Public service media in a changing market

Ofcom's 2025 Review of Public Service Media, *Transmission Critical*, argued that audiences should be able to access and easily find PSM content wherever they are

Our report highlighted the trends reshaping how people watch TV. As well as streaming services, video-sharing platforms like YouTube and TikTok have become major destinations for viewing, giving audiences access to a wider range of content, formats and creators. These changes have created new opportunities for content providers. The ability to produce, edit and self-publish content has encouraged innovation, opened up space for different voices and enabled broadcasters to reach audiences in new ways.

This also brings challenges for many public service broadcasters. In a more crowded market, it is harder to stand out and reach audiences than it was in the era of traditional television. Increasingly what viewers watch is shaped not by schedules and channel guides, but by platform recommendation systems. As viewing fragments across a growing number of services, audiences, particularly younger ones, often have a weaker connection with PSM providers than their predecessors, threatening the long-term sustainability of PSM. We recommended:

- That PSBs meet audiences where they are and continue adapting to changing tastes. This means making content available on the services audiences use, while testing different approaches to understand what best reaches and appeals to diverse viewers.

- We also called for PSBs and platforms to work together to ensure audiences can see and easily find PSM content. We highlighted the particular importance of news, which keeps audiences informed and supports a democratic society, and UK children's content, which helps young people learn, grow and see their lives reflected on screen. We recognised that voluntary action should be pursued in the first instance, while noting that Government may wish to consider whether legislative intervention is needed if sufficient progress is not being made.

This update explores developments since those recommendations, reflecting our commitment in Transmission Critical to continue building the evidence base on online viewing. It discusses audiences' continued shift to third-party platforms, responses from PSM providers, and insights from stakeholder engagement on opportunities to secure PSM visibility in future.

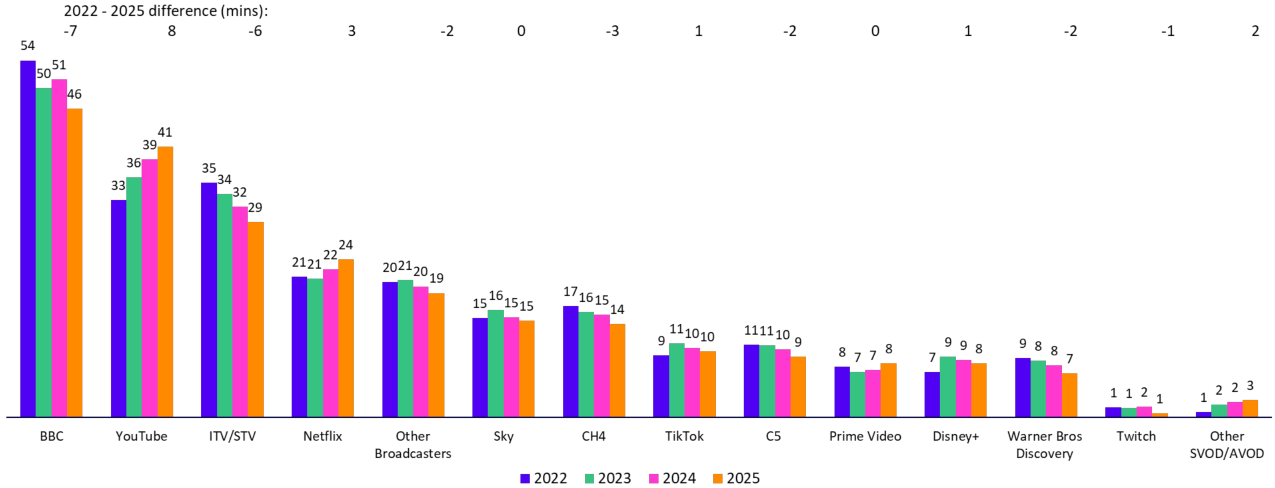
Structural pressures on PSM continue to grow

VSP viewing is becoming increasingly mainstream – particularly among older audiences and on the television

Transmission Critical highlighted how YouTube and TikTok now account for a significant share of children and young people's video viewing. In 2025 children aged 4-15 were the age group that spent the most time watching YouTube (averaging 61 minutes per day), however growth since 2022 has been strongest among those aged 55+, with viewing up 49%, compared with 24% across all viewers aged four and over. The main device for YouTube viewing in the home has also shifted from mobile to TV. In 2022, mobiles accounted for a larger share of in-home viewing than TVs (36% vs 29%) but by 2025 TV had become the leading device, accounting for almost half of all viewing (47%) compared with 28% on mobiles.

Meanwhile time spent watching broadcasters' own services overall (BVoD and linear) has continued its decline, with for example the average number of daily minutes people spend watching ITV and the BBC falling by 17 and 13% (from 35 to 29, and 54 to 46 minutes) between 2022 to 2025.

Figure 1: Average daily minutes per person viewing different services



Source: Barb as-viewed, in-home video viewing over the home broadband only (individuals age 4+). Figures shown in the chart and text are rounded to the nearest minute. Calculations presented are based on unrounded values, so results derived from the chart may differ slightly.

Broadcasters are expanding their presence on third party platforms

Transmission Critical found UK broadcasters' digital strategies at different stages of maturity. Channel 4 and ITV had YouTube ad-sales partnerships, distributed full episodes on the platform, and were experimenting with VSP and BVoD-first content. The BBC made some content available on YouTube, TikTok and other social platforms but largely used them to drive audiences back to iPlayer and linear TV. Over the past year, however, several broadcasters have shifted towards harder-to-reach audiences on YouTube, investing in VSP-first content and deepening engagement with specific groups.

In January, the BBC announced a strategic partnership with YouTube, as part of a broader move to make its content available where audiences increasingly are. It addresses challenges raised in the PSM Review – notably reaching younger viewers – and signals a shift towards digital-first programming, aimed at reaching audiences directly on the third-party platforms they are using. This includes YouTube-first children's programmes and several new channels built around BBC IP such as Horrible Histories and Operation Ouch, as well as a new documentary channel, Deepwatch, aimed at younger male audiences. In news, over the next year the BBC will launch global channels, livestreams and distinctive formats on the platform.

In April, S4C announced a YouTube partnership to grow online audiences and improve the discoverability of Welsh-language content. The collaboration will provide greater insight into platform trends and audience behaviour. S4C's plans include a dedicated news channel, livestreams of major political events such as elections, and YouTube-first content across news, entertainment and sport. It has also launched *Yr Alwad*, a TikTok-first vertical drama, and commissioned a YouTube-first series of seven short comedies.

Channel 4 recently commissioned new digital-first pilots for Channel 4.0 designed to be released on YouTube, with shorter cutdowns distributed across platforms like TikTok and Instagram. ITV is increasing the amount of advertising space it can sell on YouTube while extending ad sales to TikTok. In May, ITN announced the launch of three new YouTube channels based around their 70-year-old archive, in what they described as "a clear ambition to build fandom and long-term audience engagement around archive content." It also introduced memberships to help fund archive preservation. Sky News has announced a shift towards a digital-first model focused on original reporting and deeper analysis, distributed across platforms like YouTube and TikTok.

Globally, broadcasters have similarly announced steps to bring their content directly to audiences on third party platforms. For example, in April France Télévisions announced plans for audiences to publish all of its national and local, daily and weekly news along with investigative magazines on its YouTube channel. In Canada, CBC announced a pivot towards a more multi-platform approach, prioritising distribution of its journalism across social and online platforms to reach audiences where they increasingly consume news.

Meanwhile other audiovisual platforms have taken steps to join YouTube and existing broadcasters in the longer-form television market. Instagram recently announced it is testing longer-form, episodic and live content within its existing TV app, expanding its push into connected-TV viewing. Spotify has similarly taken steps to reach viewers on television – for example launching full-screen vodcasts and music videos on its Apple TV app.

Government has highlighted the importance of PSM accessibility

In its Green Paper, Watch this Space, the Government echoes *Transmission Critical* in stressing the importance of UK audiences being able to easily find and access PSM wherever they choose to consume it. It calls for greater prominence and discoverability of PSM on VSPs and urges deeper industry partnerships to support this. The Green Paper also argues the importance of audiences being able to access trusted news on social media and proposes measures to strengthen its visibility and prominence in platform environments. Separately, the Government's recent announcement of a social media ban for under-16s could have implications for how children access news online.

PSM providers face new competitive pressures

Measurement is improving, but remains a challenge

Since *Transmission Critical*, new analyses have improved our understanding of viewing on YouTube, including engagement with content made by the UK's public service broadcasters. However, no single measurement framework allows us to compare viewing time or content consumption across all major social media platforms and on all types of devices. For example, Barb data tells us how long users spend on YouTube, TikTok and some other platforms when connected to the home broadband, but detail on the actual content they consume is currently limited. Ipsos iris provides information on the content people watch on YouTube but this does not include viewing on connected TVs – which are now the primary means of accessing YouTube in the home.

While individual channel owners, including the PSBs, can access detailed performance data through platforms such as YouTube, the level of information available is not consistent across platforms and services. Nor is there a consistent dataset that describes the type and range of content audiences are offered. This limits our ability to develop a comprehensive picture of what audiences are engaging with across different platforms and services.

A wider range of content is competing for audiences' attention

Beyond short-form entertainment, platforms such as YouTube have become multi-purpose media environments, hosting everything from practical guidance and specialist interests to news, commentary and long-form programming. Broadcasters, publishers and creators now compete side by side, with traditional and digital-native formats increasingly converging.

These platforms operate at a vastly greater scale than broadcast television: on YouTube alone, around 500 hours of content are uploaded every minute – equivalent to hundreds of thousands of hours each day – while millions of new videos are posted to TikTok every hour. Yet visibility is shaped not just by content quality, but by recommender systems that determine what audiences are shown. As a result, success increasingly depends on how content is packaged, distributed and optimised for platform discovery and engagement, creating a less predictable environment for all providers, including PSM.

We are getting early signs of how PSBs are performing

Our understanding of how audiences engage with PSB content on third-party platforms is still developing, though emerging evidence provides some initial indications of how PSBs are performing on YouTube. Ipsos iris data – which does not include viewing on a TV – indicates that PSBs collectively reached around a quarter of the UK online population aged 15+ through their YouTube channels during November 2025. While this represents only part of PSBs' overall audience reach, it suggests they have established a meaningful presence on the platform.

Despite achieving meaningful reach, the share of viewing that goes to PSB content is small. UK YouTube viewers spent an average of 50 minutes watching PSB content on YouTube across November 2025, representing 0.9% of all YouTube viewing time (excluding TV-set viewing). To some extent this is unsurprising: viewers have much greater choice about what to watch than on broadcast and BVoD. However, it does indicate that PSBs have been generating less sustained engagement on these platforms than traditional services.

Figure 2: YouTube PSB channels reach (excluding TV sets) – November 2025

	Audience	% Reach	Average time spent per viewer (Nov 2025)
YouTube Total	49.6 million	94%	24 hours, 20 minutes
PSBs' YouTube channels (total)	13.1 million	25%	50 minutes
BBC's YouTube channels	9.8 million	19%	21 minutes
ITV's YouTube channels	7.4 million	14%	42 minutes
Channel's 4 YouTube channels	4.4 million	8%	31 minutes

Source: Ipsos iris, all internet users aged 15+. PSB YouTube total also includes Channel 5 and STV and S4C but the samples for each are too small to split out separately. Source: Ipsos iris; UK users aged 15+, accessing from PC/smartphone/tablet

It is important to note that these figures predate recent efforts to increase PSB's presence on social media, including the BBC's partnership with YouTube. They should be viewed as an early snapshot of a fast-changing market that do not account for PSB consumption on other platforms. While there are encouraging signs, it is too early to draw firm conclusions about the extent to which these services will increase overall reach or strengthen engagement with public service media over the longer term.

News consumption on YouTube

Additional analysis based on Ipsos iris data – which does not capture TV set viewing – estimates that news watched via YouTube reaches at least 24% of UK YouTube users, while PSB news on the platform reaches 5%. BBC News, ITV News and Channel 4 News all feature among the UK's ten largest news channels on YouTube by reach. However, we also estimate PSB news accounts for only around 0.1% of all UK YouTube viewing, with much of this concentrated among heavier users. Men make up a slightly greater proportion of those watching news on YouTube, but almost two-thirds of viewers of PSB news on the platform.[1]

By time spent, PSB news channels are overtaken by channels offering more niche, personality-led and conversational content – an increasingly popular format discussed later in this update. While YouTube remains one of many routes to news, its importance is growing for some providers, including through podcasts and vodcasts.[2]

Emerging lessons for PSM providers

Building audience connections in fast-changing, fragmented market

In our recent conversations with stakeholders, and specifically producers making digital-first content, we have heard that success on platforms is increasingly about building sustained engagement with particular audiences and communities, rather than achieving the broad reach historically associated with linear broadcasting. Reach remains important in some contexts, particularly around major news events, live sport and some family content, but stakeholders generally described a shift towards building stronger connections with more targeted audiences – ranging from children to gardeners and other enthusiasts.

At the same time, stakeholders consistently emphasised the uncertainty of the environment. Audience preferences, platform features and recommender systems continue to evolve, and approaches that succeed for one platform, genre or audience may not work for another. The signals that recommender systems use to promote content can rapidly change. Rather than following a single formula for success, providers described an ongoing process of testing, learning and adaptation.

There is no single blueprint for success

Stakeholders highlighted that success in platform environments can take any shape: archive content, clips, podcasts, vodcasts, digital-native formats and original commissions. With viewers using YouTube and increasingly other VSPs as a source for long-form content alongside traditional shorter videos, stakeholders said there is scope not just for showing full-length episodes but also for

[1] Ofcom analysis of Ipsos iris YouTube viewing data covering 14 January–14 February 2025 and 11 July–11 August 2025.
[2] Understanding young news audiences at a time of rapid change | Reuters Institute for the Study of Journalism

developing YouTube-first series. Examples range from the BBC's Ros Atkins-style explainers and Time Team's YouTube revival to ITN's royal family channel and platform-native hits such as Subway Takes.

Many also pointed to the growing appeal of personality-led and conversational content that does not necessarily require high production budgets – noting that today's audiences want to feel a connection with the people reporting or presenting, more so than with large media brands. However, views varied on whether different audiences place the same value on content that feels authentic and relevant to them, has high production quality, or is associated with established brands.

Data is changing how content is commissioned and produced

A recurring theme in our conversations with stakeholders was the need for faster and more flexible production models. Compared with traditional production cycles, platform strategies often require content to be developed, commissioned (where applicable), tested and refined at greater speed. While providers stressed the time it can take time to build an engaged audience, they also highlighted the need to respond quickly – both to recent events and to platforms' performance signals such as engagement and retention. These analytics allow them to see if and when audiences drop off – insights that are unique to the on-demand environment. For example, Lucy Smith, Founder of Fawkes Studios, told Ofcom:

> *"The audience is often more valuable than the format. Digital platforms allow producers to test concepts quickly, use engagement data to understand audience response, and build successful formats from content that has already demonstrated audience appeal."*

Distribution is becoming multi-platform

Stakeholders emphasised the importance of providing consistent uploads and organising content around particular interests, brands, formats or communities. Many also highlighted the role of packaging and presentation, including titles, thumbnails and channel management.

They also signal the importance of distributing content across multiple platforms and services, describing how they are creating content in a way that allows it to be edited and travel across multiple platforms and modes of consumption – from long-form programmes on linear, VoD services and some VSPs, to shorter clips on social media and VoD- and podcasts on radio and audio streamers. The growth of video podcasting was frequently cited as an example of this shift. Goalhanger, producer of The Rest Is History and The Rest Is Football, has adapted its programmes to work across audio, YouTube and social platforms, reflecting what its Head of Digital and Social, Sam Oakley, describes as a shift from "*wherever you get your podcasts*" to "*however you get them*."

News brands, personal voices and audience trust

In recent years concerns have grown about rising news avoidance, in particular among young people. While news consumption and trust in news have declined both globally and in the UK, audiences of all ages still turn to traditional news sources, especially those provided by our public service broadcasters, in a crisis. However, they increasingly value alternative voices and formats in their day-to-day. Stakeholders highlighted the success of more personal, conversational and presenter-led formats that help audiences make sense of news through timely and deep context, explanation and analysis.

There are widespread concerns that many news influencers on social media neither invest in original news gathering nor adhere to established editorial standards. However, several stakeholders told us that some creators apply traditional broadcasting practices, including fact-checking and ethical safeguards, to platform-native content.

We also heard that both independent and established providers of news content are encouraging journalists and producers to maintain a continual and direct relationship with audiences on social platforms – with for example BBC correspondents reportedly being encouraged to break news on social platforms rather than wait until flagship broadcast programmes air.

Monetisation strategies are changing

While stakeholders said that ad revenue from platforms like YouTube formed a central part of their monestisation strategy, few expected this revenue alone to replicate traditional broadcast advertising income. They instead described a broader mix of approaches, including advertising revenues but also subscriptions, partnerships, branded content and off-platform activities, like events and merchandising. For example, journalist Ben Zand's Zandland offers YouTube subscriptions providing early access to content, livestreams and behind the scenes videos. Many of Goalhanger's podcasts offer member's only content and participate in live recordings and festivals, like The Rest is Fest.

Many noted the growing role of global brands as partners or co-commissioners of digital-native content – highlighted by recent partnership between BBC Studios and LEGO which will produce 10 episodes of LEGO versions of Bluey. Stakeholders also described brands moving beyond traditional sponsorship, product placement and advertising models to provide significant investment in, and in some cases act as the primary funder of, creative content. For example, Tinder and TikTok recently announced Double Date Island, a Tinder-based reality dating programme produced by Cowshed Studios and co-developed by ITV Studio's digital arm Zoo 55.

Monetisation strategies can however be challenged by uncertainties about changes recommender systems and user experience. For example digital media brand LadBible has recently described how changes to Meta's recommendation system, designed to more heavily promote creator-led content, drove a sharp fall in their advertising revenues.

Implications for public service broadcasting

Applying these insights may be more challenging for PSM providers than for some other content providers. Building deeper engagement with particular audiences may not always sit easily with PSBs' obligations to meet certain standards, such as serving all audiences, providing a breadth of UK content, or with traditional 'high cost, low volume' production models. There may also be a tension between faster and more data-informed approaches to commissioning and wider public service objectives, including investment across the nations and regions. Emerging monetisation strategies may not align with restrictions on product placement and sponsorship. Although PSBs have valuable IP including archive content, which can create opportunities to extend reach and generate value, they may not have the rights to significant portions of it.

However, many of the examples highlighted in this report suggest these challenges are not insurmountable. Broadcasters are already experimenting with new forms of distribution, developing platform-specific content strategies and adapting formats for different audiences and modes of consumption. There are opportunities to apply the strengths of public service media – including trusted brands, high-quality content and strong audience relationships – in a more fragmented and dynamic media environment.

Next steps

As audiences spend more time across a growing range of platforms, understanding how public service media is found and consumed is increasingly important. We will continue to strengthen our evidence base, including improving audience measurement, deepening our understanding of the factors that drive visibility and engagement and undertaking further research into audience expectations and attitudes towards online content.

We will continue to engage with Government as it develops policy for the future of public service media, while working with broadcasters, platforms and other stakeholders to assess whether further action may be needed to support its availability and discoverability.