
Public Service Broadcasting: omnibus survey findings

July 2020

1. Overview

This report provides evidence on the media services that people use, the value they place on them, and the perceived personal and societal benefits of public service broadcasting (PSB).

This report supports the work of [Small Screen: Big Debate](#), our national discussion on how to make sure the UK has a resilient public service broadcasting system that continues to adapt to meet audiences' needs.

In March 2020, Ofcom commissioned Kantar to conduct a face-to-face omnibus survey. The fieldwork took place between 11 and 17 March 2020, before the Covid-19 UK lockdown.

We achieved a sample size of 1,851 UK adults aged 16+; due to the pandemic, the fieldwork was cut short, which meant we were slightly under our target sample size of 2,000. The data are weighted to be nationally representative of the UK. Full data tables are available on the Ofcom website.

Key findings

BBC services and Netflix services are the most likely to be valued by UK adults. However, there is a strong age split here; younger respondents are more likely to choose Netflix, while their older counterparts are more likely to select BBC services.

UK adults tend to value BBC and Netflix for different reasons; BBC is most highly valued for specific programmes (44% vs. 25%), while Netflix is most valued for variety (33% vs. 10%). They are valued equally for having better/more interesting choice (12% vs. 11%).

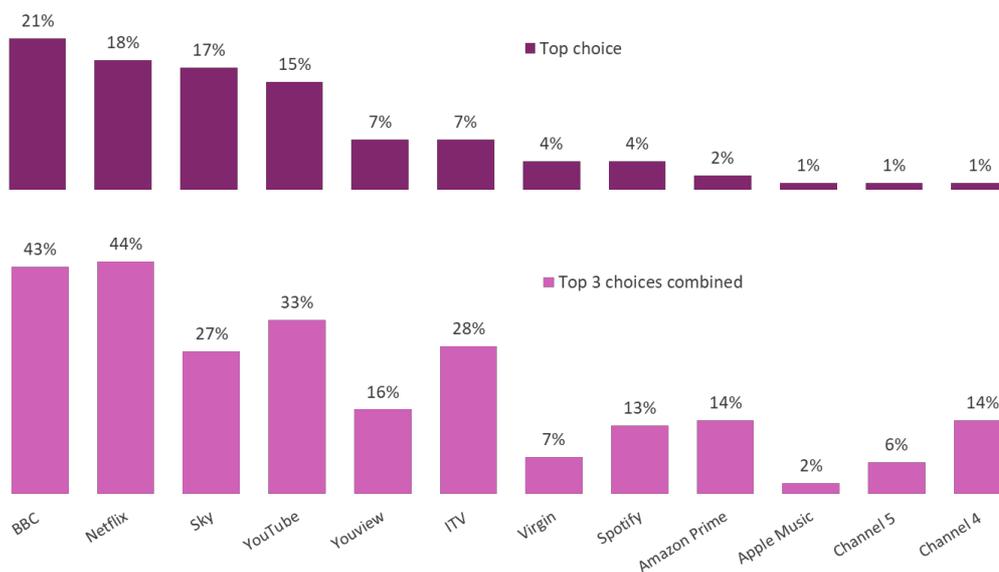
'Trusted and accurate news' is by far the most valued aspect of PSBs, both to people individually and to society, while other aspects of PSBs have a stronger resonance either personally or societally. More societal value is placed on universal availability and diversity. Aspects that affect personal viewing, such as quality, have more personal value.

Overall, young people have similar personal priorities as adults, with 'trusted and accurate news' coming out top. But they place greater emphasis than the older age groups on diversity (programmes that reflect the diversity of the UK), universality (services which are available to everyone) and distinctiveness (programmes with new ideas and different approaches). This is reflected in the societal aspect of their choices.

2. Values and attitudes towards media services

2.1 The BBC and Netflix are the services most highly valued by UK adults. However, there is a clear generational difference; younger adults are more likely to select Netflix, and older adults the BBC.

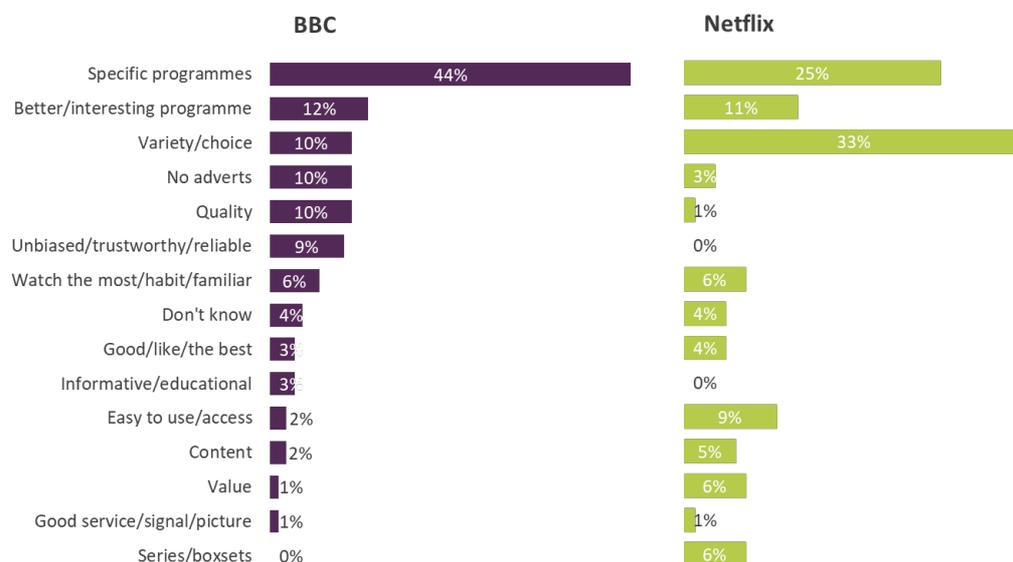
Figure 1: Services valued the most by UK adults



Q3a. And of all the services that you use, which three do you value the most? Please rank these in order 1st/2nd/3rd. Base: all who have used media providers in the last 12 months (n=1721). 'Top choice' means the service ranked first, and 'top three choices combined' includes each service ranked by a respondent.

2.2 The BBC is most valued for specific programmes (44% vs. 25%), while Netflix is most valued for variety and choice (33% vs. 10%). However, a large proportion of the ‘specific programmes’ from the BBC is news content (36% mentioned this). The BBC and Netflix are valued equally for having ‘a better/more interesting choice of programming’ (12% vs. 11%).

Figure 2: Reasons for valuing the service, by those who value it most (BBC and Netflix comparison)

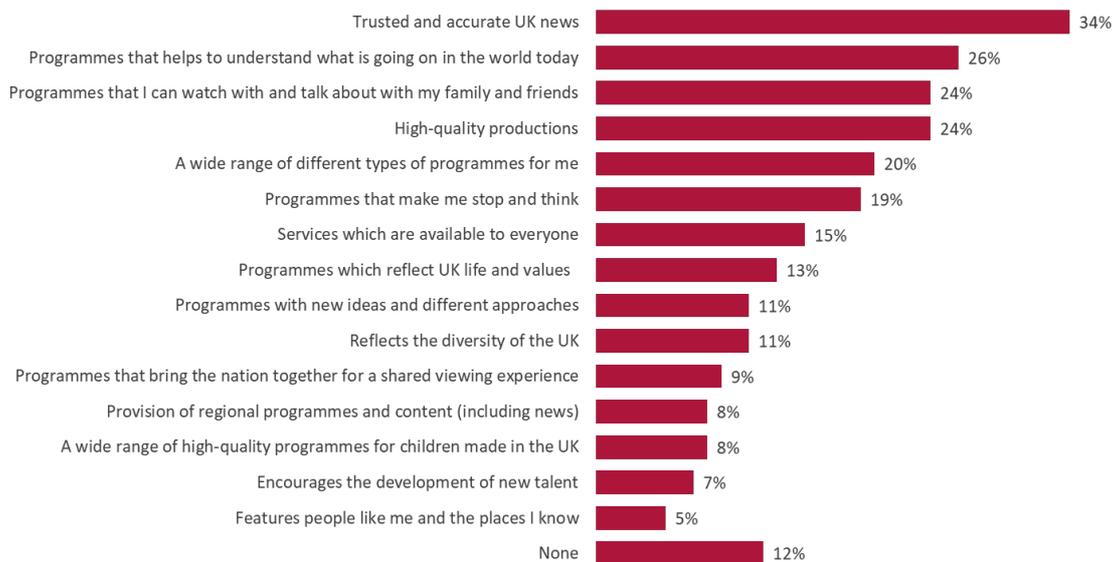


Q3b. Why do you value (SERVICE) the most? [open-ended question] Base: Ranking BBC as top media provider (n=402); ranking Netflix as top media provider (n=275)

Personal value of PSB

2.3 *'Trusted and accurate UK news'* is the most personally valued benefit of PSB by UK adults. This is followed by benefits such as *'bringing people together'*, *'high quality'* and a *'wide range of programming'*.

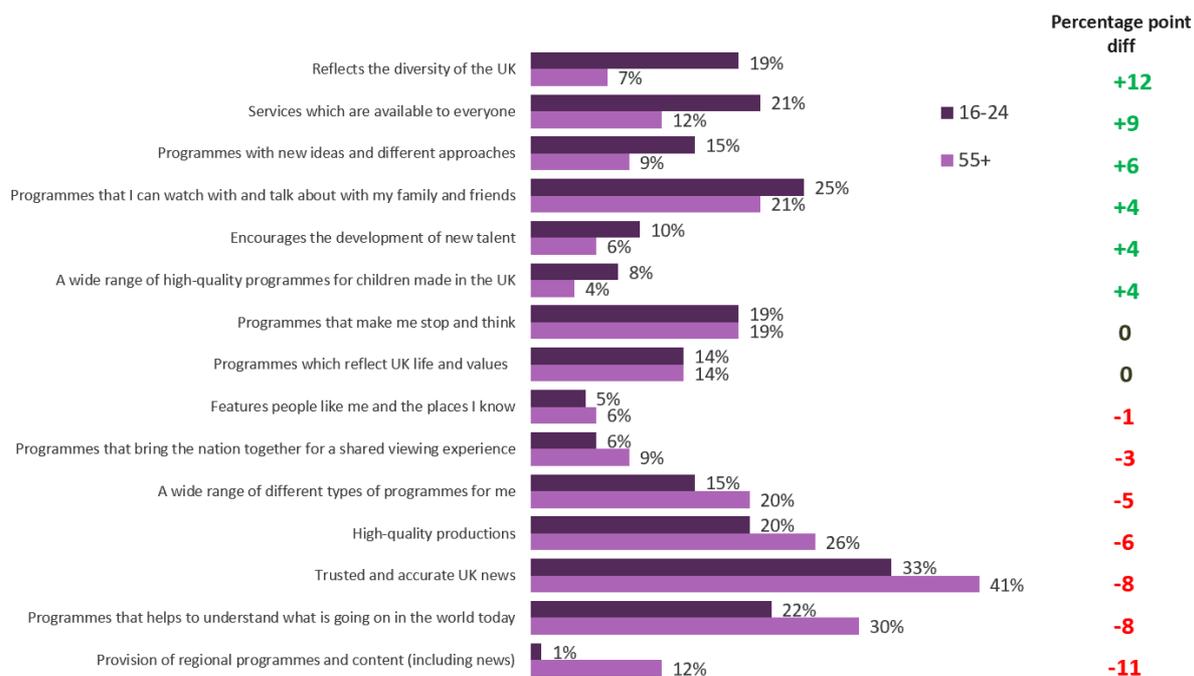
Figure 3: Personal: most valuable PSB potential benefits



Q5a. The following list describes the range of benefits that public service broadcasting is broadly designed to deliver. Could you please review the list of potential benefits in full before telling me which three you consider to be the most valuable for you personally? Base: All respondents: (n=1851)

2.4 Younger UK adults (16-24s) place greater emphasis on aspects of diversity, universality and distinctiveness than their older counterparts (aged 55+). For example, they are more likely to select ‘*reflects the diversity of the UK*’ and ‘*services which are available to everyone*’. In addition, younger adults tend to place a lower personal value on the ‘*provision of regional programmes and content*’, than do older age groups.

Figure 4: Personal PSB value: differences between 16-24s and over-54s, ranked on percentage point difference

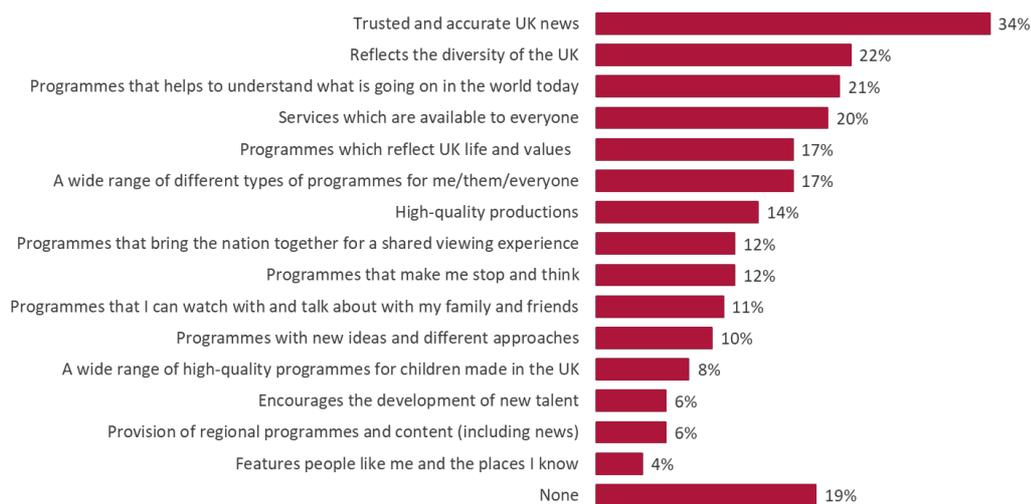


Q5a. The following list describes the range of benefits that public service broadcasting is broadly designed to deliver. Could you please review the list of potential benefits in full before telling me which three you consider to be the most valuable for you personally? Base: 16-24 (n=257); 55+ (n=805)

Societal value of PSB

2.5 After ‘trusted and accurate UK news’, other highly valued societal benefits include ‘diversity’ and ‘universal availability’. The least valued aspects include ‘regional content’, ‘children’s content’, ‘developing new talent’, ‘programmes that feature people like me and places I know’ and ‘programmes with new ideas and different approaches’.

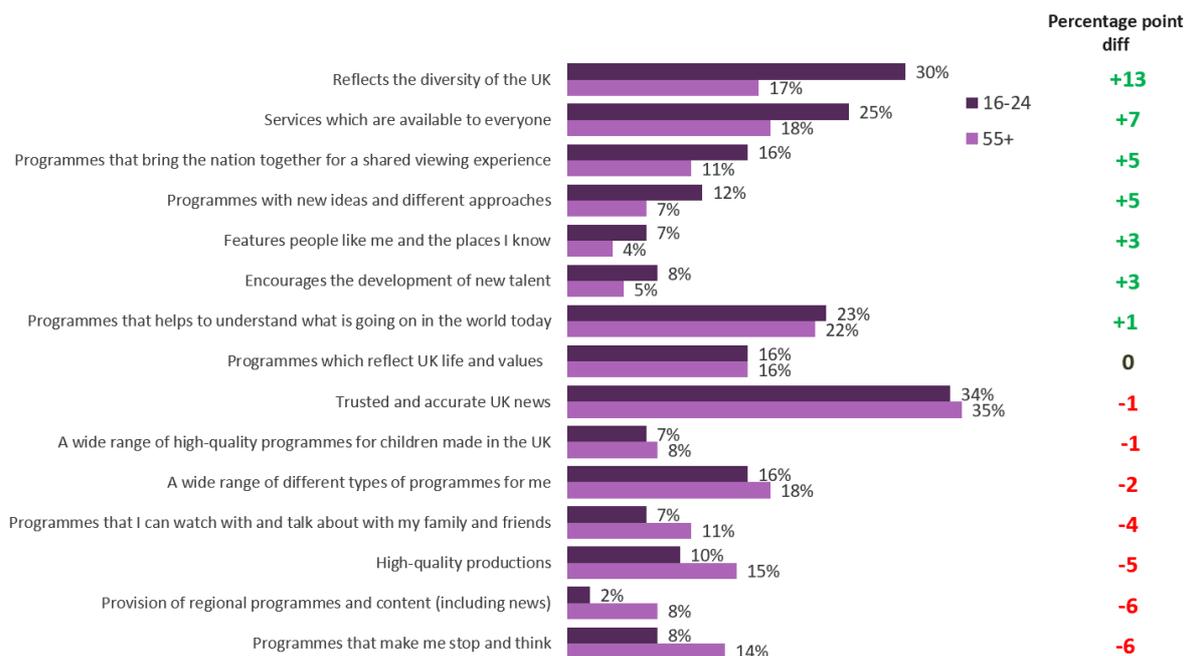
Figure 5: Societal: most valuable potential PSB benefits



Q7a. What three benefits do you think are most valuable to society overall? Base: All respondents (n=1851)

2.6 In line with how they think about these benefits on a personal level, younger respondents (aged 16-24) are more likely than over-54s to think that ‘*reflecting UK diversity*’ and ‘*programmes reflecting UK life and values*’ are important. Older respondents are more likely to say that society values ‘*programmes that make them stop and think*’, and ‘*provision of regional content*’. Interestingly, while young people more generally do not value ‘*trustworthy news*’ any more or less than other age groups, those in education strongly believe that society values this, as well as ‘*services that are available to everyone*’.

Figure 6: PSB societal value: differences between 16-24s and over-54s, ranked by percentage point difference

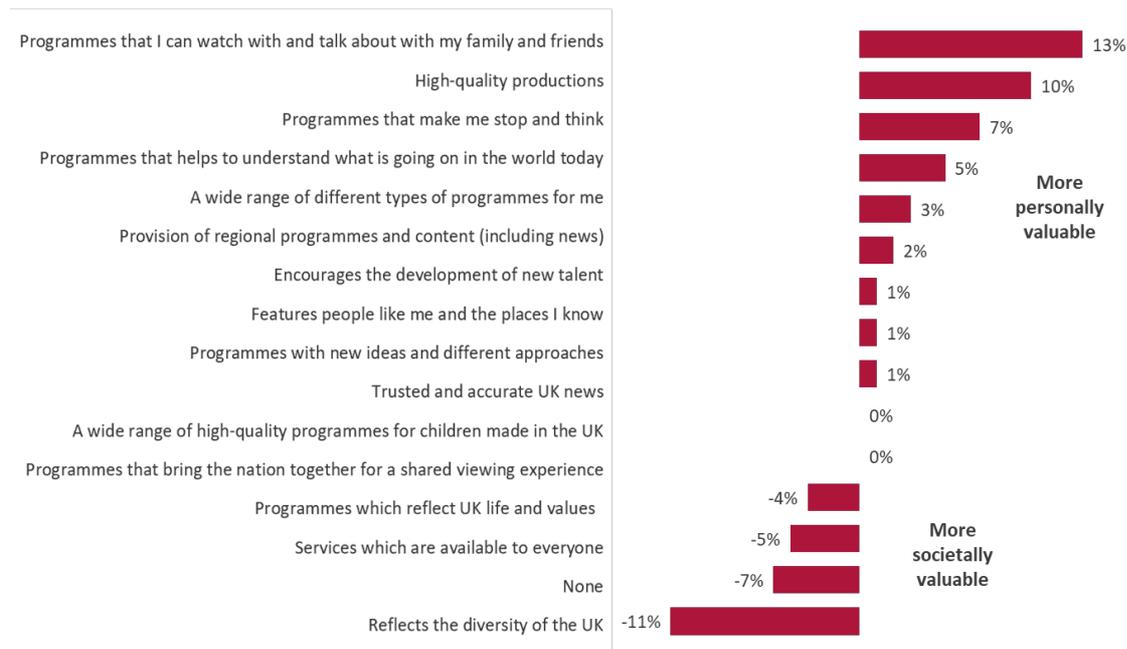


Q7a. What three benefits do you think are most valuable to society overall? Base: 16-24 (n=257); 55+ (n=805)

Personal and societal benefits compared

2.7 We calculated the percentage point difference between personal and societal value. Benefits with a more personal skew tended to include characteristics related to personal enjoyment, while provision of *‘trusted and accurate news’* was the most important benefit both personally and societally. *‘Programmes that reflect the diversity of the UK’* is considered more of a societal than a personal value.

Figure 7: Differences in personal and societal value



Q5a/Q7a/ Three most valuable benefits personal/societal. Base: personal (n=1815); societal: (n=1851)

2.8 We conducted further analysis to understand how respondents were selecting these features. We looked at their choices by PSB feature, to see if they were choosing the same features for personal and societal benefit, or just for one or the other. Generally, there was not much overlap; respondents distinguished between personal and societal value, indicating their different priorities.

2.9 The following are more likely to be personally valued:

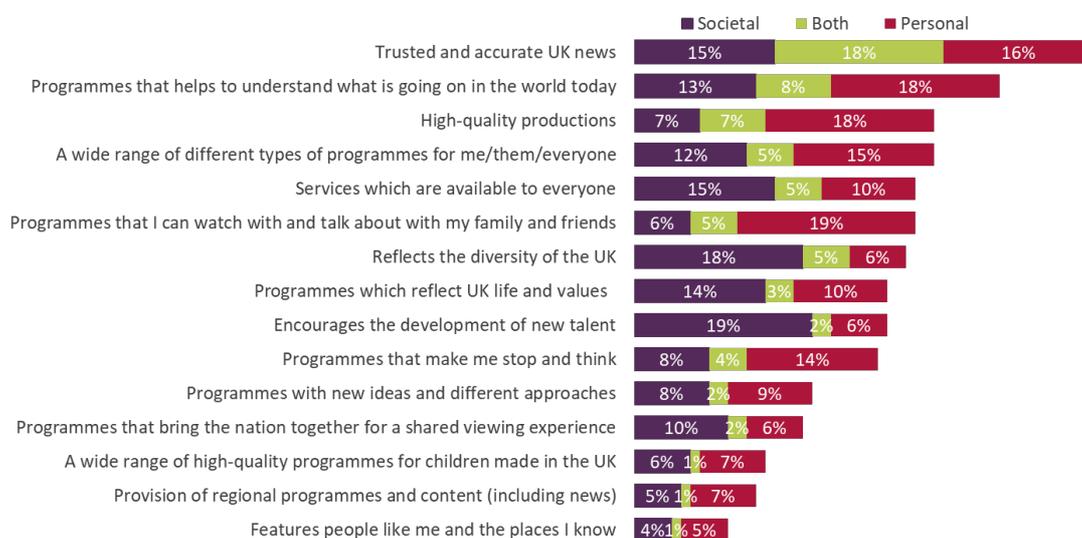
- programmes to watch and talk about with family and friends
- programmes that me stop and think
- high-quality productions

2.10 The following are more likely to be societally valued:

- encouraging the development of new talent
- reflecting the diversity of the UK
- programmes that reflect UK life and values

2.11 *‘Trusted and accurate UK news’* was the most frequently selected aspect of PSB for both personal and societal value (18% selected both). This was followed, quite a long way behind, by *‘programmes that help understand what is going on in the world’* (8%) and *‘high-quality productions’* (7%).

Figure 8: Differences between personal and societal valuation



Q5a/Q7a/ Summary: Three most valuable benefits personal/societal. Base: personal (n=1815); societal: (n=1851)