



# Small Screen: **Big Debate**



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## **Public service broadcasting: quantitative research findings**

December 2020

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# Overview

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This report supports the work of [Small Screen: Big Debate](#), our national discussion on how to make sure the UK has a resilient public service broadcasting system that continues to adapt to meet audiences' needs. It details the media services that people use, the value they place on them, and the perceived personal and societal benefits of public service broadcasting (PSB).

In March 2020, Ofcom commissioned Kantar to conduct a face-to-face [omnibus survey](#). The fieldwork took place between 11 and 17 March 2020, before the Covid-19 UK lockdown. We repeated the research in September 2020, to explore whether peoples' views towards the value of PSB had changed as a result of the Covid-19 lockdown. We commissioned Jigsaw Research to conduct a quantitative survey, using a combination of online and telephone CATI methodologies to ensure that we surveyed all UK adult (aged 16+) audiences, including those who are not online. We achieved 1,998 interviews online and 259 interviews using CATI, achieving an overall sample size of 2,257.

## What we found

**Trusted and accurate news remained the most valued PSB feature among audiences from both a personal and societal viewpoint in this second wave of quantitative research.**

- Nearly a third of UK adults (32%) consider 'trusted and accurate UK news' among their top three most valued PSB attributes, personally, while over a quarter (28%) placed it in their top three for value delivered for society.

**Looking beyond news, there are variations in what people consider to be the most important personal and societal benefits of PSB.**

- Personal preferences tend to focus more on high quality productions (32% rate this in their top three attributes), the range of programmes PSB delivers (27%) and programmes they can watch and talk about with family and friends (21%)
- People consider the more cultural aspects of PSB to be among the most beneficial to society; around one in five people consider '*programmes which reflect UK life and values*' and those that '*reflect the diversity of the UK*' as societally important (21% respectively).

**The range and quality of PSB content has become even more important to viewers during 2020<sup>1</sup>.**

- Nearly a third of people (32%) ranked '*high quality productions*' in their top three most valued PSB features in September 2020, compared to 24% in March 2020.
- Similarly, 27% rated '*a wide range of different types of programmes for me*' in their top three personally valuable in September, compared to 20% in March.

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<sup>1</sup> As a result of the change in methodology, direct comparisons between the two waves are not possible, and any inferences made in this report should be considered as indicative only.

**PSBs are generally regarded as being better than streaming services at offering programmes that reflect life in the UK, in all its diversity.**

- Nearly two-thirds (65%) of those who use both PSB and streaming services think PSBs are better at ‘providing programmes which reflect UK life and values’. A similar proportion (63%) think that PSBs are better at ‘providing programmes which reflect the diversity of the UK.’

**But streaming services are favoured over PSBs in terms of navigating and accessing content.**

- Over three-quarters (77%) of those who use both PSBs and streaming services think streaming services are better for ‘finding something new to watch’. A similar proportion (74%) consider streaming services are better for ‘accessing programmes in a way that suits you’.

# Values and attitudes towards media services

## Most valued

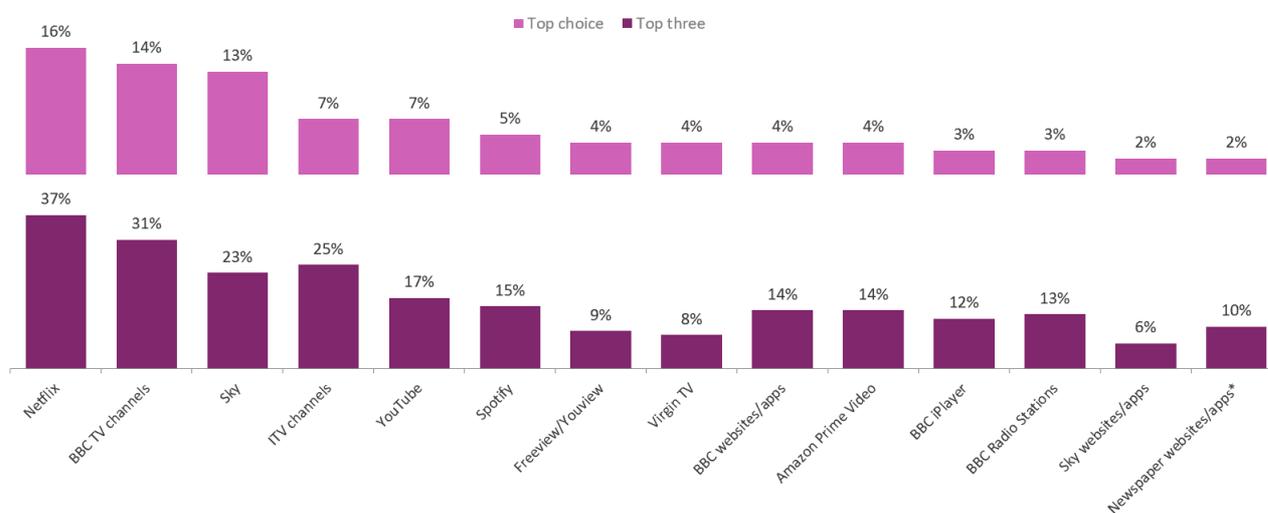
When asking users of each service what their top three most valued media services would be, Netflix is the most valued overall (37%), followed by BBC TV channels (31%) and ITV channels (25%).

However, BBC services beyond TV channels are also highly valued; 14% place BBC websites/apps in their top three, 13% do the same for BBC radio stations and 12% for BBC iPlayer. Out of the PSBs, BBC TV channels and ITV channels are followed by Channel 4 channels (9% in the top three) and Channel 5 channels (6%).

Netflix is more likely to be valued by younger generations, whilst BBC services, including TV and radio, are more likely to be valued by older generations. Over half (57%) of 16-34s place Netflix in their top three compared to one in ten (9%) for BBC TV channels; when iPlayer is included in that, it rises to one in five (18%). By contrast, half (51%) of 55+ year olds place BBC channels in their top three (60% including iPlayer), and 17% place Netflix in their top three.

Older adults are more likely to select BBC Radio (18% of 55+ year olds place in top three, compared to 6% of 16-34s). By contrast, younger adults are more likely to value Spotify (30% of 16-34s place in their top three, compared to 4% of 55+ year olds).

**Figure 1: Most valued media services – top choice and top three**



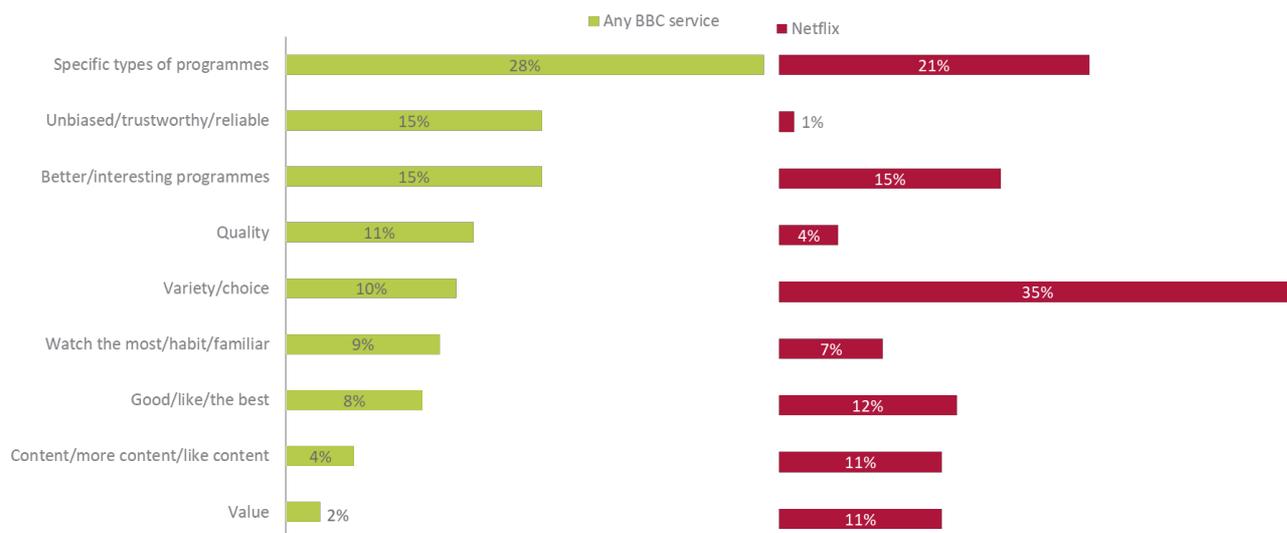
B4. And of all the services that you use, which three do you value the most? Please rank these in order 1st/2nd/3rd. Base: all who have used media providers in the last 12 months (n=2232).

Chart showing the top 13 most selected media providers, ranked by top choice. Channel 4 and Channel 5 fall out of the scope of the chart.

\*Apple News/Google News/Upday

BBC services are valued for specific types of programming (including news) (28% vs. 21% for Netflix), being unbiased/trustworthy/reliable (15% vs. 1% for Netflix) and for quality (11% vs. 4% for Netflix). Netflix tends to be valued more for variety/choice (35% vs. 10% for BBC services) and also for the value offered (11% vs. 4% for BBC services).

Figure 2: Reasons why respondents value any BBC service or Netflix the most



B4b. Why do you value [INSERT SERVICE] the most? Base: All who have BBC services in the last 12 months and value the most (n=583); all who have used Netflix in the last 12 months and value the most (n=372). NB- showing NETs for answer codes 5% and over

## Personal value of PSB

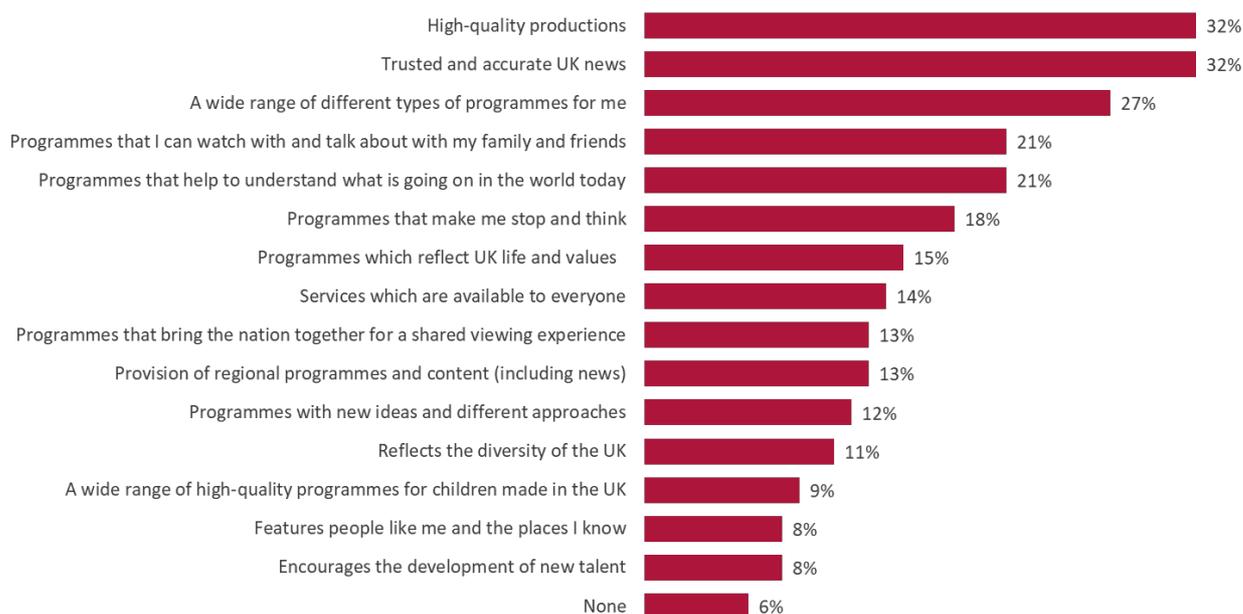
Trusted and accurate UK news (32%), high-quality productions (32%) and a wide range of different types of programmes for me (27%) are the most valued PSB attributes, personally. ‘A wide range of different types of programmes’ appears more highly valued than it was in March 2020. This is a theme we have also seen emerging in the most recent piece of qualitative research<sup>2</sup>, with participants discussing the wider range of content they began consuming during lockdown. In addition, ‘programmes that help me understand what is going on in the world today’, and ‘programmes that I can watch and talk about with my family and friends’ are also highly valued personally, with one in five UK adults selecting these in their top three.

When asked to select their three least valued attributes, (i.e. those attributes people would be more inclined to discard on behalf of themselves), amongst those who valued attributes personally ‘a wide range of high quality programming for children’ is the most selected (31%), followed by ‘reflects the diversity of the UK’ (23%) and ‘encourages the development of new talent’ (21%).

Those from an ABC1 household are more likely than those from a C2DE household to value ‘trusted and accurate UK news’ and ‘high-quality productions’; by contrast, those from C2DE households are more likely to value ‘regional programming and content (including news)’ and ‘high-quality children’s programming’.

<sup>2</sup> [Jigsaw Qualitative Research Report](#), December 2020.

Figure 3: Top three PSB benefits – Personal



C1a. The following list describes the range of benefits public service broadcasting is broadly designed to deliver. Could you please review the list of potential benefits in full before telling me which three you consider to be the most valuable for you personally. Base: All respondents: (n=2257)

N.B- All CATI respondents were first asked this for each statement: C1. For each benefit, please could you tell me how valuable it is to you personally?

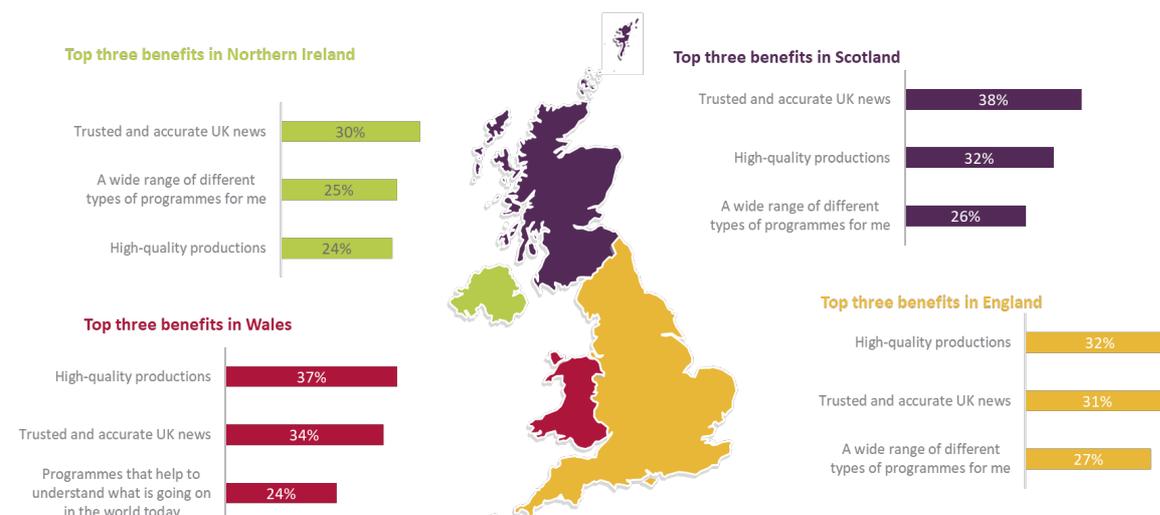
#### Top five PSB benefits – personal – March 2020

1. Trusted and accurate UK news (34%)
2. Programmes that help me understand what is going on in the world today (26%)
3. Programmes I can talk about with my family and friends (24%)
4. High-quality productions (24%)
5. A wide range of different types of programming for me (20%)

Looking at regional differences, the charts below show the top three most selected benefits in the different UK nations. Those in Scotland are significantly more likely to select ‘trusted and accurate UK news’ than those in England or Northern Ireland. Those in Northern Ireland are significantly less likely to select ‘high-quality productions’ than those in Scotland, England or Wales

Those in Greater London are significantly less likely than all other regions and nations to value ‘regional programming and content (including news)’ (5% select this in their top three), but they are the most likely to value ‘programmes that make them stop and think’ (24% select this in their top three).

Figure 4: Top three PSB benefits – Personal – split by Nation



C1a. The following list describes the range of benefits public service broadcasting is broadly designed to deliver. Could you please review the list of potential benefits in full before telling me which three you consider to be the most valuable for you personally.

Base: England (n=1014) Wales (n=415); Scotland (n=415); Northern Ireland (n=415)

N.B- All CATI respondents were first asked this for each statement: C1. For each benefit, please could you tell me how valuable it is to you personally?

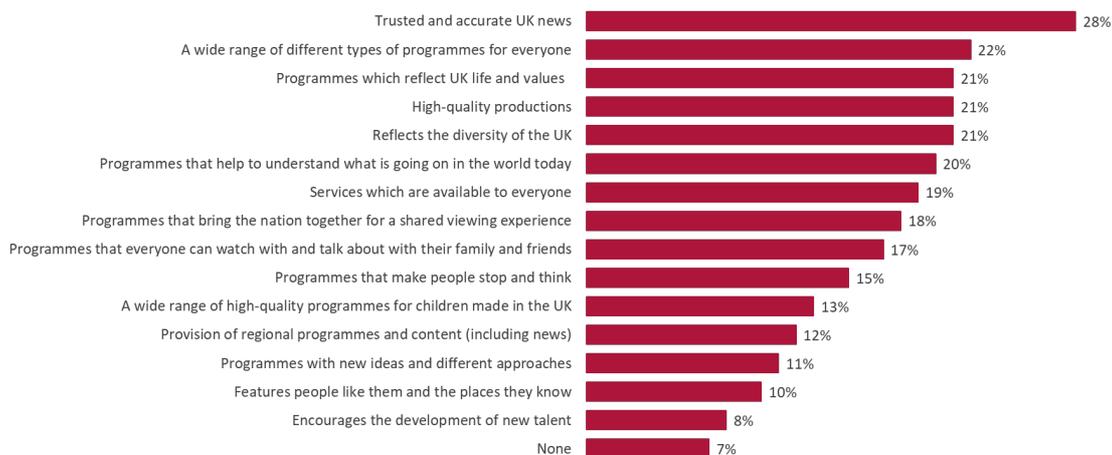
## Societal value of PSB

Trusted and accurate news remains the most valued PSB benefit for society as a whole (28%), followed by a wide range of programming for everyone (22%). ‘Reflect[ing] the diversity of the UK’ is also seen as important, as are ‘programmes which reflect UK life and values’ and ‘high-quality productions’ (21% each). Similarly, to the personally valued attributes of PSB, ‘a wide range of different types of programmes’ emerged in the September research as being an important attribute, again, likely because of the increase in content consumption since March. This is a theme we have also seen emerging in the most recent piece of qualitative research<sup>3</sup>.

When asked to select their three least valued attributes, amongst those who valued attributes for society (i.e. those attributes people would be more inclined to discard on behalf of society), two in five (20%) select ‘encouraging the development of new talent’, just under two in five (18%) select ‘reflects the diversity of the UK’ and the same proportion (18%) select ‘featuring people like them and places they know’.

<sup>3</sup> [Jigsaw Qualitative Research Report](#), December 2020.

Figure 5: Top three PSB benefits – Societal



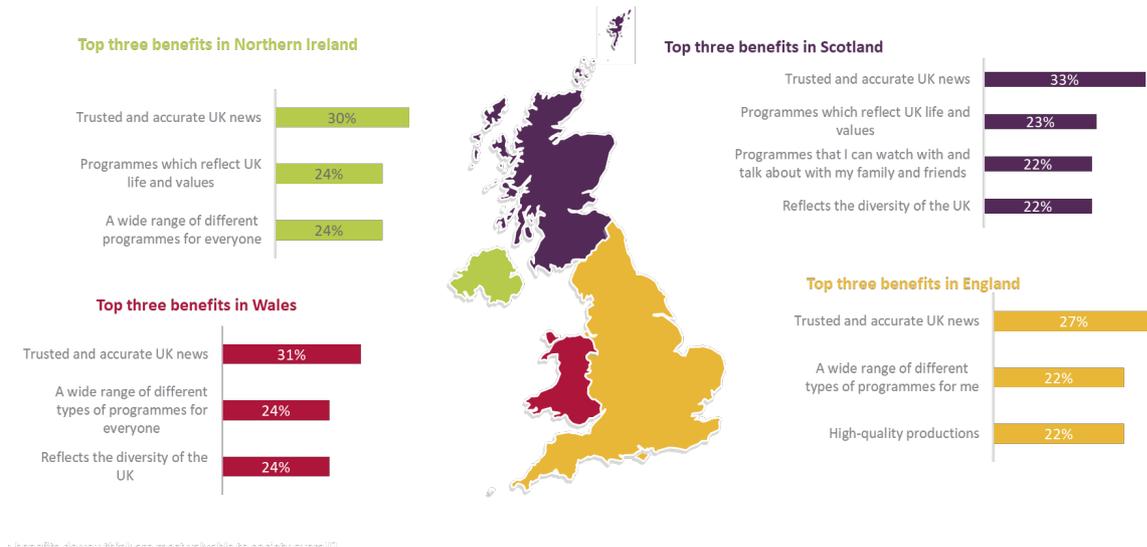
C3a. What three benefits do you think are most valuable to society overall? Base: All respondents (n=2257)  
 N.B- All CATI respondents were first asked this for each statement: C3. For each benefit, please could you tell me how valuable it is to you societally?

**Top five PSB benefits – societal – March 2020**

6. Trusted and accurate UK news (34%)
7. Reflects the diversity of the UK (22%)
8. Programmes that help me understand what is going on in the world today (21%)
9. Services which are available for everyone (20%)
10. Programmes which reflect UK life and values (17%)
11. = A wide range of types of programmes for everyone (17%)

‘Trusted and accurate UK news’ is the most valued for society across all four nations, although those in Scotland are significantly more likely than those in England to select this. As with personal preferences, those in London are some of the most likely to select ‘programmes with new ideas and different approaches. Those in the South West are the most likely to value ‘regional programming and content (including news)’ (20%). Those in Northern Ireland are significantly more likely to value ‘regional programming and content (including news)’ than those in England or Scotland.

Figure 6: Top three PSB benefits – Societal – split by Nation

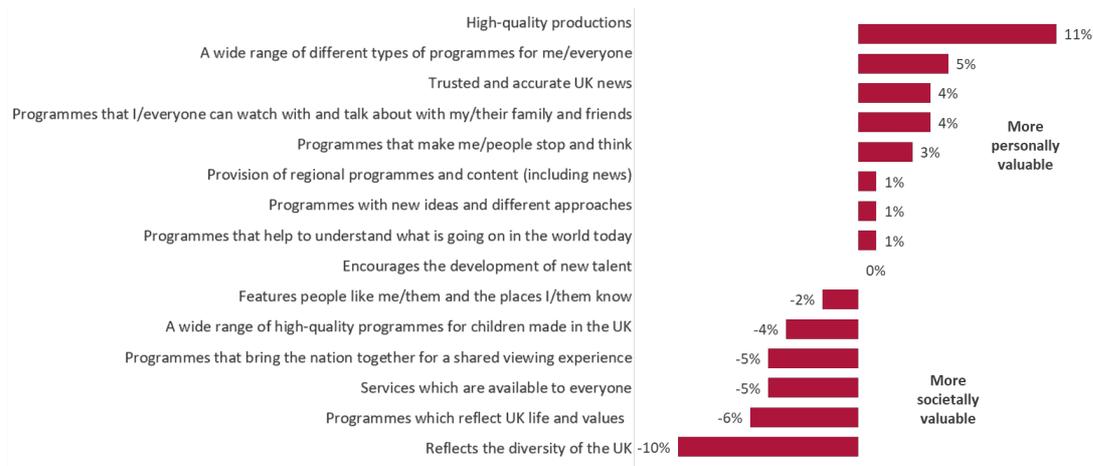


C3a. What three benefits do you think are most valuable to society overall?  
 Base: England (n=1014) Wales (n=415); Scotland (n=415); Northern Ireland (n=415)  
 N.B- All CATI respondents were first asked this for each statement: C3. For each benefit, please could you tell me how valuable it is to you societally?

## Personal versus societal value differences

The chart below shows the percentage point difference between personal and societal values. ‘Programmes which reflect UK life and values’ and ‘reflects the diversity of the UK’ are seen as more societally valuable, whilst high quality productions are seen as more personally valuable. As we saw in the previous quantitative survey in March, attributes with a more personal skew tended to be those offering personal enjoyment, such as quality and range, whereas attributes that are more related to serving and representing UK society are more societally valued.

Figure 7: Top three most valued PSB benefits – personal vs. societal – percentage point difference



C1a. The following list describes the range of benefits public service broadcasting is broadly designed to deliver. Could you please review the list of potential benefits in full before telling me which three you consider to be the most valuable for you personally. C3a. What three benefits do you think are most valuable to society overall?

Base: All respondents (n=2257)

N.B- All CATI respondents were first asked this for each statement: C1/3. For each benefit, please could you tell me how valuable it is to you personally/societally?

## Streaming services and PSB services compared

We added some new questions to our September research, designed to help us better understand the differences between PSB and non-PSB services, across a wide range of features. We asked respondents who used both PSB and streaming services to consider a range of attributes of media services, and to select whether they thought PSB services or streaming services were better at each.

PSBs are generally seen as being better than streaming services at offering programming reflective of the UK life and values and diversity, as well as providing programmes to help people understand what is going on in the world today.

Whilst half (51%) of 16-34 year olds who use both PSB and streaming services think that PSB services are better at *'providing programmes which reflect UK life and values'*, seven in ten (70%) of 35-54 year olds say the same, alongside 76% of 55+ year olds, and a similar pattern across age groups is seen for *'reflecting the diversity of the UK'*.

Those from ABC1 households who use both PSB and streaming services are significantly more likely than those from C2DE households to say PSB services are better at *'featuring people like them and places they know'* (63% vs. 52%). The same pattern is true for *'providing services which are available to everyone'* (59% vs. 49%), *'providing programmes which reflect UK life and values'* (68% vs. 61%) and *'reflecting the diversity of the UK'* (67% vs. 58%).

Figure 8: Statements where PSBs are viewed as delivering better



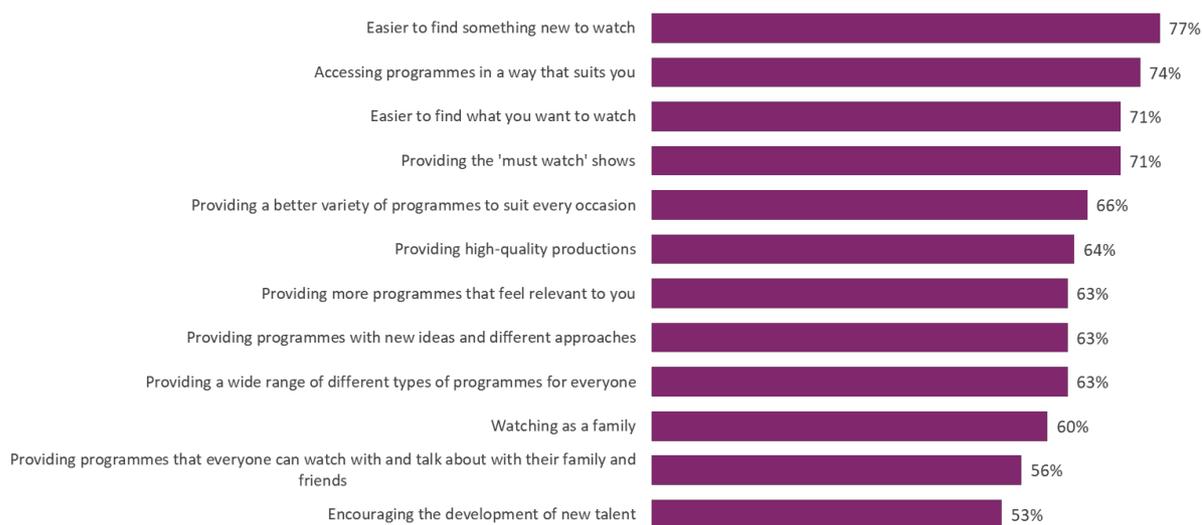
C4. In your opinion, are the PSB services or Streaming platforms better at/for? Base: all who watch both PSB and SVoD services (n=1142). Showing % selecting PSBs.

By far, streaming services are seen as better in terms of accessing content; around three quarters of those who watch both streaming services and PSB services say it is *'easier to find something new to watch'* (77%) and *'access programmes in a way that suits you'* (74%). All age groups, except those

aged 75 and above say streaming services are *'easier to find what you want to watch'*, with four in five (81%) of 16-34s saying this.

Streaming services are also seen as being better than PSBs for *'watching as a family'* (60% vs. 40%, respectively). The highest proportion who hold this opinion are the 25-34s, with 71% saying streaming services are better; in comparison, 60% of 16-24s say the same, and 47% of 55+ year olds.

**Figure 9: Statements where streaming services are viewed as delivering better**



*C4. In your opinion, are the PSB services or Streaming platforms better at/for? Base: all who watch both PSB and SVoD services (n=1142). Showing % selecting streaming services.*