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# THE IMPACT OF LOCKDOWN ON AUDIENCES' RELATIONSHIP WITH PSB

Summary Report

December 2020



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# 1. Background and Approach

Ofcom is currently undertaking a review of the UK's Public Service Broadcasting (PSB) system. At the beginning of the year Jigsaw Research was commissioned to conduct a programme of qualitative research with audiences aged 16 and above to feed into this review. The research aimed to understand audiences' relationship with PSB, including: their use of PSB content and its relevance to them, the role and value of PSB in their lives and how their requirements from PSB may evolve in the future.<sup>1</sup>

This research was completed just as the initial national lockdown came into effect in March as a response to the outbreak of Covid-19. A further piece of research was subsequently required to explore and understand how the initial lockdown, from March through to early July 2020, and Covid-19 have impacted attitudes and behaviours towards PSB.

Jigsaw Research was again commissioned to conduct this research which comprised a programme of online qualitative research taking place in July and August 2020. This new phase of research had the following overall objectives;

1. To understand whether, and how, people's relationship with PSB has changed during this period.
2. To explore whether, or not, any of these changes are likely to be enduring.

There were two different audiences for this research; reconvened participants from the previous project and new cohort participants, recruited 'fresh' for this project. This summary is designed to be read in conjunction with the main report, An Exploration of People's Relationship with PSB

([https://www.ofcom.org.uk/\\_\\_data/assets/pdf\\_file/0024/199104/exploration-of-peoples-relationship-with-psb.pdf](https://www.ofcom.org.uk/__data/assets/pdf_file/0024/199104/exploration-of-peoples-relationship-with-psb.pdf)). It is intended to provide an update on the pre Covid-19 findings as a result of the lockdown experience.

Full details of the research approach, including a description of the different interviewing methods adopted, are provided in the appendix.

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<sup>1</sup> The fieldwork for this research was conducted pre-lockdown, from January to March 2020.

## 2. Overview of Key Findings

### For many, lockdown has been hugely disruptive, breaking habitual behaviours and impacting on media needs

The experience of lockdown and its impact on media consumption varied widely. Three key variables combined to impact on the time available to consume media and how people chose to spend this time during the initial lockdown. These were:

- How people's working situation had been impacted by lockdown
- Household composition and, in particular, the presence of children in the home
- Attitudes towards the media and lockdown.

The original research conducted pre-lockdown established that media habits and attitudes differ across the generations. These generational differences appear to have been maintained through lockdown, albeit in a less pronounced way given that the lifestyles of all audiences were more homogenous during this period.

Six key media needs emerged during this period:

- Information needs, specifically around Covid-19
- Connection and companionship
- Comfort and reassurance
- Distraction and entertainment
- Engaging the brain and providing a feeling of greater productivity
- Media helping to maintain a sense of daily structure and routine.

*"I started out watching a lot of news, then I went on to Netflix and - don't laugh - romantic comedies, and then I've started to move on to all sorts of cookery programmes and what not, and it's all to make me feel better."*  
Female, 25-39, Plymouth

*"For me sometimes it was just to get away... and I wanted to search for things to make me feel better."* Male, 25-39, Plymouth

*"I think lockdown has made me think... 'I don't care, I just want to watch something different, the one time I have the time to just watch something'... I've found myself wanting to watch things that are a bit more educational as well, just to kind of keep my brain ticking."* Female, 25-39, Belfast

For the majority of audiences who found themselves with more time on their hands both active and/or more passive media consumption increased during this period. Background media was particularly important for those living or working at home alone, providing a valued sense of company in the home.

In addition, a number of other changes in media routines were apparent;

- More family and/or communal viewing
- More time hunting around or browsing for new content
- Greater willingness to experiment with new or different content.



*"We've been watching a lot more telly together (with parents), than we would've done. And it's been things that are one episode a week, like MasterChef or something like that, and we'd all sit down and watch it together. It gave a bit more structure to my week and to my days, when it all seemed a bit like it was merging into one."* Female, 18-21, Dundee

## Radio and podcast listening also, on balance, increased during lockdown

**Radio listening:** had increased for some. A minority of younger audiences found themselves listening to the radio whilst at home when previously they tended to listen to it only in the car or while at work. This shift was partly driven by listeners getting bored with their own playlists and enjoying the greater sense of company provided by the banter and entertainment of a favoured DJ. The other key benefit was not always having to think about what to play next, especially if the goal was background noise.

For others, however, the lack of radio listening in the car and at work during lockdown meant that their radio listening actually decreased during this period.

A minority rediscovered BBC radio during lockdown, appreciating the more varied playlists than commercial radio stations offer, as well as the lack of adverts. Among music fans, BBC Radio was also seen as better for deep music expertise and helping people to discover new music if they became tired of their own streaming playlists.

**Podcasts:** Podcast listening also increased overall during this period. People often found themselves with more time available and seeking out the more distracting, semi-active media occasions that podcasts work well for.

A small number of people mentioned using BBC Sounds, typically for podcasts. Content tended to be selected on the basis of the presenter, Louis Theroux or Peter Crouch podcasts

for example, or a familiar title extending their radio or TV viewing ‘The History of the World in 100 Objects’ or a familiar comedy or DJ set.



*“I’ve used a lot more BBC Sounds now. I’ve been cycling more so I’ve been downloading podcasts to listen to... I really like it - I just download different podcasts and then go out for a cycle... You’re Dead To Me, Unbelievable Truth and a couple of other things ” Male, 18-21, Dundee*

While the content on BBC sounds was praised for being good quality, some users claimed to experience issues with the navigation and could find it difficult to locate new content.

The youngest, Gen Z, audiences seemed to be less affected in their overall media habits although like other audiences their volume of watching and listening increased overall.

### **News consumption peaked in the early stages of lockdown**

At the beginning of lockdown, news consumption increased significantly as many people felt compelled by the situation to watch the news every day. This was the most reported shift in media consumption during the lockdown period. For some young people this was the first time in their lives that they had seriously engaged with the news.



*“I feel like in the peak of lockdown my media habits changed a lot. I normally don’t watch the news but I felt like it was necessary to keep up with things and to be aware of any policy changes as and when they happened.” Male, 16-17, Perth*

The need for trusted information also heightened in this period, with access to reliable news and information feeling like it was a matter of their/their family’s safety.

However, as lockdown progressed, the ongoing need for news decreased. People reported that their news consumption declined over time and some started actively avoiding watching too much news either because they felt fatigue with the ongoing Covid-19 narrative or even felt that the Covid-19 coverage had the potential to have a detrimental effect on their mental health.

As lockdown progressed, spikes in attention were typically being generated around the big announcements and rule changes and any significant changes in the narrative. However, while people were watching the daily news on TV less avidly in the later stages, they were often supplementing this, more frequently than before, with news apps, online or radio news. This was seen as easier to ‘scan and skim’ than the more appointment TV news viewing but still ensured they were up-to-date.



*“Initially whenever Covid started, I couldn’t get enough of the news. I was trying to watch every single episode of the news. And then it got to the stage where it was nearly information overload... Do you know what? I don’t need to hear this, this is too much! So I began to retract from that.”*

Female, 40-59, Derry

### **The lockdown period served to remind people of the importance of regional and nations-based news reporting**

This period highlighted the importance of regional and local news. This was especially apparent in the nations of the UK where guidance and restrictions could differ depending on the policy of each devolved Government.

People living in the devolved nations often felt the need to listen to their own nation’s news to keep up-to-date with the picture in their own area. People were keen to ensure that any information they consumed was personally relevant i.e. applicable to where they live rather than other parts of the country. As the rules have become even more fragmented across the UK since the time of the research, it is likely that the increased value of regional and local news will continue.



*“I feel like it was important to watch and explore original content given the situation of lockdown in Aberdeen and other things occurring. It is useful to be able to access regional news so easily on BBC One and STV.”*

Female, 22-24, Aberdeen

### **Even if they were not able to see a greater sense of value in PSB for themselves, all audiences felt a greater sense of value on behalf of others**

The majority of audiences were able to see a greater sense of value of PSB on behalf of society as a whole.



*“To normalize something in England it seems like the best way to do it is to chuck it on British programme, so [without PSB] we would lose that, we would lose our sense of society I think so if we lost all that, what would people look to for inspiration of how to live our lives.”* Male, 22-24, Bristol

More specifically, lockdown highlighted the value of PSB for elderly and more vulnerable audiences, as well as all those shielding at home.

As with the pre-lockdown research, people acknowledged that the elderly are less likely to have access to alternative services and are therefore more reliant on PSB. Broadcast TV

and radio was felt to be the preferred means of viewing and listening for this audience and there was a sense that they would have been lost during lockdown without it.



*"I think it has been really important that there has been some media that everyone has been able to access, because everything that has been taken away."* Female, 22-24, Aberdeen

Vulnerable groups who were shielding were also considered to be more reliant on PSB during lockdown and those that don't have the money to pay for the streaming services over and above the licence fee. Those with mental health issues, for example depression or anxiety, who relied on TV for distraction and connection during this period were also mentioned.

Some participants also raised the value of PSB in supporting the UK media industry and talent. The recognition of the importance of this emerged spontaneously in a way that it did not in the previous research. There were two key elements to this:

- One was a minority recognising the need to support UK creative industries from an employment perspective – this was perhaps more top of mind than previously given the challenges that Covid-19 is suspected to have created for the creative and production sector.
- The other was a desire to ensure we protect and nurture the highly valued UK programming and content, which it is feared would diminish without PSBs.



*"The concern I would have is that these are UK based broadcasters and content producers, if these went like would we lose programming that is based in the UK that is I suppose representing us as people and as a society and maybe stuff is something that we can sort relate to on a national level, if that kind of content decreased would it be like more Americanised content?"* Male, 25-39, Newcastle

### Overall PSBs are seen to have performed well during the lockdown, both as providers of news and as entertainment services

Most notably, the relative importance of PSB having trustworthy and accurate news increased for many as a result of their lockdown experience. This was true across all generational groups.

Views were more diverse when it comes to PSB performance in providing entertainment. However, a sizeable minority claimed to feel a greater sense of value for PSB, as a result of their increased exposure to it during lockdown, than they did previously.

Perceptions of the PSBs performance during the lockdown period tended to vary according to their previous relationships with PSB:

- Among those who were previously light PSB users (typically younger audiences), some found themselves using more PSB during lockdown to supplement their existing sources and had often found this to be a rewarding experience. However, other lighter users, particularly the youngest 16-18 year old audiences, found their behaviour remained unchanged beyond increased consumption of the news, which occurred across the majority of audiences.



*"I thought the programmes produced by PSB channels have gotten a lot better recently, they have bigger actors and even better productions. I also enjoy the convenience of being able to watch whenever I like without having to make sure I'm free to watch them on tv when they are live."* Female, 22-24, Aberdeen



*"I think I started using the [PSB] on-demand streaming before lockdown started anyway...but I think lockdown has really reinforced that I'll definitely be doing that more."* Female, 16-18, Plymouth

- Audiences who previously watched a wide range of PSB content prior to lockdown (often older) tended to feel they had been well served during lockdown, although they recognised that new content had thinned during the covid-19 crisis since production and filming had slowed down.



*"I felt they lived up to the standards they are required to when it comes to informing, educating and entertaining. I really enjoyed all channels, Radio 2 and BBC Two particularly because of how informative they were and a pleasant change from some of the boring history programmes that are often aired. I find 'The Voice Kids' very uplifting – it always makes me laugh and cry. Very entertaining."* Female, 60+, Perth

- Audiences who prior to lockdown tended to watch a lot of the soaps and/or light entertainment programmes often struggled to replace this content on the PSBs and felt compelled to look elsewhere. This included seeking out content on the streaming services, in particular Netflix, and lower down the TV guide, for example on channels such as Dave. This group still valued PSB and were looking forward to the return of their favoured shows.



*"There doesn't seem to be much new content on TV during this lockdown period. That's mainly because it's a lot of news and current affairs programmes and they have, perhaps understandably, become quite depressing. I'm definitely choosing to watch more Netflix than I ever have before." Female, 25-39, Plymouth*

Overall, there are **several aspects of PSB content that have been recognised and particularly valued** during this period:

1. **The news & keeping informed:** PSB news sources were the ones that people turned to most frequently during the lockdown to find out what was happening. They were seen to be the most reliable sources of news, providing a trusted alternative to misinformation.

As well as keeping us informed, PSB news services were also recognised as having a valued softer role, reassuring the public and building a sense of everyone 'all being in it together'. This period also served to reinforce the belief that TV news, and particularly PSB TV news, is the most authoritative source of news.

The PSBs were generally perceived to have done a good job of fulfilling this range of needs from the news during this period.



*"If you are scrolling through your Facebook news feed or something you never really know what to trust and which are the reliable sources if people are sharing news articles and things. You just take it with a pinch of salt, I think the BBC is a lot more reliable." Female, 25-39, Swansea*



*"When they [the news] encouraged everybody going out to clap and they broadcast that, that was nice. And it encouraged you to go outside and that was a sort of community thing, and they showed you all the positive things that so was really nice and so it wasn't all negative, there were positive elements of that." Female, 40-59, Birmingham*



*"I know we have talked about news [a lot], but you just depend on them [the PSBs] bringing into your living room what is going on outside when you can't get outside and you'd miss that if they were not about." Male, 40-59, Derry*

2. **Companionship:** Even people who do not usually watch much broadcast TV often found themselves watching more during the lockdown. Broadcast content provided a sense of companionship, shared experience, structure and routine, as well as offering sufficient variety of content to reduce the need to seek out content elsewhere. This was true of both broadcast TV and radio. Examples of shows that helped provide a sense of daily/weekly routine and company were *Loose Women*, *This Morning* and *Goggle Box* as well as quiz shows such as *The Chase* and *Pointless*.



*"There is a sense of community because everyone is watching the same thing at the same time... it's nice to still feel connected to my friends."* Female, 25-39, Swansea



*"I just feel alone on Netflix, because it is escapism and then when I am on the normal channels I feel like I am part of a community because I am watching real people do real things, I am learning stuff, my brain is going."* Female, 25-39, Swansea

3. **Range:** The breadth of content available, in the form of quizzes, documentaries, nature shows, lifestyle shows and chat shows, provided welcome variety and an alternative to the box sets and series on the SVoDs (subscription video on-demand). Some people turned to TV for inspiration during lockdown, to facilitate their hobbies; for example. *Gardeners World*, *The Great British Sewing Bee* and other craft and cookery shows. This same range and breadth of content was not felt to be available on the streaming services.



*"I think the main channels provide an excellent selection of programmes for all ages and interests."* Female, 25-39, Belfast

4. **Britishness:** The relatability of UK (often referred to by respondents as British) content, especially drama and comedy, provided a sense of connection through a shared sense of humour and more immediate connection with the characters. There was an even greater recognition than in the previous research that a UK made drama or comedy is more relatable than international content. Examples of UK relatable content watched over this period included *Googlebox*, *Still Game*, *Line of Duty*, *Normal People*, *Friday Night Dinner*, *The Inbetweeners*, *Derry Girls* and *Four in The Bed*.



*"I don't know where I'd be if I didn't have (PSB) TV now...it just seems like a morale booster, a sense of normality. I think with Netflix, I can reach a point where I get fed up, some bits are a wee bit too Americanised and there's only so much of that I can take. I feel like with these, they're more relatable and I just enjoy them more. I think the whole style I just enjoy more... Even just the language, the way things are presented, I don't know it's just an almost kind of homely feeling that you get around it that you might not necessarily get to recognise through a big American production. Maybe it just feels a bit more rustic and real... and it has to set a certain high standard."* Female, 25-39, Belfast

5. **Family friendly content:** The availability of family friendly content, in the form of dramas, comedies, quizzes, lifestyle and light entertainment shows, helped to fulfil the increased demand for communal /family viewing e.g. *The Chase, Ant & Dec's Saturday Night Takeaway, Race Across the World, The Voice, MasterChef, The Repair Shop, The Great Celebrity British Bake Off, Gogglebox and Pointless*. However, the absence of the new series of the Saturday night light entertainment shows due to Covid-19 filming constraints was also missed from a family viewing perspective.



*"I had to move back from uni because of Covid, so, I've been living with my parents and have found that I'll be watching TV every night-time, a lot more with my family. So, like family shows, the generic programmes that you can just all watch like Ant and Dec's Saturday night takeaway – which at university probably wouldn't necessarily have been put on the TV. Especially because at uni I don't have a TV licence, so I just watch Netflix instead of the mainstream channels. It has been nice to see whilst at home that the main channels to have things that interest me and the whole family."* Female, 22-24, Newcastle

6. **Familiarity:** Having access to familiar content, with many people choosing to watch old favourites, brought some sense of normality. Lockdown favourites among the older audiences included *Line of Duty*, while younger audiences mentioned shows like *The Inbetweeners, Still Game* and *Friday Night Dinner* (although as we found previously these were sometimes being watched via Netflix due to the large back catalogue of easily accessible content rather than on the PSB on-demand services).



*"I did just put E4 on in the background and there was a Hollyoaks episode, and I recognised all the characters. Obviously, they must be replaying old series because they must have ran out of it as well. That felt quite nice to watch something familiar, that I haven't seen for a long time... just laughing at the fashion and the music!" Female, 25-39, Plymouth*

7. **Shared experiences:** The PSBs were seen to have more of the content that helped create a sense of 'shared experience', such as presenter led shows (e.g. *This Morning, Loose Women* and *The One Show*) that reflected how others were having to adapt and compromise their lives during lockdown. These shows were seen to provide a greater sense of connection with others. Other shows helped to bring the outside world in, particularly where they were filmed in the current season or were set in familiar countryside. Examples include, *Gardeners World, Spring Watch* and *Coast*.



*"The programme that I was watching in the morning on BBC after the news with the doctor and the female presenter and they had different things [on the show] and they had an exercise thing with Mr Motivator on at the end that was really hilarious and I think it did make you kind of unite as you know we were all in it together." Female, 40-59, Birmingham*

8. **Dramas:** Thought provoking dramas that deeply engage provided a distraction, as well as offering a source of shared experience and a stimulus for conversation and discussion; the sense of everyone watching at the same time connected audiences with their peer group and to the wider nation. Examples include: *Normal People, I May Destroy You, The Secret She Keeps, The Nest* and *The Salisbury Poisonings*.



*"Shows like 'Normal People' and 'I May Destroy You', I really like those two series... [referring to I May Destroy You] it was so powerful, it's got a really strong message... it talks about sexual assault, consent, racism.. all based in the UK and in London. It's so relevant I think at the minute, with things that have been going on politically. So, there's that kind of edge to it. And then she's written it and starred in it herself, makes the show that much more powerful." Female, 18-21, Dundee*

9. **Children's educational content:** Content aimed at children provided parents with content that did more than just entertain and was seen to be supporting their child's development at a time when formal education had been suspended. For example, the interactive children's shows that are felt to be unique to PSB, for example *Something Special* on CBeebies.

**“The CBeebies channel has children on there playing and concerts and this Mr Tumble fellow, there is a lot of variety. It makes me feel like she is still getting some sort of community even though she doesn’t know it, at least she is aware that other children still exist.” Female, 25-39, Swansea**

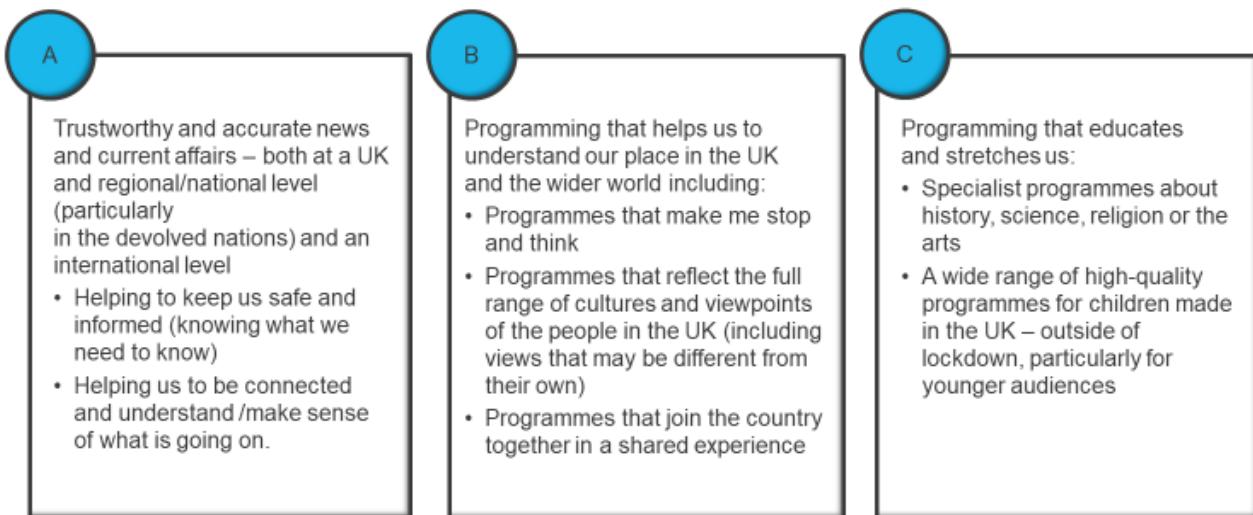
### Across all generational groups, the public service aspect of PSB came to the fore during this period

As in the pre-lockdown research we asked participants to prioritise the criteria that were most important to them for PSB to deliver. As result of their increased exposure to PSB, many were able to more clearly articulate what the role of PSB should be going forwards and were more able to recognise a degree of overlap in a number of the original statements.

The relative importance of PSB having trustworthy and accurate news, as well as local and regional news, increased for many as a result of their lockdown experience. This was true across all generational groups.

Other public service aspects of PSB also came to the fore, meaning that ‘high quality TV that entertains’ and ‘services that are available to all’ were more likely to be seen as hygiene factors - essential to make the rest work rather than unique features of PSB.

The criteria that has seemed to be particularly important for PSB can be grouped into three core buckets as outlined in the diagram below:



Other criteria that gained in importance, particularly among younger audiences, included having programmes that ‘reflect the full range of cultures and viewpoints of the people in the

UK' and programmes that made them aware of 'points of view different from my own'. However, it is hard to isolate the impact of lockdown on these criteria from other cultural events going on at the time that young people are also concerned about, such as the Black Lives Matter movement.

For some, specialist programmes about history, science or the arts rose up the agenda as a result of them having a greater degree of headspace and amount of time available to engage in this type of content. The question was also raised as to who would provide the UK perspective on history without the PSBs. Meanwhile, religious programming had become more important for those that missed being able to attend church.

### 3. Going Forwards

#### **Experiences during lockdown made audiences quicker to recognise the value of PSB and what would be lost without it – more so than in the previous research**

In particular, lockdown gave people an increased sense of the value of PSB as a trusted and independent news service and reinforced the need for this in society.



*"I think the fearmongering online is terrible whereas I don't think the BBC is fearmongering it is being very sensible in its advice and not making anyone panic."* Female, 25-39, Swansea



*"This news [BBC] tells you the whole story. It gives you everything all at once in succession, whereas if you look at news sources like Twitter, and especially the Sun, you can get a lot of fake news and have to do a lot of fact checking."* Male, 18-21, Belfast



*"If there wasn't any of the main service providers there would be a huge material difference... their news is a massive aspect of this where would we get our news from."* Male, 18-21, Belfast

Lighter PSB users that made more use of the PSB on-demand services during lockdown and found this to be a rewarding experience also claimed they would seek out PSB entertainment content more readily in future. However, participants found it difficult to assess whether or not any of the changes in their behaviour would be retained once they were 'out the other side' and 'normal life' had resumed, long term impact is therefore harder to assess.

Some did at least have aspirations to maintain some of their newly formed lockdown habits, including:

- Some enjoyed feeling more **up-to-date with the news**, and while this had declined since the initial period, they were keen to remain more up-to-date with what is happening.
- The **importance of regional news** is likely to continue given the increased variation in rules across different parts of the UK.
- The minority that have made **greater use of children's programming** during lockdown felt they would be keen to continue to do so, valuing the superior content versus other providers

- The minority that have **rediscovered BBC radio** during lockdown felt would like to continue to listen more, valuing the variety of content that is available, the presenters and the lack of adverts
- Those who have **watched more broadcast TV** during lockdown felt they may continue this habit, having come to appreciate watching something ‘in the moment’ and the convenience of having content served to them rather than having to seek it out.
- Some were also keen to **keep their viewing more varied**, having experimented with different genres during lockdown and enjoyed the variety this offered.



*“Before I didn’t really watch the news, but now I want to keep up with what is happening with lockdown and statistics and things.” Female, 16-18, Derry*



*“Because I have had more spare time I have definitely had more time to try out shows that I didn’t have time to before so I think there are now shows [on PSB] I will go to more often and genres I will try more often whenever I have more time to watch TV that I wouldn’t have gone to before lockdown happened.” Female, 16-18, Derry*



*“It has become more important and I have that greater appreciation. I didn’t really explore the main channels before lockdown but now I am using them as an alternative to Netflix. If I don’t want that heavy intense viewing [of binge watching a box set] or if I want to watch downstairs with my family and it’s more social. It’s also made me appreciate shows that I wouldn’t really have considered before as well which is quite nice.”*

*Female, 22-24, St Albans*

To conclude, while the challenges identified in the previous research for PSB remain and the long term impact **on use** is hard to assess, the lockdown period did leave people with an increased sense of **value** for PSB both for themselves and wider society as a whole that has the potential to endure.

## 4. Appendix

A qualitative approach was taken among audiences across the UK. There were two different audiences for the research; reconvened participants from the previous research and new cohort participants recruited 'fresh' for this research project.

The core of the project with both audiences was mini online triad group sessions; these were supplemented by one on one interviews with the over 60s, conducted by a mix of video and telephone calling. The inclusion of one on one interviews was to ensure that the less digitally confident were not excluded from the research. The group sessions with the reconvened participants were slightly shorter than those with the new cohort participants (1.25 hours versus 1.5 hours) as much of the background information was already known about the reconvened participants.

A summary of the approach taken is below:

### **The Reconvened Sample**

- 15 'triads' (3-4 per session) conducted over Zoom with a selection of reconvened participants aged 16-59. For comparison purposes, the same groupings were used as for the initial research and groups remained structured by age, socio-economic group and lifestage.
- 8 individual in-depth interviews, conducted over phone or Zoom depending on participant preference, with a selection of reconvened participants aged 60 or above.

### **The New Cohort Sample**

- 15 'triads' (3-4 per session) conducted over Zoom with newly recruited participants aged 16-59. Quotas were set by gender, age, socio-economic and lifestage to match the reconvened sample.
- 8 individual in-depth interviews, conducted over phone or Zoom depending on participant preference, with newly recruited participants aged 60 or above.

As with the previous study, most of the research required participants to take a personal viewpoint, although occasionally in the group sessions we asked them to think on a wider, more societal, basis.

It is also worth noting that the PSB channels were not referred to as public service broadcasters or PSBs throughout the discussion in part because of the low awareness of this term (especially among younger audiences) but also because we did not want to lead people

into thinking from a 'public service' perspective, rather than a personal or more entertainment based point of view.

## 4.1 Pre-Tasks

All participants were asked to complete a pre-task exercise prior to attending the research sessions; this was slightly different for the two audiences.

### Reconvened participants

These participants were asked to reflect on any changes in their attitudes and behaviours towards media content since the beginning of lockdown and to record these by means of answering 8 questions over WhatsApp. Moderators reviewed the responses to the 8 questions prior to the research sessions themselves.

### New cohort participants

These participants were asked to complete a more detailed pre-task in order to brief them about PSB prior to the research sessions. This had two key elements:

- Understanding of current media consumption habits

This consisted of keeping a WhatsApp based media diary over three days, followed by a recording a video selfie describing their overall thoughts on their habits and explaining what they had learnt about their viewing and listening habits over the 3 day diary period.

The diary task was intended to get people thinking about their media consumption prior to attending the research sessions. This idea behind this was to enable them to talk about their behaviours in a more considered way within the sessions. It also helps us to understand the individual behaviours and attitudes as they happen, rather than relying on subsequent recall which would not be as reliable.

- Learning about PSB

Participants were then asked to watch a short video introducing and explaining PSB and to record their initial thoughts on the role and importance of PSB in their lives generally and during lockdown in particular.

Over a further 3 days they were asked to record anything they watched or listened to on the main PSB Channels or their catch-up services or from BBC radio including BBC Sounds.

## 4.2 Online Triad Sessions

The mini online triad sessions were conducted across the UK from July to August 2020.

### Reconvened participants

Fifteen mini online triad sessions were conducted with participants reconvened from the previous research. Participants from the previous sessions were kept together and the same moderator conducted the sessions as had moderated the face-to-face sessions earlier in the year.

Each session consisted of either three or four participants; precise numbers per group are detailed in section 7.8. Participants were originally recruited to ensure a mix of media consumption types (ranging from heavier to lighter users of PSB content), with quotas being set on age, gender, ethnicity and socio-economic group. This ensured the research encompassed a wide range of participant demographics across the sessions.

The mini online triads were conducted with participants located across a range of urban and more rural locations as follows:

- England: Leeds and St Albans
- Scotland: Dundee and Glasgow
- Wales: Abergavenny and Aberystwyth
- Northern Ireland: Belfast and Newry

### New cohort participants

Fifteen mini online triad sessions were conducted with participants recruited fresh for this research.

Each session consisted of either three or four participants; precise numbers per group are detailed in section 7.9. Participants were recruited to match the profile of the reconvened sessions and so to ensure a mix of media consumption types (ranging from heavier to lighter users of PSB content), with quotas being set on age, gender, ethnicity and socio-economic group.

The mini online triads were conducted with participants located across a range of urban and more rural locations as follows:

- England: Plymouth, Newcastle and Bristol
- Scotland: Perth and Aberdeen
- Wales: Cwmbran
- Northern Ireland: Derry and Belfast

## 4.3 One on One Depth Interviews

In parallel with the mini online triads we conducted 16 one on one depth interviews amongst those aged 60+; 8 interviews with participants reconvened from the previous research and 8 with participants recruited fresh to this research. These interviews were with people living in either the same or nearby locations to the extended mini group sessions. Quotas were set to ensure a mix of genders, social economic group and media consumption behaviour.

## 4.4 Stimuli

In preparation for the sessions, stimuli were developed in conjunction with Ofcom. Stimuli for the sessions were similar across both audiences and included:

- Slides detailing a wide range of PSB and non-PSB media brands, both audio visual and audio (not used for the sessions with reconvened participants)
- A slide showing all the PSB brands – both master and channel brands (including BBC radio stations)
- A list of TV genres, to try to encourage people to think more broadly than just drama and news.
- A list of programmes for each of the PSB channel brands and the BBC sub brands, selected as those broadcast or available on demand across lockdown (not used for the sessions with reconvened participants)
- Programme images reflecting a selection of the programmes in these lists (not used for the sessions with reconvened participants)
- A summary of the high, medium and low priority criteria for the main channels (identified in the previous research)
- A slide showing different societal groups e.g. elderly, a range of ethnicities, different nations/locations, vulnerable and minority groups. This was designed to try to help people think more broadly about wider societal groups on the occasions where participants were asked to think from a wider societal rather than personal perspective.

Stimuli were tailored to each nation to reflect nation-specific brand and media content.

## 4.5 Sample

Below is a detailed overview of the sample structure.

### Under 25s

Triads were recruited to ensure a range of media use by setting the following participant quotas:

- In each triad **everyone** was required to watch some form of TV (be that live/broadcast TV, catch up or streaming services) at least 1-2 times a week.
- At least one per triad to watch no live TV/TV as it was broadcast.
- Minimum of three participants per triad to watch some form of TV live or catch up TV at least 2-3 times a week.
- Minimum of three participants per triad to watch some form of purely on-demand TV at least 2-3 times a week.
- Minimum of three participants per triad to listen to the radio at least 2-3 times a week.
- Minimum of one participant per triad to listen to podcasts at least 1-2 times a week.

Quotas were also set to ensure that a range of platforms were used to watch TV, ensuring a good mix across the session. More specifically:

- At least two per triad were required to be watching each of Netflix, Amazon Prime or YouTube 1-2 times a week or more.

Participants were required to be consuming media using a range of devices including smartphones, games consoles, tablets, laptops, radios and TV sets.

Across the groups we also recruited a mix of PSB usage levels per triad. We defined PSB use as:

- **Light users:** across the week **less than a quarter** of all their TV viewing is spent watching the main terrestrial channels (all BBC, ITV, Channel 4 and Channel 5).
- **Medium users:** across the week **a quarter to a half** of all their TV viewing is spent watching the main terrestrial channels (all BBC, ITV, Channel 4 and Channel 5).
- **Heavy users:** across the week **more than half** of all their TV viewing is spent watching the main terrestrial channels (all BBC, ITV, Channel 4 and Channel 5).

In each of the triad sessions there was a spread of gender.

Quotas were set to ensure a representative mix of BME participants per location. In Northern Ireland we recruited a mix of Unionists and Nationalists, dependent on the location.

Quotas were also set based on whether participants were studying or employed, living at home or had left home, and a minority were required to have children. Further details on the quota breakdown per group can be found in the subsequent sections.

## 25+

For the 25+ participants, while the definitions of the various audience groups remained the same as for the young people, the precise quotas were amended slightly to better reflect their viewing habits and behaviours:

- All to watch some form of TV at least 1-2 times a week
- Minimum 2 per triad to watch some form of broadcast TV or catch up TV at least 2-3 times a week
- For 3 of the triads minimum 2 to watch some form of purely on demand TV at least 2-3 time a week
- For other triads minimum of 1 to watch some form of purely on demand TV at least 2-3 time a week
- Minimum 2 to listen to the radio at least 2-3 times a week
- Minimum 1 to listen to podcasts at least 1-2 times a week

As with younger audiences, quotas were set to ensure that a range of platforms were used to watch TV, ensuring a good mix across the session. More specifically:

- At least two per triad were required to be watching Netflix 1-2 times a week or more.
- At least two were required to be watching sky 1-2 times a week or more.
- At least two were required to be watching Amazon Prime 1-2 times a week or more.

All groups were recruited to ensure a mix of levels of PSB consumption – light, medium and heavy, with the definitions as for the young people's audience.

The 25+ groups were separated by gender. Additional quotas were set by life stage, including age of children/whether they had children living at home. All participants were required to be either working, stay-at-home parents or retired.

Quotas were set to ensure a representative mix of BME participants per location. In Northern Ireland we recruited a mix of Unionists and Nationalists, dependent on the location.

## 4.6 Online triads – reconvened participants

Outlined below is a table detailing the detailed structure of the mini online triads with the Reconvened participants.

	REGION	LOCATION	URBAN/ RURAL	DATE	NO. OF PARTICIPANTS	QUOTAS
1	Wales	Abergavenny	Rural	1 July 2020	3	Age 16-18, ABC1
2	N. Ireland	Belfast	Urban	6 July 2020	4	Age 16-18, C2DE
3	England	St Albans	Urban	10 July 2020	4	Age 16-18 ABC1
4	England	Leeds	Urban	7 July 2020	4	Age 18-21 Employed/ Apprenticeship
5		Dundee	Urban	8 July 2020	4	Age 18-21, University
6	N. Ireland	Belfast	Urban	1 July 2020	3	Age 18-21 University
7	Wales	Aberystwyth	Rural	7 July 2020	4	Age 22-24, Pre- family
8	Scotland	Glasgow		9 July 2020	3	Age 22-24, with kids
9	England	St Albans	Urban	14 July 2020	4	Age 22-24 Pre-family
10	N. Ireland	Belfast	Urban	15 July 2020	3	Age 25-39, C2DE Female
11	Scotland	Inverness	Urban	14 July 2020	2	Age 25-39, C2DE Male
12	Wales	Swansea	Urban	13 July 2020	2	Age 25-39, ABC1 Female
13	N. Ireland	Belfast	Urban	16 July 2020	3	Age 40-59, ABC1 Male

Outlined below is a table detailing the detailed structure of the mini online triads with the Reconvened participants.

	REGION	LOCATION	URBAN/ RURAL	DATE	NO. OF PARTICIPANTS	QUOTAS
14	Scotland	Perth	Rural	16 July 2020	3	Age 40-59, ABC1 Female
15	England	Birmingham	Urban	8 July 2020	4	Age 40-59, C2DE Female

## 4.7 Online triads – new cohort participants

Outlined below is a table detailing the detailed structure of the mini online triads with the New Cohort participants.

	REGION	LOCATION	URBAN/RURAL	DATE	NO. OF PARTICIPANTS	QUOTAS
1	N. Ireland	Derry	Rural	4 August 2020	4	Age 16-18, ABC1, Female
2	Scotland	Perth	Rural	11 August 2020	3	Age 16-18, C2DE, Male
3	England	Plymouth	Urban	10 August 2020	3	Age 16-18 ABC1, Mixed gender
4	Wales	Cwmbran	Rural	12 August 2020	4	Age 18-21 Employed/Apprenticeship,, Female
5		Aberdeen	Urban	29 July 2020	4	Age 18-21, University, Mixed gender
6	N. Ireland	Belfast	Urban	3 August 2020	3	Age 18-21 Employed/Apprenticeship, Male
7	England	Newcastle	Urban	12 August 2020	4	Age 22-24, Living with parents, Female
8	Scotland	Aberdeen		12 August 2020	3	Age 22-24, Pre-family, Mixed gender
9	England	Bristol	Urban	17 August 2020	4	Age 22-24 Pre-family, Male
10	England	Bristol	Urban	18 August 2020	3	Age 25-39, ABC1, Female
11	England	Plymouth	Urban	6 August 2020	4	Age 25-39, ABC1, Mixed gender
12	England	Newcastle	Urban	13 August 2020	4	Age 25-39, C2DE, Female
13	N. Ireland	Derry	Rural	5 August 2020	4	Age 40-59, C2DE, Female

Outlined below is a table detailing the detailed structure of the mini online triads with the New Cohort participants.

	REGION	LOCATION	URBAN/ RURAL	DATE	NO. OF PARTICIPANTS	QUOTAS
14	Wales	Cwmbran	Rural	13 August 2020	2	Age 40-59, C2DE, Male
15	Scotland	Perth	Rural	18 August 2020	4	Age 40-59, ABC1, Female

## 4.8 Online Discussion Guides

Overleaf are the discussion guides used for the reconvened and new cohort audiences

## Ofcom PSB Follow Up

### Reconvened Discussion Guide Outline

Version 3

#### 1. Introduction (5 MINS)

##### Researcher introduction

- Explain is a follow up from the work previously about the media content they watch and listen to and the role the 'main channels' of BBC, ITV/STV/UTV, Channel 4 and Channel 5 play in their media lives. Just to recap media content we mean broadcast TV programmes and films, radio shows, programmes & films on their on-demand services (e.g. iPlayer, All 4, ITV Hub, BBC Sounds), 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. So things you watch, read or listen to on TV, radio, online, on mobile phone apps, etc.
- Explain their help last time was extremely valuable and their views have been combined with the feedback from other group sessions across the country and reported back to Ofcom, the broadcast media regulator
- Since then quite a lot has happened, in particular the Coronavirus has forced many of us during the lockdown to alter our lives fairly significantly and spend considerably more time at home.
- As you know Ofcom is in the process of developing regulation and guidelines for our media in the future and in light of the pandemic and potential changes in our media habits and behaviours wants to update the findings.
- *Ground rules and reassurances:*
  - There are no right or wrong answers to any of this, your opinions count, so please do be open and honest about how you feel and what you think
  - Not trying to sell anything and there will be no follow-up
  - Views and opinions will be held in strictest confidence
  - Online groups – need to take turns to speak and will make sure everyone's opinion gets heard. May involve sometimes going round the group and giving everyone a 'turn'.
  - Sessions are being video recorded – ensure they all completed the permission slip in advance

##### Respondent introductions

- Thanks a lot for completing the task in advance – explain have looked at your pre-tasks and will be using this as the background to a lot of our discussions today.
- Can you just remind everyone of your name, what you do and who you live with?
- Have you had to self-isolate? Have you been working/furloughed?
- Favourite programmes you have been watching during lockdown?
- Is there anything you have enjoyed listening to in lockdown e.g. something on the radio or a podcast?

#### 2. Impact of lockdown (15 MINS)

**Please now think specifically about your use of video (TV, streaming, etc) and audio (radio, streaming, etc) during the lock down period:**

- What have your key needs been from the media you watch and listen to during lock down?  
**(LISTEN OUT FOR)**
  - The need for information/to keep up to date
  - The need for entertainment
  - The need for distraction/to alleviate the boredom
  - The need for background company
  - The need to watch as a family/household
  - The need for community & connectivity
- How has the way you watch and listen to media changed during lockdown? **ALLOW TO CHAT SPONTANEOUSLY BEFORE PROBING**
- Have you formed any new habits new during lockdown?
  - Have you had any pleasant surprises?
  - Did you develop new ways of finding out about programmes/content that you like to watch/listen to?
- How well has the media you watch and listen to served your needs during lock down?
  - How easy or difficult have you found it to find things to watch or listen to?
- Which providers, services or channels have served you well during lockdown? How have they done this?
  - Who are you watching or listening to more?
  - Who, if anyone, has not performed as well during the lockdown period?
- Now looking in more detail, how, if at all, has your viewing changed during lockdown?

**PROBE:**

- Types of shows watched – Genres (show list as a reminder)
- Balance of on-demand/streaming vs linear/live watching
- Providers/brands/channels used
- Screens used (phone vs TV vs laptop, etc)
- Where watching in the house
- Who watching with - solo vs shared viewing?
- Type of viewing e.g. more background vs. lean-in active viewing
- What about your radio listening? How if at all has this changed?
- **PROBE:**
  - Are you listening to more/less?
  - Speech radio vs. music
  - Has where you are /the way you listen changed at all?
  - Which radio stations listening to more/less?
- What about podcasts? How if at all has this changed?
  - IF LISTENING: Which services are you using to listen? How, if at all, has this changed? What are the names of the podcasts? Do you know who makes these? **(LISTEN OUT FOR WHETHER BBC CONTENT OR TAKE NOTE AND LOOK UP LATER)**
- Have you found that you have watched or listened to more local radio stations or regional programmes during Lockdown?
  - What have you watched or listened to e.g. regional news bulletins, regional pages online, TV shows set in the area in which you live, local radio shows
  - Why is that? What is it that more regional/local content has given you during this period?
  - Who has done this type of content particularly well?

### 3. Impact on use of PSB (20 mins)

**EXPLAIN:** We have discussed lots of different providers but as when we met last time, our focus is on the following broadcasters; BBC TV and BBC radio stations, ITV/STV/UTV, Channel 4 and Channel 5.

This can be watching or listening to as it is broadcast or using their on demands services: iPlayer, Sounds and 4OD, ITV Hub, My5. This also includes the BBC radio and local radio stations and BBC Sounds.

#### **STIMULUS A: BRANDS – SHARE SCREEN**

- How, if at all, has your use of these channels, on demand services and radio stations changed during lockdown? (if say watched more/less get a feel for how that compares with other providers during this time i.e. have they had a greater share of their media consumption)
  - Why do you think this is? What has made them more/less valuable during this time?
- Thinking about these channels/brands/services, what types of their shows/content have you watched or listened to during lockdown? Probe:
  - Genres/categories/types (REFER THEM TO **STIMULUS B – GENRES** IF NECESSARY)
  - What sort of shows/types of content have they been particularly good for? /Have you particularly valued from these channels?
  - Which channels or stations in particular have you found yourself watching/listening to over this period?
  - Favourite/stand out shows
  - (IF RELEVANT) Educational content for children
- How have you used these channels during lockdown?
  - Broadcast vs. on demand – have you watched more scheduled TV vs on demand?
    - Catch-up vs box-set
  - Using these services vs. their content on a streaming service such as Netflix
  - Who watching with - solo vs shared viewing?
  - Type of viewing e.g. more background vs. lean-in active viewing
- How have they compared with what has been available from other providers in the following areas & why?: PROBES
  - Lean in dramas and entertainment
  - Shows for more background viewing while you are doing other things
  - Watching with others/as a family
  - (Where relevant) Watching for your children/education for your children
- What types of shows have you been able to get on these channels that you can't get in these same elsewhere?
- Thinking specifically about news, information and current affairs
  - IF NOT COVERED :Did you find yourself watching or listening to more of this type of content on the main channels or BBC stations during lockdown?
    - How did you watch/listen/catch up with this?
    - Was this instead of the other types of shows/content that you would normally watch or listen to? What did it replace?
  - How did the main channels perform in this area during lockdown?
    - Which ones did particularly well?
    - How did they compare with what was available from other sources of news/information/current affairs?
- Thinking of all the main channels, have some of the channels/services been stronger and more relevant to you in this period than others?

- Which particular channels or sub brands (i.e. channel brands of ITV and BBC)
  - Why is this – what have they done well?
- Are there any channels where you have watched or listened less or where your behaviour has been unchanged? Why is this?
- Where have they been less strong? Who does this genre/category better?
  - Can you give examples?
- What about BBC Sounds and BBC radio? Has your use of these changed at all? (IF YES ASK SIMILAR PROMPTS)

### 3. Impact on value of PSB (15 mins)

- Last time we met we talked about the value of PSB to you and society and whether it would matter if these services ceased to exist.
  - Have they become more important to you during lockdown? Do they feel any more or less relevant to you than before? Why/Why not?
  - How, if at all, has your sense of the value of PSB content changed during lockdown? How distinct is what the main channels have been offering from what is offered by streaming services such as Netflix, You Tube or Spotify?
    - Is there any type of content that they have provided that others channels or services have not?
    - Probe for: (this might be too leading – maybe it should be ‘listen for’)
      - Keeping you informed
      - Being balanced and non-alarmist
      - Feeling of community/being in it together
      - Understanding what you’re going through (empathy)
      - Keeping you connected to everyone else
    - What has been their role for you at this time?
    - What about for the country as a whole?
  - Thinking of all the main channels, their on-demand services and BBC radio is this true of all channels and services or some of these in particular?
  - If the PSB channels did not exist what do you think you would have missed most during lockdown? What else?
    - Why? Is this all channels or certain channels in particular?
- Which groups in society do you think PSB has been most important for during lockdown? Why these groups?
  - What would have been the impact on them if the PSB channels didn’t exist?
- When we last met you ranked a number of priorities according to which ones were most important to you – when combined across the various groups this looked like this (SHOW **STIMULUS C – PRIORITIES RANKING – HIGH/MEDIUM/LOWER**) Would you change anything on here as a result of your experiences in the lockdown period? Why/Why not?
  - Have any of these priorities been even more important or really come into their own during lockdown? Why ones and why?
- How well do you think they met these criteria during lockdown? Any channels or services in particular?
  - What about BBC radio stations (including local radio) or BBC Sounds?
- And which of these did you feel were not met by one or more of the main channel broadcasters?
  - Can you give examples?

### 4. Going forwards (15 mins)

- Are you likely to continue with the new habits that you have developed during lockdown once we return to a more 'normal way of life'? How and why?
  - As a result of this experience have your priorities changed at all for what these channels should be delivering in the future?
    - Would you change the ranking at all? Refer back to **STIMULUS C**
    - Would you add anything new on here that is missing?
  - Do you think the way you watch or listen to any of these channels will change going forward as a result of this? How and why?
  - Which bits of your new behaviour will you be keen to keep?
    - Channels/services watched or listen to?
    - Way you watch – broadcast vs. on demand?
    - Who you watch with – family vs. solo?
    - Types of shows you watch?
  - Has any of this had a lasting impact on how you now see these main channels and their role in society? How and in what way?
    - And what sorts of things would they need to do going forwards to ensure they meet the criteria you said were important earlier?
  - Based on what you now know what do you now see as the main role of these channels going forwards i.e. what would we lose if these channels and the British content contained on them no longer existed? (i.e. that you might not get in the same way elsewhere)
- PROBE IF NECESSARY TO ENSURE ALL AREAS COVERED :
- Britishness of content – i.e shows based and filmed in different parts of Britain - showing the lives of people like you
  - Providing a sense of community and connecting you with others – e.g. feeling like we are going through a shared experience in the current times
  - Family cohesion i.e. providing something to watch as a family
  - Educational content for children
  - Trusted source of news and current affairs – keeping you aware of what is going on
  - Helping structure your day through the TV schedule/looked forward to shows
  - Anything else?
- Has how you feel about the PSBs changed as a result of your experience in lock down?
  - What are the main things you would do differently from now to ensure that these channels continue to be relevant in the future? (e.g. including any new requirements to meet current gaps that you might include)
  - *Has any of this changed your views on the value for money you get from the current Licence Fee? Why/Why not?*

## 6.To end (5 MINS)

- Go around and ask everyone to say individually
  - If they would keep the PSBs and why?
  - And (if time) the one key purpose that the PSB would need to have in place to meet future needs

## Ofcom PSB Follow Up

### New Cohort Discussion Guide Outline

Version 1

#### 1. Introduction (5 MINS)

##### Researcher introduction

- EXPLAIN: we are going to be talking media content they watch and listen to and the role the 'main channels' of BBC, ITV/STV/UTV, Channel 4 and Channel 5 play in their media lives. By media content we mean broadcast TV programmes and films, radio shows, podcasts, programmes & films on their on-demand services (e.g. iPlayer, All 4, ITV Hub, BBC Sounds), 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. So things you watch, read or listen to on TV, radio, online, on mobile phone apps, etc.
- We have conducted some previous research into this topic at the beginning of the year but since then quite a lot has happened, in particular the Coronavirus has forced many of us during the lockdown to alter our lives fairly significantly and spend considerably more time at home. We are also interested in the impact of this on your viewing and listening habits and behaviours.
- Mostly we are asking you to talk from your own perspective but now and then we might ask you to put your 'citizen hat' on and think about wider society - everyone including the elderly, families and children - and more minority groups.
- *Ground rules and reassurances:*
  - There are no right or wrong answers to any of this, your opinions count, so please do be open and honest about how you feel and what you think
  - Not trying to sell anything and there will be no follow-up
  - Views and opinions will be held in strictest confidence
  - Online groups – need to take turns to speak and will make sure everyone's opinion gets heard. May involve sometimes going round the group and giving everyone a 'turn'.
  - Sessions are being video recorded – ensure they all completed the permission slip in advance

##### Respondent introductions

- Thanks a lot for completing pre task exercise in advance – explain have looked at your entries and will be using this as the background to a lot of our discussions today.
- First name, where you live and who with
- What do you normally do? Are you at college/university? Are you working?
- What have you been doing in lockdown, have you had to self-isolate? Have you been working?/furloughed?
- Favourite programmes you have been watching during lockdown?
- Is there anything you have enjoyed listening to in lockdown e.g. something on the radio or a podcast?

#### 2. Current behaviour (15 MINS)

- AS A GROUP: You all mentioned a number of favourite shows, what is it about these shows that makes them your favourite?

**STIMULUS A1: BRAND BOARD (SHOWING LOGOS OF TV/STREAMING BRANDS)**

- Looking at this, which of these brands feel most relevant/relatable to you?
  - What makes them feel more relevant/relatable?
- Of these which do you watch and listen to the most? Why?
- Are there any brands on here you don't feel are particularly relevant to you?
  - Why is that? Who do you feel the content they produce is more aimed at? Why?
- How do you typically watch these brands?
  - Which work best when actively watching alone? Why?
  - Which work best when you want something to keep you company/in the background? Why?
  - Which work best when watching with others/as a family? Why?
  - How much TV content do you watch broadcast vs. on demand?

**STIMULUS A2: BRAND BOARD (SHOWING LOGOS OF RADIO/AUDIO STREAMING BRANDS)**

- Looking at this, which of radio or audio brands feel most relevant/relatable to you?
  - What makes them feel more relevant?
- Of these which do you watch and listen to the most? Why?
- How and when do you typically listen to radio or audio content?
  - Which work best when at home? Why?
  - Which work best when out and about? Why?
  - How much audio content do you listen to on the radio as its broadcast vs. on demand services?
- What about podcasts?
  - How frequently do you listen?
  - Which services do you use to find new podcasts? Why these ones?
- How do you find new things to watch or listen to? How do you use your favoured services to assist you finding new content (e.g. are you searching/heading straight for things you know you want to watch vs. browsing vs. using recommendations)?

### 3. Impact of lockdown (15 MINS)

**Please now think specifically about your use of video (TV, streaming, etc) and audio (radio, streaming, podcasts etc) during the lock down period:**

- What have your key needs been from the media you watch and listen to during lock down? (LISTEN OUT FOR)
  - The need for information/to keep up to date
  - The need for entertainment
  - The need for distraction/to alleviate the boredom
  - The need for background company
  - The need to watch as a family/household
  - The need for community & connectivity

- How has the way you watch and listen to media changed during lockdown? ALLOW TO CHAT SPONTANEOUSLY BEFORE PROBING

PROBE:

- Types of shows watched – Genres (show list as a reminder)
- Balance of on-demand/streaming vs linear/live watching
- Providers/brands/channels used
- Who watching with - solo vs shared viewing?
- Type of viewing e.g. more background vs. lean-in active viewing
- What about radio listening or podcasts, has this behaviour changed at all?
  - Are you listening to more or less?
  - Where
- Have you formed any new habits new during lockdown?
  - Have you had any pleasant surprises?
  - Did you develop new ways of finding out about programmes/content that you like to watch/listen to?
- How well has the media you watch and listen to served your needs during lock down?
  - How easy or difficult have you found it to find things to watch or listen to?
- Which providers, services or channels have served you well during lockdown? How have they done this?
  - Who are you watching or listening to more?
- Who, if anyone, has not performed as well during the lockdown period or have you struggled to find things you want to watch or listen to on during lockdown?
- What about your radio listening? How, if at all, has this changed? PROBE:
  - Are you listening to more/less?
  - Speech radio vs. music
  - Has where you are /the way you listen changed at all?
  - Which radio stations listening to more/less?
- What about podcasts? How if at all has this changed?
  - IF LISTENING: Which services are you using to listen? How, if at all, has this changed?  
What are the names of the podcasts? Do you know who makes these? (LISTEN OUT FOR WHETHER BBC CONTENT OR TAKE NOTE AND LOOK UP LATER)
- Have you found that you have watched or listened to more local radio stations or regional programmes during Lockdown?
  - What have you watched or listened to e.g. regional news bulletins, regional pages online, TV shows set in the area in which you live, local radio shows
  - Why is that? What is it that more regional/local content has given you during this period?
  - Who has done this type of content particularly well?

#### 4. Impact on use of PSB (20 mins)

EXPLAIN: We have discussed lots of different providers but for this part our focus is on the following broadcasters; BBC TV and BBC radio stations, ITV, Channel 4 and Channel 5.

This can be watching or listening to as it is broadcast or using their catch-up/on demands services: iPlayer, BBC Sounds and All4, ITV Hub, My5

- How would you describe this group of broadcasters?

### **STIMULUS B; PSB BRANDS – SHARE SCREEN**

- How important to you are these channels and their on-demand services to you in your viewing habits? Why/Why not?
- What about the radio stations and BBC Sounds? Why/why not?
- How, if at all, has your use of these channels, on demand services and radio stations changed during lockdown? (if say watched more/less get a feel for how that compares with other providers during this time i.e. have they had a greater share of their media consumption)
  - Why do you think this is? What has made them more/less valuable during this time?
- Thinking about these channels/brands/services, what types of their shows/content have you watched or listened to during lockdown? Probe:
  - Genres/categories/types (REFER THEM TO **STIMULUS C – GENRES** IF NECESSARY)
  - What sort of shows/types of content have they been particularly good for? /Have you particularly valued from these channels?
  - **Which channels or stations** in particular have you found yourself watching/listening to over this period? & Why?
  - Favourite/stand out shows
  - (IF RELEVANT) Educational content for children

### **STIMULUS D: PROGRAMME BY CHANNEL LIST**

- Please take a minute to a look at the list of just some examples of the shows or programmes on these brands as a reminder of what they offer. What are your thoughts looking at this?
- If you don't watch/listen to much, what might encourage you to watch these types of channels more/what might make them feel more relevant? (if they aren't already). Probe:
  - Content; appeal, breadth, choice
  - Navigation
  - Ease of finding what you want/functionality
  - Ease of finding things that feel aimed at you
  - Knowing/hearing more about the shows/content
- How have you used these channels and or the content they produce during lockdown?
  - Broadcast vs. on demand – have you watched more scheduled TV vs on demand?
    - Catch-up vs box-set
  - Using these services vs. their content on a streaming service such as Netflix
  - Who watching with - solo vs shared viewing?
  - Type of viewing e.g. more background vs. lean-in active viewing
- How have they compared with what has been available from other providers in the following areas & why?: PROBES
  - Lean in dramas and entertainment
  - Shows for more background viewing while you are doing other things
  - Watching with others/as a family
  - (Where relevant) Watching for your children/education for your children
- What types of shows have you been able to get on these channels that you can't get in these same elsewhere?
- Thinking specifically about news, information and current affairs
  - IF NOT COVERED :Did you find yourself watching or listening to more of this type of content on the main channels or BBC stations during lockdown?
    - How did you watch/listen/catch up with this?

- Was this instead of the other types of shows/content that you would normally watch or listen to? What did it replace?
- How did the main channels perform in this area during lockdown?
  - Which ones did particularly well?
  - How did they compare with what was available from other sources of news/information/current affairs?
- Thinking of all the main channels, have some of the channels/services been stronger and more relevant to you in this period than others?
  - Which particular channels or sub brands (i.e. channel brands of ITV and BBC)
    - Why is this – what have they done well?
  - Are there any channels where you have watched or listened less or where your behaviour has been unchanged? Why is this?
- Where have they been less strong? Who does this genre/category better?
  - Can you give examples?
- What about **BBC Sounds and BBC radio**? Has your use of these changed at all? (IF YES ASK SIMILAR PROMPTS)
  - Have you listened to more or less BBC radio and BBC Sound? Why/Why not?
    - Which stations? Why them – what did they do well/Less well?
    - Which podcasts/audio content? Why – what did they do well/less well?
  - What did these services offer that more commercial radio stations or podcast services did not?

## 5. Impact on value of PSB (20 mins)

- How would you feel if all TV and radio services from these channels disappeared tomorrow?
  - What would you miss the most?
  - You mentioned earlier - finding shows or programmes from one of the TV channels we have been discussing being shown on other services such as Netflix, Amazon Prime or YouTube. How would you feel if this type of British made shows or programmes was no longer available to watch on these other platforms?
- What would we, both personally and as a society, lose if these channels and the programmes that they make didn't exist in their current form? In other words what do you see as the role of these channels and the content they produce? PROBE WHERE SEEMS RELEVANT
  - The range of programming on offer across these channels (i.e. the range of different genres of programming)
  - Britishness of content – i.e shows based and filmed in different parts of Britain that you can relate to
  - Providing a sense of community and connecting you with others – e.g. feeling like we are going through a shared experience in the current times
  - Family bonding i.e. providing something to watch as a family
  - High quality/thought provoking dramas and documentaries
  - The company of radio and broadcast TV – ensuring you don't feel lonely when at home
  - Educational content for children
  - Trusted source of news and current affairs – keeping you aware of what is going on
  - Helping structure your day through the TV schedule/looked forward to shows
  - Anything else?
- You mentioned earlier certain shows that you like to watch or listen to on **scheduled/broadcast TV or radio** by which we mean you are watching it as it is aired on the TV or radio rather than on catch up later, are there any others we have missed (probe: News, reality shows, 'must watch' dramas)?

- What does watching or listening to **scheduled/broadcast** TV and radio bring that catch-up or streaming services don't? (LISTEN OUT FOR IDEA OF BRINGING PEOPLE TOGETHER/FAMILY TIME/CONNECTION)
- How, if at all, has your sense of the value of PSB content changed during lockdown? How distinct is what the main channels have been offering from what is offered by streaming services such as Netflix, You Tube or Spotify?
  - Is there any type of content that they have provided that others channels or services have not?
  - When you come across the shows they make on other platforms, do you see content differently/have different expectations of it when you see it on say Netflix or Amazon Prime than if you see it on a broadcast channel like BBC or ITV? How do your perceptions differ? Why is this?
- Thinking of all the main channels, their on-demand services, **BBC radio and BBC Sounds** is this true of all channels and services or some of these in particular?
- If the PSB channels did not exist what do you think you would have missed most during lockdown? What else?
  - What has been their role for you at this time?
  - What about for the country as a whole?
  - Why? Is this all channels or certain channels in particular?
- Which groups in society do you think PSB has been most important for? Why these groups?
  - Are there any other groups that you think may have found PSB particularly valuable during lockdown?

### **SHOW STIMULUS E – PRIORITIES RANKING**

- Explain that these are all possible elements that the channels we have been talking about – BBC TV and BBC Radio, ITV, C4 and C5 – might be required to build into their programming. This chart sorts these into different priority groups based on some previous research, however, we appreciate that in the recent period all of our priorities are likely to have changed.
- We would now like you to imagine that you could decide which of these you personally would want to ensure were provided by these channels and stations. There is a limited budget and so you can't have everything – you need to prioritise some things over others.
- You've got 13 statements can you please individually select the statements that you think should be the highest priority – you can each pick up to five statements to go in the top box. ASK TO DO INDIVIDUALLY THEN SHARE AS A GROUP
  - Discuss reasons for selecting their top 5
- Which of these would you say are lower priority?
- How well do you think they met these criteria during lockdown? Any channels or services in particular?
  - What about **BBC radio stations (including local radio) or BBC Sounds**?
- Would you add anything on here that is missing?
- And which of these did you feel were not met by one or more of the main channel broadcasters?
  - Can you give examples?

### **6. Going forwards (10 mins)**

- Are you likely to continue with the new habits that you have developed during lockdown once we return to a more 'normal way of life'? How and why?
  - Do you think the way you watch or listen to any of these channels will change going forward as a result of this? How and why?

- Which bits of your new behaviour will you be keen to keep:
  - Channels/services watched or listen to?
  - Way you watch – broadcast vs. on demand?
  - Who you watch with – family vs. solo?
  - Types of shows you watch?
  - What about BBC Sounds and BBC Radio?
- Has any of this had a lasting impact on how you now see these main channels and their value in society? How and in what way?
  - And what sorts of things would they need to do going forwards to ensure they meet the criteria you said were important earlier?
  - Has how you feel about the PSBs changed as a result of your experience in lock down or do you think you have always felt this way?
- What are the main things you would do differently from now to ensure that these channels continue to be relevant in the future? (e.g. including any new requirements to meet current gaps that you might include)
- *FOR OLDER AUDIENCES ONLY: Has any of this changed your views on the value for money you get from the current Licence Fee? Why/Why not?*

## 7. To end (5 MINS)

- Go around and ask everyone to say individually
  - Whether they feel the PSBs have a valuable role to play in British media AND if they would keep the PSBs and why?
  - **What about BBC Radio and BBC Sounds?**