

.YONDER

Exploration into audience expectations of the BBC in the current media environment

**Research conducted for Ofcom by Yonder to inform
the future regulation of the BBC**

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1. Overview

There have been significant changes in the media landscape in recent years, with audiences having more opportunities to access content via different services and devices. In particular, the growth in the number of streaming services is providing more content for audiences to consume at their convenience, whenever and wherever they are.

Ofcom commissioned a programme of quantitative and qualitative research to investigate where the BBC sits in the current market, and to better understand use of and attitudes towards the BBC.

More specifically, the research sought to understand how audiences are consuming media and how they make decisions about what to watch or listen to, with a particular focus on:

- The media decision-making journey, including:
 - how audiences decide what content to consume;
 - how audiences use different providers and services;
 - level of enjoyment;
 - attribution of content;
 - the extent of any consequential activity / decisions following media consumption.
- What people want and expect from the BBC now, given the huge range of content available to audiences via other services, including:
 - how audiences compare the BBC to other providers for different genres;
 - the extent to which they see BBC iPlayer and BBC Sounds as destinations;
 - if and how audiences feel represented by the BBC.
- Actual consumption and attitudes towards BBC content when separated from any potential bias of overall brand/institution perceptions, including:
 - the role the BBC plays in audiences' real-life consumption behaviours;
 - if and how behaviours differ from stated perceptions;
 - impact of perceptions on perceived impartiality of BBC news content.
- The extent to which content delivers against the BBC's public purposes to inform, educate, and entertain, including:
 - if people relate the core purposes to BBC content;
 - what audiences consider important for the BBC to provide and why.

This research follows on from the '[Understanding audience perceptions of the BBC during Covid-19](#)' research commissioned by Ofcom, conducted by Yonder and published in November 2021, which this report will refer to where relevant.

2. Methodology

Yonder conducted this study as a three-phase quantitative/qualitative research project.

Quantitative stage

- Online survey (c.20 min) using an online panel (YonderLive)
- Fieldwork period: 17th October – 20th of October 2021
- Sample: online nationally representative sample of 3,026 individuals aged 13+
- Quotas set for gender, age, socio-economic group, and region

Qualitative stages: Online diary task and focus groups

The qualitative phase included an online diary task, adult focus groups and smaller triad focus groups with children. At the end of the quantitative survey, all adult respondents were asked to participate in a follow-up qualitative study. All interested adult respondents were recontacted for the diary task and online focus groups. All under-18 participants were found via specialist qualitative recruiters.

3. Executive Summary

1. **Motivations and behaviours in content consumption are complex and highly individual. The research identified that people broadly navigate content based on three key media moments: habit, mood, and occasion.**
 - i) **Habit:** Choosing content that is *part of people's every day or weekly lives and routines*. This type of media moment tends to feel reliable and safe and is therefore highly valued, such as the morning news or evening soaps. The BBC and other broadcast channels (TV and radio) are perceived to be better at serving habitual media needs compared to both subscription video-on-demand services (SVoDs)¹ and broadcaster video-on-demand services (BVoDs).²
 - ii) **Mood:** Choosing content based on *how people are feeling* and personal interests. This type of TV moment is engaging though it tends to have less lasting impact. It can be easily replaced by the next 'big' programme, and we find a lot of 'binge watching' behaviours here. The SVoDs tend to lead in this area as they can offer the volume and variety to deliver to different moods.
 - iii) **Occasion:** Choosing content because it provides *a special moment* such as live sporting or entertainment events that people want to watch when they are broadcast live. This type of media moment is highly engaging and valued as it brings people together and creates excitement. The BBC's TV channels are a go-to for this type of programming. Some feel ITV also fulfil this moment with their live entertainment shows.

¹ Paid subscription video-on-demand services such as Netflix, Amazon Prime Video and Disney+. Under this model, consumers pay a flat fee, usually on a monthly or annual basis, to stream and/or download content.

² This type of video on-demand service may be free or paid-for. This label refers to services provided by broadcasters such as the public service broadcasters (PSBs) and Sky. Services include BBC iPlayer, ITV Hub, All4, My5 and Sky Go. These services can offer more than just broadcast catch-up viewing.

2. In addition to this, there are six contextual elements that frame what specific piece of content audiences choose in each moment.

- **Emotional:** Feelings and moods people have and are trying to achieve (e.g. being bored and looking for excitement, or stressed and looking for a positive uplift)
- **Personal:** Individual interests, values, or memories of something they recently enjoyed
- **Contextual:** Day of the week, time of day, how much time people have, what else they are doing at the same time
- **Social:** Who else is in the room, who people are watching / listening with, their relationship to other viewers / listeners and their moods / interests (more TV than radio)
- **Cultural:** what other people are watching / listening to at the moment, what conversations viewers / listeners can be part of, any advertising they have seen
- **Prompted:** instantaneous prompts that people act upon such as provider recommendations, algorithms, and auto-play

These factors come into play for every content choice across the three broader drivers of habit, mood, and occasion.

3. There are now many providers that satisfy a broad range of these media needs across live, catch-up, and on-demand content and across a variety of different genres.

The research showed that media consumption behaviours are not fixed and are constantly evolving, with people using a myriad of platforms to satisfy their media needs. This includes combinations of BVoD services, SVoD and paid music streaming providers as well as traditional live TV and radio. People may use only some, or all of these, to access the mix of content that feels right for them as an individual and that they want at any given moment.

4. Within this environment, on-demand content is becoming increasingly important for audiences – more so than traditional broadcast TV. However, SVoD and BVoD services tend to be used in different ways.

The convenience and flexibility of accessing content with on-demand services means these platforms are dominating how consumers currently access TV content across life stages. Audiences typically perceive SVoDs as services which offer a wide volume and variety of content and enable them to find something to watch when they don't have something specific in mind. On the other hand, BVoD services are generally being used for specific shows or catching up on programmes previously shown on broadcast TV.

5. Nevertheless, the research shows that there is still a role for traditional broadcast content – especially for news, special events and live entertainment shows.

Traditional broadcast TV content is still considered a basic access point to daily information for most audiences. Broadcast TV is especially connected to moments of bonding with family and friends and feeling part of a wider community over live entertainment shows and sports events.

SVoDs are not seen to be able to provide live entertainment that connects people over a shared experience at the same time. Some people also mention that the amount of content across SVoD

services can be overwhelming and confusing, while broadcast TV are perceived as easier and more reliable to navigate.

For audio content, people appreciate Spotify, Apple Music and Amazon Music for their personalised experience and wider range compared to radio. Similar to TV, people still value live radio for news and informational content, and radio also provides easy access to content when travelling in the car.

6. Within this varied landscape, the BBC continues to be seen as a key provider, delivering high quality content across its mission to inform, educate and entertain.

The BBC is mainly associated with inform and educate content as people use BBC news programmes and the weather app habitually to start and end their day. However, BBC News, BBC Bitesize, Horrible Histories and Blue Planet also contribute to the perception that the BBC delivers informative and educational content. Any negative perceptions of the BBC's impartiality held by a small number of people did not seem to impact this association and they would still consider using the BBC for informative content despite this.

The BBC is also known to deliver content that entertains through programming such as *Strictly Come Dancing* and *Line of Duty* which brings people together and creates appointment to view content. Entertainment that is of high quality is a key strength of the BBC and where it leads against its competitors. However, it can struggle to compete with the volume and variety of entertaining content from SVoDs, which are often top of mind for this type of content as people perceive them to have the commercial influence to create and promote a high volume of content.

7. Diversity of representation is important to people and the BBC is well placed to deliver this

When asked what the BBC should do more of in the future³, over two fifths of people feel the BBC should make a wide range of different programmes, with a third saying that they should include people from different backgrounds and content that features their region.

In comparison, when asked how well the BBC is performing⁴ against these measures, a third say that the BBC performs well in showing a wide range of different type of programmes, with just over half having a neutral opinion and less than one in ten saying that the BBC perform badly. This was ranked as the second most important factor for the BBC to do more of but also ranked first for performing well.

Similarly, more than a third also felt that that the BBC performed well in providing content featuring people from different backgrounds, with around half remaining neutral. However, only one-fifth rated the BBC as performing well for content that features their region or features people like them, with six in ten remaining neutral and one in ten rating the BBC's performance as bad. This suggests that although the BBC are not performing badly, more could be done to deliver diversity.

People associate the BBC with quality over quantity of entertainment content. They also tend to perceive BBC dramas to be intelligent and even educational in their nature, for example by exploring interesting and challenging themes and topics, as well as using recognisably British settings and

³ Respondents were asked to rate the degree to which they agreed or disagreed on a scale of 1 to 10 for a series of statements relating to what the BBC should do more or less of. Scores were then aggregated into 8 to 10 ratings for agree, 4 to 7 ratings for neutral and 1 to 3 ratings for disagree.

⁴ Respondents were asked to rate the degree to which they thought the BBC performed well or badly on a scale of 1 to 10 for a series of statements rating to the BBC's performance. Scores were then aggregated into 8 to 10 ratings for performed well, 4 to 7 ratings for neutral and 1 to 3 ratings for performed badly.

storylines. Younger audiences mentioned existing example of this such as *I May Destroy You* or *Fleabag*.

The BBC tends to feel the least relevant to younger audiences aged around 16-20 years old. They have grown up with the BBC in the background (e.g. when parents are watching) and through CBeebies, CBBC and BBC Bitesize but then feel the BBC becomes less relevant for their age group.

8. SVoD providers are seen to be leading the BBC in representing diversity, mainly, by means of offering a higher number and wider range of titles.

Audiences often use variety of content as a proxy for perceptions of a diverse range of people and feeling represented as they can find content that feels relevant to them more easily. SVoDs are well placed to deliver to this perception, and they achieve a sense of diversity through the sheer volume and range of content they can offer. In particular, the 16-20 year-old audience does find relevant content on the SVoDs, while at the same time they feel less catered for by the BBC.⁵

⁵ Please note this research took place before the re-launch of BBC Three as a broadcast channel.

4. How do audiences decide what to watch or listen to?

The qualitative research showed that there are a range of factors that influence how people make decisions about what content they consume. These decisions are highly individual, complex and specific to each moment and each piece of content chosen.

Audiences navigate their choices around habit, mood and occasion

Across the research, we were able to identify three key motivations that people have when navigating the media environment. Content chosen by audiences tends to broadly fall within one of these brackets:

- i) Audiences are choosing content out of **habit** as it is part of the routine of their day or week. Examples include waking up and putting on the radio for news or watching soaps or game shows in the evening after work.
- ii) They also choose content in line with how they are feeling and their **mood**, and they use different personal interests to decide what would give them what they need in the moment. For some, this could be that they are bored and they watch *Squid Game* as they have heard a lot about this show. For others, it could be watching *Friends* because they want something light-hearted and fun and they are familiar with it so they know they will like it.
- iii) Audiences also choose content that creates an **occasion** and brings people together. For example, a live event such as sport or a Saturday evening show like *Strictly Come Dancing*.

Habitual content is important to audiences but tends to have low engagement

Content that is chosen out of habit tends to be routine driven and plays a key role in people's lives as it feels reliable, relaxing and comforting. Content such as the news, weather, soaps, and quiz shows are examples of content people watch or listen to out of habit. The regularity of this type of programming makes it highly valuable to audiences as it feels safe and predictable. However, people often consume this content on 'auto-pilot' while they are doing other things at the same time, e.g. household chores or checking their phone. Therefore, it does not always engage people fully and can, at times, be just on in the background.

Audiences use radio, online and TV content in a habitual manner, with live broadcast playing a central role.

"There are my filler programmes, every evening at 7.30pm I sit down to my soaps"

Woman, 30-55yrs, Family, older children (Diary)

"I listen to BBC 6 Music every morning whilst I get ready for school, but rarely otherwise"

Boy, Under 18

"...like all other soaps I watch out of habit"

Woman, 30-55yrs, Family, older children (Diary)

The BBC performs well in delivering habitual content compared to other providers

The BBC is known for being reliable, familiar, and comfortable which is what people are seeking when it comes to habitual content. In comparison, the SVoDs, like Netflix, Amazon Prime Video and Disney+, are not usually known for offering this type of content and hence are not strongly associated with these values.

BBC news is still very much part of audiences' day to day, and we find that the young people we spoke to are growing up with BBC news because their parents are watching or listening to it in the home. Thus, they are often adopting the habit of watching or listening to BBC news at various points of the day or engaging with it online. While BBC news is the key driver of a habitual media moment, the BBC also delivers to this need through programming like the *The Great British Sewing Bee*, *The Repair Shop*, *EastEnders* or *Pointless*. Other public service broadcasters like ITV also play a key role in this space.

Choosing content based on mood and personal interests can be engaging but often has limited lasting meaning for audiences

Content based on mood gives audiences a sense of escapism and feels entertaining and exciting. There is often a buzz around the content which makes consumers want to watch it. While this type of content is engaging, the next big talked about show or another piece of content that is available for binge-watching often replaces it and therefore, it does not always have much lasting impact or value.

Programmes like *Friends*, *Squid Game* or *Line of Duty* are examples of content that fulfil this media moment.

"[I watched] You on Netflix [because] my friends at college watch it and it was trending on Netflix...very gripping and tense"

Girl, Under 18

"Finished the series I had been watching and Riverdale was a Netflix recommended watch...binge watched a few episodes...they are intriguing and easy to just keep watching"

Woman, Family, younger children

"Close to You (Channel 4) ...I had seen this advertised on TV recently and wanted to watch it...I was in the mood for a thriller today"

Man, Family, older children

SVoDs are top of mind when it comes to choosing content based on mood

SVoDs are leading in delivering content for a mood moment. The volume and variety of content they produce means audiences feel there is always something on these platforms that they will find to watch. We also found that when people don't have a specific programme to watch, about a third (31%) said they turned to Netflix to search for content compared to 16% for the BBC.⁶

Another advantage SVoDs have in this moment is that their platforms allow audiences to easily navigate and discover relevant and appealing content. Features such as personalised suggestions or auto-playing another piece of content the platform has identified as relevant help with this perception. There was also a sense that Netflix in particular feels like the standard for how people like to navigate content, e.g. easily accessible genres and sub-genres, suggestions and themes.

This is consistent with the research we [did during the Covid-19 period](#) where we found that SVoDs were the go-to platforms during lockdown where audiences were searching for content that offered them escapism. As people had more time, we found that SVoDs seemed to be offering the volume of content people were seeking to pass the time and allow them to binge on series after series.

Most people also feel that SVoDs deliver content that people talk about and are therefore more likely to be top of mind for this type of moment. They appreciate that SVoDs have more funding available to invest in

⁶ Q11: When you do not have a specific programme you want to watch, which one of the following TV and video services do you usually turn to first?

raising awareness and hype around new content. In comparison, audiences feel the BBC is not as widely known for creating content that is talked about but also recognise that the BBC is more limited with the funding it has available.

Choosing content based on occasions is less frequent but can be more meaningful

This is where people are choosing to watch live entertainment such as a Royal Wedding, sporting events or shows like *Strictly Come Dancing* or *I'm a Celebrity...* These moments tend to build a sense of anticipation and often bring people together. They may be less close to personal interests but create engagement and excitement around taking part in the social occasion and can be impactful in the longer term e.g. by strengthening relationships or making people feel part of something.

The BBC is strongly associated with delivering content for occasions

To meet needs for occasion-based viewing, content needs to be perceived as high quality or providing unique access to an event. Live broadcast has a central role for this moment as people build up excitement around watching something at a specified time.

The BBC's heritage in live broadcast gives it an advantage over the SVoDs here as this is type of content that the BBC is known for. Audiences historically relate the BBC to impactful events coverage like the Royal Wedding or Wimbledon as well as to more regular live content such as *Match of the Day*.

"When big occasions happen – it will [be] on the BBC like the Royal Wedding or Wimbledon. BBC is the place to turn to when something big is taking place"

Man, 30-55yrs, Family, younger children (Diary)

"The BBC helps to give a sense of community with live events because everybody will talk about it the next day and say "did you see that last night" – you don't get that with streaming platforms"

Man, Empty Nester

Additionally, there are a wide range of other factors influencing specific content choices within habit, mood and occasion

The online media diary task demonstrated the viewing patterns of some of the people in this research study, which can be summarised in the three media moments. The diaries also highlighted a range of wider influences in terms of how people choose specific pieces of content.

For example, people often decide what to watch depending on who they are with, what time of day it is or if they want to watch something that they have heard about on social media or from a friend – for example to be part of a social or cultural conversation.

Figure 1 summarises the questions and thought processes that people go through to decide on the specific piece of content they want to watch in different moments.



Figure 1: Influences on how people choose content

“I enjoy Marvel films so had been wanting to watch it for a while and then saw it advertised on Disney+. I watched it at home on TV with my dad because we are both Marvel fans. We sat and had a takeout while watching.”

Girl, under-18s (Diary)

“I was scrolling through Netflix and saw Squid Games which everyone has been raving about and I had never seen it, so I watched it to see what all the fuss and excitement was about.”

Man, 30-55yrs, Family, younger children (Diary)

“If I watch anything too exciting or involving in the evening lately, it ends up [...] stopping me from dropping off to sleep, or it gives me weird dreams, so I wanted to watch something light and easy.”

Woman, 55+, Empty Nester (Diary)

Case studies



Diary

Examples from the diary demonstrate how people across life-stages navigate what content they choose across their everyday life

To show the variety of influences on specific content choices across the three media moments for different individuals, we have chosen three case studies from different life- stages.

Case Study 1: No children: Meet Francesca⁷

Francesca finds the convenience and flexibility of watching content through SVoD services appealing. It allows her to watch what she wants in and around her busy lifestyle. She chooses to watch some content based on how she is feeling and who she is with. For example, while primarily a viewer of content on SVoD providers, she reserves broadcast TV for more occasion-based moments with her family.

How would you describe yourself when it comes to watching TV/listening to content?

Regarding my TV habits, I tend to sway more towards online streaming services such as Netflix and Amazon Prime. They are easy to access, and I can fit them around what else I am doing on the day. Occasionally, I watch live TV when visiting family or going to the pub for a specific match. I usually watch box sets and occasionally action or documentary films. My guilty pleasure are chick flicks though!

I used to listen to a lot of radio stations such as Kerrang! and Absolute Radio, but in the age of music streaming services, I spend a large majority of my time listening to music on Spotify and/or Tidal.

What I have been watching...



“I needed something easy to watch before going to sleep and I’ve watched The Office many times”



“Myself and my partner were on the train home from a day out and wanted to be entertained”

⁷ Reader note: names have been changed to protect participants’ anonymity.

Case Study 2: Family, young children: Meet Mary



Diary

Mary's online diary shows that choosing content fits around her life as a mum and the care she has for other people in her life. Therefore, she often chooses content as background noise while doing other things or based on what other people in her life are watching and talking about. This could be friends for the moments that she takes to herself to recharge or it could be because she wants to spend time with her family in the evening and leaves the choices up to her children.

How would you describe yourself when it comes to watching TV/listening to content?

I would describe myself as a binge watcher when it comes to TV, I love nothing more than being able to watch episode after episode of a new show when I find time for myself. I have recently started watching more TV with the family, although personally I prefer the catch-up method or recording to watch later. I love to watch crime dramas, thrillers, documentaries, and animation.

I also listen to the radio most days, usually choosing commercial radio while doing chores.

What I have been watching...



"Watching the morning news (BBC Breakfast on BBC One) has become part of my daily morning routine"



"I was prompted to watch this after speaking to my friend on the phone, she told me there was a new series available on Netflix."



"The kids wanted to watch a Christmas film and we all agreed on this one as we wanted a comedy. We decided what to watch together."

Case Study 3: Family, older children: Meet Daniel



Diary

TV plays a big role in Daniel’s life and he has strong and long-standing habits that make him feel comfortable and relaxed. Traditional TV is important to him as he finds a variety of shows that he watches regularly. He also uses it to connect to his children on the weekends. However, when he is looking for escapist or more stimulating content, he also uses Netflix to find something new to watch.

How would you describe yourself when it comes to watching TV/listening to content?

I absolutely love TV, I love all sorts of programmes. Ant and Dec’s *Saturday Night Takeaway* and *I’m a Celebrity* are my favourites. I love game game shows such as *The Chase*, *Beat the Chasers*, *The Wheel*, *Judge Rinder*. My wife has got me fixed on *Strictly Come Dancing*. I really like watching *The Cube*, *Gogglebox*, *Top Gear*. I really like my sports and watch my favourite team Man City whenever they are playing. I love my crime dramas and really started to get into *The Crown* and other period dramas as well. Jonathan Ross and anything with Jimmy Carr in as I find him really funny. And any talk show programmes I love as well.

I watch all these programmes on BBC, ITV, Channel 4, Netflix, Amazon Prime, Sky, BT and Disney+.

I love listening to local commercial radio and BBC Sounds podcasts.

What I have been watching...



“Emmerdale - It made me feel happy to be watching the continuation of the soap and what was going to happen next.”



“I was scrolling through Netflix and saw Squid Game. I spoke to my wife to say I was really engrossed in this series from start to finish.”



“My kids love The Wheel, so we watch it together– it’s a family show, it comes after Strictly.”

5. How do audiences navigate the variety of providers and services?

The current media environment in the UK is varied and offers audiences a multitude of ways to access and consume content via live and on-demand video and audio content services and providers. While different types of providers serve different roles in audiences' daily lives, we observed that people are consuming more and more content via on-demand services that offer them flexibility, such as BVoDs, SVoDs and audio streaming providers. Traditional broadcast TV and radio still play a role as well, but audiences tend to use them more for specific content and occasions.

Audiences increasingly value on-demand content over traditional channels

People increasingly use on-demand content that offers them the flexibility to watch or listen in their own time and wherever they are. Audiences feel it is easier to find content that is right for them compared to traditional broadcast TV or radio because they can either search for it specifically or the provider personalises suggestions for them based on what they watched or listened to previously. Creating personal playlists was also mentioned as a particular benefit of audio streaming platforms.

"That's why streaming services are pretty good because there's usually stuff to suit all tastes"

Woman, 55+, Empty Nester (Diary)

"It's probably out of convenience, I can watch it on my phone on my own and really engage with the content in my own time"

Man, 18-30yrs, no children (Diary)

"I like to experience different programmes, so with Netflix or Prime it means I'm not tied to one platform and always find something I want to watch"

Man, 18-30yrs, no children (Diary)

In contrast, broadcast TV and radio are perceived to be associated with more specific occasions, times of day or programmes. They are also chosen if the content addresses a particular personal interest in that moment. Around six in ten said that they watch traditional TV to see specific shows that they regularly watch.⁸ This aligns with our finding that especially where mood is a deciding factor in choosing content (not set habits or occasions), SVoD providers have an advantage with the variety of content on offer.

"For live TV – usually for me it is the news at 10 on the BBC or ITV"

Man, Family, older children

"If something we like is on then we will watch it, we do tend to watch live TV when shows are on at the time when we are available"

Woman, 30-55yrs, Family, younger children (Diary)

⁸ Q9: Which of these best describe how you choose what to watch on the following?

SVoDs are used for a wider variety of reasons than BVoDs

SVoDs and BVoDs both give people freedom and flexibility to watch what they want when they want to watch it. However, Figure 2 shows that audiences mainly use BVoD services to catch up on shows they have missed, whereas a key reason for audiences to use SVoDs is also used to browse for content.

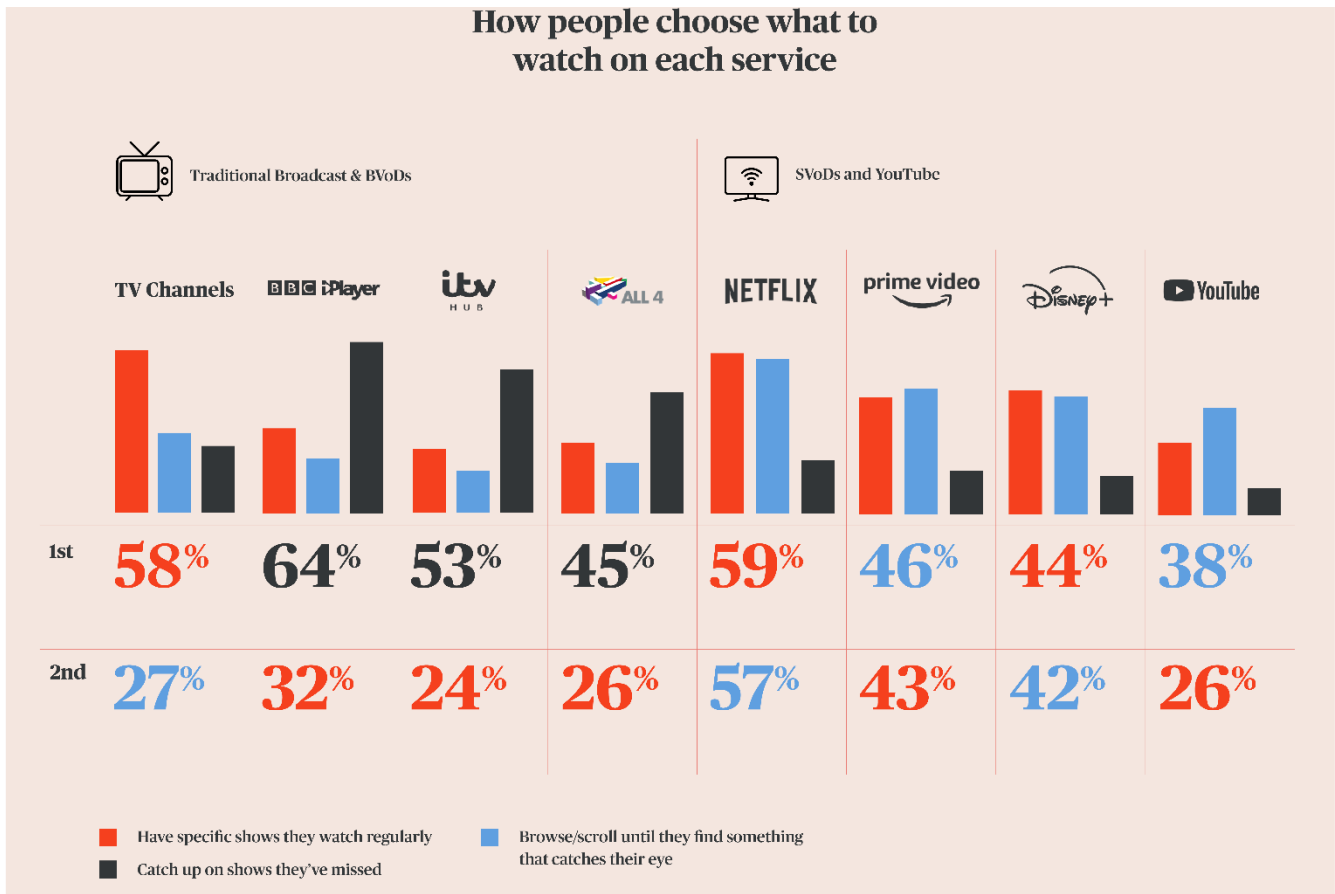


Figure 2: The top reasons people choose what to watch on different services⁹

Although much of the focus has been on SVoD, YouTube was also frequently mentioned as a key content provider. Audiences perceive SVoDs and YouTube to cater for a wider range of people’s different interests. A key reason for this is that they offer larger volumes of content to them when compared to BVoDs (as well as to traditional channels). Audiences also feel that they can find a high degree of content that feels personalised on these services. Therefore, not only are people using these services to watch their regular programmes, but they also use them equally to explore new content.

Netflix and YouTube were the main services chosen first when people were asked which service, they would turn to first if they did not have a specific programme in mind to watch – with BBC TV channels ranking third. Overall, almost one-third turn to Netflix first (31%) – a significant share compared to other channels and services – and 15% to YouTube.¹⁰ In comparison, 10% chose BBC TV channels and a further 6% chose BBC iPlayer as their first place to browse for content.¹¹

⁹ Q9: Which of these best describe how you choose what to watch on the following?

¹⁰ Q11: When you do not have a specific programme you want to watch, which one of the following TV and video services do you usually turn to first?

¹¹ Q11: When you do not have a specific programme you want to watch, which one of the following TV and video services do you usually turn to first?

Netflix was also the most likely SVoD service to be used to browse content, with almost three in five (57%) using it for this purpose.¹² This was followed by more than two-fifths (46%) who chose content on Amazon Prime Video like this and around two-fifths did so on Disney+ (42%) and YouTube (38%).

Conversely, use of BVoDs (and traditional TV) for exploring new content is less than a third. Among the BVoDs, there was higher engagement with BBC iPlayer to catch up on shows they've missed and to watch specific shows they regularly watch, compared to ITV Hub and All4. Just under two-thirds (64%) used BBC iPlayer to catch up on shows they have missed, followed by more than a half (53%) using ITV Hub and over two-fifths using All4. Around a third (32%) also chose BBC iPlayer to watch specific shows they regularly watch, and this falls to around a quarter for ITV Hub (24%) and All4 (26%).¹³

Platform preferences indicate a larger generational shift towards services that cater for personal preference and individual choice

Younger audiences told us that they tend to find more value in SVoD providers than older audiences, who tend to watch more traditional broadcast content, including the BBC. The survey data also shows that minority ethnic groups and women tend to mirror the trend towards using SVoDs. A possible factor contributing to this could be a finding in the qualitative discussions, that the range and variety on offer with these providers is also perceived as more inclusive and catering to more diverse audience types.

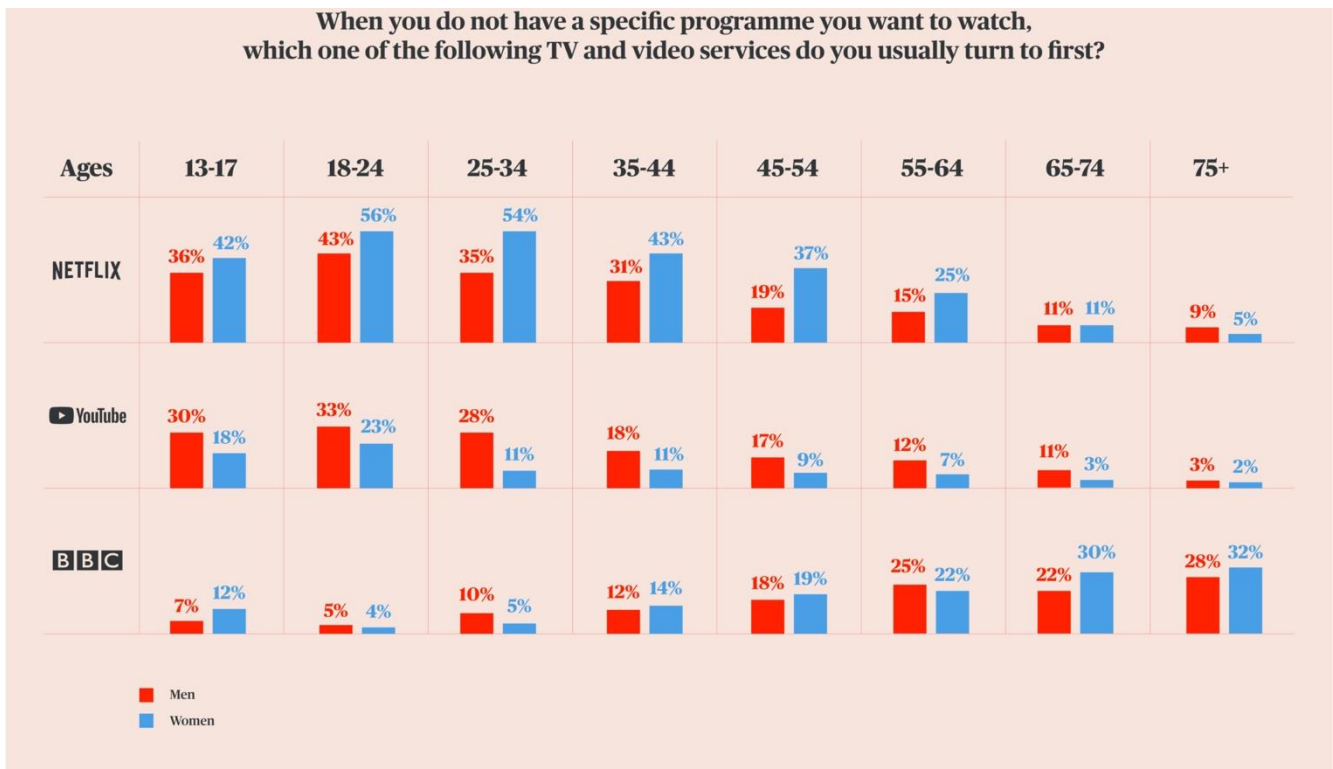


Figure 3: Age and gender differences for people who turned to Netflix, YouTube and the BBC first when they did not have a specific programme to watch¹⁴

¹² Q9: Which of these best describe how you choose what to watch on the following?

¹³ Q9: Which of these best describe how you choose what to watch on the following?

¹⁴ Q11: When you do not have a specific programme you want to watch, which one of the following TV and video services do you usually turn to first?

Netflix is preferred by younger audiences and women

The younger audiences are growing up with Netflix, which offers not only a large volume of content but also variety of content. Coupled with its easy-to-use interface, this makes Netflix the top-of-mind platform to search for content when they do not have a specific programme to watch. Almost half (47%) of those aged 16-34 opted for Netflix compared with 14% of those aged over 55. As shown in figure 3, women (56%) were also more likely to turn to Netflix than men (43%).

YouTube is preferred by younger audiences, men, and minority ethnic groups

The YouTube audience followed a similar age trend as Netflix for similar reasons. The preference for YouTube declined with age (22% for 16-34-year-olds versus 7% of those aged over 55). However, men preferred YouTube (19%) more than women (10%). Minority ethnic groups preferred YouTube (31%) equally as much as they did Netflix (32%) and significantly more than those whose ethnicity was White (12%). Males for most age groups prefer YouTube compared to females of the same age group, as shown in figure 3.

Any BBC channels are preferred by older audiences and white ethnic groups

The key difference for those who turn to the BBC as their first port of call, was that the trend seen for Netflix and YouTube is reversed. Preference for the BBC significantly increased with age (7% for 16-34s versus 26% for over 55s), with both men and women aged 55 and over preferring the BBC significantly more than those younger than 55 as shown in figure 3. Those belonging to white ethnic groups preferred the BBC (16%) more than those from minority ethnic groups (12%).

Younger audiences also seem to shift towards BVoDs as a first port of call for consuming traditional broadcaster content more generally

When comparing the age profiles for BBC iPlayer and ITV Hub, we can observe clear differences in how people choose to watch their content between younger (16-34-year-old) and older (55+ year-old) audiences. Figure 4 shows that catching up on shows they had missed was overwhelmingly high for older age groups for BBC iPlayer and ITV Hub. Catching up on shows they have missed was also the primary reason for using these BVoD services for younger age groups, but not as high as for the older groups. However, 'I have specific shows I watch regularly there' came a close second for younger audiences. For 16-24-year-old users of BBC iPlayer this was almost as high as catching-up on shows.

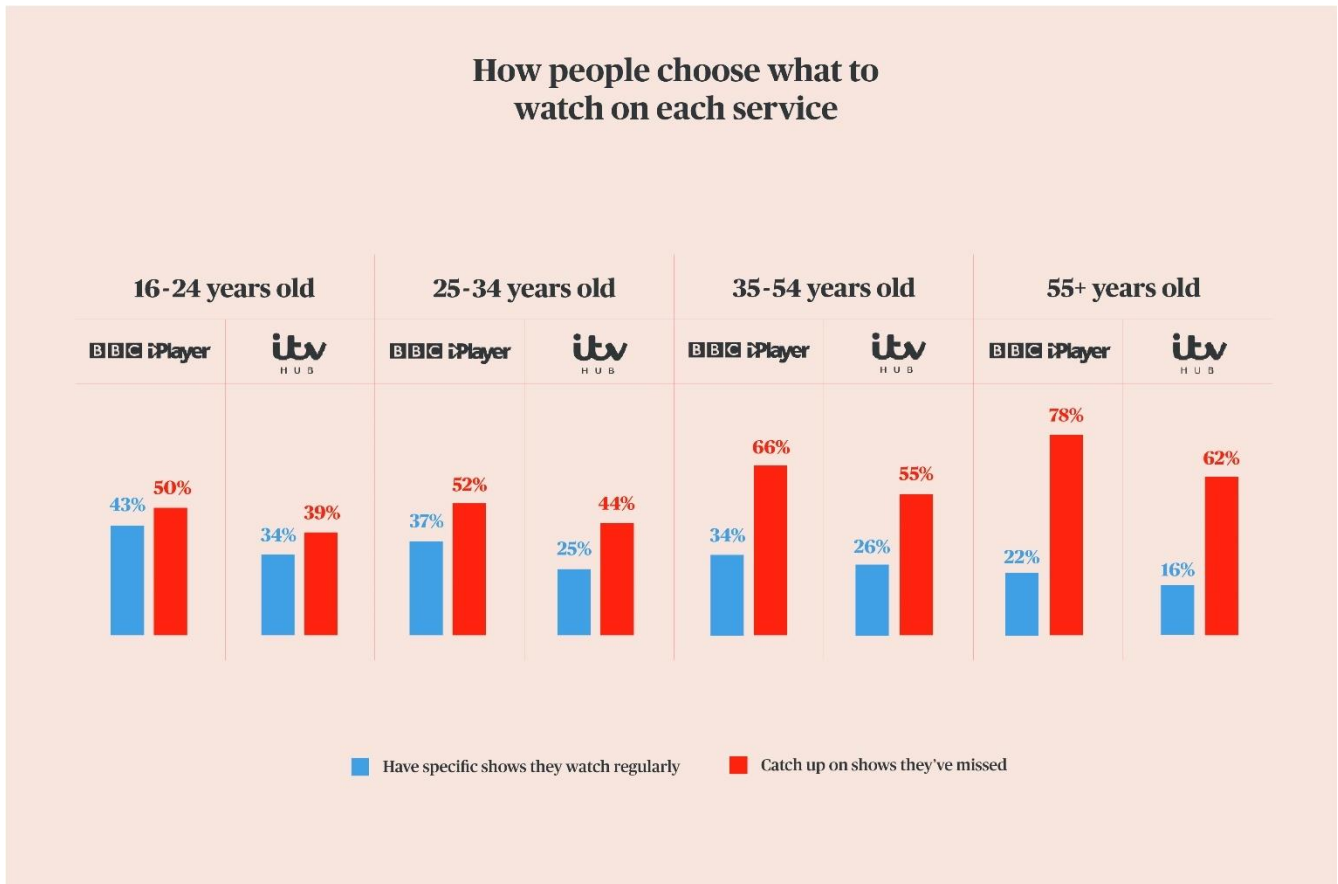


Figure 4: Top one and two reasons people use BBC iPlayer and ITV Hub, split by age groups.¹⁵

This indicates a fundamentally different way of engaging with broadcast content for younger audiences, especially for the BBC. It seems that for many in in this audience broadcast TV is not their first choice for content produced by traditional broadcasters. The qualitative research suggests that this may be related to convenience when living arrangements mean that live TV is unavailable to them or that they need to share it with others (i.e. when living with parents or friends). However, these audiences also told us that live TV is not top of mind for content more generally, and that they go to on-demand content first. For the BBC specifically, this means that a large number of younger audiences will generally watch BBC content that is interesting to them on BBC iPlayer rather than when it is on broadcast TV.

Audiences increasingly consider broadcast TV as less relevant to them personally and find it provides lower overall value than SVoDs

Consumers perceive SVoD subscriptions as low-cost and low-risk by providing a monthly payment model that can be cancelled at any time. They told us that this provides them with the flexibility to cancel or switch content when it no longer feels relevant, though most have several subscriptions at the same time. Already feeling that SVoDs provide more personally relevant content, consumers increasingly consider them to provide better value overall.

The annual payment of the TV licence feels high when paid all at once – and is not felt to account for the perceived lower relevancy of content. While the licence fee only directly funds the BBC, most consumers think the payment of the licence fee as a proxy for all traditional broadcast TV (and their associated BVoDs). This leads many to question the value of BBC TV and some in our sample had already decided to not pay the TV licence at all. There are individuals who may still consider traditional broadcast content (often BBC)

¹⁵ Q9. Which of these best describe how you choose what to watch on the following?

as their primary way to consume media. For some of them, however, there was a sense that they may also be less engaged with the wider media environment more generally (e.g., because of age, long-standing habits, time limitations etc.). This also aligns with wider finding that younger, more engaged audiences are leading a shift towards on-demand viewing.

“I buy one and cancel the other based on the content that this provider has, and I use the promotions they offer”

Man, 18-30yrs, no children (Diary)

“They are stuck with what they can and can’t do with the licence issues. I think it’s linked to the volume of content being produced – Netflix pumps out a lot when the BBC doesn’t produce as much”

Man, 30-55yrs, Family, younger children (Diary)

However, traditional TV remains an anchor amid emerging frustrations with SVoD services

There can be downsides to using SVoD services for some audiences. Ownership of programmes and films is perceived to regularly shift between different providers, making it difficult for people to keep up with who offers what and aligning this with personal need and tastes. Original content creates momentum but is also seen as a barrier to the perfect mix of content – people want to be part of the conversation but having all subscriptions is not economical and makes people feel they are paying ‘twice’ (e.g. if it is offered by several providers).

“There’s too many things to watch, it’s quite hard to decide what to watch, it’s overwhelming”

Girl, 14yrs, Under-18s (Diary)

At the same time, traditional TV still is relied upon by many as an access point to daily information and valued moments of bonding or belonging, especially at a national level. So, although broadcast TV is often intuitively less compelling, it has a unique selling point in that the ‘live’ element is not currently delivered in the same way by most SVoD platforms.

“TV is still about inviting people to watch it together, bringing in new topics and making it fun and engaging”

Man, 30-55yrs, Family, older children (Diary)

Most audiences also claim that they are aware that broadcaster content is available on other on-demand platforms

Almost 8 in 10 (78%) people say they are aware that BBC content is available on SVoD platforms¹⁶ and almost a third (31%) of people who use Netflix say they have watched BBC content on Netflix the last six months¹⁷. This is followed by almost a fifth (18%) for users of YouTube¹⁸ and around 1 in 7 (14%) users of

¹⁶ Q15: Were you aware that some TV programmes and shows which were originally broadcast on the BBC are available to watch on other services like Netflix, Amazon Prime Video and YouTube?

¹⁷ Q17. In the last 6 months, have you watched content on Netflix originally produced by any of the following broadcasters?

¹⁸ Q16. In the last 6 months, have you watched content on YouTube originally produced by any of the following broadcasters?

Amazon Prime Video¹⁹ who say they watched BBC content on these platforms.

We found that most people in the focus groups were aware that they can find BBC content like *The Serpent*, *Luther*, or *Line of Duty* on SVoD platforms. Younger audiences said that it does not matter to them if they watch BBC content on another platform. However, some older consumers prefer to watch BBC content on BBC TV or BBC iPlayer. Mainly this was based on habit and feeling most comfortable with watching it on a channel that they know well and have used for a long time.

In our previous research²⁰ we found that there was a lack of awareness that high-quality dramas like *The Serpent* were in fact BBC content and most audiences were surprised that shows like *Killing Eve* and *The Serpent* were BBC originals. However, this seems to not be the case to the same extent in this study.

Ease of use of other platforms is the main reason audiences don't use BBC iPlayer more to watch BBC content

More than a third say they watch BBC content on Netflix, YouTube or Amazon Prime Video because they find these platforms easier to use than BBC iPlayer. More than a quarter also first discovered BBC content on these platforms. We also found that around a third for each platform said that they watched BBC content there because the provider recommended it to them.

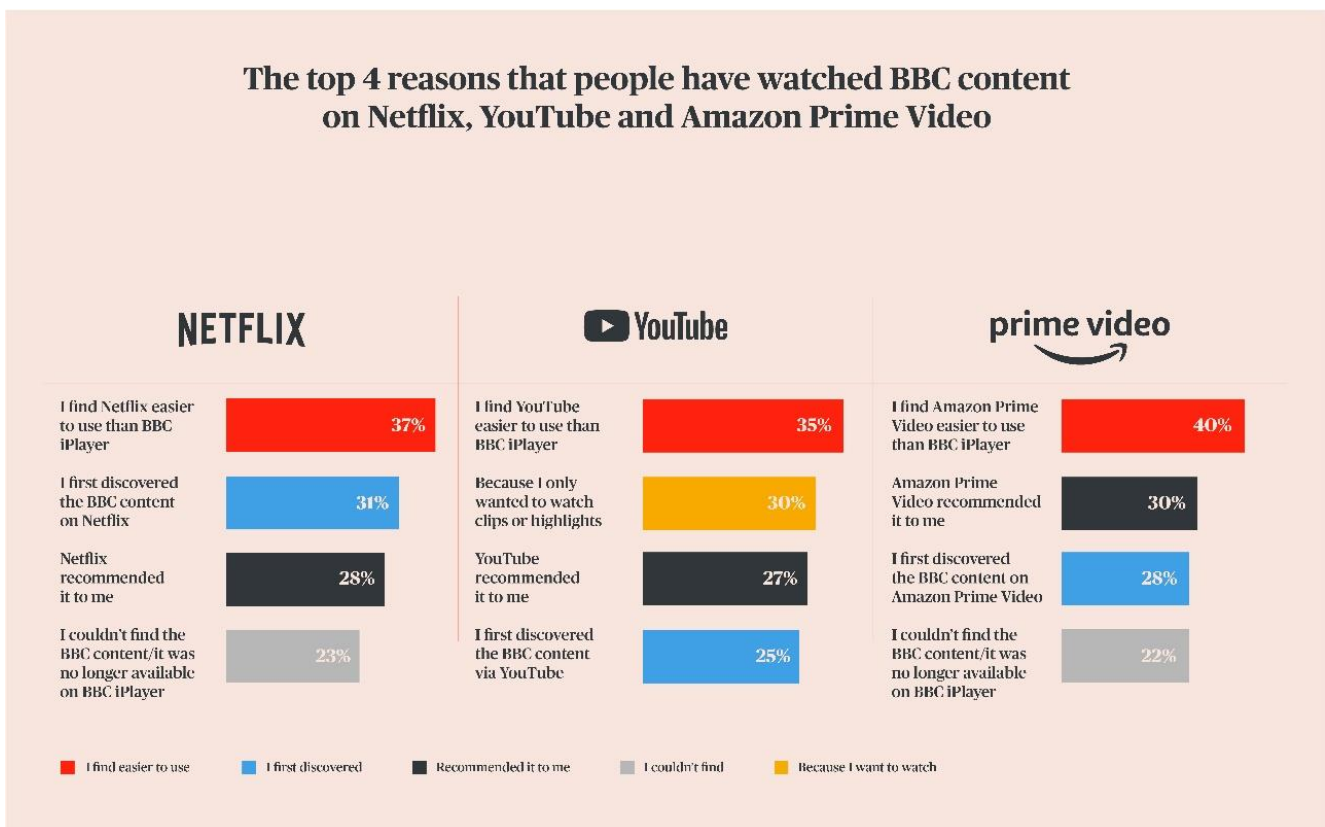


Figure 5: The Top 4 reasons that people have watched BBC content on Netflix, YouTube and Amazon Prime Video²¹

¹⁹ Q18. In the last 6 months, have you watched content on Amazon Prime Video originally produced by any of the following broadcasters?

²⁰ [Understanding audience perceptions of the BBC during Covid-19](#)

²¹ Q19: You said you had watched BBC content via YouTube, why was this? Q20: You said you had watched BBC content via Netflix, why was this? Q21: You said you had watched BBC content via Amazon, why was this?

In our previous research²⁰, we found a key barrier to using BBC iPlayer was its lack of useability and poor navigation and interface. However, in this recent study qualitative findings indicate that BBC iPlayer's' interface has improved but it still has some way to go compared to Netflix in terms of navigability.

“BBC iPlayer is like an old-fashioned library where you can browse some books. But Netflix and Prime have got a better algorithm. They feel more interactive compared to iPlayer which is more static.”

Man, 55+, Empty Nester (Diary)

6. How do people perceive the BBC, its value to the public and how it delivers on its mission to inform, educate and entertain?

Despite the proliferation in the availability of on-demand services, the BBC continues to be seen as a key provider within this varied and growing landscape of media services. Audiences also have an emotional relationship with the BBC from its long-standing presence in the people’s lives and the expectations of the public value it delivers. It is currently perceived to deliver high quality content across all three of the pillars of its mission: inform, educate and entertain. However, the BBC is seen to especially excel in providing informative and educational content and to a lesser extent in the provision of entertaining content.

Across most audiences spontaneous associations with the BBC were positive, though this does not translate to personal importance for everyone

We found that most people have broadly positive associations with the BBC and feel it is informative, reliable, educational, and entertaining. Spontaneous associations with it included high-quality dramas, the news and the weather. Some people in the qualitative groups, however, said that the BBC feels outdated, especially for comedies, and does not have enough variety.

The qualitative research also showed that the BBC continues to feel part of the fabric of the nation, though this does not always mean they actively engage. For some, this means that the BBC feels important as a part of everyday life that is used habitually and therefore feels present and reassuring. For others, there is a sense of nostalgia associated with the BBC, with families growing up with the BBC from one generation to the next, even if they do not currently use it as much. The quantitative results reveal that just under two-fifths (37%) consider the BBC as important to them personally²², though around half of those surveyed (52%) would miss the BBC if it were no longer available, particularly those aged over 55 (60%).²³

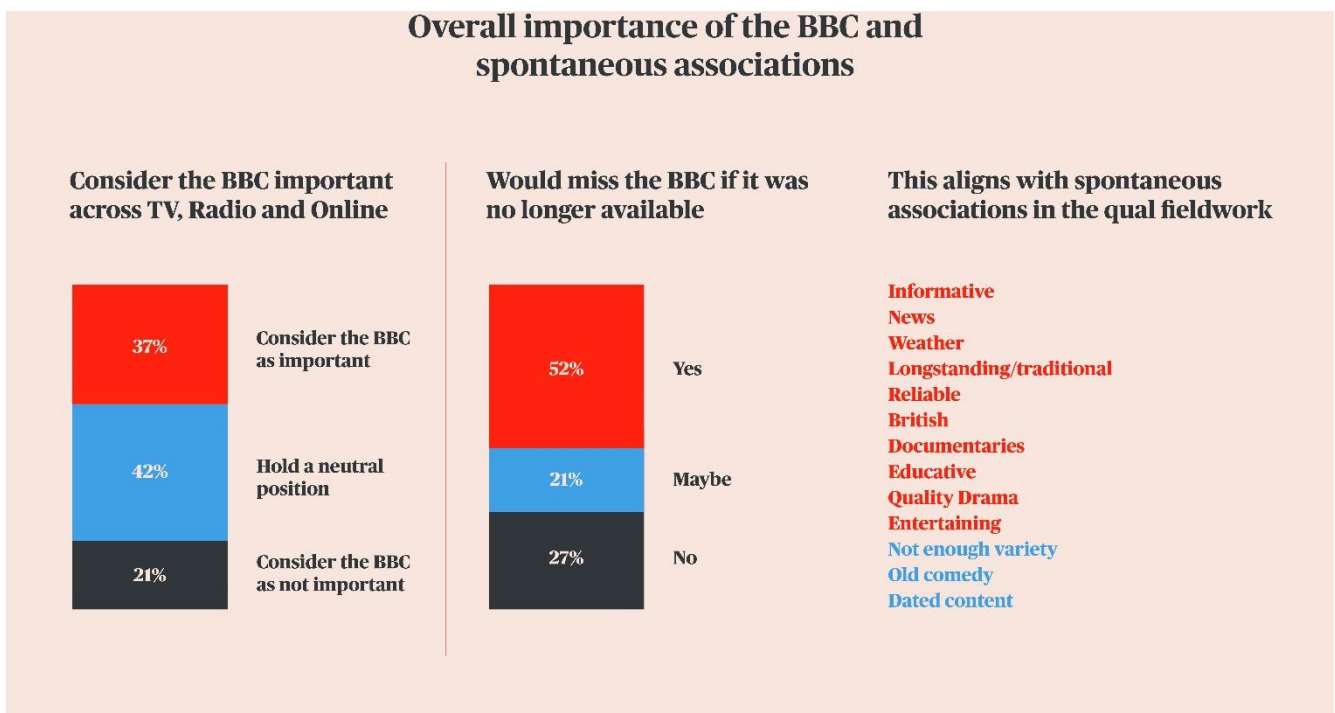


Figure 6: Overall importance of the BBC and spontaneous associations

²² Q25: Where would you place yourself on this scale in terms of how you feel about the BBC as a whole?

²³: Would you miss the BBC if it was no longer available?

Live broadcast moments are seen as a particular strength for the BBC

The way audiences use and feel about the BBC in their everyday consumption are closely aligned to the value they attribute to traditional broadcast more generally. Consumption of BBC content via broadcast TV and radio was among the most mentioned in the qualitative research. It is seen to fulfil a role in people's lives for moments of habit and occasion that the SVoDs struggle to provide in the same way.

This also relates to wider perceptions of the BBC's public value. Audiences feel it is the live broadcast content that contributes to this in an essential way by providing access to basic and key up-to-date information as well as to recognisably British occasions and events.

The BBC is delivering across its aims to inform and educate most strongly, while not being as consistently associated with entertaining content

The majority feels the BBC delivers on being informative through content like the news and weather. They also feel it is educational as it is known for high-quality documentaries, and content like *Horrible Histories* and BBC Bitesize give the BBC strong educational credentials.

To some extent, the BBC is known for entertaining content through its soaps and flagship quality dramas like *Luther* and *Line of Duty*. However, when compared to others, especially the SVoDs, audiences think it is more difficult for the BBC to compete and to stand out for providing entertaining content. The SVoDs dominate in this area with the volume and variety of content, and having the advantage of being able to invest in advertising their services widely, leading to greater awareness. This is consistent with our previous research²⁰ where the BBC struggled to compete for being known for entertaining content compared to the SVoDs.

However, the overall quality of news, educational and entertaining content are the top three topics considered as being the best thing the BBC does currently.

“Educational – because of the news and all the documentary programmes”
Girl, Under-18s

“Informative – I think of the BBC as reliable – I check BBC news as it is the most reliable.”
Man, Family, older children

“Entertainment – they always have good shows, there is always something to watch”
Girl, Under-18s

Most audiences feel the BBC's informative content is more reliable and accurate compared to other providers

The BBC's provision of news, weather and sport were mentioned as the most widely used informative content across all qualitative audience groups across a range of platforms including TV, radio and online. Others recognise the BBC's commitment to offering informative content through its BBC Parliament programming.

For most, the news is the content they engage with habitually at various daily intervals and they find the BBC news format appealing as it is short, succinct, and easy to understand, across TV, radio and online channels.

Audiences feel that the BBC could improve its delivery of local / regional / nations news content to truly reflect and represent news of the wider area and not focus primarily on the city it is based in e.g. BBC Scotland is perceived to mainly focus on the Glasgow area.

“Their news coverage is one of the best – they do a good job at being unbiased and it’s why I go to their websites for news

Woman, 18-30yrs, no children (Diary)

“I believe it is the only channel which live stream parliament, sometimes watch it on Wednesday for PM session

Woman, 18-30yrs, no children (Diary)

“BBC Scotland – not very good, incredibly biased to Glasgow because their headquarters are there.”

Woman, 55+yrs, Empty Nester (Diary)

The BBC is a trusted provider of educational content

Both parents and children trust the educational content provided by the BBC. This trusting relationship with BBC educational content starts from a very young age with CBeebies and CBBC and then graduates to slightly older primary school age children with programming such as *Horrible Histories*. It then sees children into the early teens where they are engaging with BBC Bitesize for GCSEs.

Presenters who are well known and trusted are associated with the BBC through impactful and memorable programmes, thereby supporting the BBC’s educational credentials. For example, David Attenborough is seen as linked to the BBC through programmes such as *Blue Planet*. For some, the BBC educational content stands out from the competition as it is interactive and entertaining. In our previous research²⁰ we found BBC Bitesize really supported parents and children through home-schooling.

“There’s some educational content on YouTube, but the BBC is best for higher quality. It’s also the people, like David Attenborough – they’re people associated with the BBC that you know and trust.”

Man, 18-30yrs, no children (Diary)

“Shows like Horrible Histories, they are entertaining, and it makes learning fun”

Boy, Under-18s (Diary)

“BBC has some thought-provoking content, I watched this programme about climate change, and it’s played on my mind, it made me think more about what I can do.”

Woman, Family, older children

The BBC is known for producing high-quality dramas and live shows, but audiences say it lacks the light-hearted entertainment and comedy programmes they find on SVoDs

Most audiences feel that the BBC produces high-quality entertainment content for specific moods or occasions, though they find it caters less consistently to the variety of their entertainment needs.

Audiences told us that the BBC produces dramas that are distinct because of their intelligent production and that they are more cerebral in their nature. Consumers perceive these dramas as unique, stimulating and engaging, though they can also feel more demanding to some. Dramas such as *Line of Duty* or *Killing Eve* are examples watched across audiences in this research study.

Conversely, the BBC stands out less for light-hearted content or for comedies. While the BBC is known for big-hitting live entertainment like *Strictly Come Dancing*, there is also a feeling that these shows are mainly for family-viewing and have been around for several years. BBC comedies are known for being recognisably 'British' more than other providers. However, audiences also feel that the amount of newly produced BBC comedies feels more limited and less 'cutting edge' than the variety of humour they can find with SVoD providers. For example, some feel that BBC comedies are too 'politically correct' or less daring than others.

Overall, people told us that they would consider the BBC as delivering good entertainment for some occasions, but that they have a stronger association with SVoDs for light-hearted entertainment overall because it is easier to find the right content more often.

"You know you're watching a BBC drama, it feels different, it's British. It's at a certain level that it's not replicated elsewhere. Totally different from what you can find on ITV or Sky.

Man, Family, older children

Comedies are a bit cringy and not very funny, it's not really my type of humour, it's too childish or too American"

Man, 18-30yrs, no children

Diversity of representation is important to people when they evaluate the BBC's public value, but SVoDs are currently leading perceptions here

In general, entertainment programmes are the most engaging form of content for audiences and are closely linked to how they make sense of their perceptions of providers within the market. The people we spoke to tended to make assumptions about the BBC's wider public value partly by how well it caters to their own personal and fluid interests.

People also told us they use the variety of programming on offer as a proxy for diversity because people assume that it would cater for the interests for a large variety of people across the UK and how many people could therefore feel represented as an audience. Although the BBC is seen to perform well in delivering pieces of recognisably 'British' content, audiences perceive the SVoDs to have the ability to cater to a wider range of different stories and experiences for people from different backgrounds.

This tendency was strongest with younger audiences who felt less represented by the BBC than older people. They most often turn to streaming providers first, both for TV and audio content. They feel the content is more personalised, and that streaming-only services produce content with younger people in mind, unlike the BBC. It is worth noting that this research was conducted just before the announcement of BBC Three's return as a broadcast channel and a consistent point of feedback we received as part of the research was that the BBC's entertainment had catered less well to younger parts of the public since BBC Three's cancellation.

7. What are potential opportunities for the BBC in the future?

The BBC is clearly important to people and has a role in their daily lives but there could be potential to attract and retain more audiences with more relevant and engaging content that feels more tailored to them.

Audiences would like to see the BBC leverage existing strengths to improve representation of different audiences, especially for younger age groups

More than a third feel that the BBC currently performs well in providing a wide range of different types of programmes (36%)²⁴ and this was ranked as the second most important thing that the BBC does well for audiences. A similar percentage (42%)²⁵ also feel that the BBC should do more of this. Similarly, audiences already feel that the BBC delivers recognisably ‘British’ content – at least more so than other providers. They associate the BBC with programmes that show British cities, regions, and accents. Over a third feel that the BBC performs well in providing content made for UK audiences (33%).²⁶

Nevertheless, people mention representation and diversity as specific areas that they would like to see some improvement. Only a fifth feel that the BBC performs well in providing ‘content that features people like me’ (18%) with six in ten remaining neutral.²⁷ However, almost one in three (30%)²⁸ feel that the BBC should do more of this. This is particularly true amongst younger audiences. Those aged over 55 generally feel there is enough content aimed at people like them.

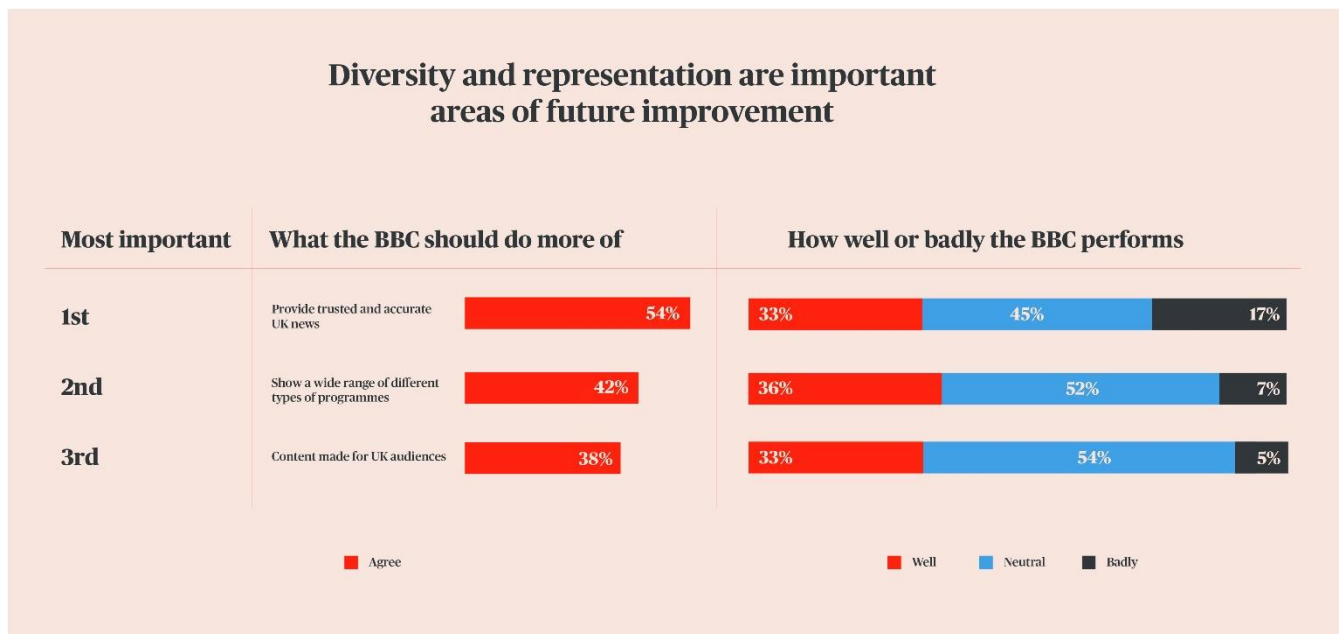


Figure 7: Diversity and representation are important areas of future improvement

Age representation

Most people feel that the BBC is particularly strong in offering relevant educational content across its different services for most life stages. In particular, it is seen to perform particularly well in providing educational content for children (28%). However, after BBC Bitesize becomes less relevant (often after GCSEs), older

²⁴ Q24: On a scale of 1 to 10 where 1 means extremely well, how well or badly would you say the BBC provides...?

²⁵ Q22: What do you think the BBC should do more or less of?

²⁶ Q24: On a scale of 1 to 10 where 1 means extremely well, how well or badly would you say the BBC provides...?

²⁷ Q24: On a scale of 1 to 10 where 1 means extremely well, how well or badly would you say the BBC provides...?

²⁸ Q22: What do you think the BBC should do more or less of?

teens and young adults start to look elsewhere for educational content, for example on YouTube. This coincides with a feeling that there is not enough to entertain them on the BBC.

Regional representation

Audiences feel that there is room for improvement in terms of the representation of people outside of London and other metropolitan areas. For ‘content that features my region/Scotland/Wales/Northern Ireland’ a fifth feel that the BBC did this well (18%)²⁹ but almost a third (31%) wanted the BBC to do more of this.³⁰ While people mention that they somewhat feel represented, for example by a local presenter or coverage of where they live, this is not a consistent perception of the BBC overall. The BBC and BBC news in particular also came across as London-centric to people in the qualitative groups. People in other regions often preferred other outlets to keep informed at a local level, with some preferring other regional radio stations over the BBC offers.

“Generally, content is very London focused, the North or other regions such as Scotland/Wales are not very represented”

Man, 18-30yrs, no children

“BBC Northwest News tend to be more general when ITV seems to be more local, in areas I know”

Man, Empty Nester

Representation of experiences

We found in the qualitative research that when content consistently aligns with personal interests and tastes audiences feel that a provider or service does a better job representing them. The challenge of representation can therefore be met with scale. Here it is hard to compete with the funding support of the large streaming providers (especially Netflix), which appeals more to the younger demographic. However, in the qualitative research people considered the BBC better placed to deliver content that tackles specific areas of interest with high-quality productions e.g. *I May Destroy You*.

The BBC should also maintain its strong performance in two key moments of media decision-making

The BBC performs well in providing content that creates occasion moments. It is often the go-to channel for events like Royal Weddings or appointment to view entertainment shows such as *Strictly Come Dancing* or *Match of the Day* that bring people together. BBC news and weather are also used daily across all audience groups and tend to be consumed live.

The BBC also does well in delivering habitual content. It is known for being reliable, familiar and reassuring, unlike other providers. BBC news is the key driver of a habitual media moment, with the younger generation adopting these habits through their parents. The BBC also delivers other habitual content such as *Great British Sewing Bee*, *The Repair Shop*, *EastEnders* or *Pointless*.

²⁹ Q24: On a scale of 1 to 10 where 1 means extremely well, how well or badly would you say the BBC provides...?

³⁰ Q22. What do you think the BBC should do more or less of?

Annexes

Annex 1: Methodology

Yonder conducted this study as a three-phase quantitative/qualitative research project.

Quantitative stage

- Online survey (c.20 min) using an online panel (YonderLive)
- Fieldwork period: 17th October – 20th of October 2021
- Sample: online nationally representative sample of 3,026 individuals aged 13+
- Quotas set for gender, age, socio-economic group, and region

The questionnaire was designed to quantify usage behaviours, perceptions and satisfaction with BBC and other media content, covering:

- Media consumption: what TV, radio or online content people consume and how often
- Decision-making: how do people decide what TV, radio or online to consume at any moment in their day/week
- Attribution of content: do people know the channel or platform the content they are watching is from
- Satisfaction with and expectations of the BBC; how happy are they with the BBC and does it deliver on what they expect from the BBC
- Satisfaction with other services: how happy are consumers with the other platforms they use

Qualitative stage

The qualitative phase included an online diary task, adult focus groups and smaller triad focus groups with children. At the end of the quantitative survey, all adult respondents were asked to participate in a follow-up qualitative study. All interested adult respondents were recontacted for the diary task and online focus groups.

Younger participants (aged 13-17) were recruited through an external recruiter.

Diary exercise – 50 respondents aged 13+

Fieldwork period: 17th November – 21st November 2021.

The online community covered adults at different life stages and a group of under-18s.

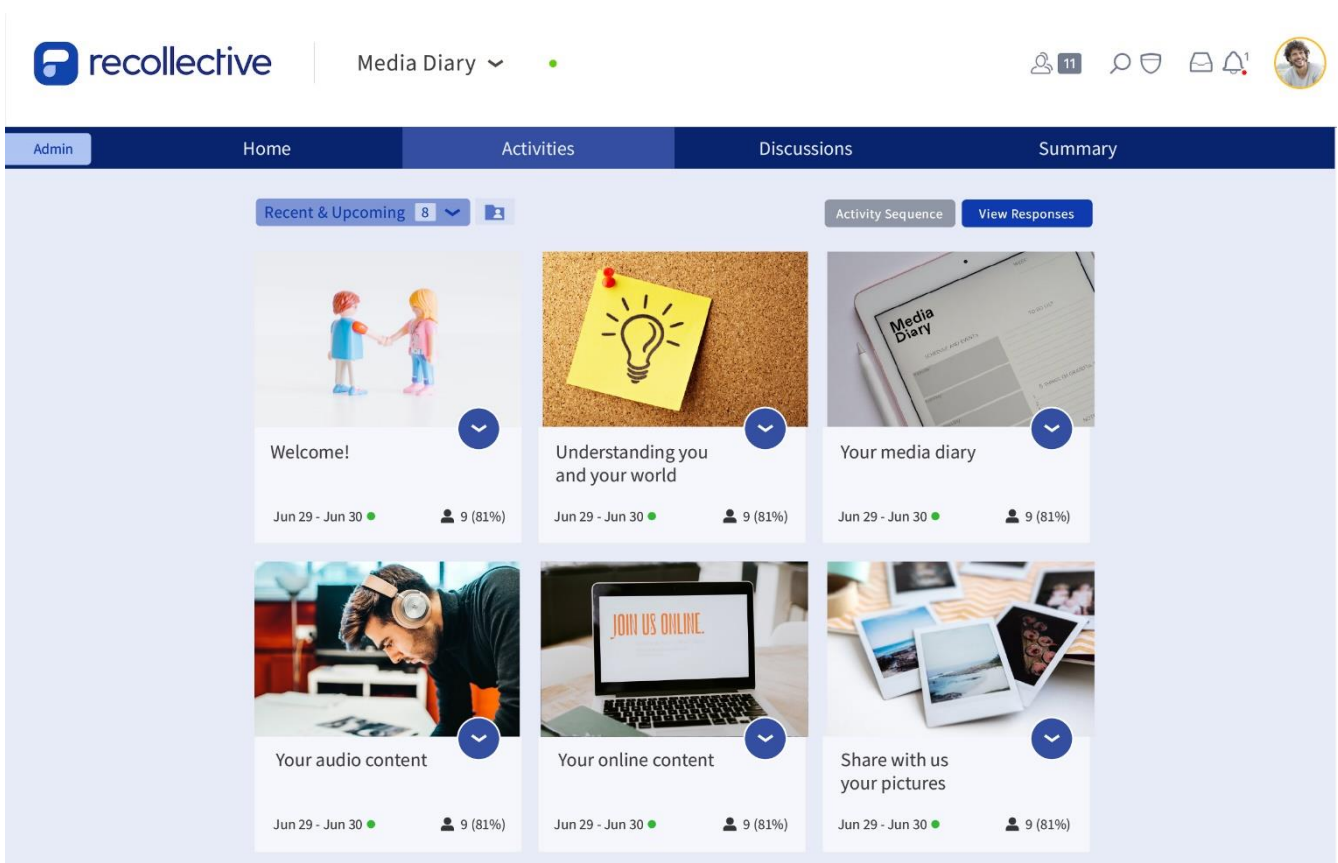
- 10 x Adults 18-30yrs no children
- 10 x Family, younger children
- 10 x Family, older children
- 10 x 'Empty nesters' (55+)
- 10 x Under-18s (13-17)

All participants were invited to join an online community platform where they were encouraged to record their viewing habits over several weekdays and the weekend. The platform was designed (Figure 1) with easy to navigate sections to capture media consumption (TV, radio, online) across the day.

Prompts included:

- Why they selected each media content / how they came across it
- The context of how they consumed the media i.e. who they were with, where they were
- Reactions to content i.e., how did it make them feel, did they do anything as a result of consuming the content?

Picture A: Community Platform



Online Focus Groups and Triads

Fieldwork period: 22nd of November – 9th of December.

Twelve online focus groups (each containing six adult participants, lasting 90 minutes)

- 2 x Adults 18-30yrs no children
- 2 x Family, younger children
- 2 x Family, older children
- 2 x Empty nesters (55+)
- 4 x groups recruited from the diary
 - 2 x younger 18-40
 - 2 x older 40+

Five online under-18 triads (aged 13-17 years, lasting 60 minutes)

Friendship triads were used for children to encourage this age group to relax and talk confidently as well as create a rapport within the sessions to facilitate the discussion.

- 1 x 13-year-old
- 1 x 14-year-old
- 1 x 15-year-old
- 1 x 16-year-old
- 1 x 17-year-old

The discussion groups were used to explore in more detail:

- Media decision making: the different influences on how people choose (BBC) content
- Perceptions of BBC content: spontaneous mentions of BBC content and channels
- The public role of the BBC: the BBC's performance in its role to inform, educate and entertain
- Needs and expectations of the BBC: what people would 'miss' if BBC wasn't there, and what the BBC should do more of in the future

Annex 2: Qualitative Recruitment Screener

Ofcom BBC Charter Research – Sample Overview

Diary Task – sample overview

- Recruiting 50 x participants from the quantitative survey (sample originally from Yonder panel)
- *Note: under 18s to be recruited separately via external recruiters as we are not able to recruit these via the Panel*
 - 10 x adults 18-30 years old (no children)
 - 10 x parents 30-55 (children to be age 4-11 years old)
 - 10 x parents 30-55 (children to be age 12-16 years old)
 - 10 x 55+ (children to have left home)
 - 10 x under-18s (2 x 13, 2 x 14, 2 x 15, 2 x 16, 2 x 17)

Group Discussions – sample overview

- Recruiting 12 x online video groups (7 respondents per group, for 6 to attend)
 - 2 x adults 18-30 years old (no children)
 - 2 x parents 30-55 (children 4 -11 years - Primary School age)
 - 2 x parents 30-55 (children aged 12-16 years - Secondary School age)
 - 2 x empty nesters 55+ (children to have left home)
 - 4 x groups recruited from the diary (sample breakdown TBC)
 - 1 x younger 18-40 (higher engagement with the BBC)
 - 1 x younger 18-40 (lower engagement with the BBC)
 - 1 x older 40+ (higher engagement with the BBC)
 - 1 x older 40+ (lower engagement with the BBC)
 - NOTE: 2 of these groups may be reallocated, pending quant survey results

NB. there is no need for a full recruitment screener for over-18s as we are recruiting from an existing sample - we will target respondents who fit the specific criteria listed below.

Over-18s – further sample details

- All sample cells to have good spread of: SEG, ethnicity and locations (i.e. mix of nations, mix of regions within each of these)

- All to be BBC content users (focus on BBC TV /BBC iPlayer / BBC radio/ BBC Sounds, but also website) – mix of heavier and lighter consumption
- Across the sample, respondents to also watch and listen to a mix of the following media content: ITV/STV/UTV, Channel 4 and Channel 5 this also includes on their on-demand services (e.g. All 4, ITV Hub)
 - Programmes on video on-demand services (e.g. Amazon Prime, Netflix)
 - Video content on video sharing platforms like YouTube and video content on social media
- Mix of attitudes towards the BBC i.e. Q25 in quant survey (expect weighting to be driven by the quant survey)
 - Including some respondents who choose Netflix / Amazon Prime Video / Disney + , Apple TV / YouTube as their first choice TV and video service (Q11 in quant survey)
- All parent group respondents only – mix of those who feel the BBC provides educational content for children well / badly (Q24 code 9 in quant survey)

Under-18s – further sample details (note: full screener also used)

- Mix across the sample: SEG, ethnicity and locations (i.e. mix of nations)
- All to be BBC content users, frequency driven by quant survey (focus on BBC TV / iPlayer / BBC Radio/ Sound, but also website/digital) – mix of heavier and lighter consumption
- Across the sample, respondents to also watch and listen to a mix of the following media content: ITV/STV/UTV, Channel 4 and Channel 5 this also includes on their on-demand services (e.g. All 4, ITV Hub)
 - Programmes on video on-demand services (e.g. Amazon Prime, Netflix)
 - Video content on video sharing platforms like YouTube and video content on social media
- Mix of attitudes towards the BBC – those who like/value it vs. those who are indifferent / don't like or value
 - Including some respondents who use Netflix / Amazon Prime Video / social sharing platforms frequently
- All to be aware that the BBC offers educational content (mix of users / non-users)

Annex 3: Quantitative Questionnaire

Ofcom

SURVEY NAME: AUDIENCE EXPECTATIONS OF THE BBC

METHODOLOGY: ONLINE SURVEY. RECRUITMENT INTO QUAL INCLUDED WITHIN SURVEY

SURVEY LENGTH: 20 MINUTES (APPROX.)

SAMPLE: 3000 UK NATIONALLY REPRESENTATIVE ONLINE SURVEY WITH PEOPLE AGED 13+, WITH BOOSTS TO BRING WALES AND NORTHERN IRELAND TO N=150 EACH. QUOTAS ON AGE, GENDER, REGION, SEG TO CREATE NATIONALLY REPRESENTATIVE QUOTAS

Introduction

Today we have some questions for you about your use of and attitudes towards different types of TV, radio and online services. This research is being conducted on behalf of Ofcom.

ASK ALL

D5. How long have you lived in the UK for?

Please select one option

| | |
|--------------------------------|---|
| All my life/ born in the UK | 1 |
| Less than 6 months | 2 |
| 6 months to less than 1 year | 3 |
| 1 year to less than 3 years | 4 |
| 3 years to less than 5 years | 5 |
| 5 years to less than 10 years | 6 |
| 10 years to less than 15 years | 7 |
| 15 years or more | 8 |
| Prefer not to say | 9 |

D6a Children in household

ADULTS ONLY

[SINGLE/MULTI-CODE]

Do any children aged 17 or under live in your household?

1. No children aged 17 or under [SINGLE CODE]
2. Yes, aged 0-2
3. Yes, aged 3-4
4. Yes, aged 5-10
5. Yes, aged 11-15
6. Yes, aged 16-17

- 7. Don't know [SINGLE CODE]
- 8. Prefer not to say [SINGLE CODE]

D6b. Childcare responsibility

ASK IF THERE IS/ARE CHILD/CHILDREN IN HOUSEHOLD AGED 15 OR UNDER – ASK ADULTS ONLY

[SINGLE]

Are you responsible for any of the children aged under 16 in your household, as a parent or guardian?

- 1. Yes
- 2. No
- 3. Prefer not to say

Section 2 – Consumption

[ASK ALL]

Q1. How often, if at all, do you use the following TV channels to watch programmes,?

SINGLE CHOICE GRID

GRID ROWS - Group by broadcaster with other code after the main channels as per answer option order below

| | |
|----|--|
| 1 | BBC One |
| 2 | BBC Two |
| 3 | The main ITV/ STV [Scotland]/ UTV [Northern Ireland] channel |
| 4 | Channel 4 |
| 5 | Channel 5 |
| 6 | BBC Four |
| 7 | Other ITV channel (e.g. ITV2, ITV3, ITV Be) |
| 8 | Other Channel 4 channel (e.g. E4, Film4, More4, 4Seven) |
| 9 | Other Channel 5 channel (e.g. 5USA, 5Star) |
| 10 | Any UKTV channel (e.g. Dave, Really, Yesterday, Drama) |
| 11 | Any Sky channel (e.g. Sky1, Sky Atlantic, Sky Sports) |
| 12 | S4C (Welsh) [Wales] |
| 13 | BBC News channel |
| 14 | BBC Parliament |
| 15 | BBC Alba (Scottish Gaelic) [Scotland] |
| 16 | BBC Scotland TV channel (on air between 7pm and midnight) [Scotland] |
| 17 | CBBC |
| 18 | CBeebies |

GRID COLUMNS – SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often
- h. Never

[ASK ALL]

Q2. How often, if at all, do you use the following services to watch programmes, films or other content?

SINGLE CHOICE GRID**GRID ROWS - RANDOMISE ORDER**

- 1. BBC iPlayer
- 2. ITV Hub **[IF REGION =SCOTLAND: STV Player or STV Player VIP]** or ITV Hub+
- 3. All4
- 4. My5
- 5. UKTV Play
- 6. BritBox
- 7. Netflix
- 8. Amazon Prime Video
- 9. Disney+
- 10. NOW TV
- 11. Apple TV+
- 12. YouTube

GRID COLUMNS – SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often
- h. Never

[ASK ALL WHO DO NOT USE BBC TV CHANNELS/IPLAYER – Q1 codes 1,2,6, 13-18 = Never OR Q2 code 1=Never]

Q3. Why do you not watch BBC TV services (including TV channels or iPlayer)?

OPEN-ENDED CODED

[ASK ALL]

Q4. Now thinking about radio, how often, if at all, do you listen to the following?

SINGLE CHOICE GRID**GRID ROWS - RANDOMISE ORDER**

1. BBC Radio 1
2. BBC Radio 2
3. BBC Radio 3
4. BBC Radio 4
5. BBC Radio 5 live
6. BBC radio for your region [England] / nation [SCO/WAL/NI]
7. Any other BBC radio station
8. Any non-BBC radio stations e.g. Heart, Capital, Magic, Absolute

GRID COLUMNS

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often
- h. Never

[ASK ALL]

Q5. Now thinking about online audio services, how often, if at all, do you listen to the following?

SINGLE CHOICE GRID**GRID ROWS - RANDOMISE ORDER**

1. BBC Sounds
2. Apple Music or Apple Podcasts
3. Google Play Music or Google Podcasts
4. GlobalPlayer
5. RadioPlayer
6. Spotify
7. Deezer
8. Amazon Music
9. Tidal
10. YouTube Music
11. SoundCloud

GRID COLUMNS

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often
- h. Never

[ASK ALL WHO DO NOT USE BBC RADIO/SOUNDS – Q4 codes 1-7 = Never or Q5 code 1 = Never]

Q6. Why do you not listen to BBC audio services (including BBC radio stations or BBC Sounds)?

OPEN-ENDED CODED

[ASK ALL]

Q7. And now, thinking about websites and apps, how often do you use the following, if at all?

SINGLE CHOICE GRID

GRID ROWS - RANDOMISE ORDER

1. BBC News
2. BBC Sport
3. BBC Bitesize
4. BBC Weather
5. BBC children's websites or apps (e.g. CBBC or CBeebies website, CBeebies Playtime Island, CBeebies Storytime, Newsround)
6. Other BBC website or apps
7. Other online news sites (e.g. MailOnline, HuffPost, Apple News)
8. Social media sites or apps (e.g. Facebook, Twitter, Instagram)

GRID COLUMNS – SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often
- h. Never

[ASK ALL WHO DO NOT USE BBC WEBSITES OR APPS – Q7 codes 1-6 = Never]

Q8. Why do you not use BBC websites or apps?

OPEN-ENDED CODED

Section 3 – Decision-making

[ASK ALL, ONLY LIST SERVICES THEY SAID THEY USED ABOVE IN CONSUMPTION SECTION, but everyone is shown code 1 TV channels]

Q9. Which of these best describe how you choose what to watch on the following

MULTIPLE CHOICE GRID

GRID ROWS - RANDOMISE ORDER

1. TV channels (e.g. BBC One, BBC Two, ITV, Channel 4 or Channel 5)
2. BBC iPlayer
3. ITV Hub [IF REGION =SCOTLAND: STV Player or STV Player VIP] or ITV Hub+
4. All4
5. Netflix
6. Amazon Prime Video
7. Disney +
8. YouTube (for watching TV programmes /films)

GRID COLUMNS – RANDOMISE ORDER

1. I have specific shows I watch regularly on there
2. I catch up on shows I've missed
3. I browse / scroll until I find something that catches my eye
4. I look at the 'recommended for you' section on the service [DO NOT SHOW FOR CODE 1: TV CHANNELS]
5. I see shows on these channels/services promoted in trailers or adverts or notifications
6. I look in newspapers or magazines for recommendations
7. Friends or family recommend things to me
8. I see mentions on social media of shows on these channels/services
9. Other (WRITE IN)
10. Don't know

[ASK ALL, ONLY LIST SERVICES WHERE THEY GAVE A REASON ABOVE – Q9 codes 1- 10]

Q10. What is the MAIN reason why you use these TV on-demand/streaming services?

SINGLE CHOICE GRID

GRID ROWS - RANDOMISE ORDER

1. TV channels (e.g. BBC One, BBC Two, ITV, Channel 4 or Channel 5)
2. BBC iPlayer
3. ITV Hub [IF REGION =SCOTLAND: STV Player or STV Player VIP] or ITV Hub+
4. All4
5. Netflix
6. Amazon Prime Video
7. Disney+
8. YouTube (for watching TV programmes /films)

GRID COLUMNS – SINGLE CODE

- a. Watching live TV [Do not show for Netflix and Disney+]
- b. Catching up on shows I missed when originally broadcast
- c. Watching the latest episode of a new show/series
- d. Watching repeats of shows/films that I enjoy
- e. Exploring and discovering content I haven't seen
- f. To pass the time when I have nothing else to do
- g. To watch in the background while I do something else
- h. I tend to watch whatever other members of my household want to watch
- i. Other (WRITE IN)

[ASK ALL, ONLY LIST SERVICES THEY SAID THEY USED ABOVE IN Q1 AND Q2]

Q11. When you do not have a specific programme you want to watch, which one of the following TV and video services do you usually turn to first?

SINGLE CHOICE [TV CHANNELS AND VOD SERVICES TO BE SHOWN AS SEPARATE CODES BUT TV/VOD BRANDS TO BE GROUPED TOGETHER AND LIST TO BE ROTATED]

1. BBC TV channels (e.g. BBC One, BBC Two) [Q1 CODES 1, 2,6,13,14,15,16,17,18]
2. BBC iPlayer [Q2 CODE 1]
3. ITV/ STV/ UTV TV channel [Q1 CODE 3 OR 7]
4. ITV Hub [IF REGION =SCOTLAND: STV Player or STV Player VIP] or ITV Hub+ [Q2 CODE 2]
5. Channel 4 channels (e.g. E4, Film4, More4, 4Seven) [Q1 CODE 4 OR 8]
6. All4 [Q2 CODE 3]

7. Channel 5 channels (including 5USA, 5Star) [Q1 CODE 5 OR 9]
8. My5 [Q2 CODE 4]
9. S4C (Welsh) [Q1 CODE 12]
10. Sky channels (e.g. Sky1, Sky Atlantic, Sky Sports) [Q1 CODE 11]
11. NOWTV [Q2 CODE 10]
12. UKTV Play [Q1 CODE 10]
13. BritBox [Q2 CODE 6]
14. Netflix [Q2 CODE 7]
15. Amazon Prime Video [Q2 CODE 8]
16. Disney + [Q2 CODE 9]
17. Apple TV+ [Q2 CODE 11]
18. YouTube [Q2 CODE 12]
19. Other – specify
20. Don't know

[ASK ALL]

Q12. Why did you choose _____? Please ensure your response is full and relates to the question being asked, otherwise we may not be able to use any of your survey data.

OPEN-ENDED CODED

MIN 4 CHARACTERS

Section 5 – Attribution

[ASK ALL – SPLIT SAMPLE INTO 2 AND ROTATE 10 SHOWS PER RESPONDENT ON A LEAST FILL QUOTA BASIS. PARENTS (D6=1) TO BE SHOWN D, F AND H, THEN RANDOMLY ASSIGNED SHOWS TO MAKE UP 10. ALL CHILDREN D1=<18 TO BE SHOWN H AND THEN OTHER RANDOMLY ASSIGNED SHOWS TO MAKE UP 10. REMAINING SHOWS TO BE RANDOMISED]

Q13. We are now going to show you some popular TV programmes and shows, please can you say which TV broadcaster or service you believe this show was originally shown on

SINGLE CHOICE - RANDOMISED

- a. Peaky Blinders
- b. Top Gear
- c. The Serpent
- d. Horrible Histories **[SHOW TO PARENTS OF CHILDREN]**
- e. Dispatches
- f. Peppa Pig **[SHOW TO PARENTS OF CHILDREN]**
- g. Happy Valley
- h. Mr Bean: The Animated Series **[SHOW TO PARENTS OF CHILDREN AND 13-17s]**
- i. Benidorm
- j. Whitechapel
- k. Downton Abbey
- l. Friday Night Dinner
- m. Gogglebox
- n. Ramsay's Kitchen Nightmares
- o. Too Hot to Handle
- p. Atypical
- q. The Crown

- r. The Grand Tour
- s. The Boys
- t. Good Omens

- 1. BBC
- 2. ITV
- 3. Channel 4
- 4. Channel 5
- 5. Netflix
- 6. Amazon Prime Video
- 7. YouTube
- 8. Disney +
- 9. Other – specify
- 10. Don't know – I haven't heard of it

[ASK ALL who have heard of the show at Q13 codes 1-9]

Q14. Which channel or service did you watch each show on?

SINGLE CHOICE – GRID WITHOUT IMAGES

- 1. BBC
- 2. ITV
- 3. Channel 4
- 4. Channel 5
- 5. Netflix
- 6. Amazon Prime Video
- 7. YouTube
- 8. Disney +
- 9. I have not watched this programme [FIXED]
- 10. Other – specify
- 11. Don't know

[ASK ALL]

Q15. Were you aware that some TV programmes and shows which were originally broadcast on the BBC are available to watch on other services like Netflix, Amazon Prime Video and YouTube?

SINGLE CHOICE

- 1. Yes, and I have watched BBC content via other services in the past
- 2. Yes, but I have not or don't think that I have watched BBC content via other services in the past
- 3. No

[ASK ALL WHO USE YOUTUBE AT Q2]

Q16. In the last 6 months, have you watched content on YouTube originally produced by any of the following broadcasters?

SINGLE CODE

| | |
|--|---|
| BBC (e.g. BBC, BBC News, CBBC, CBeebies) | 1 |
| ITV (e.g. ITV, ITVBe, ITV2, ITV News) | 2 |
| Channel 4 (e.g. Channel 4, Channel 4 News, All 4, E4, Film4) | 3 |

| | |
|---|---|
| Channel 5 (e.g. Channel 5, 5 News) | 4 |
| STV (e.g. STV, STV News) [RESPONDENTS IN SCOTLAND ONLY] | 5 |
| S4C (e.g. S4C, Hansh, S4C Dysgu Cymraeg) [RESPONDENTS IN WALES ONLY] | 6 |
| I have not watched YouTube in the last 6 months | 7 |
| Don't know / can't remember | 8 |
| None of these (SINGLE CODE) | 9 |

[ASK ALL WHO USE NETFLIX AT Q2]

Q17. In the last 6 months, have you watched content on Netflix originally produced by any of the following broadcasters?

SINGLE CODE

| | |
|---|---|
| BBC (e.g. BBC, BBC News, CBBC, CBeebies) | 1 |
| ITV (e.g. ITV, ITVBe, ITV2, ITV News) | 2 |
| Channel 4 (e.g. Channel 4, Channel 4 News, All 4, E4, Film4) | 3 |
| Channel 5 (e.g. Channel 5, 5 News) | 4 |
| STV (e.g. STV, STV News) [RESPONDENTS IN SCOTLAND ONLY] | 5 |
| S4C (e.g. S4C, Hansh, S4C Dysgu Cymraeg) [RESPONDENTS IN WALES ONLY] | 6 |
| I have not watched Netflix in the last 6 months | 7 |
| Don't know / can't remember | 8 |
| None of these (SINGLE CODE) | 9 |

[ASK ALL WHO USE AMAZON PRIME AT Q2]

Q18. In the last 6 months, have you watched content on Amazon Prime Video originally produced by any of the following broadcasters?

SINGLE CODE

| | |
|---|---|
| BBC (e.g. BBC, BBC News) | 1 |
| ITV (e.g. ITV, ITVBe, ITV2, ITV News) | 2 |
| Channel 4 (e.g. Channel 4, Channel 4 News, All 4, E4, Film4) | 3 |
| Channel 5 (e.g. Channel 5, 5 News) | 4 |
| STV (e.g. STV, STV News) [RESPONDENTS IN SCOTLAND ONLY] | 5 |
| S4C (e.g. S4C, Hansh, S4C Dysgu Cymraeg) [RESPONDENTS IN WALES ONLY] | 6 |

| | |
|--|---|
| I have not watched Amazon Prime Video in the last 6 months | 7 |
| Don't know / can't remember | 8 |
| None of these (SINGLE CODE) | 9 |

[ASK ALL WHO HAVE WATCHED BBC CONTENT ON YOUTUBE – Q16 = 1]

Q19. You said that you have watched BBC content via YouTube, why was this?

MULTIPLE CHOICE

1. I find YouTube easier to use than BBC iPlayer
2. I first discovered the BBC content via YouTube
3. I don't have a TV licence so cannot watch via the BBC
4. YouTube recommended it to me
5. I couldn't find the BBC content / it was not available on BBC iPlayer
6. I only ever use YouTube
7. I do not watch BBC channels/use BBC iPlayer
8. Because I only wanted to watch clips or highlights
9. Other please specify
10. Don't know

[ASK ALL WHO HAVE WATCHED BBC CONTENT ON NETFLIX – Q17 = 1]

Q20. You said that you have watched BBC content via Netflix, why was this?

MULTIPLE CHOICE

1. I find Netflix easier to use than BBC iPlayer
2. I first discovered the BBC content on Netflix
3. I don't have a TV licence so cannot watch via the BBC
4. Netflix recommended it to me
5. I couldn't find the BBC content / it was no longer available on BBC iPlayer
6. I only ever use Netflix
7. I do not watch BBC channels/use BBC iPlayer
8. Other please specify
9. Don't know

[ASK ALL WHO HAVE WATCHED BBC CONTENT ON AMAZON PRIME – Q18 = 1]

Q21. You said that you have watched BBC content via Amazon Prime Video, why was this?

MULTIPLE CHOICE

1. I find Amazon Prime easier to use than BBC iPlayer
2. I first discovered the BBC content on Amazon Prime Video
3. I don't have a TV licence so cannot watch via the BBC
4. Amazon Prime Video recommended it to me
5. I couldn't find the BBC content / it was no longer available on BBC iPlayer
6. I only ever use Amazon Prime Video
7. I don't watch BBC channels/use BBC iPlayer
8. Other please specify
9. Don't know

Section 6 – BBC expectations and satisfaction

[ASK ALL]

Q22. SLIDING SCALE: FROM 'THE BBC SHOULD DO MORE OF THIS' TO 'THE BBC SHOULD DO LESS OF THIS. MIDDLE OPTION 'THE BBC IS DOING ENOUGH OF THIS'

What do you think the BBC should do more or less of?

The BBC is a public service broadcaster and has a duty to deliver programmes and services which cover a wide range of subjects and meet the needs and interests of audiences across the whole of the UK.

Thinking about everything that the BBC does, across TV, radio and online including BBC TV channels, iPlayer, BBC radio stations, Sounds, Bitesize etc., what do you think the BBC should be doing more or less of?

RANDOMISE LIST - Group codes 13 and 12 (with 13 before 12) and statements to appear one at a time

1. Content that features [my region/Scotland/Wales/NI]
2. Content that features people like me
3. Content which features people from different backgrounds
4. Provide trusted and accurate UK news
5. Content that helps me to understand what is going on in the world today
6. News and current affairs about my local area
7. Show a wide range of different types of programmes e.g. drama, comedy, entertainment, sport
8. Content about science, arts, culture and religion
9. Educational content for children
10. Educational content for adults
11. Broadcast events that bring the nation together for a shared viewing experience
12. Content made for UK audiences
13. Wide-range of content for children made in the UK
14. Make recommendations personalised for me
15. Improvements to their catch-up services (BBC iPlayer, BBC Sounds)

[ASK ALL]

Q23. [Show list of all the statement and ask them to select which 3 they think are most important to them personally]

Which of the following statements are the most important to you personally?

Please select your top 3 answers in order from 1-5, where 1 is the most important, 2 is the second most important, etc.

ASK ALL

Q24. And on a scale of 1 to 10 where 1 means extremely badly and 10 means extremely well, how well or badly would you say the BBC provides [insert statement from Q22]?

SINGLE CHOICE

| | |
|---------------------|---|
| 1 – Extremely badly | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 6 | 6 |
| 7 | 7 |

| | |
|---------------------|----|
| 8 | 8 |
| 9 | 9 |
| 10 – Extremely well | 10 |
| Don't know | 11 |

Section 7 – close

Q25. Where would you place yourself on this scale in terms of how you feel about the BBC as a whole?

| | |
|--------------------------------|----------------------------|
| The BBC is not important to me | The BBC is important to me |
|--------------------------------|----------------------------|

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|----|

ASK ALL

Q26. Would you miss the BBC if it was no longer available?

SINGLE CODE

| | |
|-------|---|
| Yes | 1 |
| No | 2 |
| Maybe | 3 |