, E**

**Age:** Younger participants, accustomed to extensive content choices and widespread streaming, held views which were more negative. Unlike older generations with a deep emotional connection to the BBC, younger individuals, influenced by greater exposure to online providers as part of their everyday media habits, saw it as somewhat old-fashioned and just one among many options. Growing up with more choices, they lacked the same emotional affinity for the BBC and other PSB services.

*'The BBC fails to create content that resonates with my generation compared to platforms like YouTube and Instagram, where the content is created by individuals who understand our experiences.'*

**Goole, Man, 18-24, D/E**

## 7.4 BBC programmes can feel a bit dry, serious, or stuck in the past

Participants generally agreed that BBC programmes tend to be more serious than other channels, including ITV, Channel 4, and Channel 5, as well as newer streaming services. This perception stemmed from the belief that BBC programmes are admired for their high quality<sup>7</sup>, which can require more emotional investment. Examples such as *Peaky Blinders*, *Killing Eve*, *Doctor Who*, and period dramas were cited. Overall, when compared to other streaming and PSB services, BBC programmes were seen as more:

- **Dry and overly serious** – but this is expected/preferred for serious content (e.g. news reading/radio debate shows), and the BBC was seen to do this well and appropriately
- **Demanding attention** – but for those looking for complete escapism, this can work; they can immerse if they want to, although this 'want' is becoming less and less prevalent for them

<sup>7</sup> When probed on what made a programme 'high quality', participants struggled to articulate specifics, and when they could this varied based on individual tastes. E.g., for some it was the actors/presenters, others liked the longevity of programmes, others liked the 'look' or 'feel' but were unable to pinpoint what this was.

- **Safe/ comfortable** – some actively seek comfortable and familiar programming; but many others are starting to want less ‘neutral’ programming that is instead more aligned to their political views
- **Familiar/old** – again, some actively look for this; they appreciate a companionship offered by longstanding shows and view it as heritage

*‘BBC, to me is more of a serious TV than ITV is. Like, if you want a bit of light relief, you watch ITV.’*

**St Mellons, Woman, 35-54, E**

*‘Time needs overhaul, and I think some of them [feel] old to me, they just feel a little bit stale. I just feel like it needs to be changed somehow to maybe get younger people watching again.’*

**Liverpool, Man, 18-24, D**

*‘It’s safe, it’s traditional. They don’t do things out of the box like other providers.’*

**London, Woman, 37, E**

Because of this perception, individuals were not turning to the BBC for much needed forms of light-hearted escapism, fun and engagement, and were looking to other streaming services and social media platforms to fill this void. Overall, there was a strong sense that the BBC needed to ‘lighten up’ and ‘take more risks.’

### BBC comedy

The notion that the BBC needed to ‘lighten up’ was illustrated by BBC comedy. Participants, influenced by exposure to the Sensorium, noted that in the past, the BBC was renowned for unique British comedy programmes such as *Only Fools and Horses*, *The Office*, *Gavin and Stacey*, and *The Royle Family*. They reflected how little they now watched comedy on the BBC, whereas in the past everyone had watched these programmes. While some participants were happy to watch the re-runs, younger participants were seeking out edgier, riskier content on YouTube and TikTok and there was generally felt to be little awareness of any new comedy (TV or Radio) from the BBC that appealed.

*‘Gavin and Stacey, they were good as well. There’s nothing like that [anymore]’*

**Hampshire, Woman, 48, E**

## 7.5 The BBC, rocked by scandals, is starting to lose trust and respect

All participants, regardless of their feelings toward the BBC, thought the BBC had faced scandals. Many associated the organisation with scandals, specifically mentioning Jimmy Savile and other, more recent

news stories.<sup>8</sup> There was a general sense that the BBC had underlying issues (e.g. a male-dominated culture), along with the public scandals, which affected trust and respect over time.

*'The scandals leave you feeling – what is going on in that place? Breaks trust and impacts on things like BBC news – are they giving the full story?'*

**London, Woman, 37, E**

*'I don't trust the BBC and feels that they have their own agenda... I don't pay much attention to it.'*

**Welshpool, Man, 55+, D/E**

Other aspects of the BBC that were felt to be misaligned to participants' values centred around **presenter pay** and the **licence fee**:

PRESENTER PAY	LICENCE FEE
<ul style="list-style-type: none"> <li>• Presenter pay discussed in the context of a 'them and us' culture</li> <li>• Concerns about presenters earning in excess of £100,000</li> <li>• Perceived as an indication that the organisation is out of touch with people's realities, particularly during the cost-of-living crisis</li> </ul>	<ul style="list-style-type: none"> <li>• There was greater dissatisfaction with the licence fee compared to negative feelings about presenter pay</li> <li>• There was a perception that the licence fee is inconsistent with how people pay for other streaming services</li> <li>• Feeling of unfairness in not being able to choose to 'opt in' as with other services</li> <li>• Examples of individuals cutting back on other streaming services to manage budgets</li> <li>• Inability to opt in or out of BBC services seen as out of touch and an outdated concept in paying for media services</li> </ul>

<sup>8</sup> The Sun newspaper released an exclusive report into allegations of sexual misconduct by a BBC presenter on the 7<sup>th</sup> July 2023, coinciding with the research fieldwork; it is possible this heightened perceptions of the BBC as an institution that has many scandals.

## 7.6 There are doubts around the BBC's impartiality and perceived bias

The extent to which the BBC was seen to be impartial was a more complex area of discussion. Overall, the BBC's political affiliation or stance was unclear, some felt it was too politically influenced (especially in the nations) whereas others felt the BBC was too politically neutral and 'safe'.

*'It gets lots of criticisms – like some people say that BBC has got a left liberal bias, other people say it's too pro government. But there are a lot of people in the government who don't particularly like it and think about wanting to defund it basically.'*

**Liverpool, Man, 18-34, E**

Those who felt the BBC was too politically affiliated, would draw on examples such as pushing vaccinations during COVID, or questioning its perceived pro-Ukraine stance on BBC news.

*'Then with the Ukraine-Russia thing. There's two brothers who were being held in prison by the Ukrainian authorities on false charges, and there have been death threats made against them, and it's abhorrent. And this is what Ukrainians are doing, but no one's going to talk about that. That's not impartiality; they're refusing to talk about this.'*

**Goole, Man, 18-24, D/E**

*'[Channel 4 and ITV] seems just slightly less political. For example, on the BBC, on soap operas you think 'oh here we go, it's the latest policy rollout.' Sometimes it feels like it's been rammed down your throat slightly. I'm not that stupid that I'm going to think 'oh they did it in Eastenders, so I'd better go to the doctors and get my vaccination.' It's sending that weird subliminal messaging about how we should behave and it's infuriating.'*

**Hampshire, Woman, 48, E**

Some others felt that the BBC was trying too hard to be politically neutral – trying to please everyone or playing it too safe through omission. This naturally led to further discussions around the BBC's perceived impartiality and left some to question whether this was even achievable.

*'I don't necessarily think [its impartiality] is great, because I think sometimes they are swayed by various political parties where they shouldn't be.'*

**Aberdeen, Woman, 50, E**

*'And I think that's where it's not impartial, because it feels like they're backing whoever they're interviewing [news coverage] and forgetting about us, who want to know the truth.'*

**Derry/Londonderry, Woman, 35-54, E**

*'They don't publish certain stories either. They just won't talk about really important things, usually because of the impartiality thing.'*

**Goole, Man, 18-24, D/E**

*'[When the BBC started] it was tied to the government, and it became accepted and expected that the BBC would tell us how to live our lives. It's been very, very difficult for them to shake. It's quite a bit better, now the BBC is still clinging on to this idea that it knows better than us, because it's paid for by the government and the taxpayer. And the BBC tend to have an agenda that it would improve and educate the people of the country. But to what standard? To whose level? The Government's.'*

**Welshpool, Man, 55+, D/E**

It was on this issue where we saw notable differences within the audience groups, particularly those who were younger, or from Wales, Northern Ireland, and Scotland. Many in these groups questioned the BBC's impartiality, feeling it has a distinctly British / English / Southern agenda, and didn't reflect a greater diversity of thought and opinions.

## Impartiality and perceived bias in the nations

**Wales:** Participants did not believe that the BBC reported or created programming in a way which was always free of bias or prejudice. This perception was partly political in nature:

*'I have noticed for years that interviewing Tories, they are on their back all the time, they are like a dog with a bone.'*

**Welshpool, Man, 55+, D/E**

However, this was not limited to party politics. For example, when a quote was shared with participants asking whether they believed that the BBC was *'standing at the heart of British culture'* it was met with a strong challenge in both Welshpool and Cardiff. They did not identify as being British, but Welsh. Therefore, the BBC as a 'British' broadcaster was not thought to represent who they are. To them, the very concept of a unified 'British culture' overrode their own minority culture and the lack of understanding of this fact was given as proof of BBC bias: by promoting the idea of a single British culture, the BBC were, consciously or unconsciously, operating against the agenda of those who do not support the Union.

*'What even is the British culture? We're not British. We're Welsh.'*

**St Mellons, Man, 35-54, E**

**Scotland:** Participants in Peterhead and Glasgow held similar views about the BBC's impartiality to those in Welshpool and Cardiff. Many were sceptical about the BBC's ability to remain impartial, believing that biases and political influences impact the BBC's coverage of specific subjects or events. Occasions where participants perceived a lack of transparency, or a failure to present balanced perspectives were also mentioned.

*'They're biased towards everybody apart from England. Even the Welsh, the Irish. When there's nothing political to say they do good stuff though. Like they do a really good job with science stuff. You can't have a political agenda on Jupiter, right? So, it's just entertaining and good! But whenever there's a chance they can get their prejudices in, they do.'*

**Glasgow, Man, 25-34, E**

**Northern Ireland:** In Northern Ireland, while participants were keen to point out that they would miss the BBC if it were not there, they also expressed some doubts about its impartiality and perceived bias, mentioning shows like *Question Time* as often appearing to side with the government in power. However, they were less likely than those in Scotland or Wales to say the BBC was more 'unionist' than other broadcasters.

## 8. Gaining a fresh perspective on these audience groups

### 8.1 SEG by itself doesn't consider the intersectionality of individuals

SEG D	SEG E
Semi-skilled or unskilled manual worker (e.g., baggage handler; restaurant server; factory worker; labourer; gardener)	Housewife/ househusband; Casual work (working flexibly without fixed hours every week); Unemployed and on state benefits; Retired/long term sick and on state pension only

The use of Socio-Economic Group (SEG) to measure demographics in some circumstances is incompatible with the dynamics of contemporary society. SEG is a fixed metric traditionally tied to specific occupations. However, the modern world has witnessed a shift towards greater fluidity and transience, where an individual's socio-economic status can change rapidly, and fewer people identify with a singular 'occupation.'

In current times, most people do not neatly categorise themselves as 'working class' or 'lower income' and their self-perception diverges from the classifications dictated by SEG. The way people define themselves is more nuanced and complex than what these traditional metrics capture. In addition, when analysing their own income or financial status, most within this group do not see themselves as poor, but rather self-describe as just 'ordinary'. To illustrate, during the Welsh-speaking research participants used the phrase '*y werin bobol*' to describe themselves, translating roughly to 'ordinary people'.

In addition to this, personal preferences and lifestyle choices, such as how people spend their leisure time, their likes, dislikes, interests, and values, are not inherently tied to occupation or linked to SEG. The evolving landscape of personal identity and individuality challenges the effectiveness of SEG as a comprehensive measure of demographics, highlighting the need for more contemporary and flexible approaches to understanding and categorising diverse populations.

*'I think there's a lot of fluidity with this and class isn't as structured and isn't as difficult to traverse as it used to be.'*

**Goole, Man, 18-24, D/E**

*'Some of my family, a lot of them are artists, or they do arty things and they're never going to earn a lot of money, unfortunately, in their niche jobs. And they've got very bad views of BBC. And I imagine there are some correlations between certain jobs that are less to do with class, more to do with life choices.'*

**Goole, Man, 18-24, D/E**

Focusing on SEG mainly looks at employment status, but we found in our research, that people's media choices are rarely related to their jobs. Instead, what they watch is influenced by personal interests and daily life. Currently, many of the people we spoke to felt that only UGC truly captures and reflects these realities.

## 8.2 All groups have highly personalised likes and dislikes

Within the 10.6 million adults in the SEG D and E groups in the UK<sup>9</sup>, there exists a vast and diverse segment comprising various ages, ethnicities, backgrounds, and nationalities, representing a multitude of experiences, challenges, interests, and difficulties.

The contemporary media landscape reflects this diversity, allowing groups to curate their own content, deviating from strictly defined 'age,' 'gender,' or 'SEG' programmes. Instead, there is a departure from the notion of a typical audience, as people exhibit wildly eclectic media habits.

Individual tastes within SEG Ds and Es are remarkably diverse, with viewers enjoying a wide range of programming, such as *University Challenge*, National Geographic documentaries, *Squid Game*, *Line of Duty*, *Killing Eve*, or *Luther* before switching to something entirely different, such as classic Disney films, *Gavin and Stacey*, *Strictly Come Dancing*, or *Below Deck*. This variety challenges traditional notions of targeting content based on rigid demographic categories.

*'One of the main questions I say to my partner is, do you want a Disney film or do you want a really graphic horror film? Which end of the spectrum are we today?'*

**Cheshire, Woman, 26, D**

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<sup>9</sup> [Approximated Social Grade, England and Wales - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk)

## 9. Appendices: Sample structure and locations

### 9.1 Sample structure

D and E groups, as with groups within any SEG classification, are not a homogeneous audience, and the sampling criteria had to ensure that their diversity was recognised. To achieve this, participants were screened on: SEG, age, gender, location, whether they lived in urban or rural areas, and how often they engaged with BBC content. By doing so, we aimed to capture a broad range of perspectives within the D and E groups, recognising that these individuals are not a uniform audience.

For the in-depth interviews, we aimed to include a range of different impairments using six different criteria: mobility, visual, hearing, neurodivergent, mental health, and complex/fluctuating impairments. Whilst a 'primary impairment' is listed in the below sample frame, most participants reported multiple impairments, highlighting the internal complexity of the D and E group.

This diverse sampling strategy helps ensure that the insights gained from our research are representative of the varied experiences and preferences within the D and E group, accounting for factors that contribute to the complexity and richness of this demographic.

#### 9.1.1 Focus group sample frame

Group	SEG	Group	Age	Gender	Location	Region	BBC frequency
1	D	Mix semi-skilled vs. unskilled	18-24	M	Speke, Liverpool	Urban	Low
2	D	Mix semi-skilled vs. unskilled	35-54	F	Nottingham	Urban	Low
3	D	Mix semi-skilled vs. unskilled	25-34	F/M	Scotland Aberdeenshire (Peterhead)	Rural	High
4	D	Mix semi-skilled vs. unskilled	35-54	M/F	Northern Ireland Antrim	Rural	Low
5	D/E	State pension/ long term sick	55+ (incl. 60s/70s+)	F	Gosport, Hampshire	Urban	Medium
6	D/E	State pension/ long term sick	55+ (incl. 60s/70s+)	M	Wales Welshpool, Powys	Rural	High
7	D/E	Unemployed state benefits	18-24	M/F	Goole, Yorkshire	Rural	High
8	E	Unemployed state benefits	35-54	F/M	Wales St Mellons, Cardiff	Rural	Medium
9	E	Casual/ lowest grade	25-34	M	Scotland Glasgow	Urban	Low
10	E	Casual/ lowest grade	35-54	F	Northern Ireland Derry/ Londonderry	Urban	High

## 9.1.2 In-depth impairment interview sample frame

IDI	SEG	Age	Gender	Region	Rural/urban	BBC frequency	Primary impairment
1	D	35-54	F	London	Urban	Medium	Mobility
2	D	18-34	F	North West	Suburban	Low	Mental Health
3	D	18-34	F	Scotland	Semi-rural	Low	Mental Health
4	D	35-54	F	Wales	Suburban	High	Mental Health
5	D	35-54	F	Scotland	Suburban	Low	Mobility
6	D	55+	M	East	Suburban	Low	Complex/fluctuating
7	D	55+	F	London	Urban	Low	Complex/fluctuating
8	D	18-34	M	North West	Urban	High	Visual
9	E	18-34	F	East Midlands	Urban	High	Complex/fluctuating
10	E	35-54	F	South East	Suburban	Medium	Mobility
11	E	35-54	M	South East	Suburban	Low	Mental Health
12	E	55+	M	London	Urban	Medium	Complex/fluctuating
13	E	35-54	F	North West	Suburban	Medium	Mental Health
14	E	35-54	M	London	Urban	High	Mobility
15	E	18-34	F	Wales	Urban	Low	Mental Health
16	E	55+	F	Yorkshire & Humber	Semi-rural	High	Hearing
17	E	55+	M	West Midlands	Urban	High	Visual
18	E	35-54	F	Wales	Urban	Medium	Mobility
19	E	35-54	M	Wales	Urban	Medium	Neurodivergent
20	E	35-54	F	West Midlands	Suburban	Low	Complex/fluctuating
21	E	35-54	M	North West	Semi-rural	Medium	Mobility
22	E	35-54	F	Scotland	Rural	Low	Mobility
23	E	35-54	M	West Midlands	Suburban	Low	Mental Health
24	E	35-54	F	East Midlands	Suburban	Medium	Complex/fluctuating

## 9.2 Where we conducted the research

### 9.2.1 Focus group locations

Focus groups took place across a variety of venues, including leisure and community centres, pub function rooms, hotel rooms, sport centres, adult learning facilities, libraries, and church/ town halls. Research was conducted primarily in-person, first, to address potential connectivity issues that D and E groups may experience, and to encourage more authentic, nuanced, and natural discussions, more easily fostered in a face-to-face setting. The exception to this was the Goole group, which was conducted online, due to difficulties in recruitment. When trying to reach this younger (18-24) D and E group, many potential participants were unable to commit to an in-person focus group due to the changing nature of their employment, and them prioritising casual work over taking part in the

research session. This is a natural consequence of conducting research with those in casual employment.

Venues were chosen predominantly to prioritise comfort and familiarity for participants. In qualitative research, most tend to feel more comfortable sharing opinions in familiar spaces due to a sense of security, shared experiences, and common values with those present. In addition, familiarity reduces uncertainty, as individuals know the social dynamics and potential reactions. Positive past experiences of expressing opinions in these spaces also contribute to the comfort, while unfamiliar or diverse spaces may trigger hesitation due to fear of conflict or misunderstanding. Moreover, these venues were easily accessible for participants.

The selection of locations aimed to encompass diverse regions within the UK and Northern Ireland, striving to represent a broad cross-section of these areas. The intention was to deliberately include "off the beaten path" places, ensuring that the research reached beyond commonly studied or more urban settings. By doing so, the goal was to amplify the voices of individuals from less-represented communities, ensuring a more inclusive and comprehensive understanding by capturing a diverse range of perspectives and experiences. This approach was taken to uphold the principle that all people, regardless of their location or background, should have the opportunity to be heard and contribute to the research.

<b>Scotland</b>	<ul style="list-style-type: none"> <li>• Glasgow</li> <li>• Peterhead, Aberdeenshire</li> </ul>
<b>England</b>	<ul style="list-style-type: none"> <li>• Speke, Liverpool</li> <li>• Nottingham, Nottinghamshire</li> <li>• Goole, Yorkshire</li> <li>• Gosport, Hampshire</li> </ul>
<b>Wales</b>	<ul style="list-style-type: none"> <li>• St Mellon's, Cardiff</li> <li>• Welshpool, Powys</li> </ul>
<b>Northern Ireland</b>	<ul style="list-style-type: none"> <li>• Derry/ Londonderry</li> <li>• Antrim</li> </ul>

### 9.2.2 In-depth impairment interview locations

IDIs were conducted online via zoom, with one participant opting to take part by telephone. This ensured that the interviews would be accessible to all participants, and the researchers and moderators could accommodate all accessibility needs. As with the focus groups, we ensured a diverse geographical spread.

<b>Scotland</b>	<ul style="list-style-type: none"> <li>• Dunfermline</li> <li>• Peterhead</li> <li>• Aberdeen</li> </ul>
<b>England</b>	<ul style="list-style-type: none"> <li>• Nottingham</li> <li>• Hampshire</li> <li>• London</li> <li>• Staines-upon-Thames</li> <li>• Cheshire</li> <li>• Wolverhampton</li> <li>• Liverpool</li> </ul>

	<ul style="list-style-type: none"><li>• Carlisle</li></ul>
<b>Wales</b>	<ul style="list-style-type: none"><li>• Wrexham</li><li>• Vale of Glamorgan</li><li>• Cardiff</li></ul>
<b>Northern Ireland</b>	<ul style="list-style-type: none"><li>• Antrim</li></ul>

## 10. Appendices: Materials

### 10.1 Pre-task materials

Those who took part in the focus groups completed the pre-task; those who did the in-depth interviews did not take part in the pre-task. Most participants completed the pre-task via an online platform, Recollective, but some completed the task offline for accessibility purposes. The tasks took a daily diary format and participants were sent a daily email reminding them to complete the task.

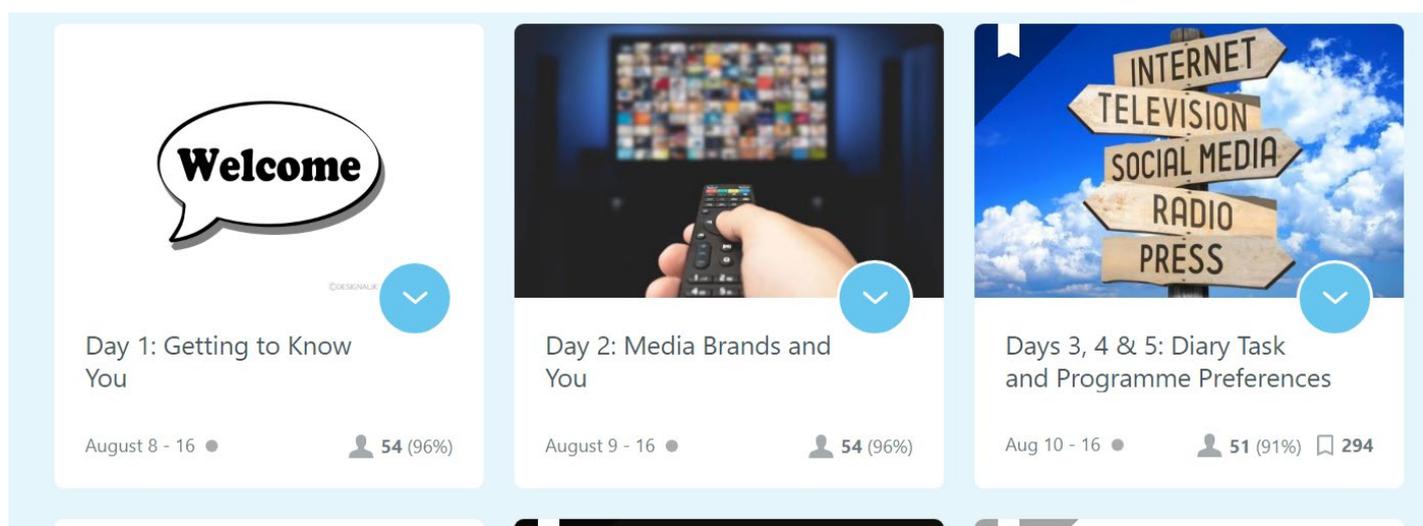


Figure 1: Screenshot from the online pre-task platform Recollective

### Week 1: Diary task

Welcome to the 'Media and Me' research project! Thank you very much for agreeing to take part. The aim of this research is to explore the media you consume daily – across the things you watch, listen to and view/access through online platforms (e.g. streaming services). We'll also be specifically interested in understanding your relationship with the media – this includes TV, radio, podcasts, online information, etc. Basically, we'd like to understand the role of the media in your life!

There is no such thing as a right or wrong answer, so please share freely in the same way you would with a close friend/family member. Also, the more detail that you can add to your answers, the better.

#### So, what do you need to do?

This project will run for 2 weeks from 7<sup>th</sup> August, to the 21<sup>st</sup> August.

**During Week 1:** You will complete 2 tasks for the first couple of days, and one short task that will be repeated for the next 3 days (a diary task). The tasks will vary in length but should take between 10-20 minutes to complete.

**During Week 2:** We will ask you to complete a small, but specific task which we'll explain at the end of this week – the task will ask you to answer some quick questions for 2 days, then the final day will ask you to reflect on your experience over the past couple of weeks.

#### Day 1: Getting to know you

### Question 1

Please tell us your first name, and a little bit about your household. We'd like as much detail as possible so we can imagine your world! You could include things like who you live with, who/what makes up your household (e.g., frequent visitors, pets, plants!), how long you spend at home, your favourite room in your home, and any other relevant information!

### Question 2

Great! Now we'd like to find out a bit more about what you do to pass the time. We're interested in **all things entertainment**. In particular, you could tell us what is your favourite programme of all time? This could be a TV or radio programme, a podcast, online or social media entertainment, or something on a streaming services. It could be a series, a documentary, a drama, or anything else!

Please let us know what it is, and why. How does it make you feel when you're watching or listening to it? How did you discover it? How often do you rewatch/relisten to it?

### Question 3

Are there any programmes you're **currently** watching/listening to that you're particularly enjoying? We'd love to tell us about them if so! Again, this could be a TV or radio programme, a podcast, online or social media entertainment.

What is it? What channel is it on? Why are you enjoying it?

### Question 4

Thank you! The last question for today – we'd love to understand where you consume media. Please describe to us where you like to watch TV or listen to programmes or other media would all help. This could be a photo of your media stations, hifi systems, TV/lounge room, or if you like to watch on a laptop or tablet in bed, this helps too!

## Day 2: Media brands and you

### Question 1

Below is a list of different media providers and channels. Please could you circle the ones that you watch/listen to/subscribe to currently.

- Netflix
- Prime Video
- Disney+
- Apple TV
- Now TV
- ITVX
- BBC iPlayer
- BBC One
- BBC Two
- BBC Three
- BBC Four
- All4
- BBC Radio 1
- BBC Radio 2
- BBC Radio 3
- BBC Radio 4
- BBC Radio 5 Live
- BBC radio station for your region
- Heart
- Magic
- Kiss
- BBC Sounds
- Music streaming services (Spotify, Apple Music etc)
- YouTube
- TikTok
- Facebook video/stories
- Instagram video/stories
- Twitch

- Live TV (Terrestrial, Freeview, Cable & Satellite etc)

- Other Service
- BBC national services (e.g., BBC Scotland,

BBC Cymru, BBC Northern Ireland)

### Question 2

Thanks! Now please could you tell us which one you use (watch / listen to) **the most**, and why? Think about its content, how you feel when you're watching/listening to it, its usability etc., Do you *like* this one the most too? How valuable is it to you? Why do you choose to subscribe to it? Why do you use this one the most?

### Question 3

Thanks! Now please could you tell us which one use (watch / listen to) **the least**, and why this is? Think about its content, how you feel when you're watching/listening to it, its usability etc.. Why don't you want or listen to it more? Why do you use this one the least?

### Question 4

And looking again at this list, are there any that you used to have, but no longer do? Please tell us which ones you used to have but no longer use, and tell us why you don't use these anymore.

### Question 1

Can you tell us which of these brands **most** represents – and is for – you, and people like you? By this we mean the brand that reflects the lives of people like you, features the regions where you live and the type of life that you lead, and creates the content that best reflects your interests. Please be as detailed as possible. For example, how does it 'speak' to you? What about it best represents you, and why?

### Question 2

Can you tell us why you've chosen the brand that you believe **least** represents you, and other people like you. Again, when we say 'represents', we mean the brand which doesn't reflect your life or interests. Can you tell us why this is? Please be as detailed as possible. For example, why do you believe it doesn't cater for you? What specifically about it means it isn't for you?

## Day 3: Media brands and you

Today, we're going to be asking you to keep track of everything you've watched or listened to throughout the day. We recommend you keep a note of this throughout the day. Then check back here just before you go to bed to upload this information.

**This can be any sort of media! TV, radio, podcasts, online or social media entertainment, or streaming services are all relevant.**

When documenting what you've listened to or watched, please only tell us those you have *made a choice to listen to or watch*.

For example, if you pop into a shop and Radio 1 is on the radio – or if you go to the gym and Love Island is on a screen - you will not need to include these.

But if you get home and someone else in your household is watching a programme, and you sit down to watch it with them, then this would be included.

### Task 1

Using the chart below – we'd like you to tell us when where/what channel you consumed media content on, how long for, and what you watched. For example, if you watched 10 minutes of Good Morning Britain in the morning, just write '*Good Morning Britain – 10 minutes - ITVX*' in the box that says 'morning.' (morning/afternoon/evening)

### Question 1

Of all the programmes or media content you watched / listened to today, what did you **love / enjoy the most**, and why?

### Question 2

And of all the programmes or media content you watched / listened to today, what did you find **disappointing**, and why?

## Day 4: Media brands and you

### Task 1

Using the chart below – we'd like you to tell us when where/what channel you consumed media content on, how long for, and what you watched. For example, if you listened to In Our Time podcast today for 1 hour in the evening, just write '*In Our Time, 1 hour, BBC Sounds*' in the box that says 'evening.' **As a reminder, this can be any sort of media! TV, radio, podcasts, online or social media entertainment, or streaming services are all relevant.** (morning/afternoon/evening)

### Question 1

Of all the programmes or media content you watched / listened to today, what did you **love / enjoy the most**, and why?

### Question 2

And of all the programmes or media content you watched / listened to today, what did you find **disappointing**, and why?

## Day 5: Media brands and you

### Task 1

Using the chart below – we'd like you to tell us when where/what channel you consumed media content on, how long for, and what you watched. For example, if you watched videos on YouTube this afternoon for 30 minutes, just write '*DIY Youtube video, 30 minutes*' in the box that says 'afternoon'. **As a reminder, this can be any sort of media! TV, radio, podcasts, online or social media entertainment, or streaming services are all relevant.** (morning/afternoon/evening)

### Question 1

Of all the programmes or media content you watched / listened to today, what did you **love / enjoy the most**, and why?

### Question 2

And of all the programmes or media content you watched / listened to today, what did you find **disappointing**, and why?

## Week 2: Diary task

### Day 1: Avoid the BBC!

For the next **two days** we want to you **avoid watching/ listening to any BBC content**. This includes anything on iPlayer, BBC sounds, BBC radio stations, and on live BBC channels.

You can still watch or listen to anything that isn't the BBC – so Netflix, HBO, Prime, Spotify, and commercial radio stations are all fine to watch!

Don't worry if you hear or watch the BBC accidentally when you're out and about. We're interested in you making an **active choice** not to listen to or watch BBC produced content. If you don't live alone, it might be easier to get your household on board with the task too! At the end of the day, please answer Question 1 below.

### Question 1

We'd like you to write just a short paragraph about how you got on today – the below questions may help you to think about your experience.

- How did you feel about the task when you were asked to do it?
- How easy was it to avoid the BBC?
- What did you watch/listen to/consume instead?
- What did you miss?
- Were there any positives to not engaging with any BBC content?
- What about any downsides?

### Day 2: Avoid the BBC!

Just a quick reminder from us today to **not watch or listen to any BBC content today**. As a reminder, this includes anything on iPlayer, BBC sounds, BBC radio stations, and on live BBC channels.

You can still watch or listen to anything that isn't the BBC – so Netflix, HBO, Prime, Spotify, and commercial radio stations are all fine to watch! At the end of the day, please answer Question 1 below.

### Question 1

We'd like you to write just a short paragraph about how you got on today – the below questions may help you to think about your experience.

- How did you feel about the task when you were asked to do it?
- How easy was it to avoid the BBC?
- What did you watch/listen to/consume instead?
- What did you miss?

- Were there any positives to not engaging with any BBC content?
- What about any downsides?

### Day 3: Final reflection

#### Question 1

Welcome to your last task!

For this task, we'd like you to *either* **film a short selfie video**, or **write a paragraph for us**, discussing how you have found the last 2 days **only watching or listening to BBC content**.

We'd like for you to tell us about your experience over the past couple of days. Some topics to cover could include:

- How did you feel about the task when you were asked to do it?
- How easy or difficult was it to avoid all BBC content?
- What did you watch? Did you discover anything new?
- What did you miss the most?
- Were there any positives to avoiding all BBC content?
- What about any downsides?
- Did the task change your view towards the BBC at all? How?

#### Question 2

Now, we'd like you to give us a quick overview of how you've found taking part in the research for the past few days. For example, did you find the instructions clear and easy to follow? Did it make you think or feel differently about the media you consume, and the providers and channels where you watch it? Did you learn anything about yourself in the process?

Thank you for completing all the tasks!

## 10.2 Impairment Depths Discussion Guide

### Introduction and warm up (5 minutes)

#### Moderator to introduce the research

Introductions: Name, where they live, household composition

### Section 1: Understanding programmes, content, and reasons for engaging with the media (10 minutes)

*Explain that we're going to focus on media, their usage of and relationship to it, for today's conversation. As a reminder, when we say media brands and organisations we mean any companies / organisations that provide TV, Radio and Online content. We are not including newspaper brands (i.e. The Sun, The Daily Mail, The Guardian).*

#### Let's start off by discussing some of the media you're consuming day-to-day:

- Why do you turn the TV on? What are you looking for when you do?
  - How do you choose what to watch? *Probe on decision-making processes. E.g., knowledge/reputation of provider/ similar content/ recommendations/ etc?*
  - *Adapt as appropriate for participant – eg if participant's impairment or circumstance leads to lower engagement with TV specifically, focus on Audio/online*
- What about the radio? Why do you turn the radio on?
  - How do you choose what to listen to? *Probe on decision-making processes*
  - What about podcasts? How do you choose what to listen to?
- And what about when you go online for news/sports/education/podcasts/streaming?
  - How do you choose where to go for these?
- What's your favourite TV / radio / podcast/ online programme right now, etc., and why?
  - What does it bring to your life? Why do you watch/listen to it?
    - What would be the impact of having it taken away?
- How do you typically access these types of media? *Probe – channel, brand, provider/service*
  - Which channels, platforms, services and brands do you engage with...
    - Every day?
    - Less frequently?
    - Rarely/never? Why?
- What media style (i.e. online platforms, radio, satellite TV) do you gravitate towards more?
  - What might make it more difficult for you to interact with media/certain channels or types of media? Why?
    - If participant struggles, give examples – eg ease of use, relevance, tone, content
- Now thinking about what's available to watch/listen to. How happy are you with what's currently on offer?

- What you watch on the TV?
- What you listen to on the radio?
- What you stream online?

## Section 2: Understanding relevance and appeal (15 minutes)

*Moderator to adapt following section depending on participant. For all visual impairment IDI's, moderator to read out list of media brands and organisations and conduct verbally/aurally. For all others, moderator to flash up 'media brand cards' stimulus on screen. Moderator to remind that when we talk about media brands and organisations, we mean any companies / organisations that provide TV, Radio and Online content. We are not including newspaper brands (e.g. the Sun, The Daily Mail, The Guardian, etc.)*

*Flash up on screen 'media brand cards' and ask them to sort into 2 groups. 'Appeals to people like me' 'doesn't appeal to people like me'.*

- *Moderator to arrange the cards on participants behalf, as participant guides moderator accordingly*

*For visual impairment IDIs:*

*Read out the brands listed on 'media brand cards' and ask them to sort into 2 groups. 'Appeals to people like me' 'doesn't appeal to people like me'.*

- What makes them **appealing** to people like you?
  - Do you feel that you are the audience for these brands?
  - How do they cater for people like you?
  - What are they getting 'right'?
- When we say 'people like you' what do you mean here? What does this make you think of?

*Moderator to make note of the language participants use in response. **Probes:** content, access, payment, scheduling (if TV), ease of use (e.g., online UX), permanent vs. transient programming, presenters/actors/DJs (personalities)*

- Is appeal the same as them feeling **relevant** to people like you? Probe fully.
  - What does 'relevant' mean to you?
  - How do they connect with people like you?
  - How do they reflect your values / identity – what's important to you?
- Have these brands always been **relevant** to you? Or have things changed over the years?
  - What's caused this to change? *Probe themselves (tastes, preferences, needs). Or the brand (content, format)*

*Moderator to capture list and probe around values / themes brought up in section 1.*

- Does this differ between TV/audio/online/ podcasts? *Probe*
- What are you currently watching / listening to / streaming that feels most **relevant** to you? *Probe: TV, Online, Audio (podcast and radio)*

- Are there any particular 'types' of programmes / podcasts that are most relevant?
- What do they have in common? What makes them **relevant**?
- How do these programmes leave you feeling when you're watching/listening?
  - What causes this?

**Repeat for brands and organisations not appealing. Probe specifically:**

- Were they once appealing? *Probe change in needs / preferences.*
- Who do they appeal to?
  - What kinds of people watch/listen to/stream these brands?

*Moderator to explore why this is; explore who might be happier with current content; who content mostly seems to be aimed at*

- What types of programmes do you want to see more of? Probe fully to understand why.
  - Why is that important to you?
- What types of programmes would you not miss at all?
  - Why is that?

**Section 3: BBC brand and content exploration (20 minutes)**

*Moderator, explain to participants that you want them to think now **only** about the BBC.*

- What comes to mind when you hear 'BBC'? *Probe, words, images, facts, emotions, news, people, developments etc.*
- How do you feel about the BBC programmes and content? *Probe/listen out for drivers and barriers re impairment, accessibility, representation/lack thereof etc*
  - What does the BBC do well?
  - Do you turn to the BBC for specific content types? Which?
    - i. What about this content is more attractive / appealing?
  - What could it do better?
- How do you feel about the BBC as an organisation? *Probe emotional relationship – do they 'like' the BBC?*
  - What makes you like / dislike it?
- Did you 'grow up' with the BBC?
  - How did you feel about it when you were younger vs now?
  - How have your feelings towards the BBC changed over time?
  - Do you think you have changed, or the BBC has changed? Why/how?
- How would you describe the BBC to a friend who had never heard of it before?
  - What are they like? Would you be friends with them?
  - What about their values? *Moderator to return back to first question and compare*
- Does anything here jump out to you?

- Anything missing?
- Any you would add?
- Are you would take away?

For each Purpose ask...

- Is this something you look for in content? Who does?
- Do you think the BBC delivers on it? How?
  - Which specific BBC services deliver on it?
  - Are there BBC services which don't deliver on it? How/why?

*Moderator to screen share **BBC logo brand cards** (N.B. – For Visual impairment IDI's, Moderator to read each BBC brand out instead)*

Then, explore for each:

- What are the first thoughts that come to your mind? Probe for spontaneous emotional associations for each BBC brand
  
- Which channels/stations/sites are more **appealing for you** and why? *Probe fully*
  - *Probe for online content (e.g, apps, online content)*
  - *Probe for TV channels and their content*
  - *Probe for audio content*
  
- Which of these BBC channels/stations/sites do you think has **you** in mind as their audience when they're creating content?
  - What makes you think this?
  
- Are there parts of the BBC that feel more/ less **relevant** for you? *Probe fully*
  - How does this differ between channels? (e.g., BBC One, Two, Three, Four etc.)
  - How does this differ between online, TV, radio, podcasts, etc.?
  - What about radio stations? (BBC One, Two, Three Four, 5 Live)
  
- What about **local** BBC services - how important are the local BBC services to you/people like you?
  - How important is local news, content, information to you?
  - Does it matter to you where a programme is made?
  - Do you watch more if there is a local connection?
  - Do you believe that your local community is represented by the BBC?
    - How? Probe importance

*Moderator to share a reduced version of the BBC content sensorium slides, sharing each in turn – before then exploring the below key questions. For IDI's with visually impaired participants,*

- What does this content say about the BBC as a whole?
  - What does it say about who the BBC is for, as a whole?
    - Probe on different groups

- What's connecting most with them?/ What feels most 'for them'?
  - Anything that's jarring with them/ not 'for' them? Why is that?
  - What's surprising?
- Did they know this was all BBC content/programming?
  - What surprises them about this content?
  - Were they aware of all the different content?
- How does it leave them feeling about the BBC?
  - What about the content leads to this feeling?
  - What part of the content makes them feel included/excluded?
- How does the BBC compare against other providers?
  - How is it different/ how is it the same?
- What would they like the BBC to do...
  - More of?
  - Less of?

#### Section 4: Summing up (5 minutes)

- How would you feel if the BBC were suddenly no longer there? How much would this impact you?
  - What would you miss? Moderator link back to the types of content that they only get on BBC
  - Where else would you go for this?
- What do you think is most important for the BBC in terms of improving satisfaction for people like you? What should the BBC...
  - Start doing more of
  - Stop doing
  - Keep doing

*Thank and Close*

## 10.3 Group Discussion Guide

### Introduction and warm up (10 minutes)

#### Moderator to introduce the research

**Introductions:** Name, where they live, household composition

### Section 1: Understanding programmes, content, and reasons for engaging with the media (10 minutes)

*Moderator to explain that we will be discussing different media brands and organisations. As a reminder, when we say **media** brands and organisations we mean any companies / organisations that provide TV, Radio and Online content. We are not including newspaper brands (i.e. The Sun, The Daily Mail, The Guardian).*

- Why do you turn the TV on? What are you looking for when you do?
  - How do you choose what to watch? Probe on decision-making processes. E.g., knowledge/reputation of provider/ similar content/ recommendations/ etc?
- What about the radio? Why do you turn the radio on?
  - How do you choose what to listen to? *Probe on decision-making processes*
  - What about podcasts? How do you choose what to listen to?
- And what about when you go online for news/sports/education/podcasts/streaming?
  - How do you choose where to go for these?
- From the pre task activity – what did they notice about the types of programmes they enjoyed.

*Moderator to use this question to help 'bond the group' focusing in on shared interests in programme genre / content*

Ask participants to grab a pen and note down on a scale of 1-10 how happy are you with what's currently on offer?

- What you watch on the TV?
- What you listen to on the radio?
- What you stream online?

### Section 2: Understanding relevance and appeal (30 minutes)

Place 'media brand cards' and ask them to sort into 2 groups. 'Appeals to people like me' 'doesn't appeal to people like me'.

- What makes them **appealing** to people like you?
  - Do you feel that you are the audience for these brands?
  - How do they cater for people like you?
  - What are they getting 'right'?

Moderator to capture list on whiteboard. **Probes:** content, access, payment, scheduling (if TV), ease of use (e.g., online UX), permanent vs. transient programming, presenters/actors/DJs (personalities)

- When we say 'people like you' what do you mean here? *Probe on communities, identity, values, upbringing etc.,*
- Is appeal the same as them feeling **relevant** to people like you? Probe fully.
  - What does 'relevant' mean to you?
  - How do they connect with people like you?
  - How do they reflect your values / identity – what's important to you?
- Have these brands always been relevant to you? Or have things changed over the years?
  - What's caused this to change? *Probe them (tastes, preferences, needs). Or the brand (content, format)*

Moderator to capture list on whiteboard

- Does this differ between TV/audio/online/ podcasts? *Probe*
- What are you currently watching / listening to / streaming that feels most **relevant** to you? *Probe: TV, Online, Audio (podcast and radio)*
  - Are there any particular 'types' of programmes / podcasts that are most relevant?
  - What do they have in common? What makes them **relevant**?
  - How do these programmes leave you feeling when you're watching/listening?
    - What causes this?

Repeat for brands organisations not appealing. Probe specifically:

- Were they once appealing? *Probe change in needs / preferences.*
- Who do they appeal to?
  - What kinds of people watch/listen to/stream these brands?

Moderator to explore why this is; explore who might be happier with current content; who content mostly seems to be aimed at

- What types of programmes do you want to see more of? Probe fully to understand why.
  - Why is that important to you?
- What types of programmes would you not miss at all? Probe fully

### Section 3: BBC brand and content exploration (40 minutes)

Moderator, explain to participants that you want them to think now only about the BBC. Note key questions in this section\* are key and allow plenty of time to explore in detail.

- \*What comes to mind when you hear 'BBC'? *Probe, words, images, facts, emotions, news, people, developments etc.*

- How do you feel about the BBC programmes and content?
  - What is the BBC known for?
  - What does the BBC do well?
  - Do you turn to the BBC for specific types of content? Which?
    - i. What about this content is more attractive / appealing?
  - What could it do better?
- \*How do you feel about the BBC as an organisation? *Probe emotional relationship – do they 'like' the BBC?*
- \*Did you 'grow up' with the BBC?
  - How did you feel about it when you were younger vs now?
  - How have your feelings towards the BBC changed over time?
  - Do you think you have changed, or the BBC has changed? Why/how?
- \*How would you describe the BBC to a friend who had never heard of it before?
  - What are they like? Would you be friends with them?
- What about their values?

The BBC has one mission and four purposes that they work under. *Moderator to share BBC Mission and purposes:*

- Does anything here jump out to you?
  - Anything missing?
  - Any you would add?
  - Are you would take away?

*Working in pairs, think about the kind of BBC programmes, services, content that sits under each Purpose. Some might fit into more than one Purpose. Please rate each Purpose out of 10, on how well you think the BBC delivers on each.*

- Explore programmes/services/stations etc that sit under each. *Moderator to probe on knowledge of breadth of BBC services and content here*
- What score did you give each Purpose out of 10? Why? *Probe fully on responses here*

For each Purpose ask...

- Is this something you look for in content? Who does?
- Do you think the BBC delivers on it? How?
  - Which specific BBC services deliver on it?
  - Are there BBC services which don't deliver on it? How/why?

*Moderator to hand out different BBC logo brand cards – participants to initially note down key associations with each before coming back as a group and sharing initial thoughts*

- \*Which channels/stations/sites are more **appealing for you** and why? *Probe fully*

- *Probe for online content (e.g, apps, online content)*
- *Probe for TV channels and their content*
- *Probe for audio content*
- \*Which of these BBC channels/stations/sites do you think has **you** in mind as their audience when they're creating content?
  - What makes you think this?
- Are there parts of the BBC that feel more/ less **relevant** for them? *Probe fully*
  - How does this differ between channels? (e.g., BBC One, Two, Three, Four etc.)
  - How does this differ between online, TV, radio, podcasts, etc.?
  - What about radio stations? (BBC One, Two, Three Four, 5 Live)
- What about **local** BBC services - how important are the local BBC services to you/people like you?
  - How important is local news, content, information to you?
  - Does it matter to you where a programme is made?
  - Do you watch more if there is a local connection?
  - Do you believe that your local community is represented by the BBC?
    - How? Probe importance

*Moderator to share sensorium content and allow participants time and space to take in the different stimulus material*

- Collect initial thoughts and observations on the content
  - What does this content say about the BBC as a whole?
  - What does it say about who the BBC is for, as a whole?
    - Probe on different groups
- What did they notice about the different content?
  - What's connecting most with them?/ What feels most 'for them'?
  - Anything that's jarring with them/ not 'for' them? Why is that?
  - What's surprising?
- Did they know this was all BBC content/programming?
  - What surprises them about this content?
  - Were they aware of all the different content?
- What are their thoughts on the content?
  - Probe on the breadth
  - Do they see the BBC as one brand/ lots of smaller brands? Did the sensorium change this?
- How does it leave them feeling about the BBC?
  - What about the content leads to this feeling?

- What part of the content feels makes them feel included/excluded?
- How does the BBC compare against other providers?
  - How is it different/ how is it the same?
- What would they like the BBC to do...
  - More of?
  - Less of?

#### Section 4: BBC 'Who it is for'? (20 minutes)

*Explain for the remainder of the session, we want to share with them some data from the BBC and see what they make of it. Explain that the BBC conducts annual surveys interviewing people from all different backgrounds. We have some quotes / that we would like their thoughts and views on.*

For each quote explore:

- Why do you think this is?
- Does the licence fee have an impact here? How in what way?
- What about the range/type of content the BBC offers?

*Moderator, if there is enough time, share 1 or 2 quotes with participants. Please be mindful of the dynamics in the room and explore any issues of 'lower income' with care and sensitively.*

For each fact explore:

- Thoughts/impressions.
- How do they feel about that fact?
  - Why do they think that is?
- Is this something you would say?
  - What sort of person do you think might say/think this?
  - Why might they say this? Is this true?
- Why do you think this person feels this way?
- Do you think this is true of all the BBC's channels/content?

#### Section 6: Summing up (10 minutes)

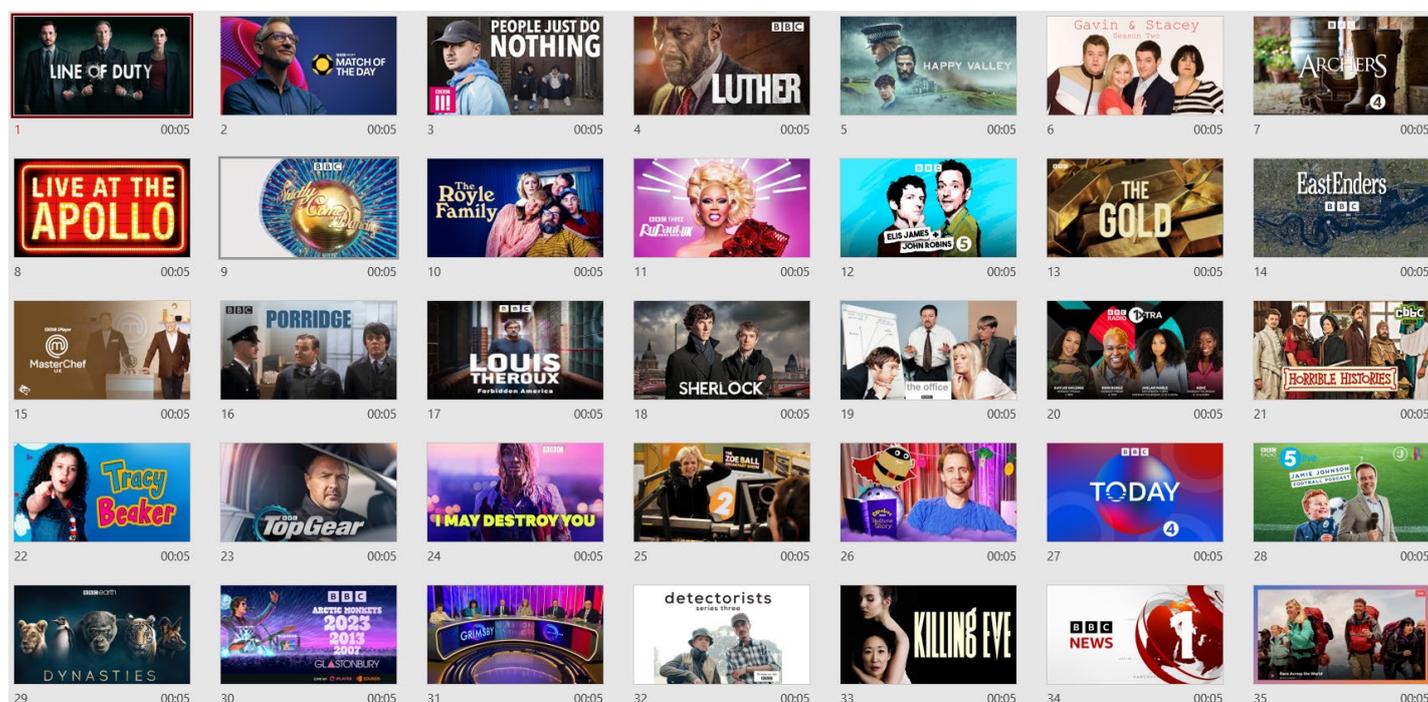
- How would you feel if the BBC were suddenly no longer there? How much would this impact you?
  - What would you miss? Moderator link back to the types of content that they only get on BBC
  - Where else would you go for this?
- What do you think is most important for the BBC in terms of improving satisfaction for people like you? What should the BBC...
  - Start doing more of
  - Stop doing
  - Keep doing

*Thank and Close*

## 10.4 Sensorium Stimulus

Stimulus shared in focus groups and IDIs to facilitate discussions surrounding BBC content and values. All Materials for the group held in Welshpool were translated into Welsh.

### 10.4.1 BBC sensorium stimulus



### 10.4.2 BBC's Public Purposes, mission statement, data points, and quotes

**BBC Mission:** To act in the public interest, serving all groups through the provision of impartial, high-quality and distinctive output and services which inform, educate and entertain".

#### BBC's Public Purposes:

- **Informing** – News and information to help people understand what is going on in the UK and the world
- **Educating** - Programmes and content that help people to learn about new things
- **Distinctiveness** - High quality and creative content
- **Representation & Portrayal** - Content that reflects the life and culture of communities throughout the UK

#### Quotes provided by Ofcom from open-ended responses in its annual BBC Performance Tracker

1. *"The BBC does not show or represent all regions of this country, the BBC is a club which does not represent the working class, unemployed or state pensioners, it is more interested in the haves not the have nots!"*
2. *"The BBC is an institution that has been around for a long time. It's reliable and at the heart of British culture."*
3. *"It's a biased tv company that doesn't represent the average British person."*

4. *"The BBC has been with me throughout my life in one form or another. It had a great reputation that I would find hard to let go of. I want to see it continue."*

#### Data points

1. *Overall, those on lower incomes have a less positive view of the BBC compared to both the overall UK population, than those on higher incomes [Ofcom BBC Performance Tracker]*
2. *When watching TV, those on lower incomes watch the BBC 26% of the time. For those on higher incomes, this rises to 41%. Those on lower incomes spend more of their time watching other channels (e.g., Netflix, Disney+) [Barb]*
3. *People who would not miss the BBC if it were not there, site bias, representations, the license fee, and a lack of interest in its content as their core reasons for this.[Ofcom BBC Performance Tracker]*
4. *81% of the UK population is happy with BBC iPlayer, but this is lower amongst those on lower incomes, at 77% [Ofcom Public Service Media Tracker]*
5. *Those on higher incomes (above average) are less likely to listen to BBC local radio stations. [RAJAR]*

### 10.4.3 Media and BBC brand stimulus

