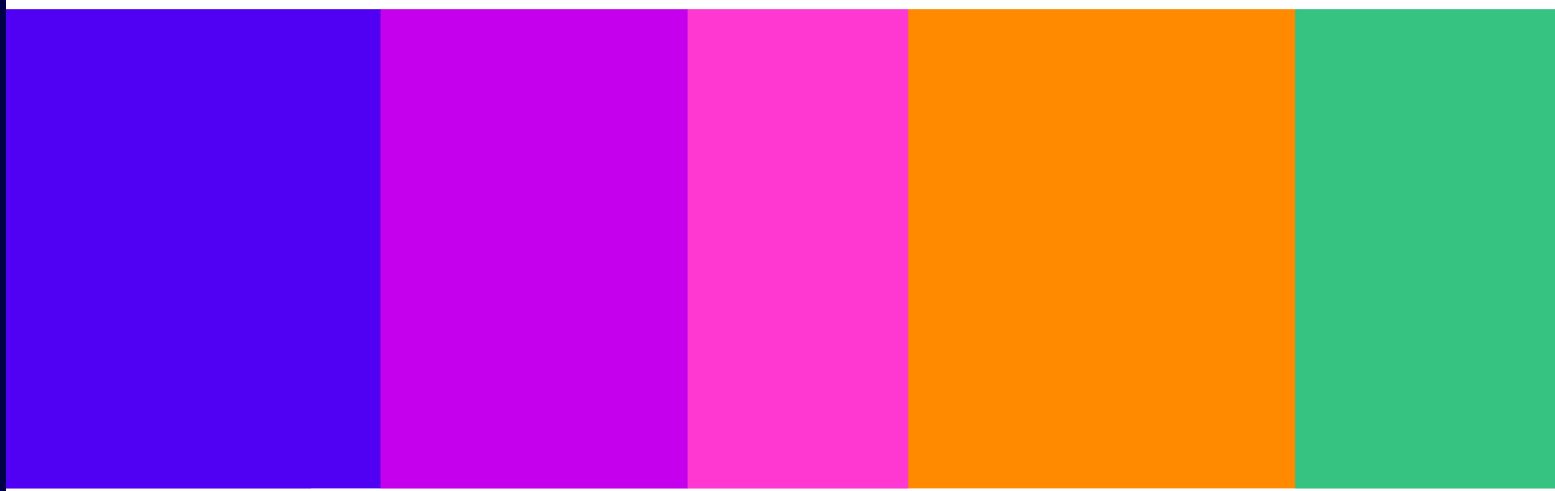


PSBs in the platform era: A YouTube case study

Annex 1: Review of Public Service Media

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Contents

Section

1. Introduction	3
2. How much time do people in the UK spend on VSPs?	4
3. What do people in the UK watch on YouTube?.....	5
4. How do people in the UK discover videos on YouTube?	7
5. What are the PSBs doing on YouTube?	9
6. Are PSBs reaching people with news on YouTube?.....	11

1. Introduction

In the [document](#) we published in December as part of the Review of Public Service Media, we highlighted that “viewing on VSPs, in particular YouTube and TikTok, has grown rapidly in recent years”. However, we also noted that “there is limited data available on what audiences are watching on YouTube and other VSPs”. This annex is an attempt to help address this data gap and to answer some related questions about video sharing platforms (“VSPs”), especially YouTube.¹

Section 2 explores the importance of VSPs for video consumption in the UK. We find that people in the UK spend nearly an hour a day watching VSPs at home and that YouTube accounts for three quarters of this time, with viewing on TV sets and viewing by older adults growing rapidly.

In Section 3 we present some indicative findings about the kinds of content that people in the UK watch on YouTube. Our findings suggest that two thirds of the time people in the UK spend on YouTube goes to content from digital-native content creators and organisations.

Section 4 examines how people discover videos on YouTube. We find that the videos that people in the UK watch when viewing YouTube on web browsers is primarily driven by YouTube’s recommender systems, due to things like YouTube’s Up Next feature.

Section 5 discusses how public service broadcasters (“PSBs”) are approaching YouTube. We find that in general the PSBs are increasingly using VSPs, including by entering into ad-sales partnerships with YouTube.²

Finally, in Section 6 we analyse the presence, popularity and discoverability of news content published by PSBs on YouTube. Among other things, we find that, when searching YouTube using a wide range of popular news related search terms, only 6% of the top ten results were from PSBs while three quarters of the videos did not originate in the UK.

While our findings are wide ranging, they reflect an initial attempt to better understand VSPs, PSBs, and how platforms such as YouTube support the delivery of public service media (“PSM”) content. Further work is needed to deepen and update our understanding of YouTube and how audiences use it.

¹ Most of our previous quantitative analysis in relation to online intermediaries has focused on social media. For example, in March 2024 we published some analysis and a summary of the academic literature related to [online news](#) and social media. To support the December document, we updated some of our previous analysis of social media (on [topic diversity](#) and [societal outcomes](#)) to apply to public service media. Video sharing platforms were outside the scope of these previous analyses.

² Channel 4 and ITV have become official ad-sales partners with YouTube.

2. How much time do people in the UK spend on VSPs?

VSPs like YouTube and TikTok play an increasingly important role in UK audiences' video consumption. In 2024 audiences spent around 51 minutes per day watching VSP content at home, across all devices – equivalent to one third of the time spent on broadcaster content (150 minutes, combining live, recorded and on-demand), or one fifth of the time spent on all video (270 minutes).³

YouTube is far and away the largest VSP by time spent. In 2024, YouTube accounted for around three quarters of all UK in-home VSP viewing, and for nearly all VSP viewing on TV sets. YouTube is a popular first destination for children aged 4-15 when turning on the TV set, with 20% of all TV journeys among this age group starting with YouTube. By comparison, the large majority (83%) of TV journeys among adults aged over 55 start with broadcast linear TV, while only 2% of TV journeys among this older age group start with YouTube.⁴

Viewing on TV sets, as well as viewing by adults, plays an increasingly important role in overall YouTube usage. TV set YouTube viewing grew at an average of 31% year-on-year between 2022 to 2024 and accounted for 41% of all YouTube's in-home viewing in 2024. Meanwhile, over the same period, viewing by adults over 55 years of age grew at an average of 17% year-on-year across all devices, and at 48% year-on-year on TV sets. While all age groups have seen increases in viewing to YouTube on the TV since 2022, the largest year-on-year increases have been among adults 55-64 (51%) and adults 65-74 (46%). Meanwhile total VSP viewing in the home grew at an average rate of 8% year-on-year from 2022 to 2024 (9% for YouTube), while viewing to broadcaster services dropped by an average of 3% year-on-year. If these growth patterns continue, YouTube could become even more important to overall video viewing, including among groups of people that have not used it heavily in the past.

According to Ofcom's Public Service Media Tracker 2024, around three quarters (77%) of viewers in the past six months said that YouTube (including YouTube Premium) *'appeals to a wide range of audiences'* well.⁵ Viewers also said YouTube delivered well for *'provid[ing] services that are easy to find my way around'* (70%) and being *'easy to find something I want to watch'* (69%) as well as for *'programmes which feature people from different backgrounds'* (69%) and *'programmes that are relevant to me'* (69%).⁶

³ All figures in this section are based on Barb 'as viewed' data for in-home viewing by audiences 4 years or older.

⁴ Ofcom/TRP TV Viewer Journeys.

⁵ The Ofcom Public Service Media Tracker uses questions asking respondents to say how 'well' or 'badly' different attributes are being provided, using a 1-10 scale where 1 means extremely badly and 10 means extremely well. When referring to 'well', this is NET of scores 7 to 10.

⁶ Ofcom Public Service Media Tracker 2024.

3. What do people in the UK watch on YouTube?

The growth of VSP viewing raises the question of what content is being viewed within these platforms. However, information in the public domain on VSP viewing is limited. We therefore undertook further analysis to develop an indicative view of what content UK audiences view on the largest video-sharing platform, YouTube. This analysis relied on data on the amount of time spent by UK YouTube users on different channels; the manual classification of a sample of YouTube channels for a specific point in time (May 2024); and statistical techniques to generalise findings based on this sample.⁷

Due to limitations in this methodology, only indicative rather than detailed quantitative findings can be provided. Noting those limitations, we found that that:

- Our indicative analysis suggests that around two thirds of YouTube UK viewing is to content published by a wide variety of ‘digital native’ creators. Of this:⁸
 - a) The analysis suggests the vast majority is to content from individual influencers, podcasters, and other creators publishing primarily to video-sharing, podcasting and social media platforms. Channels span a wide range of new genres such as ‘gameplay’, ‘tutorials’, ‘reacts’ and ‘unboxing’,⁹ from the niche to the mainstream, from small-audience to mass-audience, and from non-commercial to highly professional and commercial.
 - b) The rest is to channels owned not by individual creators or talent but by firms that publish only or primarily online (sometimes referred to as ‘digital studios’).
- Our indicative analysis suggests that the remaining third of the viewing goes to content from a wide range of organisations including: TV broadcasters, studios and distributors; music labels; and non-media organisations (e.g. universities publishing lectures online, or consumer product brands publishing promotional material or product instructions). Broadcasters as a group seem to account for a minority of this, and for only a small fraction of all YouTube viewing.
- Our indicative analysis suggests that UK-originated content only accounts for around one-fifth of UK users’ viewing,¹⁰ while over half of the viewing goes to content from North America. A significant minority of UK viewing goes to non-English-language content.

⁷We relied on data from Comscore’s Video Metrix Multi-Platform YouTube Partners Report on per-channel viewing (total minutes), covering tens of thousands of YouTube channels that opt into sharing viewing data with third-party agencies, based on total audience data from May 2024, UK (and we note that viewing patterns may have changed since then). We used statistical techniques to construct a representative sample of these channels, which we then manually categorised in terms of their country of origin, type of originator, and other aspects. This produced an Ofcom modelled estimation of total all-screens for YouTube viewing.

⁸ It should be noted that this distinction is indicative and not always clear-cut – for example in the case of successful ‘YouTubers’ who have launched companies with tens of employees to produce their channels.

⁹ Videos which show people opening and reviewing consumer products.

¹⁰ We do not what proportion of the content viewed outside the UK is UK-originated.

Shorter videos up to 15-minutes long (but not YouTube Shorts¹¹) remain the most popular form of content on YouTube, with 59% of users claiming to have watched videos of this length (up from 53% in 2023), according to Ofcom's VoD Survey. The proportion of users claiming to have watched videos longer than 15-mins declined from 45% in 2023 to 41% in 2025.¹²

¹¹ [YouTube Shorts](#) are vertical videos up to three minutes in length which can be created using just a phone.

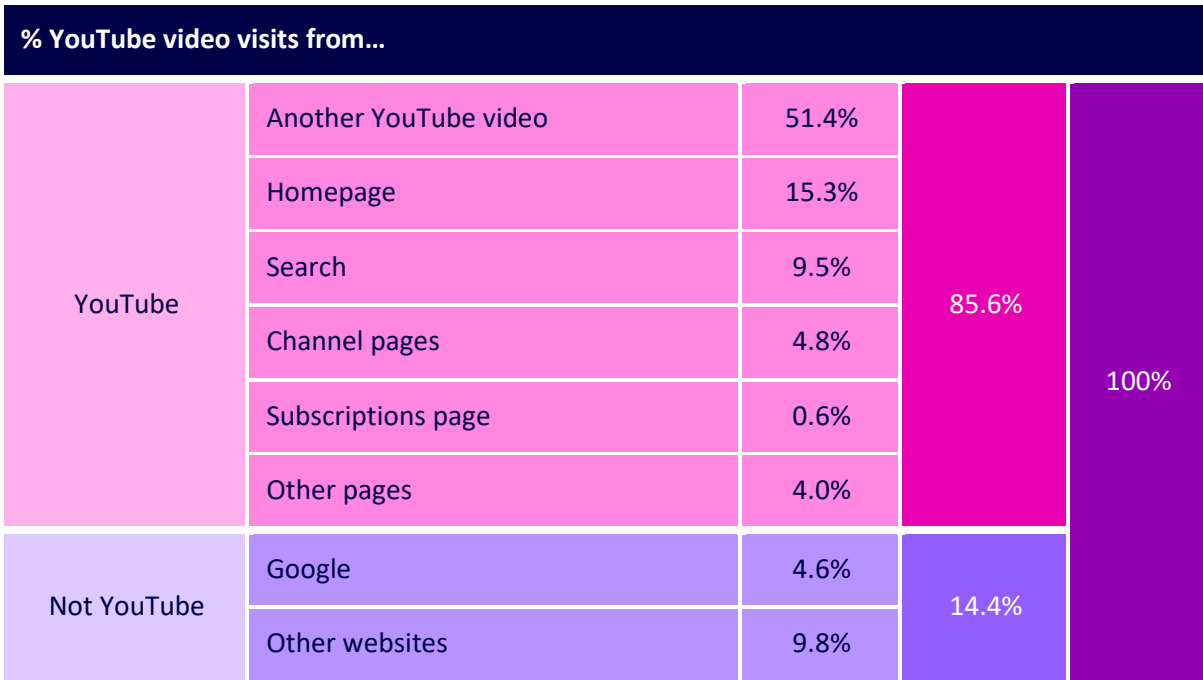
¹² Ofcom VoD Survey 2025.

4. How do people in the UK discover videos on YouTube?

There are various ways people might discover videos on YouTube. Within YouTube, [places](#) to discover videos include YouTube’s homepage, the Shorts player, Up Next, search, channel pages, and a user’s subscriptions page. People might also be referred to videos on YouTube from other services such as Google Search.

To understand the relative importance of these sources for discovering videos on YouTube, we used data from Ipsos iris which tracked in-browser activity for around 10,000 UK internet users aged 15+. ¹³ For the period 15th January 2025 to 15th February 2025, there were 7,828 users in the panel that made a total of 1,147,791 visits to YouTube on their browsers across 10,413 devices including phones, tablets, laptops and desktops. ¹⁴ We assume that each YouTube video was discovered on the webpage that the user visited immediately prior to the video. ¹⁵ For example, if the preceding webpage was YouTube’s homepage, then we assume that the user discovered the video on the homepage. ¹⁶ Figure 1 shows the results of this analysis.

Figure 1: Webpages that precede a visit to videos on YouTube



Source: Ofcom analysis of Ipsos iris clickstream data, 15th January to 15th February 2025. UK 15+ Base of 7,828 panellists. The percentage refers to the proportion of visits to a given type of webpage that preceded a visit to

¹³ We weighted visits according to the gender, age, socio-economic grade and ethnicity of the relevant user to make the panel demographically representative of the UK.

¹⁴ Webpages were identified using the structure of the URLs that were visited by the panel. As these were only visible for browser visits, we were unable to analyse how users discovered videos within the YouTube app.

¹⁵ By ‘immediately’, we mean that there was no time interval between when a user finished viewing a webpage and when they began visited the subsequent webpage.

¹⁶ This assumption may not always hold true. For example, if a user switches tabs to get to a YouTube video, then the webpage on the previous tab may be falsely assumed to be where the user discovered a video.

a YouTube video. Web browser only. Census data from ONS, Scotland's Census, and NISRA. Panellists weighted by gender, age, socio-economic grade, ethnicity and nation.

Our analysis, which is based on in-browser visits by thousands of people in the UK over a one-month period, suggests that a large majority of YouTube videos are discovered when users are already viewing YouTube. One in two visits to a YouTube video are preceded by another YouTube video, which is likely driven by people clicking on videos recommended in YouTube's [Up Next](#) feature. The next most significant page in determining user behaviour is YouTube's homepage, which preceded around 15% of videos in our analysis. One in ten of the videos that people watched seemed to have been discovered via YouTube's search functionality. Channel pages and a user's subscriptions page, both of which are (by default) ordered chronologically rather than based on complex recommendation systems, preceded a small fraction of videos.

Our analysis suggests that the content people watch on YouTube is driven primarily by YouTube's recommendations¹⁷. According to YouTube, their [recommender system](#) is constantly evolving based on signals such as watch history, search history, subscriptions, likes, dislikes, "not interested" and "don't recommend channel" feedback selections, and satisfaction surveys.

This analysis is limited to how YouTube videos are discovered on web browsers. We recognise that 41% of YouTube's in-home UK viewing is on TV sets,¹⁸ and much of the rest of the time spent watching YouTube is via the app on phones and tablets. Nevertheless, we believe that the conclusion that most content people watch on YouTube is driven by YouTube's recommendations, is still likely to hold true more generally.

¹⁷ This finding is in line with YouTube's own estimates, as reported in industry publications, see [CNET article](#) (January 2018)

¹⁸ Barb 'as viewed' data.

5. What are the PSBs doing on YouTube?

In recent years the PSBs have increased their use of VSPs, and YouTube especially, experimenting with a variety of approaches to connecting with audiences on these platforms. Strategies are evolving and vary both across PSBs and between different operating units of the individual PSBs. We describe some the PSBs' approaches to using YouTube below.

The BBC has primarily used VSPs and other social media to distribute short-form promotional material such as trailers, clips and compilations that support long-form content which can only be viewed on BBC iPlayer or the BBC's linear channels. However, like other broadcasters' its strategy continues to evolve. Units such as BBC News, BBC Sport and BBC Children's and Education create digital-native content, podcasts and some long-form news content that is distributed across a range of platforms – from BBC's own services like Sounds and iPlayer, to YouTube, Spotify and TikTok.

Channel 4's YouTube strategy initially centred on uploading promotional material to the platform with the aim of encouraging viewers back to their BVoD player. In recent years, however, it has pivoted towards providing audiences access to their content – including full-length programming – where they are. To that end, they distribute their content across platforms like YouTube, TikTok and Instagram. They have also recently announced plans to work with [Spotify](#). In addition to offering full-length episodes of programmes like *Married at First Sight* on YouTube, they commission digital-native content and run 4Studio, a dedicated in-house social content agency. Channel 4 notes that their VSP strategy allows them to reach additional viewers who would not otherwise engage with their content.¹⁹ In 2022 they became the first UK PSB [to strike an ad-sale partnership](#) with YouTube, under which they can sell advertising placed against its content.

Like Channel 4, ITV's strategy has also shifted from one focused on driving viewers back to its own BVoD player to one that aims to [connect with viewers where they are](#). They operate a number of channels on YouTube, including ITV News, ITV Sport and ITV Reality. Their digital content agency, Zoo 55, manages the YouTube presence of successful ITV Studios' IP like [Love Island and The Masked Singer](#). Under this approach they have increased the volume of content they place onto YouTube and offer both digital-native and full-length programming. In December 2024 they too announced an ad-sales partnership with YouTube. They noted earlier this year that their new strategy offers opportunities to reach additional audiences and to [attract advertisers](#).

Channel 5 operates a small set of genre channels providing trailers, compilations, and sports clips. 5 News meanwhile has sought to expand its digital presence. Paramount has said that 5 News social content [reached more than 57.8m views across all platforms](#) and their TikTok account has led to “substantial engagement from a growing group of 35-44 year olds.”

S4C operates a number of YouTube channels. This includes a main channel featuring a mix of news, entertainment and sport; S4C Chwaraeon, a sports channel that includes live events; and Hansh, its youth-focused brand that provides digital-native and other content – including some longer-form material. Their children's brand, Cyw, runs a YouTube channel which provides a range of short and

¹⁹ In 2024 Channel 4's CEO Alex Mahon commented: “Our social channels performed well. YouTube in particular saw strong growth: total UK views increased 26% to 340 million, and long form ‘full episode’ views surged by a huge 169% to 110 million.” See: [Chief Executive Statement](#) (Channel 4 Annual Report 2024).

longer-form content including songs and short stories while Stwnsh, its brand for older children also features a mix of short and longer-form content.

6. Are PSBs reaching people with news on YouTube?

One fifth of respondents to Ofcom's [News Consumption Survey](#) said that they use YouTube for news. Based on the same survey, we also found that, across all media, PSBs account for 40% of UK audiences' overall share of attention to news.²⁰ Given the importance of YouTube and the wider significance of PSBs for news consumption, we wanted to better understand the extent to which PSBs are reaching people with news content on YouTube. To do so, we used the [YouTube Data API](#) to analyse the presence, popularity and discoverability of PSB news videos on YouTube.

How many videos do PSBs post from their news channels on YouTube?

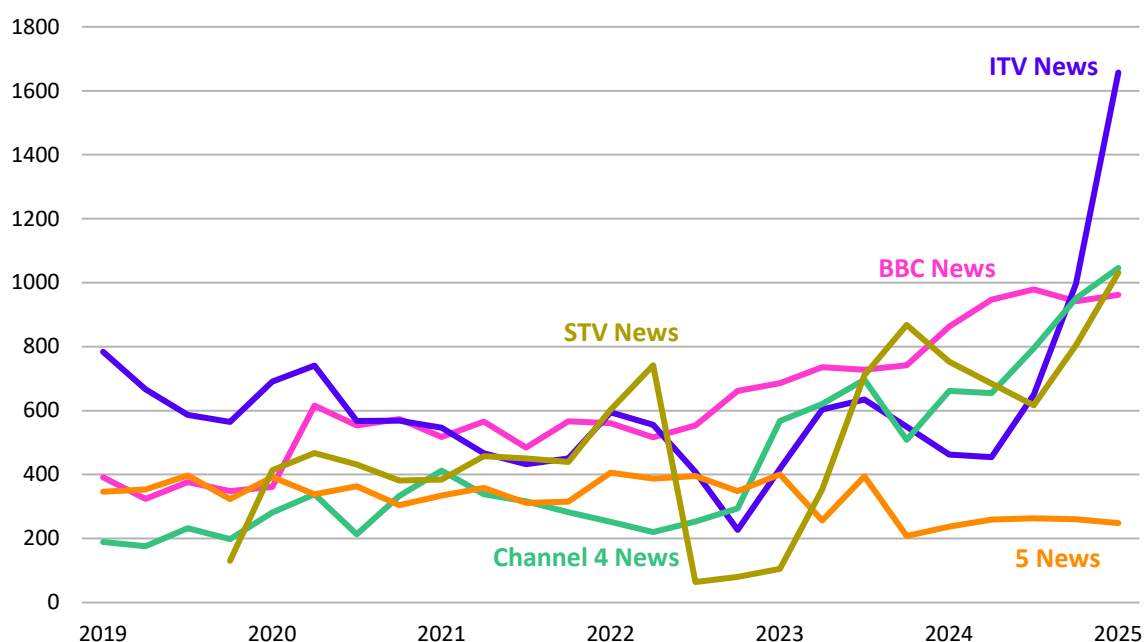
Most PSBs have a primary YouTube channel from which they post news content.²¹ The primary PSB news channels - BBC News, ITV News, Channel 4 News, 5 News and STV News - have been active on YouTube for well over a decade. As well as posting videos in YouTube's traditional video format, these channels now also regularly post YouTube Shorts. In this analysis we have not included channels from S4C or UTV, as neither have dedicated news channels which are active on YouTube.

We used the YouTube Data API to count the number of videos posted from the PSBs' primary news channels over time. Figure 2 shows that the primary PSB news channels all post hundreds of videos every quarter. Over the last few years, BBC News, ITV News, Channel 4 News and STV News have substantially increased the number of videos they post on YouTube. The quarterly number of videos uploaded by ITV News increased by around 66% between the last quarter of 2024 and the first quarter of 2025, rising to over 1,600. This increase was largely driven by a rise in YouTube Shorts uploads. The next most active primary PSB news channels on YouTube in the first quarter of 2025 were Channel 4 News, STV News and BBC News, with around 1,000 posts each. Some of the PSBs told us that they were developing new strategies for reaching audiences with news on YouTube, so we might expect the increase in activity to continue.

²⁰ Share of attention and reach are both metrics used to understand news consumption, but they capture different aspects of audience behaviour. *Reach* refers to the percentage of a population that accesses news through a particular platform or service, offering a broad measure of how widely a source is used. In contrast, *share of attention* goes deeper by measuring the proportion of attention each news source receives relative to others. It is calculated at the individual level and then aggregated, giving more weight to sources used by individuals who consume fewer news outlets. This means that while reach tells us how many people use a source, share of attention tells us how much focus that source commands among its users.

²¹ Our analysis focuses on the following YouTube channels: BBC News, ITV News, Channel 4 News, 5 News and STV News. As well as posting on these YouTube channels, the PSBs sometimes post news content from YouTube channels that aren't dedicated to news (e.g. BBC World Service) and the BBC have non-English-language news channels (e.g. BBC News Hindi). S4C does not have an active channel dedicated to news and UTV has no significant presence on YouTube.

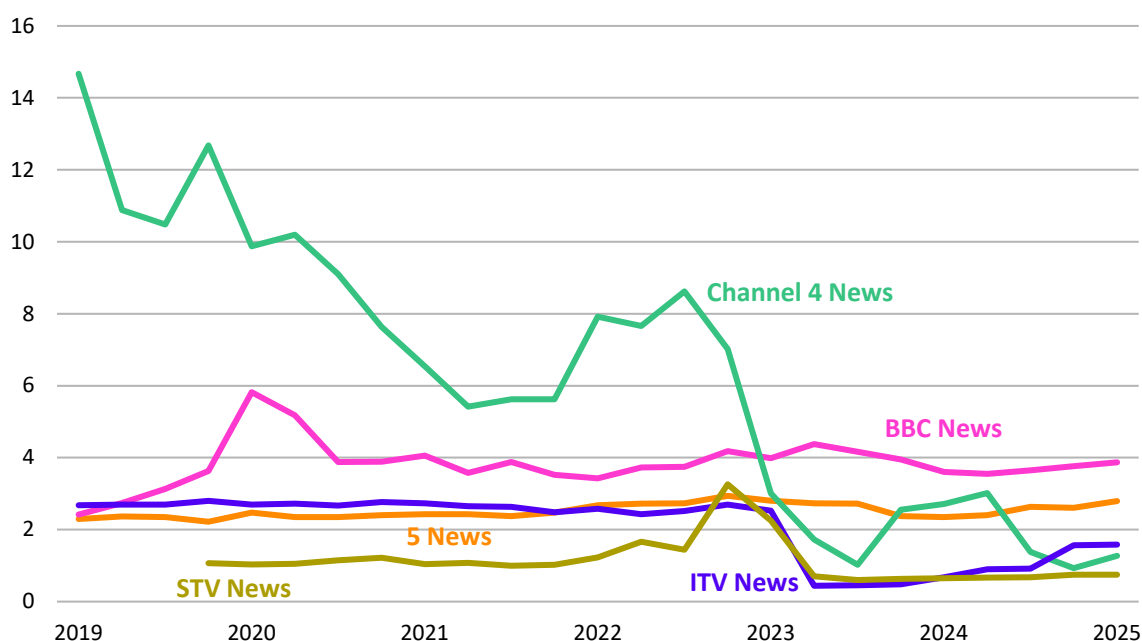
Figure 2: Number of YouTube videos posted from primary PSB news channels, quarterly



Source: YouTube Data API, Ofcom analysis. This includes regular videos and YouTube shorts.

To get another insight into the PSBs' evolving YouTube strategy for news, we analysed the average duration of videos posted from their primary news channels over time. As seen in Figure 3, BBC News posts the longest videos, with an average duration of around 4 minutes in 2025. In contrast, STV News currently posts the shortest videos, with an average duration of less than 1 minute. Channel 4 News, ITV News and STV News all heavily pivoted towards shorter videos in 2023.

Figure 3: Average duration (minutes) of YouTube videos posted from primary PSB news channels, quarterly



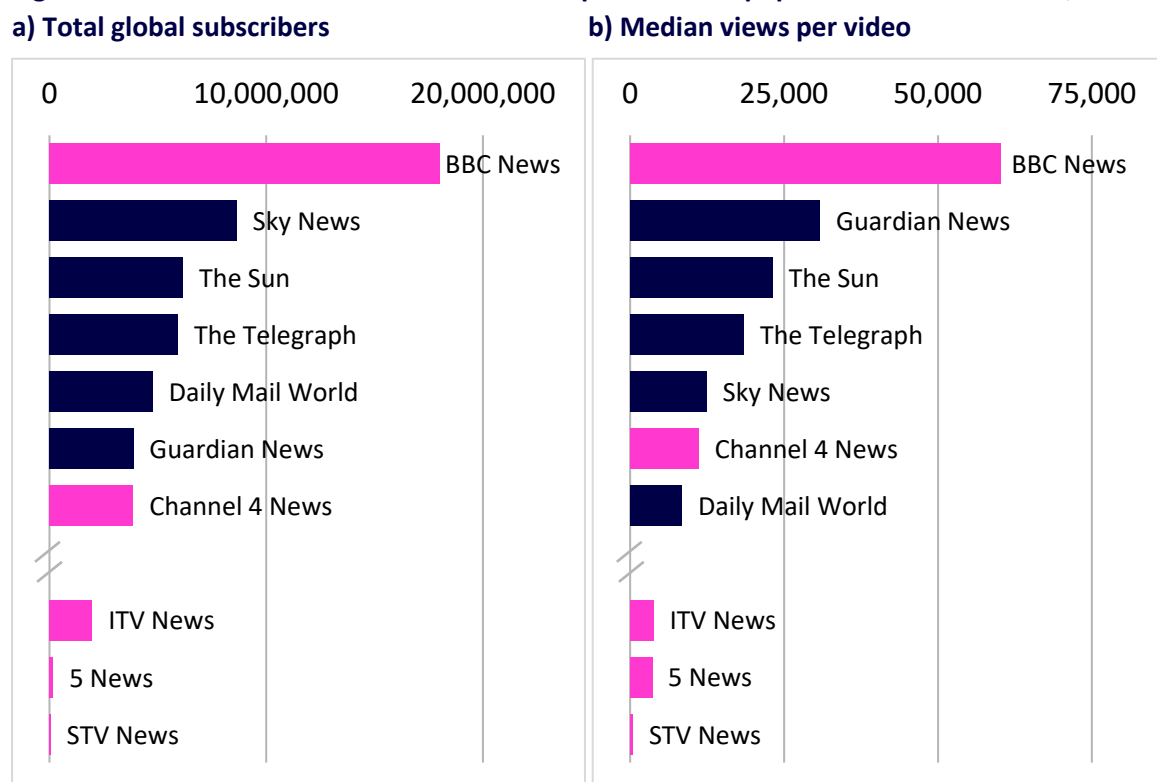
Source: YouTube Data API, Ofcom analysis. We have used the median to measure average duration. This includes regular videos and YouTube shorts.

How many people do PSB news videos reach on YouTube?

There are various metrics by which to judge the success of channels on YouTube in engaging with users, including subscriptions, views, watch time, likes etc. We have chosen to focus on global subscribers and average global views per video because these are simple indicators of engagement based on publicly available data.

Figure 4 benchmarks the primary PSB news channels against some popular UK-based YouTube news channels. As of May 2025, BBC News had 18 million subscribers on YouTube from around the world. In terms of subscribers, this makes BBC News the most popular English-language news channel on YouTube that originates in the UK.²² Channel 4 News had nearly 4 million global subscribers, which is comparable to some of the most popular commercial UK-based news channels such as Guardian News and Daily Mail World. ITV News had 2 million global subscribers while 5 News and STV News have 184k and 64.5k subscribers, respectively.²³

Figure 4: Global subscribers and median views per video for popular UK news channels, Q1 2025



Source: YouTube Data API, Ofcom analysis. As well as primary PSB news channels, Figure 4 includes the five most subscribed non-PSB UK news channels. Median views per video were calculated using view counts as of May 2025 for videos uploaded in the first quarter of the year; subscriber counts are also reported as of May 2025.

²² Interestingly, BBC News Hindi has more global subscribers than BBC News but it is not included as the chart only considers English language channels. There are also English-language channels such as ABC News that have more global subscribers than BBC News, but they do not originate in the UK.

²³ There are other UK-based news channels not included in Figure 4 which have more subscribers than ITV News, 5 News and STV News.

The number of subscribers that a PSB YouTube channel has is correlated with the number of views that its videos receive.²⁴ For example, videos from BBC News also receive significantly more views than other UK news channels, with an average of over 60,000 views for videos posted in the first quarter of 2025, as of May 2025. As these are global views, rather than views from the UK, the BBC's popularity in terms of views may be partially explained by its unique global brand.

There are many interrelated factors that determine the number of people that a YouTube video reaches. We now analyse one such factor: discoverability.

How discoverable are PSB news videos on YouTube?

In this section, we present our analysis of the discoverability of PSB news videos in YouTube search results. We focus on search results because the search function is made available via the YouTube Data API, but we are mindful that search is one of many places on YouTube where videos can be discovered. As previously analysed, many people discover videos via YouTube's Up Next feature and on YouTube's homepage. YouTube also has a dedicated news page and a breaking news shelf on the home page, which were not considered in our previous analysis. Nevertheless, a significant number of videos are discovered via search, which means that the analysis presented in this section provides some insight into the overall discoverability of PSB news videos on YouTube.²⁵

To analyse the discoverability of PSB news videos on YouTube search results, we used the API to search YouTube for news in a regular and systematic way. We ran searches twice a day, at 08:00 and 21:00, between 26 February 2025 and 15 June 2025. To mimic realistic user behaviour, we used popular YouTube searches based on data from Google Trends. To reflect general interest in news, we used the top YouTube search terms in the UK from 2024 that were not tied to specific news events. These were: "news", "news live", "news today", "latest news", and "politics". To reflect interest in specific news events, we also used a regularly updated set of search terms based on the top and rising news related search terms in the UK on YouTube in the past week.²⁶ Over the course of the analysis, we used 184 unique terms reflecting users searching for specific stories; some examples are: "starmer trump", "helicopter crash today news", "pope francis", "pakistan india news", and "uk local elections 2025".

We focused our analysis on the top 10 search results from each query. These search results are ordered by the API [based on many factors](#) such as how well the title, tags, description, and video content match the search query. The API also considers location, which we set to the UK. We note that, unlike when a user searches YouTube from their personal account, the API does not deliver personalised search results based on search and watch history. As such, we would expect the top 10 search results to resemble but not perfectly reflect the videos that users see first when searching for news on YouTube.

Figure 5 shows the proportion of the top 10 search results that are from PSB channels, non-PSB UK channels, and non-UK channels, tracked over time.²⁷ Our analysis suggests that, for a wide range of

²⁴ Ampere Analysis, 2025. [Rethinking Reach: YouTube's evolving role for UK broadcasters](#), p. 9.

²⁵ Our analysis of how users discover videos on YouTube was not specific to news, so the significance of search for news could be higher or lower than for general content.

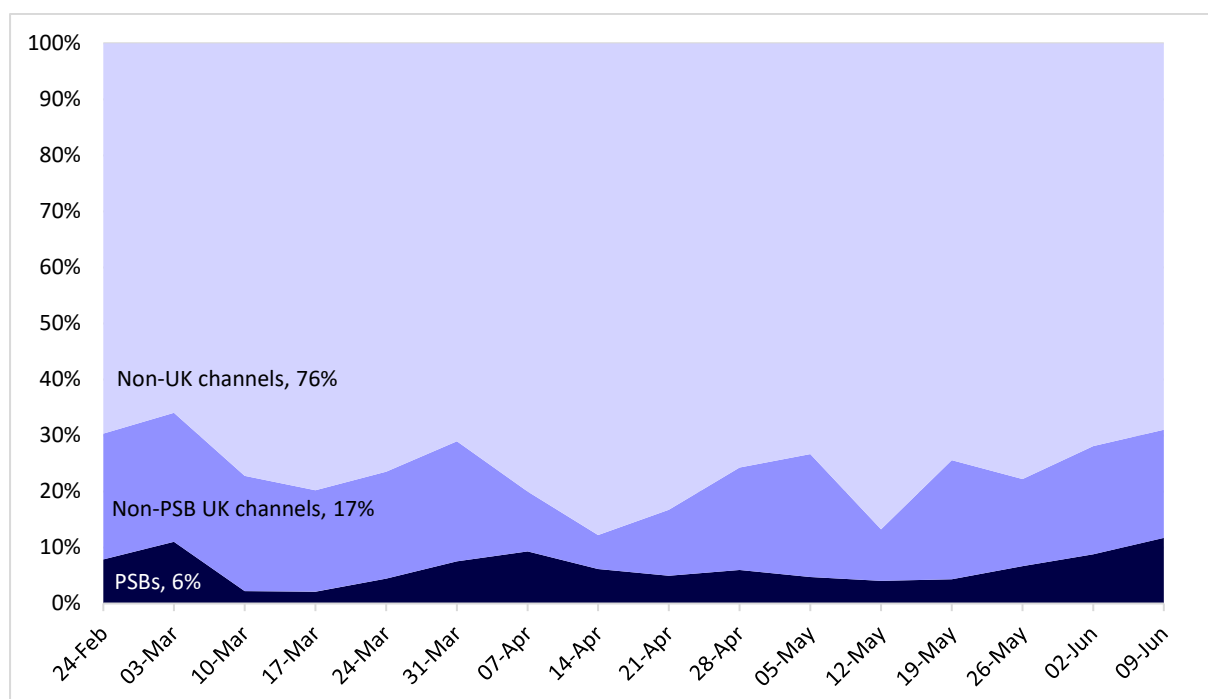
²⁶ 'Top' refers to the most popular overall search terms, while 'rising' highlights those with the largest recent increases in search frequency.

²⁷ Our findings are broadly consistent when considering the top 20 videos. They are also consistent when only including the five general news search terms.

popular news related search terms, around 6% of the top 10 videos are from PSB channels, a finding which is relatively stable over time.

BBC News accounts for the majority of the PSB videos in the top 10 search results. Across the period analysed, it accounts for 3.8% of the top 10 search results, making it the second most prominent channel in our analysis. ITV News and Channel 4 News had similar levels of prominence to each other, accounting for 0.7% and 0.6% of the top 10 videos, respectively. The most prominent channel was Sky News, making up around 4.3% of results. Following Sky News and BBC News, the next five most frequently featured channels in the top 10 search results were Fox News, Jamuna TV, Forbes Breaking News, LiveNOW from Fox, and Firstpost. The next most prominent UK-based channels were The Rest Is Politics, ITV News and The Sun, making up 1.0%, 0.7%, and 0.7% of the top 10 videos, respectively.

Figure 5: Most prominent types of channels in YouTube search results during weeks in 2025



Source: YouTube Data API, Google Trends, Ofcom analysis. The vertical axis refers to the frequency of channels in the top 10 search results during a given week when searching twice daily using a range of popular news related search terms. All dates relate to 2025. PSB content includes all PSB channels, rather than just the primary news channel. Videos from channels that don't label their country of origin are removed from our results, but this doesn't materially affect the conclusions. Percentages may not sum to 100% due to rounding.

Overall, around 23% of videos in the top 10 search results were from YouTube channels that originate in the UK, including the PSBs. Despite us setting our location to the UK and using search terms from the UK, the most common country of origin was the US, whose videos made up 30% of the top 10 results. Videos originating in India were also prominent, accounting for 21% of search results. All other countries accounted for significantly smaller shares of the search results. Although many of the search terms may relate to stories from specific countries, we get very similar results when restricting the analysis to the search terms that did not relate to specific news events (e.g. “latest news”), giving us confidence that the country-of-origin findings are not simply driven by the content of search terms.

This analysis has given us a better understanding of the discoverability of PSB news videos in YouTube searched from the UK, but further analysis is needed to understand the discoverability of PSM news content in other places on YouTube (not just search), explore how much prominent news differs by user, and include other online platforms that are commonly used for news (e.g. TikTok and Facebook).