

Ofcom PSM Tracker 2022

Produced by: BMG Research

Fieldwork: February to December 2022

Background and Objectives

- The PSM tracker was developed in 2021 to reflect today's more complex media market and replaces the Public Service Broadcasting (PSB) tracker, which was last conducted in 2019. In 2022 a second wave of the PSM tracker was conducted.
- The objectives are to:
 - Assess audience satisfaction with PSB services
 - Understand how well individual PSB services are delivering in the marketplace, across a range of attributes
 - Assess satisfaction and delivery for a range of BVoDs and SVoDs
 - Understand reasons why audiences are not watching specific PSB services
 - Understand reasons for using and not using BVoDs
- Since we have two complete waves of the PSM tracker we can now view changes between 2021 and 2022

Methodology

Sample

- 3,027 total
- 2,140 in England, 330 in Scotland, 328 in Wales and 390 in Northern Ireland.
- No quotas added in the push-to-web approach, but quotas on online survey based on age, gender, social grade, region/country and ethnicity ensured sample balance. Minimum targets per region were set to achieve a readable base size.

Data collection

- Push-to-web (Letter to address followed by completing online); Telephone (Letter to address followed by completing over the phone); Panel (Stratified random sample of online panel); River sampling (Recruiting respondents via panels who are not full panel members).
- Fieldwork period: 14th February – 13th December.

Data reporting

- Weighted to be nationally representative of the UK using mid-2020 population estimates, 2011 census, 2017 annual population survey.
- Significance testing applied at the 95% confidence level.

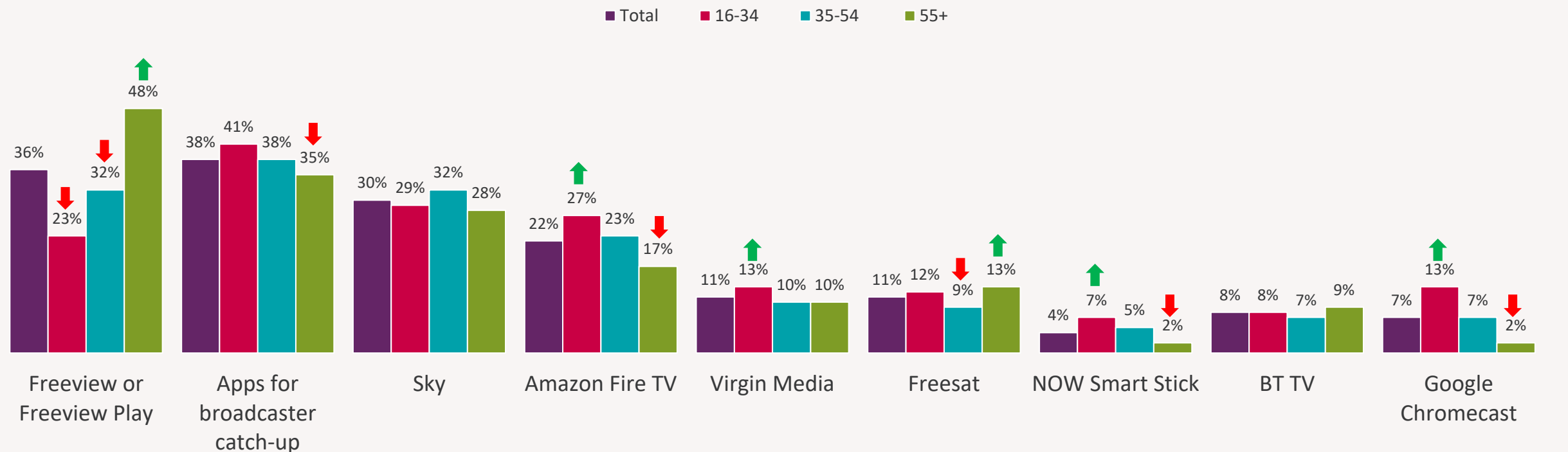


Section 1: Consumption



Ways of watching broadcast TV are diverse, and vary across age groups.

Ways of watching PSBs by age



↑ ↓ Significantly higher/lower than Total

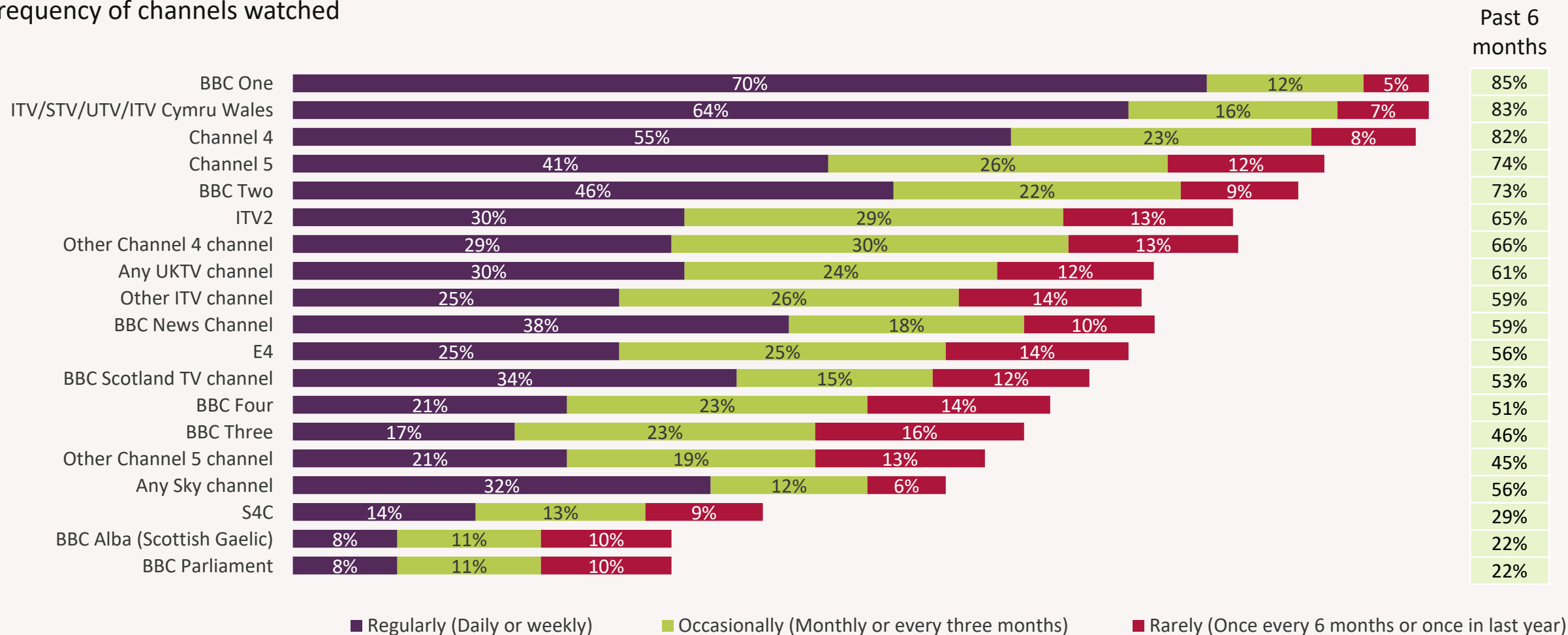
Source: Ofcom Public Service Media Tracker 2022

Q17. Which of the following ways of watching broadcast TV channels like BBC, ITV or Channel 4 are used in your household? (Note: not all services asked about shown)

Base: All respondents: Total (3027), 16-34 (806), 35-54 (1013), 55+ (1208)

BBC One, ITV and Channel 4 are most likely to be watched regularly.

Frequency of channels watched



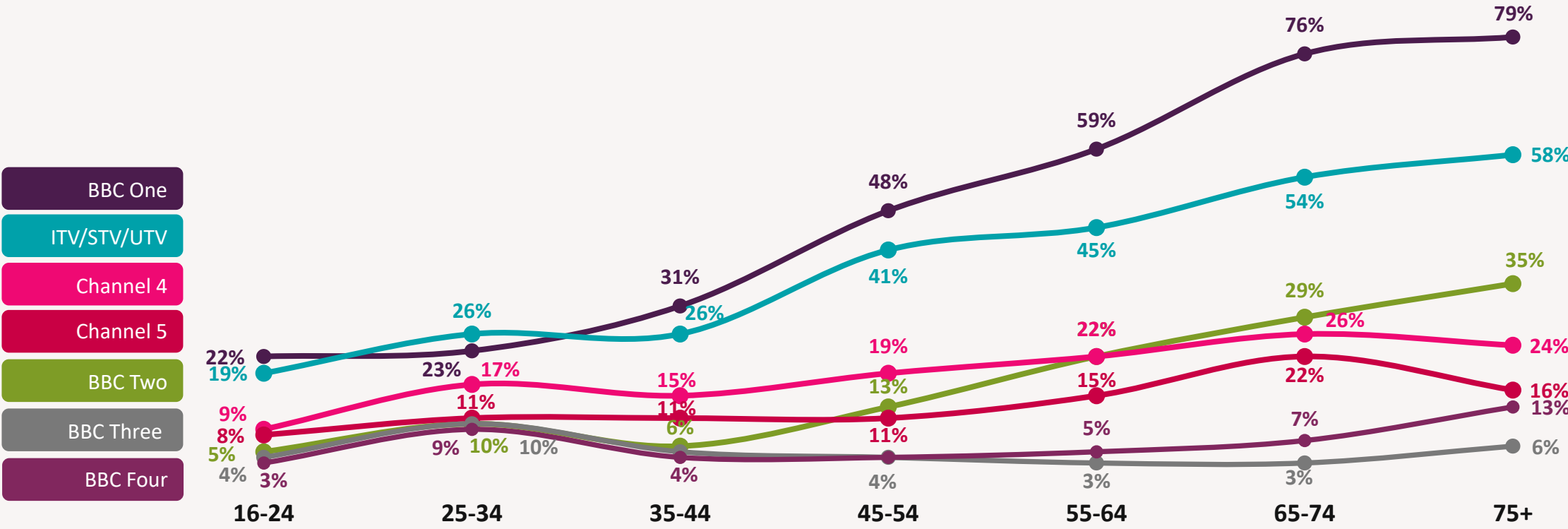
Source: Ofcom Public Service Media Tracker 2022

Q18. Summary - How often in the past 12 months have you watched these TV channels?

Base: All respondents: Total (3027)

BBC One tends to be the channel most watched daily across age groups, rising to over three quarters of those aged 65+.

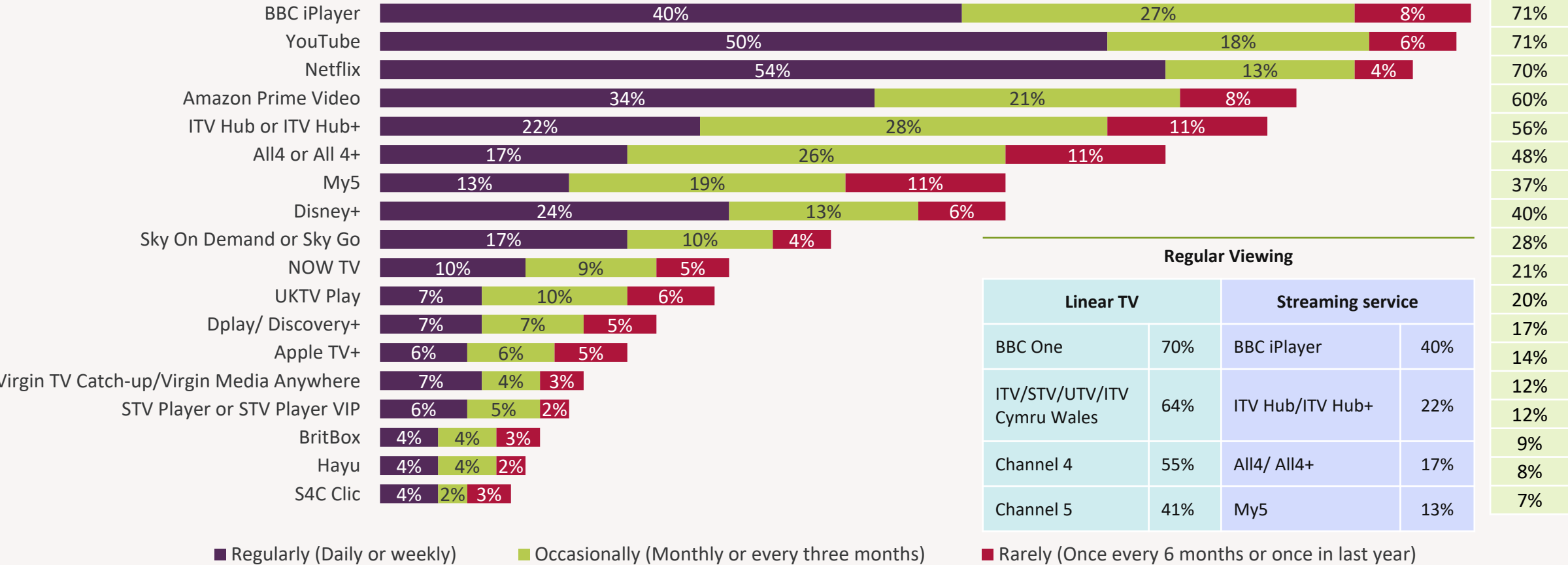
Channels watched daily by age



Source: Ofcom Public Service Media Tracker 2022
 Q18. Summary - How often in the past 12 months have you watched these TV channels? Daily
 Base: All respondents: 16-24 (321), 25-34 (485), 35-44 (494), 45-54 (519), 55-64 (523), 65-74 (410), 75+ (275)

Regular viewing is highest for YouTube, BBC iPlayer and Netflix.

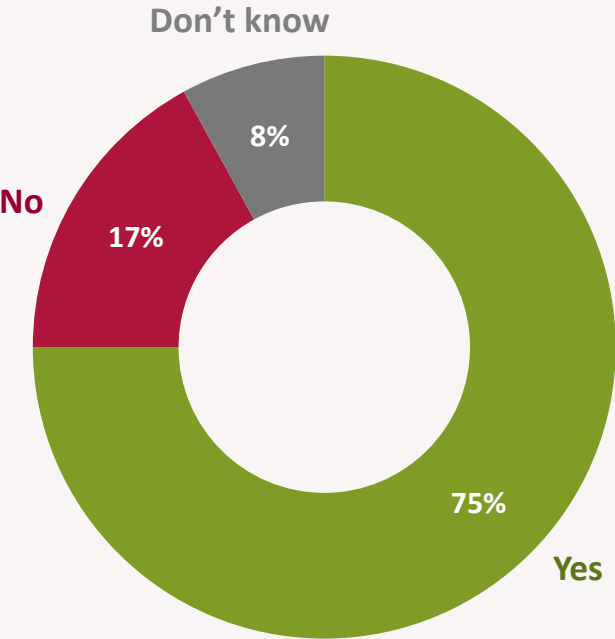
Frequency of streaming services used



Source: Ofcom Public Service Media Tracker 2022
 Q20. Summary - How often in the past 12 months have you watched programmes or films using these services?
 Base: All respondents: Total (3027)

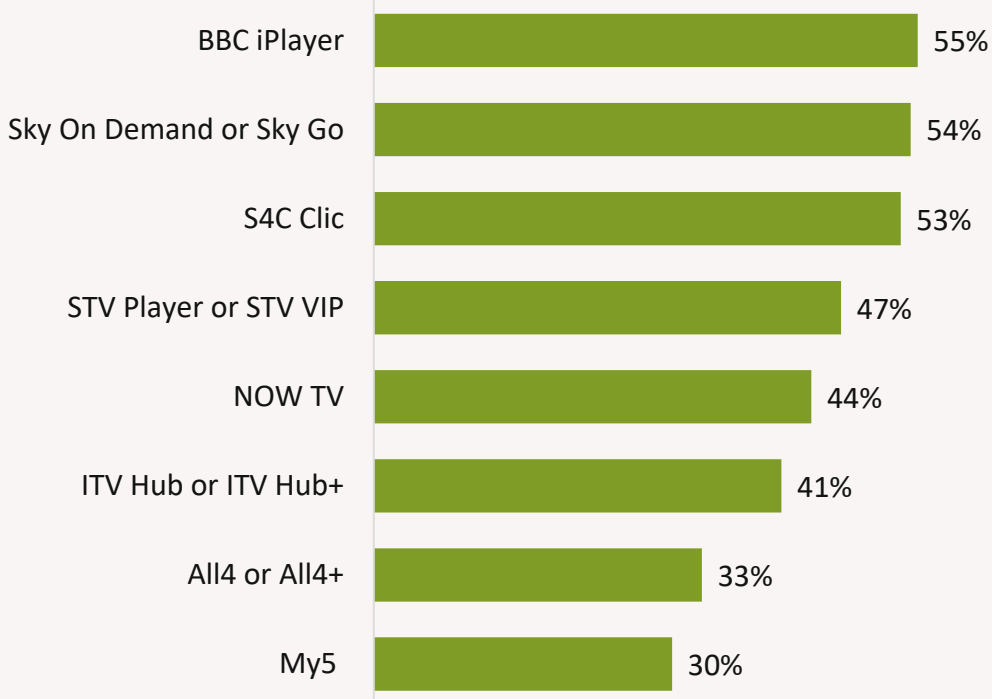
Three quarters of audiences are aware they can watch channels or programmes on BVoD services at the time they are broadcast live.

Awareness can watch live channels/programmes on BVoD at same time they are broadcast



New question for 2022

BVoDs audiences use to watch live channels/programmes (% Yes)



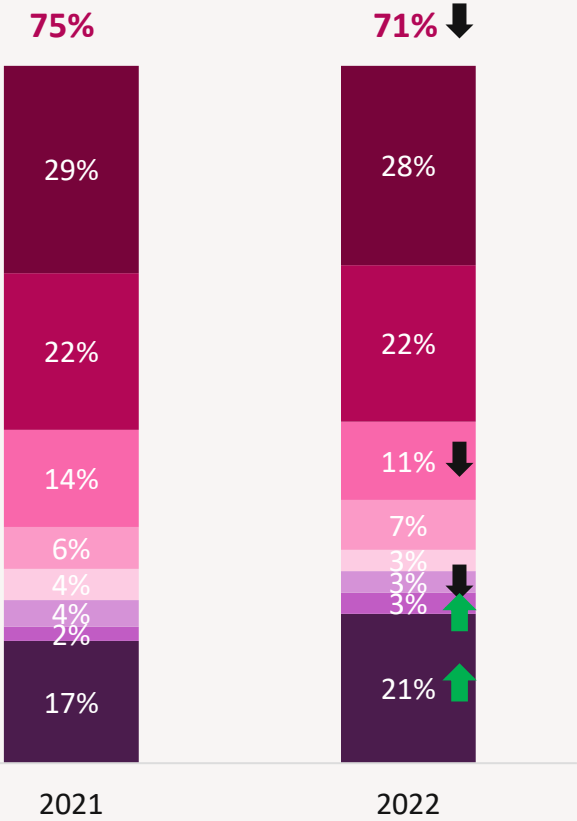
Source: Ofcom Public Service Media Tracker 2022
Q45. Were you aware that you could watch channels or programmes live at the time they are broadcast on online video/streaming services such as BBC iPlayer or ITV Hub?
Base: All respondents (3027)
Q46. Do you ever watch channels or programmes live at the time they are broadcast on the following services? Base: All aware they could watch channels live on online video/streaming services and have used each service in last 6 months: BBC iPlayer (1801), ITV Hub or ITV Hub+ (1457), STV Player or STV VIP (333), S4C Clic (178), All4 or All4+ (1254), My5 (942), Sky On Demand or Sky Go (709), Now TV (489)

Seven in ten audiences have watched YouTube at least once in the past 6 months, declining since 2021. A third have watched content from a PSB YouTube channel.

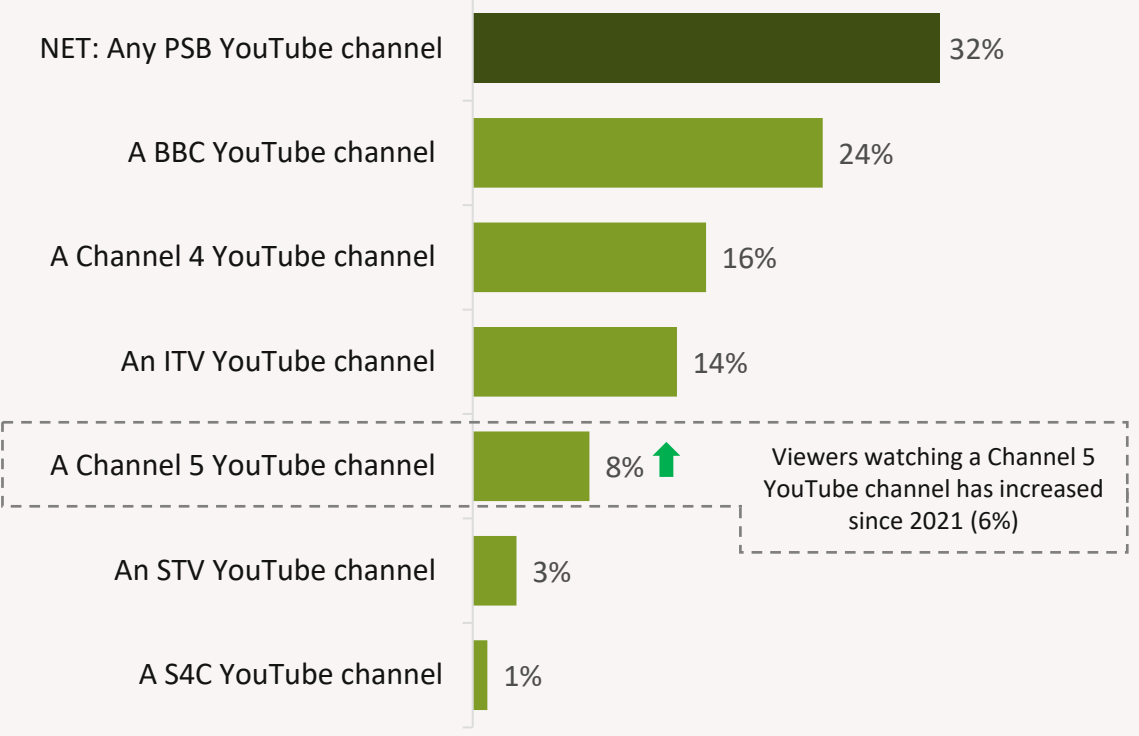
Frequency of watching YouTube

NET At least once in last 6 months:

- At least daily
- At least weekly
- At least monthly
- At least once every 3 months
- At least once every 6 months
- Only around once in the last 12 months
- Haven't watched in the last 12 months but have watched previously
- I have never watched or used this service



YouTube content watched



Viewers watching a Channel 5 YouTube channel has increased since 2021 (6%)

Green/black arrows show higher/lower compared to 2021

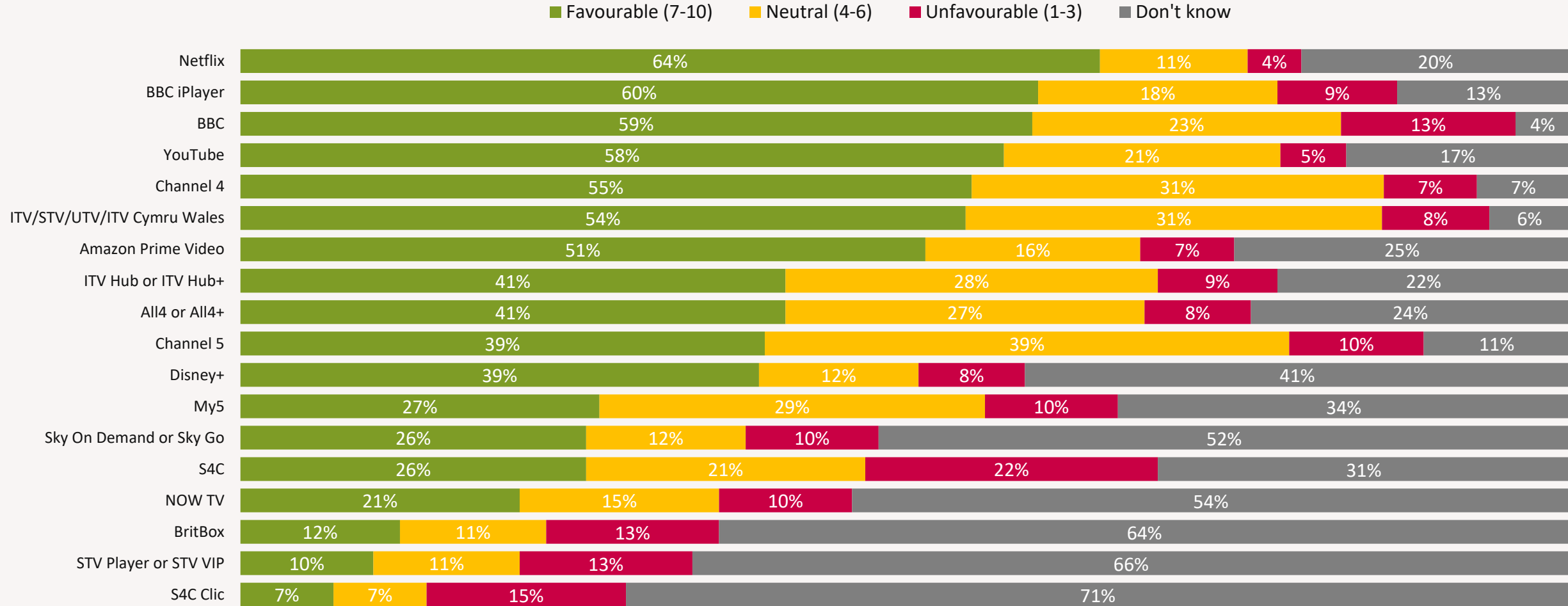
Source: Ofcom Public Service Media Tracker 2022
 Q20. How often in the past 12 months have you watched programmes or films using these services? YouTube (including YouTube Premium). Base: All respondents 2021-2022 (3115-3027),
 Q21. When watching YouTube in the past 6 months, have you watched content from the following channels? Base: All respondents who use YouTube at least once in last 6 months 2021-2022 (2353-2185)



Section 2: Favourability and satisfaction

BBC and Netflix have the highest overall favourability scores.

Favourability with different services



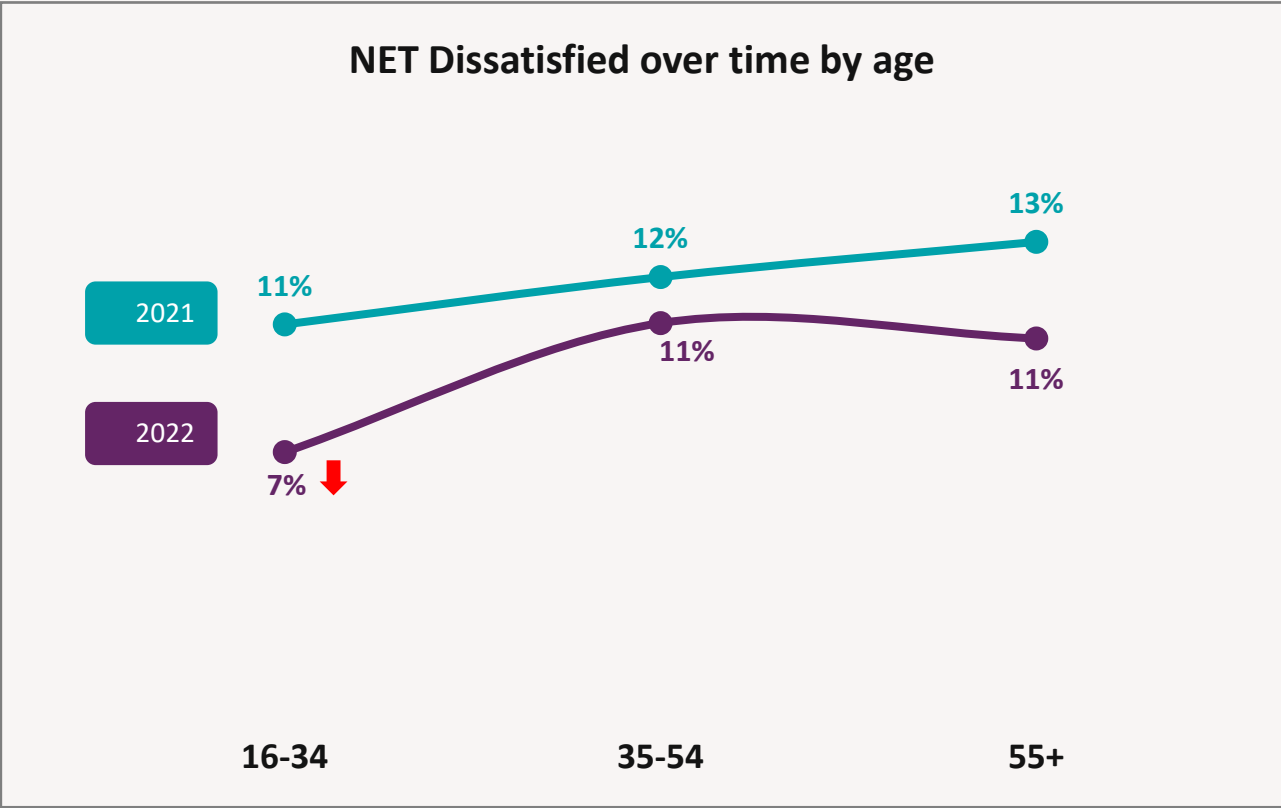
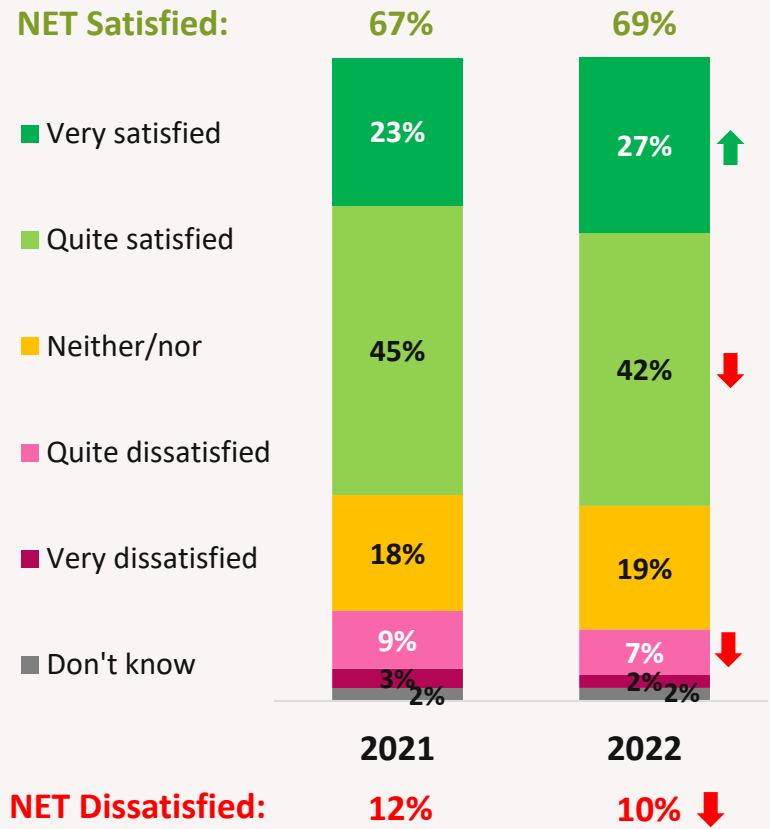
Source: Ofcom Public Service Media Tracker 2022

Q22. On a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourably, what is your overall impression of...?

Base: All respondents: Total (3027)

In line with 2021, seven in ten are satisfied with PSBs overall, however the proportions stating they are very satisfied has increased.

Satisfaction with PSBs overall and by age



↑ ↓ Significantly higher/lower than 2021

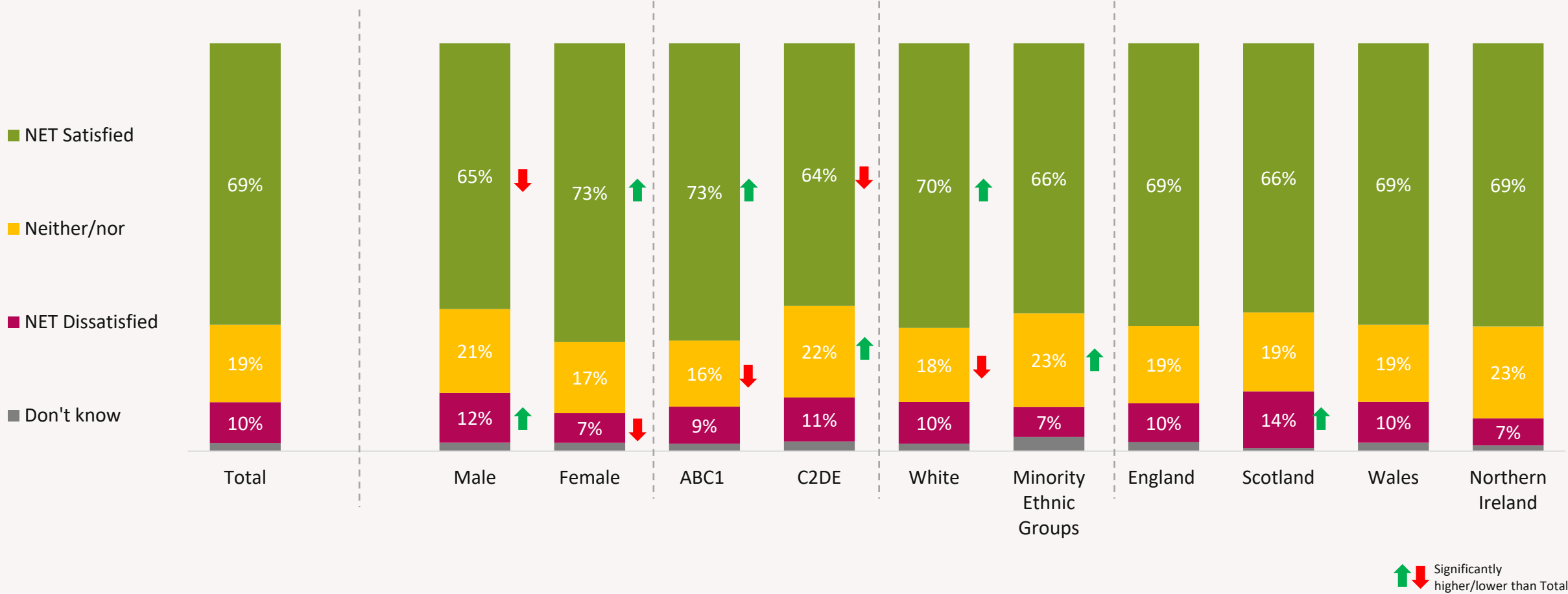
Source: Ofcom Public Service Media Tracker 2022

Q28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question?

Base: All who have watched any PSB channel in last 6 months 2021-2022: Total (2916-2826), 16-34 (810-699), 35-54 (955-949), 55+ (1151-1178)

Women, white audiences and those in social grade ABC1 are more likely to be satisfied with PSBs overall.

Satisfaction with PSBs overall and by demographics

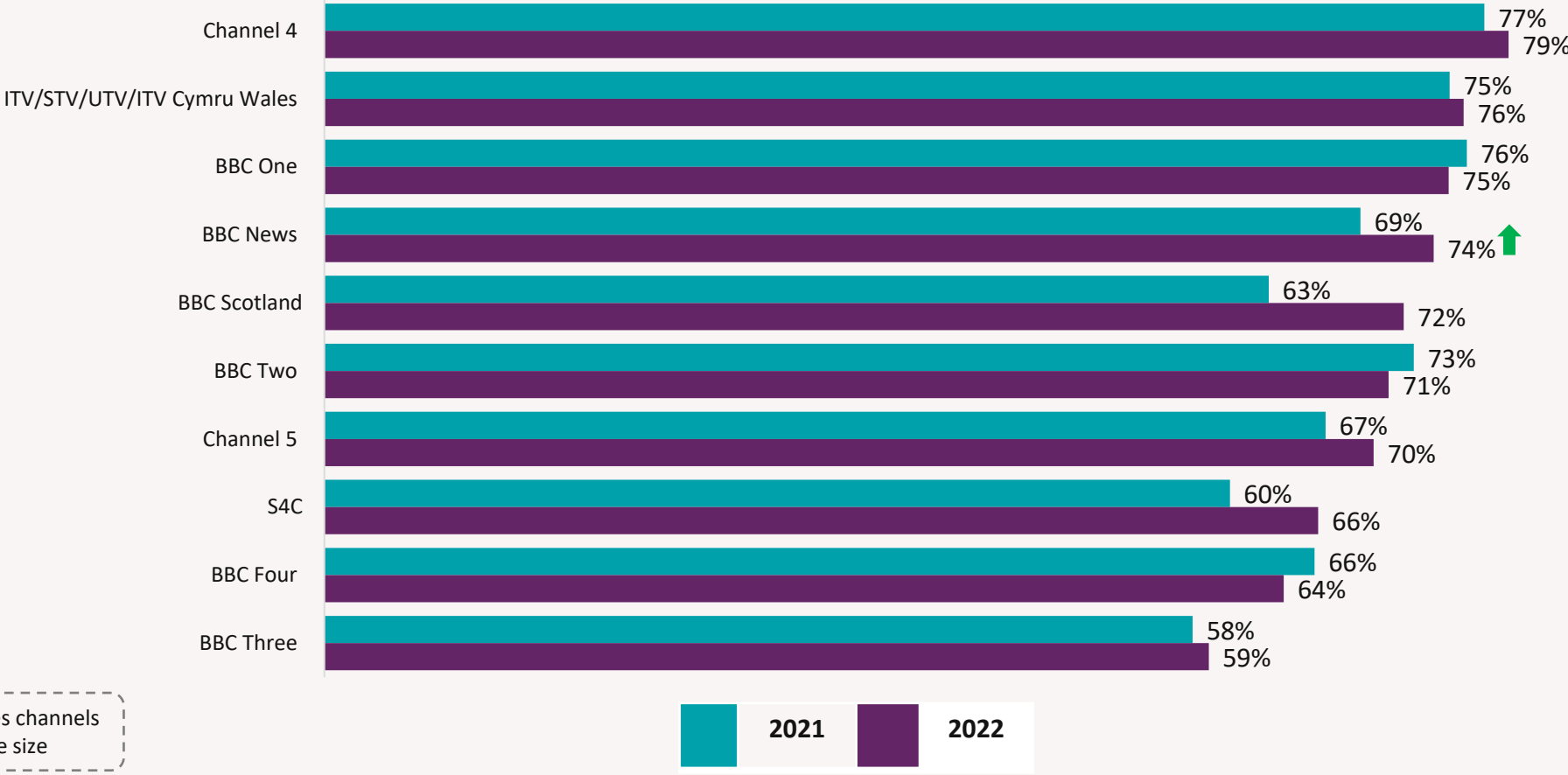


↑ ↓ Significantly higher/lower than Total

Source: Ofcom Public Service Media Tracker 2022
 Q28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question?
 Base: All who have watched any PSB channel in last 6 months: Total (2826), Male (1315), Female (1492), ABC1 (1723), C2DE (1064), White (2398), Asian (192), Black (106), England (1850), Scotland (303), Wales (307), Northern Ireland (366)

Across the individual PSB channels, Channel 4 continues to have the highest levels of satisfaction among its viewers, followed by ITV and BBC One.

Satisfaction with TV channels



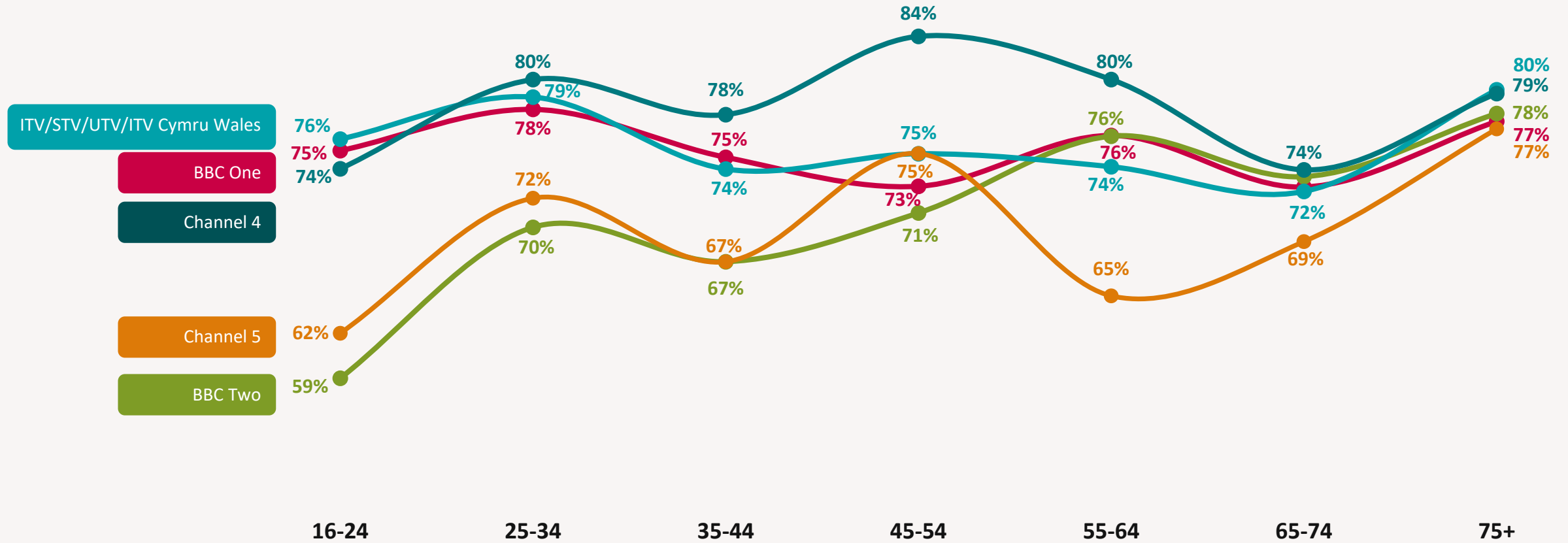
Please note, excludes channels below 100 base size

↑ ↓ Significantly higher/lower than 2021

Source: Ofcom Public Service Media Tracker 2022
Q23. Satisfied Summary - Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels?
Base: All respondents: Where have watched channel in last 6 months, 2021-2022, BBC One (2676-2574), BBC Two (2384-2216), BBC Three (1451-1401), BBC Four (1741-1531), BBC News (1899-1814), ITV/ITV Cymru Wales/ STV/ UTV (2618-2481), Channel 4 (2620-2502), Channel 5 (2319-2243), S4C (103-101)

Satisfaction with main TV channels varies by age, particularly in the youngest viewers.

Satisfaction with main TV channels by age



Source: Ofcom Public Service Media Tracker 2022

Q23. Satisfied Summary - Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels?

Base: All respondents: Where have watched channel in last 6 months, 2022 bases: BBC One (2574), BBC Two (2216), ITV/ITV Cymru Wales/ STV/ UTV (2481), Channel 4 (2502), Channel 5 (2243)

There are few demographic differences in satisfaction across the UK nations

Satisfaction with TV channels by demographics

		England	Scotland	Wales	Northern Ireland	White	Minority Ethnic Groups	Limiting Condition	No Limiting Condition	Children in Household	No children in Household
Channel 4	79%	79%	77%	80%	78%	80% ↑	73%	76%	80%	78%	81% ↑
BBC One	75%	75%	73%	77%	80%	76% ↑	71% ↓	75%	76%	76%	76%
ITV/STV/UTV/ITV Cymru Wales	76%	76%	75%	69% ↓	80%	76%	72%	73%	77%	79% ↑	75%
BBC Two	71%	72%	65%	73%	73%	72%	66% ↓	70%	72%	69%	72%
BBC News	74%	75% ↑	66% ↓	69%	73%	73%	75%	71%	75%	75%	73%
Channel 5	70%	69%	70%	74%	68%	70%	68%	69%	70%	71%	69%
BBC Four	64%	64%	60%	62%	63%	63%	67%	61%	64%	63%	64%
BBC Three	59%	60%	55%	53%	58%	59%	58%	53% ↓	62% ↑	62%	57%

↑ ↓ Significantly higher/lower than Total

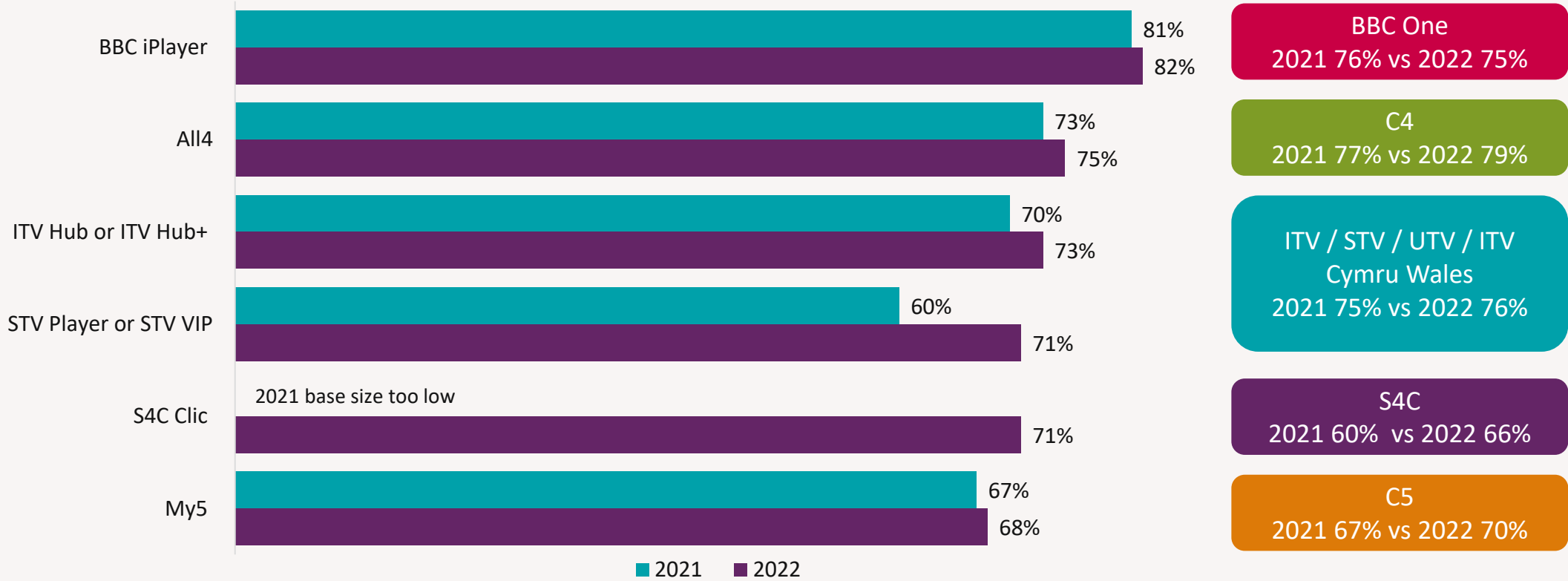
Source: Ofcom Public Service Media Tracker 2022

Q23. Satisfied Summary - Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels?

Base: All respondents: Where have watched channel in last 6 months – base size will vary for each demographic group by channel.

Levels of satisfaction with BVoD services has remained consistent year on year.

Satisfaction with BVoD and PSBs: over time

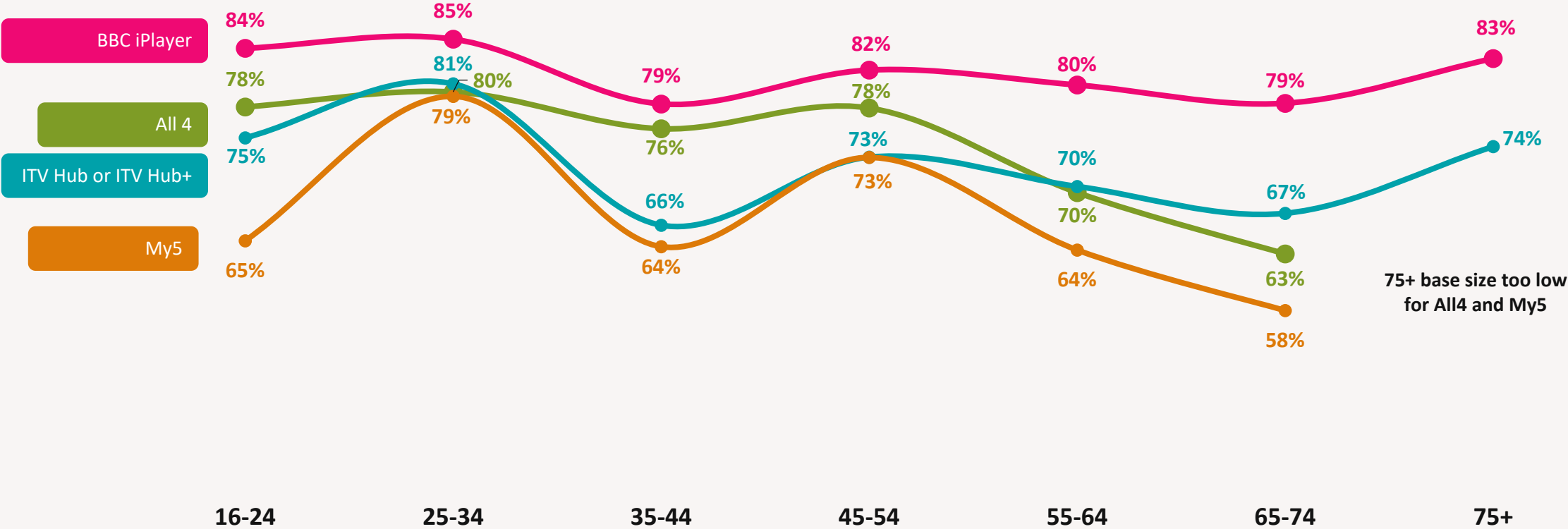


Satisfaction for STV Player or STV VIP has increased from 2021, but this is likely due to being asked to all in the UK in 2022 and not just those in Scotland.

Source: Ofcom Public Service Media Tracker 2022
 Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services?
 Base: All respondents: Where have watched platform in last 6 months. 2021 – 2022 Bases: BBC iPlayer (2249-2204), All4 (1525-1475), ITV Hub or ITV Hub+ (1807-1738), STV Player or STV VIP (149-401), My5 (1132-1127) S4C Clic (too low-222).
 Q23. Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels? 2021 – 2022 Bases: BBC One (2676-2574), Channel 4 (2620-2502), ITV/ITV Cymru Wales/STV/UTV (2618-2481), S4C (103-101), Channel 5 (2319-2243)

Satisfaction with BVoDs is generally higher in 16-34 year olds, with the lowest satisfaction among those aged 65-74.

Satisfaction with BVoDS by age: 2022



Source: Ofcom Public Service Media Tracker 2022
Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services?
Base: All respondents: Where have watched platform in last 6 months – base size will vary for each demographic group
*Note that not all BVoDs are shown on the chart

Levels of satisfaction with SVoD services has remained consistent year on year.


Satisfaction with SVoDs




Source: Ofcom Public Service Media Tracker 2022

Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services?

Base: All respondents: Where have watched platform in last 6 months 2021-2022: Netflix (2155-2139), Amazon Prime Video (1818-1826), Disney+ (1057-1227), Sky On Demand or Sky Go (899-875), YouTube (2353-2185), BritBox (339-267), NOW TV (679-595)



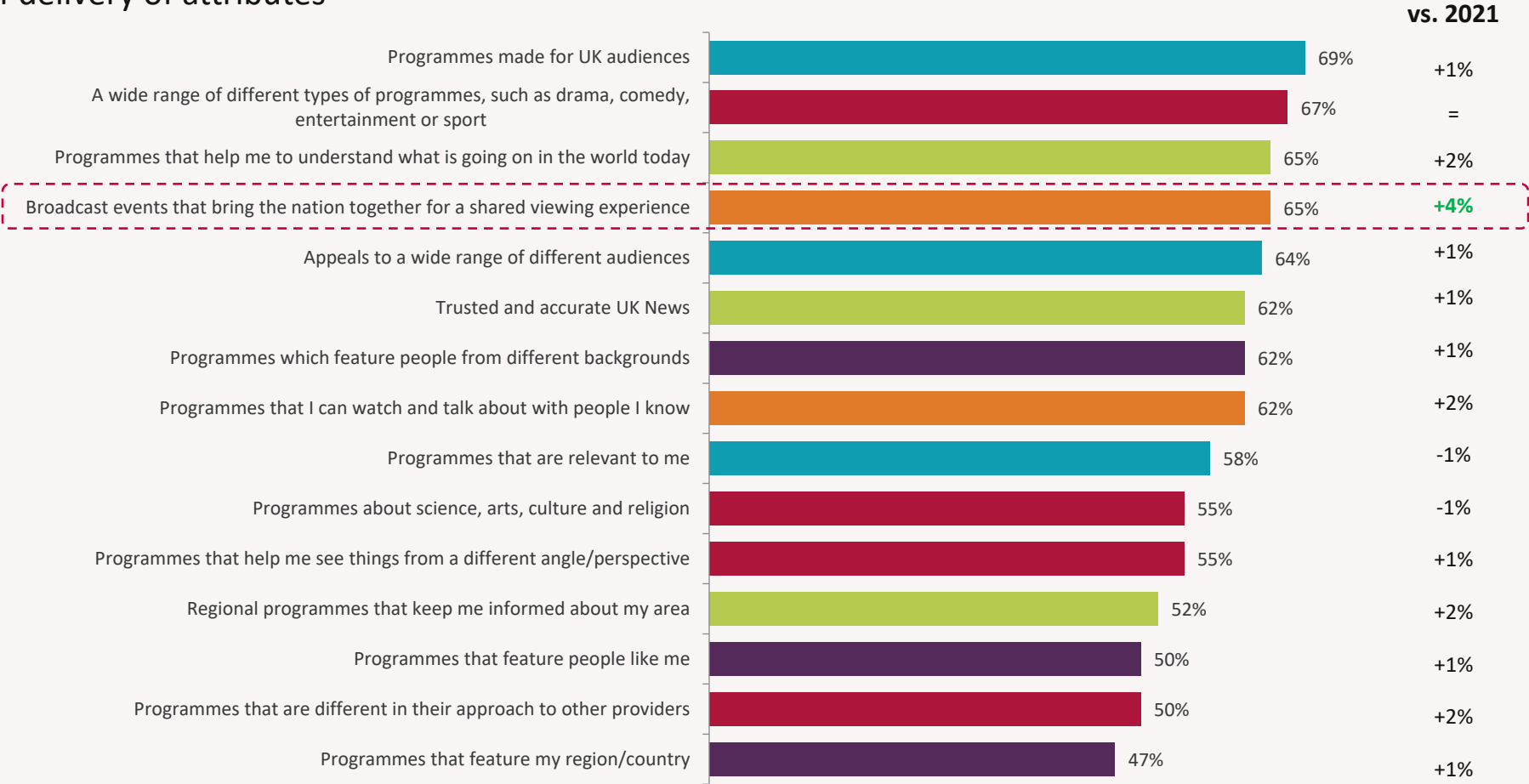
Section 3: Delivery of PSB



Compared to 2021, there has been an increase in viewers who feel PSBs deliver well on 'broadcast events that bring the nation together for a shared viewing experience'.

Rating well (7 to 10) of delivery of attributes

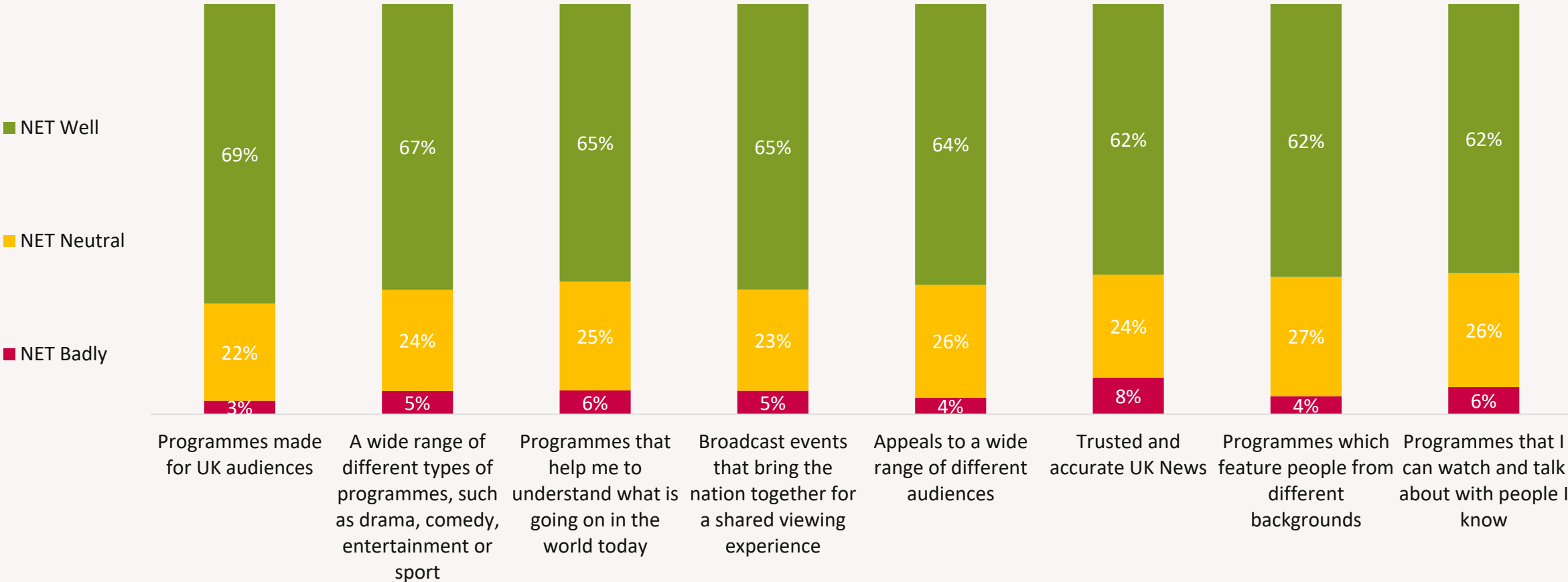
- Concept Areas**
 Diversity
 News
 Quality/Range
 Audience
 Shared Viewing



Source: Ofcom Public Service Media Tracker 2022
 Q26. Well (7-10) Summary - How well or badly would you say they provide ...?
 Base: All who watched channel in past 6 months 2021-2022: (2916-2826)

Around seven in ten viewers feel PSBs do well to provide programmes made for UK audiences, followed by a providing a wide range of different programmes.

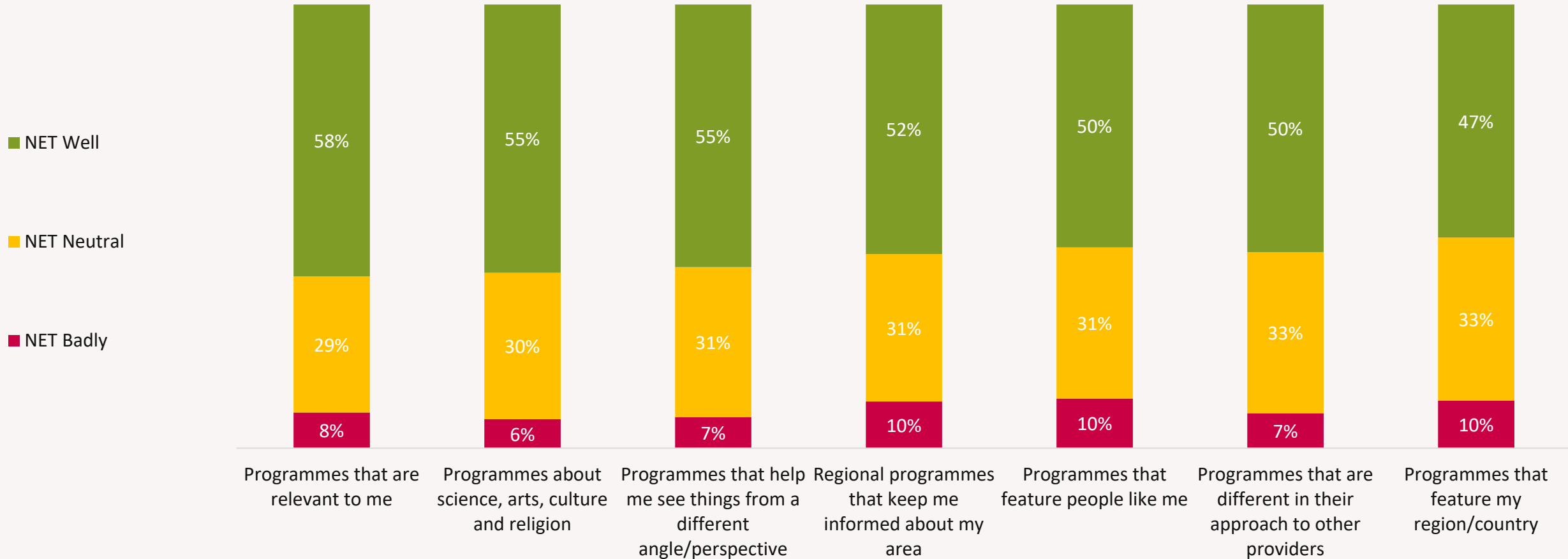
Rating of delivery of attributes



Source: Ofcom Public Service Media Tracker 2022
 Q26. Well (7-10) Summary - How well or badly would you say they provide ...?
 Base: All who watched PSB channel/service in past 6 months: Total (2826)

Around three in five viewers feel PSBs do well to provide programmes that are relevant to them.

Rating of delivery of attributes



Source: Ofcom Public Service Media Tracker 2022
 Q26. Well (7-10) Summary - How well or badly would you say they provide ...?
 Base: All who watched channel in past 6 months: Total (2826)

ABC1 viewers tend to rate PSBs more positively across a range of attributes.

Rating well (7 to 10) of delivery of attributes

	Total	ABC1	C2DE
Programmes made for UK audiences	69%	73% ↑	65% ↓
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	67%	71% ↑	62% ↓
Programmes that help me to understand what is going on in the world today	65%	68% ↑	61% ↓
Appeals to a wide range of different audiences	64%	67% ↑	61% ↓
Trusted and accurate UK News	62%	66% ↑	59% ↓
Broadcast events that bring the nation together for a shared viewing experience	65%	68% ↑	61% ↓
Programmes which feature people from different backgrounds	62%	65% ↑	59% ↓
Programmes that are relevant to me	58%	61% ↑	56% ↓
Programmes that I can watch and talk about with people I know	62%	65% ↑	58% ↓
Programmes about science, arts, culture and religion	55%	59% ↑	50% ↓
Programmes that help me see things from a different angle/perspective	55%	57% ↑	53% ↓
Regional programmes that keep me informed about my area	52%	53%	52%
Programmes that feature people like me	50%	52% ↑	48% ↓
Programmes that are different in their approach to other providers	50%	53% ↑	46% ↓
Programmes that feature my region/country	47%	47%	48%

- Concept Areas**
- Diversity
- News
- Quality/Range
- Audience
- Shared Viewing

↑ ↓ Significantly higher/lower than Total

Source: Ofcom Public Service Media Tracker 2022
 Q26. Well (7-10) Summary - How well or badly would you say they provide ...?
 Base: All who watched channel in past 6 months: Total (2826) ABC1 (1723), C2DE (1064)

Those with limiting or impacting conditions are less likely to rate positively on a few attributes, including that PSBs provide programmes relevant to them and create a shared viewing experience.

Rating well (7 to 10) of delivery of attributes

	Total	Limiting/ impacting conditions	No limiting/ impacting conditions
Programmes made for UK audiences	69%	69%	69%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	67%	67%	67%
Programmes that help me to understand what is going on in the world today	65%	64%	65%
Appeals to a wide range of different audiences	64%	63%	65%
Trusted and accurate UK News	62%	62%	63%
Broadcast events that bring the nation together for a shared viewing experience	65%	61% ↓	66% (+4) ↑
Programmes which feature people from different backgrounds	62%	61%	63%
Programmes that are relevant to me	58%	55% ↓	60% ↑
Programmes that I can watch and talk about with people I know	62%	59%	63%
Programmes about science, arts, culture and religion	55%	50% ↓	57% ↑
Programmes that help me see things from a different angle/perspective	55%	54%	56%
Regional programmes that keep me informed about my area	52%	53%	52%
Programmes that feature people like me	50%	47%	52%
Programmes that are different in their approach to other providers	50%	48%	51%
Programmes that feature my region/country	47%	47%	47%

- Concept Areas**
- Diversity
- News
- Quality/Range
- Audience
- Shared Viewing

Green/Red =Significantly higher/lower than 2021

↑ ↓ Significantly higher/lower than Total

Source: Ofcom Public Service Media Tracker 2022
 Q26. Well (7-10) Summary - How well or badly would you say they provide ...?
 Base: All who watched channel in past 6 months: Total (2826) Limiting/impacting conditions (895), No limiting/impacting conditions (1931)

There are few differences between nations, though there are some areas where there have been improvements since 2021.

Rating well (7 to 10) of delivery of attributes

	Total	England	Scotland	Wales	Northern Ireland
Programmes made for UK audiences	69%	69%	70%	72%	72%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	67%	67%	63%	75% (+10) ↑	65%
Programmes that help me to understand what is going on in the world today	65%	64%	65%	68%	65%
Appeals to a wide range of different audiences	64%	64%	61%	66%	61%
Trusted and accurate UK News	62%	63%	60%	66%	59%
Broadcast events that bring the nation together for a shared viewing experience	65%	65%	59%	66%	64% (+10)
Programmes which feature people from different backgrounds	62%	62%	61% (+9)	65%	60%
Programmes that are relevant to me	58%	59%	54%	62%	59%
Programmes that I can watch and talk about with people I know	62%	62%	57%	63%	62%
Programmes about science, arts, culture and religion	55%	55%	50%	57%	51%
Programmes that help me see things from a different angle/perspective	55%	55%	52%	58% (+9)	55%
Regional programmes that keep me informed about my area	52%	52%	48%	58%	54%
Programmes that feature people like me	50%	50%	51%	51%	51%
Programmes that are different in their approach to other providers	50%	51%	44%	51%	48%
Programmes that feature my region/country	47%	47%	47%	49%	49%

Concept Areas
 Diversity
 News
 Quality/Range
 Audience
 Shared Viewing

Green/Red = Significantly higher/lower than 2021

↑ ↓ Significantly higher/lower than Total

Source: Ofcom Public Service Media Tracker 2022
 Q26. Well (7-10) Summary - How well or badly would you say they provide ...?
 Base: All who watched channel in past 6 months 2021-2022: Total (2916-2826) England (2007-1850), Scotland (291-303), Wales (301-307), Northern Ireland (317-366)

There is little difference in the successful delivery of attributes across nations, and little difference since 2021.

Top 5 attribute deliveries in each nation

Northern Ireland	2021	2022
Programmes made for UK audiences	70%	72%
Programmes that I can watch and talk about with people I know	56%	62%
Programmes that help me to understand what is going on in the world today	64%	65%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	63%	65%
Broadcast events that bring the nation together for a shared viewing experience	54%	64% ↑

Wales	2021	2022
Programmes made for UK audiences	70%	72%
Appeals to a wide range of different audiences	65%	66%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	65%	75% ↑
Trusted and accurate UK news	63%	66%
Programmes that help me to understand what is going on in the world today	63%	68%



↑ ↓ Significantly higher/lower than 2021

Scotland	2021	2022
Programmes made for UK audiences	68%	70%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	65%	63%
Programmes that help me to understand what is going on in the world today	63%	65%
Appeals to a wide range of different audiences	60%	61%
Trusted and accurate UK news	58%	60%

England	2021	2022
Programmes made for UK audiences	68%	69%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	68%	67%
Programmes that help me to understand what is going on in the world today	63%	64%
Appeals to a wide range of different audiences	63%	64%
Broadcast events that bring the nation together for a shared viewing experience	62%	65%

Source: Ofcom Public Service Media Tracker 2022

Q26. Well (7-10) Summary: Thinking about the following combined: BBC, ITV, Channel 4, Channel 5 and S4C. On a scale of 1 to 10, where 1 means extremely badly and 10 means extremely well, how well or badly would you say they provide...?

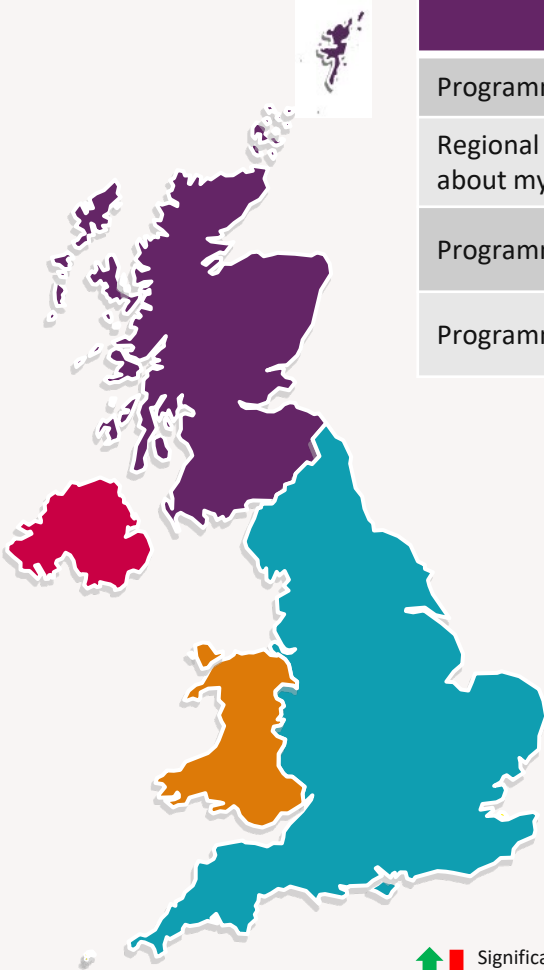
Base: All who watch PSB channel/service in past 6 months: 2021-2022: England (2007-1850), Scotland (291-303), Wales (301-307), Northern Ireland (317-366)

There are few differences across the nations in the delivery of attributes related to diversity and nations/regions programming.

Statements relating to audience and local area

Northern Ireland	2021	2022
Programmes that feature my region/country	46%	49%
Regional programmes that keep me informed about my area	54%	54%
Programmes that are relevant to me	57%	59%
Programmes that feature people like me	47%	51%

Wales	2021	2022
Programmes that feature my region/country	45%	49%
Regional programmes that keep me informed about my area	52%	58%
Programmes that are relevant to me	55%	62%
Programmes that feature people like me	44%	51%



Scotland	2021	2022
Programmes that feature my region/country	42%	47%
Regional programmes that keep me informed about my area	44%	48%
Programmes that are relevant to me	58%	54%
Programmes that feature people like me	46%	51%

England	2021	2022
Programmes that feature my region/country	46%	47%
Regional programmes that keep me informed about my area	50%	52%
Programmes that are relevant to me	59%	59%
Programmes that feature people like me	49%	50%

↑↓ Significantly higher/lower than 2021

Source: Ofcom Public Service Media Tracker 2022
 Q26. Well (7-10) Summary: Thinking about the following combined: BBC, ITV, Channel 4, Channel 5 and S4C. On a scale of 1 to 10, where 1 means extremely badly and 10 means extremely well, how well or badly would you say they provide...?
 Base: All who watch PSB channel/service in past 6 months 2021-2022: England (1850-2007), Scotland (303-291), Wales (307-301), Northern Ireland (366-317)

BBC TV channels remain the strongest performing of the PSB channels across most attributes.

Rating well (7 to 10) of delivery of attributes

	BBC TV channels		ITV/STV/UTV /ITV Cymru Wales and ITV channels		Channel 4 TV channels		Channel 5 TV channels		S4C	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
Year										
Programmes made for UK audiences	68%	67%	65%	66%	60%	60%	51%	53%	50%	61%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	65%	67%	61%	63%	55%	58%	43%	46%	45%	50%
Programmes that help me to understand what is going on in the world today	66%	66%	54%	57%	51%	56%	39%	43%	44%	41%
Appeals to a wide range of different audiences	60%	60%	58%	59%	54%	58%	46%	48%	36%	41%
Trusted and accurate UK news	60%	61%	56%	57%	50%	53%	39%	43%	46%	57%
Broadcast events that bring the nation together for a shared viewing experience	64%	67%	58%	58%	42%	45%	33%	37%	46%	45%
Programmes which feature people from different backgrounds	58%	61%	56%	57%	57%	60%	47%	50%	43%	47%
Programmes that are relevant to me	59%	60%	52%	54%	53%	56%	43%	45%	45%	45%
Programmes that I can watch and talk about with people I know	60%	61%	54%	56%	52%	55%	40%	43%	45%	44%
Programmes about science, arts, culture and religion	58%	60%	36%	40%	44%	47%	34%	36%	36%	29%
Programmes that help me see things from a different angle/perspective	52%	52%	44%	46%	51%	54%	40%	44%	42%	44%
Regional programmes that keep me informed about my area	56%	56%	49%	52%	29%	30%	27%	28%	67%	63%
Programmes that feature people like me	46%	49%	44%	45%	44%	46%	38%	40%	46%	58%
Programmes that are different in their approach to other providers	45%	47%	41%	43%	50%	54%	41%	44%	43%	52%
Programmes that feature my region /country	50%	51%	48%	49%	29%	33%	27%	29%	75%	79%

Concept Areas
 Diversity
 News
 Quality/Range
 Audience
 Shared Viewing

Green/Red =Significantly higher/lower than 2021

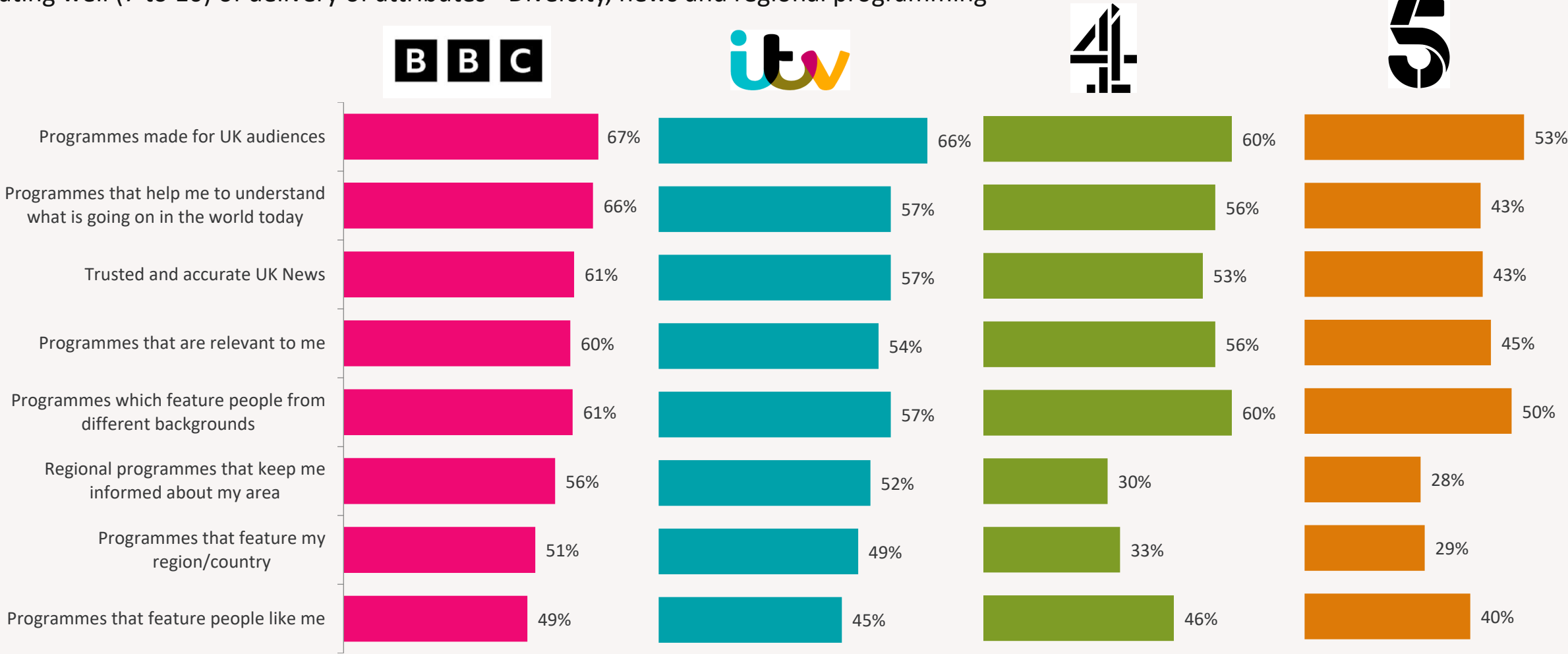
Source: Ofcom Public Service Media Tracker 2022

Q24. Well (7-10) Summary - How well or badly does it provide ...?

Base: All who watched channel in past 6 months 2021-2022: BBC TV channels (2766-2666), ITV/STV/UTV/ITV Cymru Wales and ITV channels (2702-2611), Channel 4 TV channels (2729-2599), Channel 5 TV channels (2399-2313), S4C (103-101)

BBC is the strongest performer across these attributes relating to diversity, news and regional programming.

Rating well (7 to 10) of delivery of attributes - Diversity, news and regional programming



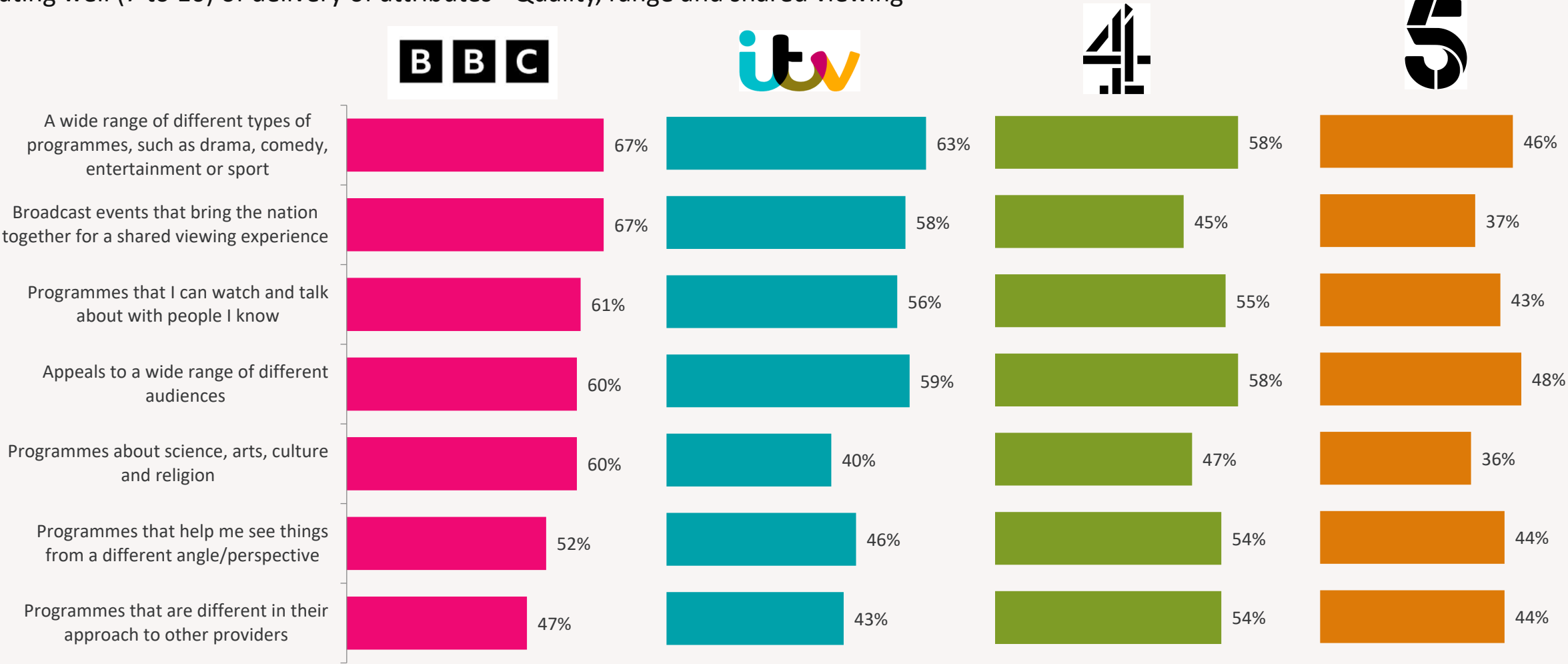
Source: Ofcom Public Service Media Tracker 2022

Q24. Well (7-10) Summary - How well or badly does it provide ...?

Base: All who watched channel in past 6 months: BBC TV channels (2666), ITV/STV/UTV/ITV Cymru Wales and ITV channels (2611), Channel 4 TV channels (2599), Channel 5 TV channels (2313)

Again BBC shows strength across most attributes related to quality, range and shared viewing, though Channel 4 leads on individuality.

Rating well (7 to 10) of delivery of attributes - Quality, range and shared viewing



Source: Ofcom Public Service Media Tracker 2022

Q24. Well (7-10) Summary - How well or badly does it provide ...?

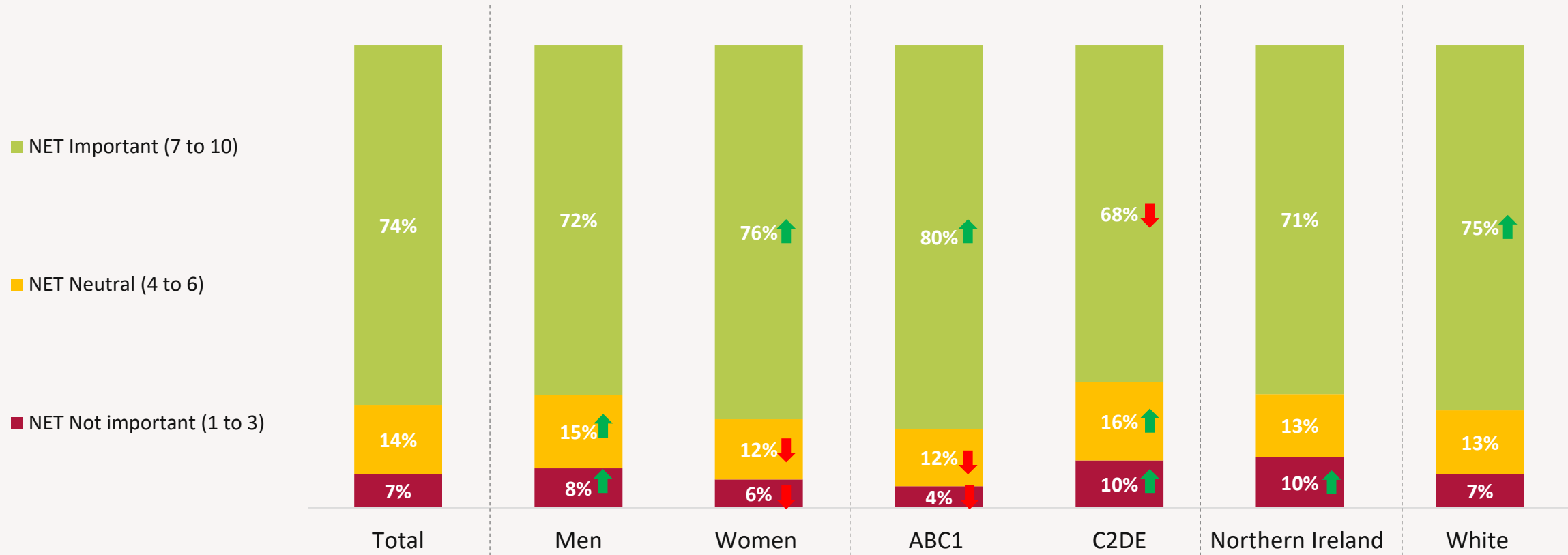
Base: All who watched channel in past 6 months: BBC TV channels (2666), ITV/STV/UTV/ITV Cymru Wales and ITV channels (2611), Channel 4 TV channels (2599), Channel 5 TV channels (2313)

BVoD Delivery



Around three quarters feel it is important that PSBs provide catch up, on-demand, or streaming services.

Importance of providing catch up, on-demand or streaming services



Figures are in line with 2021

↑ ↓ Significantly higher/lower than Total

Source: Ofcom Public Service Media Tracker 2022
 Q40. How important, if at all, would you say it is that public service broadcasters provide catch up, on-demand, or streaming services?
 Base: All respondents: Total (3027), Northern Ireland (390), ABC1 (1816), C2DE (1161), Male (1403), White (2544)

ITV Hub or ITV Hub+ has seen the most improvements since 2021, while BBC iPlayer is still the strongest in delivering attributes related to quality/range.

Rating well (7 to 10) of delivery of attributes

	BBC iPlayer		ITV Hub or ITV Hub+		STV Player or STV Player VIP		S4C Clic**		All4 or All4+		My5	
Year	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	73%	75%	64%	67%	57%	68%	n/a	64%	61%	65%	53%	55%
Provides services that are easy to find my way around	71%	74%	62%	66%	57%	65%	n/a	66%	63%	65%	57%	58%
Easy to find something I want to watch	71%	73%	59%	63%	59%	65%	n/a	67%	61%	64%	55%	58%
Programmes made for UK audiences	70%	73%	65%	68%	62%	68%	n/a	67%	61%	66%	58%	59%
Appeals to a wide range of different audiences	70%	70%	63%	64%	58%	65%	n/a	64%	65%	66%	57%	58%
Programmes that are relevant to me	66%	68%	57%	62%	54%	64%	n/a	66%	58%	62%	52%	54%
Programmes that help me to understand what is going on in the world today	65%	66%	52%	57%	54%	62%	n/a	63%	52%	55%	45%	48%
Broadcast events that bring the nation together for a shared viewing experience	64%	68%	55%	59%	50%	61%	n/a	62%	45%	50%	41%	44%
Programmes that I can watch and talk about with people I know	63%	67%	56%	60%	58%	61%	n/a	64%	57%	60%	49%	49%
Programmes about science, arts, culture and religion	63%	62%	41%	46%	34%	55%	n/a	65%	50%	52%	39%	43%
Programmes which feature people from different backgrounds	62%	66%	54%	61%	49%	62%	n/a	67%	63%	65%	52%	55%
Programmes that help me see things from a different angle/perspective	58%	60%	49%	52%	43%	59%	n/a	66%	58%	58%	49%	51%
Programmes that are different in their approach to other providers	52%	55%	45%	51%	39%	56%	n/a	67%	56%	60%	48%	51%
Programmes that feature people like me	49%	56%	46%	52%	50%	61%	n/a	67%	47%	53%	46%	46%
Programmes that feature my region /country	44%	48%	41%	45%	67%	60%	n/a	66%	33%	37%	32%	37%

Concept Areas
 Diversity
 News
 Quality/Range
 Audience
 Shared Viewing

Green/Red =Significantly higher/lower than 2021

Source: Ofcom Public Service Media Tracker 2022

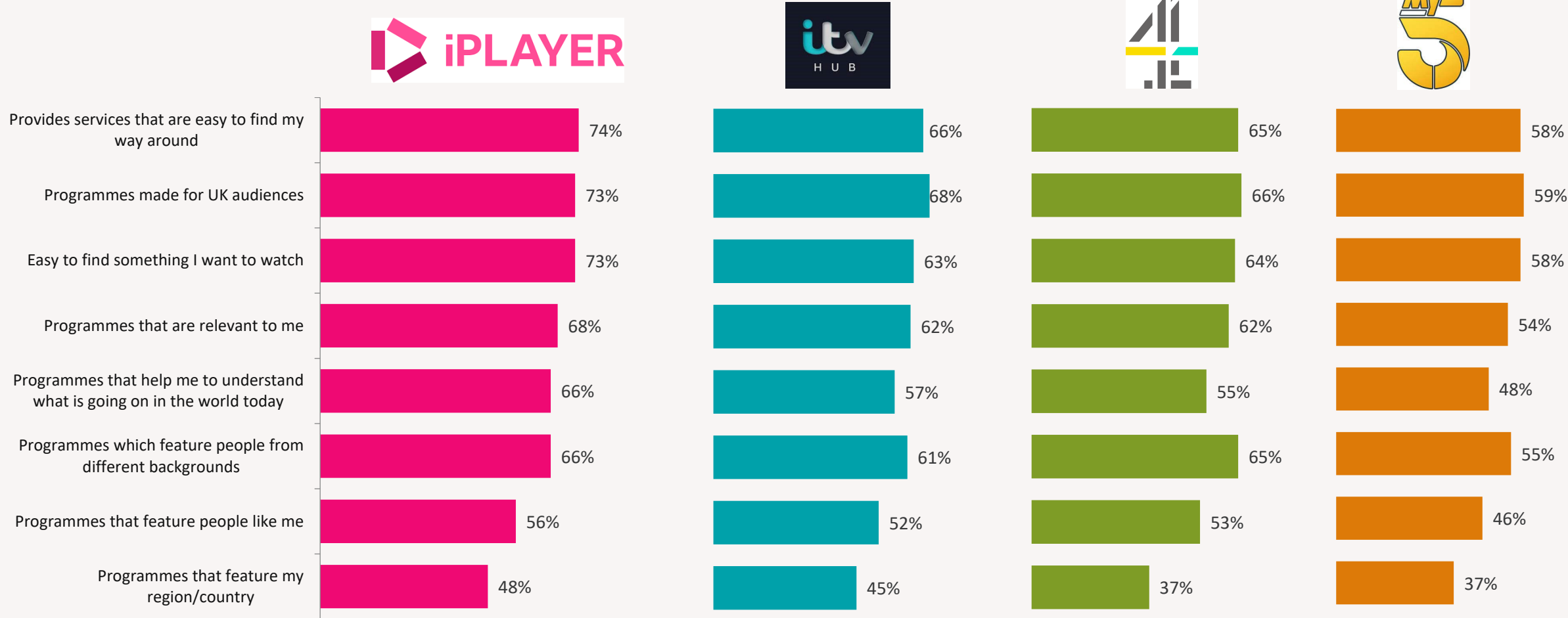
Q35. Well (7-10) Summary - How well or badly does it provide ...?

Base: All who watched channel in past 6 months 2021-2022: BBC iPlayer (2249-2204), ITV Hub or ITV Hub+ (1807-1738), STV Player or STV Player VIP (149-401), All4 or All4+ (1525-1475), My5 (1132-1127) S4C Clic (**-222)

**S4C Clic too low a base size to report 2021 data

BBC iPlayer leads on all attributes related to diversity, news and regional programming, though All4 is also strong on featuring people from different backgrounds.

Rating well (7 to 10) of delivery of attributes - Diversity, news and regional programming



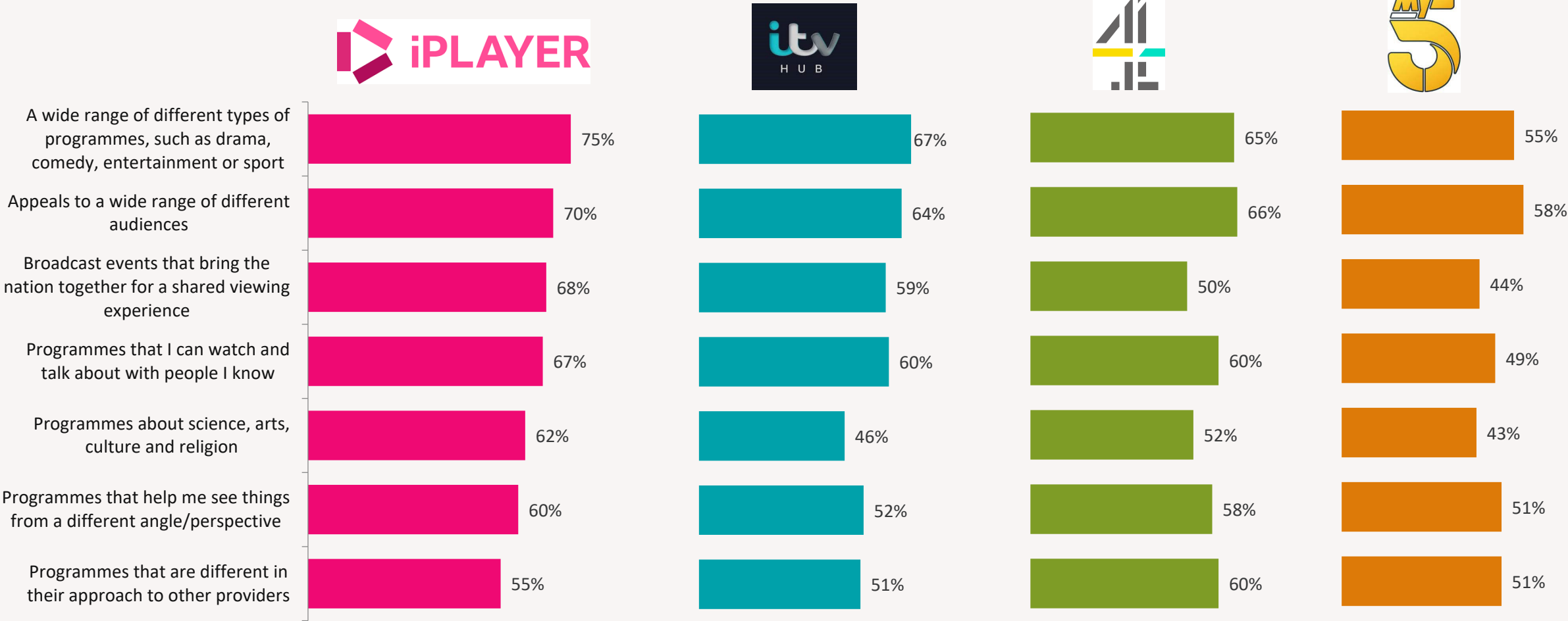
Source: Ofcom Public Service Media Tracker 2022

Q35. Well (7-10) Summary - How well or badly does it provide ...?

Base: All who watched channel in past 6 months: BBC iPlayer (2204), ITV Hub or ITV Hub+ (1738), STV Player or STV Player VIP (401), S4C Clic (222), All4 orAll4+ (1475), My5 (1127)

Similarly, BBC iPlayer leads on attributes related to quality, range and shared viewing, however All4 performs the best for programmes that are different in their approach.

Rating well (7 to 10) of delivery of attributes – Quality, range and shared viewing



Source: Ofcom Public Service Media Tracker 2022

Q35. Well (7-10) Summary - How well or badly does it provide ...?

Base: All who watched channel in past 6 months: BBC iPlayer (2204), ITV Hub or ITV Hub+ (1738), STV Player or STV Player VIP (401), S4C Clic (222), All4 orAll4+ (1475), My5 (1127)

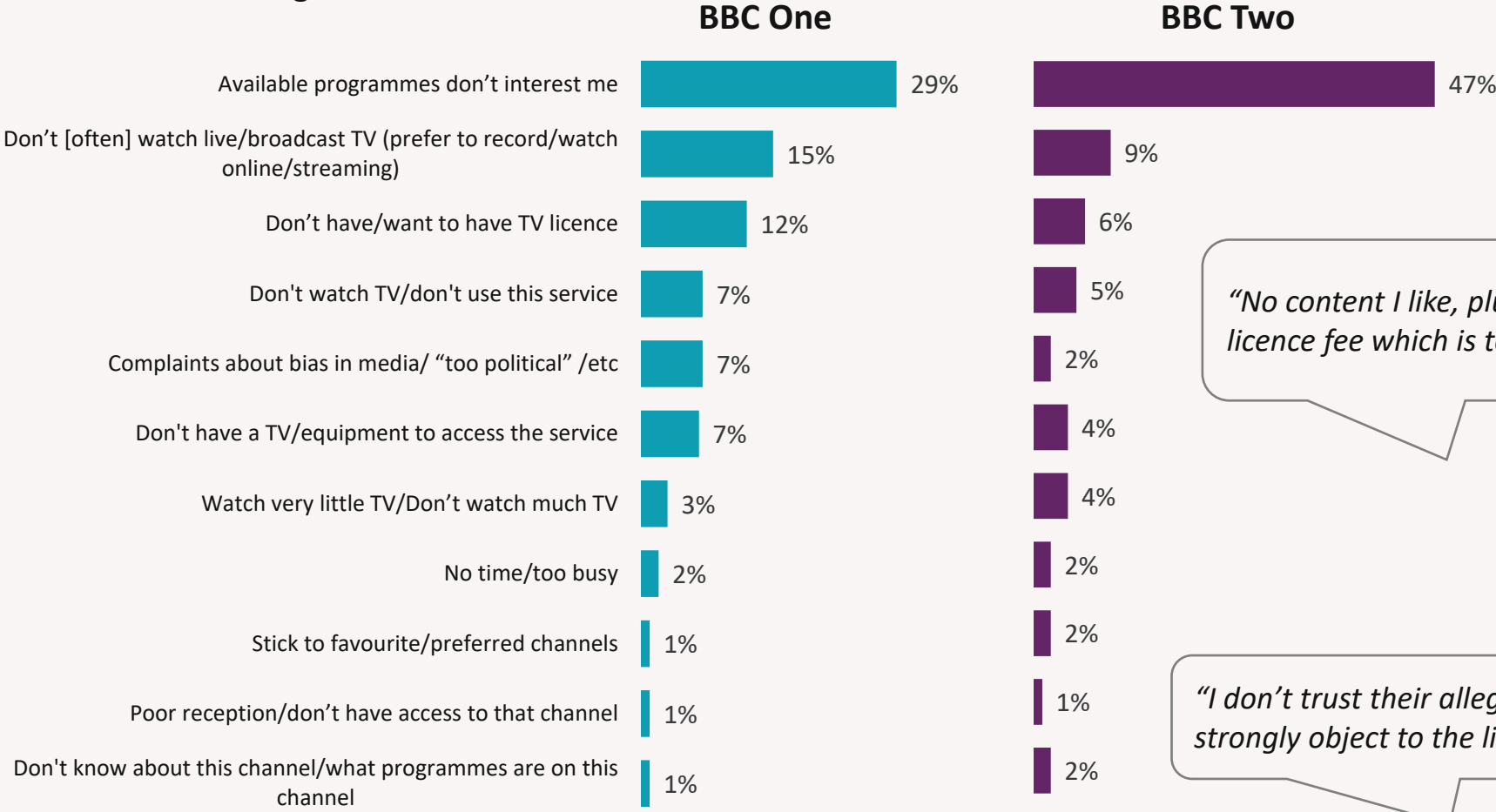


Section 5: Reasons for not watching PSBs



A lack of programmes of interest is the key reason for not watching BBC One and BBC Two.

Reasons for not watching channels



"Not really anything I'm interested in apart from special events." – (BBC One)

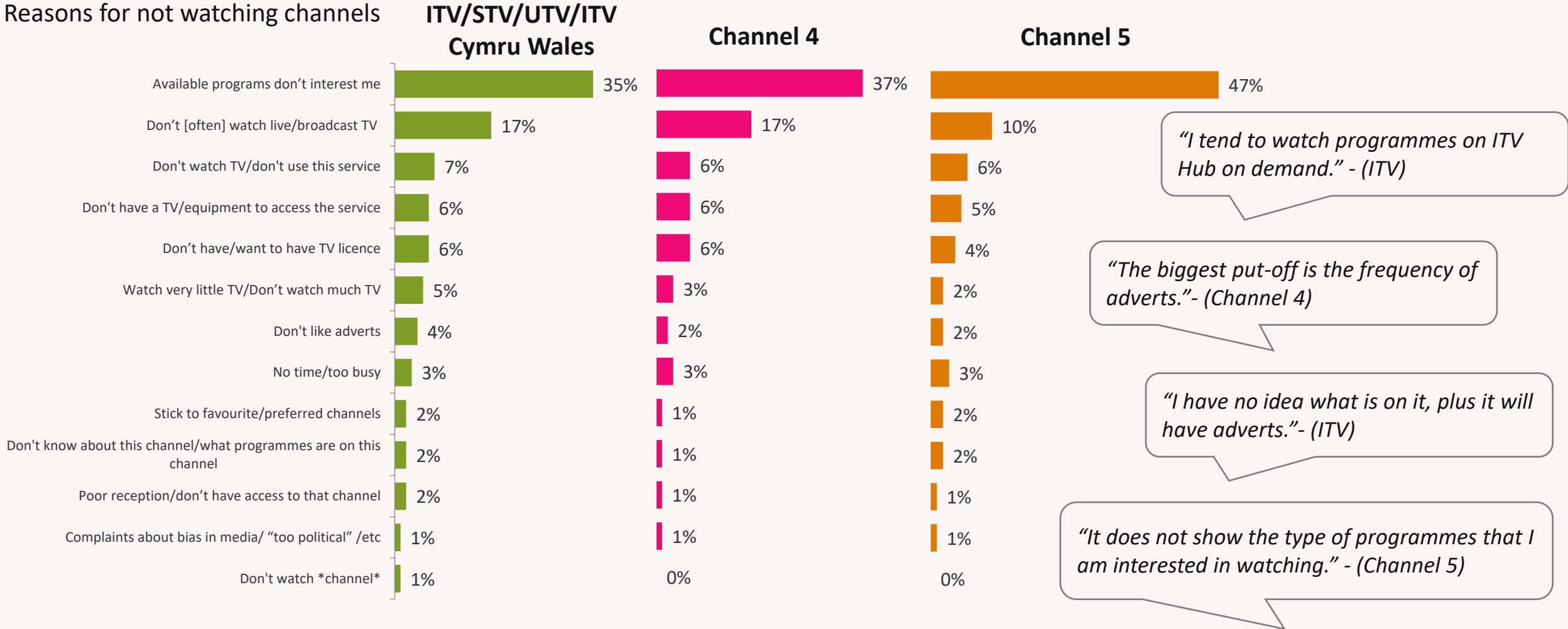
"No content I like, plus you have to pay a TV licence fee which is too costly." – (BBC One)

"Too many other options to choose from offering the same things." – (BBC Two)

"I don't trust their alleged impartiality and I strongly object to the licence fee!" – (BBC One)

Source: Ofcom Public Service Media Tracker 2022
 Q25. Earlier you mentioned that you have not watched BBC One/BBC Two in the last 6 months. Why is this?
 Base: All who have not watched channel in past 6 months: BBC One (453), BBC Two (811)

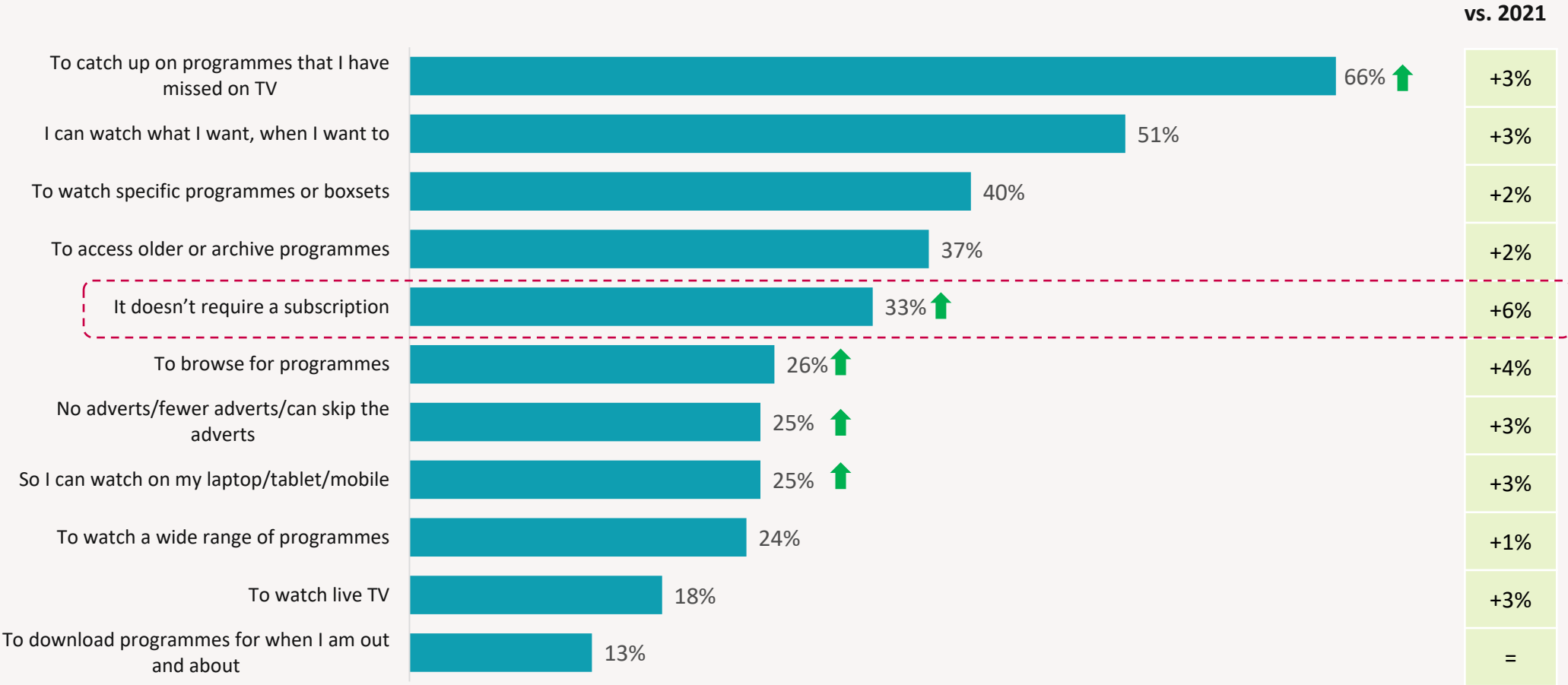
Interesting content is also the key reason for not watching ITV, Channel 4 and Channel 5.



Source: Ofcom Public Service Media Tracker 2022
 Q25. Earlier you mentioned that you have not watched BBC One/BBC Two in the last 6 months. Why is this?
 Base: All who have not watched channel in past 6 months: ITV/STV/UTV/ITV Cymru Wales (546), Channel 4 (525), Channel 5 (784)

Catch-up continues to be a key motivator for the use of BVoDs, although there has been an increase in the those saying they use them because they don't require a subscription.

Reasons for using BVoDs

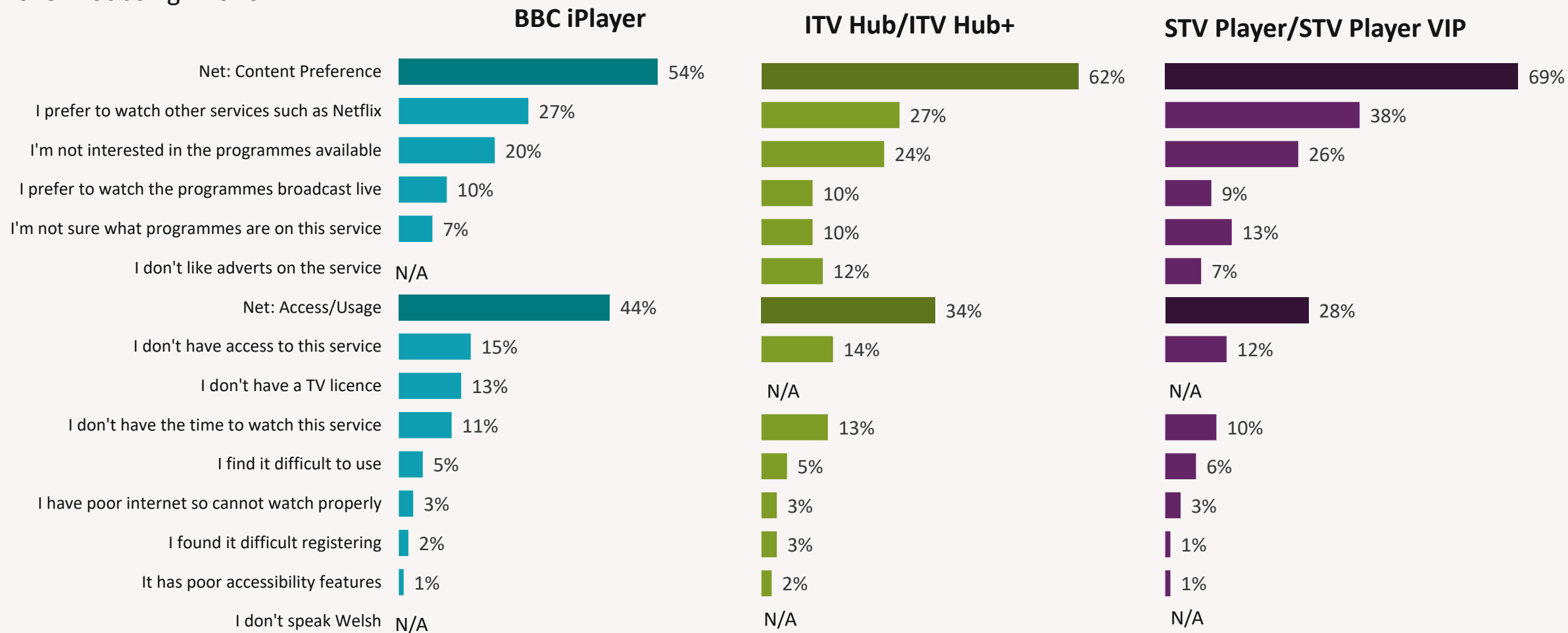


↑ ↓ Significantly higher/lower than 2021

Source: Ofcom Public Service Media Tracker 2022
 Q33. Why do you use these services?
 Base: All who watched BVoD channel in past 6 months 2021-2922: (2509-2454)

For most BVoDs key barriers are around content preferences, particularly preferring to watch other services such as Netflix, Amazon Prime Video, Disney+.

Reasons for not using BVoDs



Source: Ofcom Public Service Media Tracker 2022

Q34. Earlier you mentioned that you haven't used the service in the last 6 months or more. Why don't you use this services?

Base: All who have not watched BVoD channel in past 6 months: BBC iPlayer (823) ITV Hub or ITV Hub+ (1289) STV Player or STV Player VIP (152)

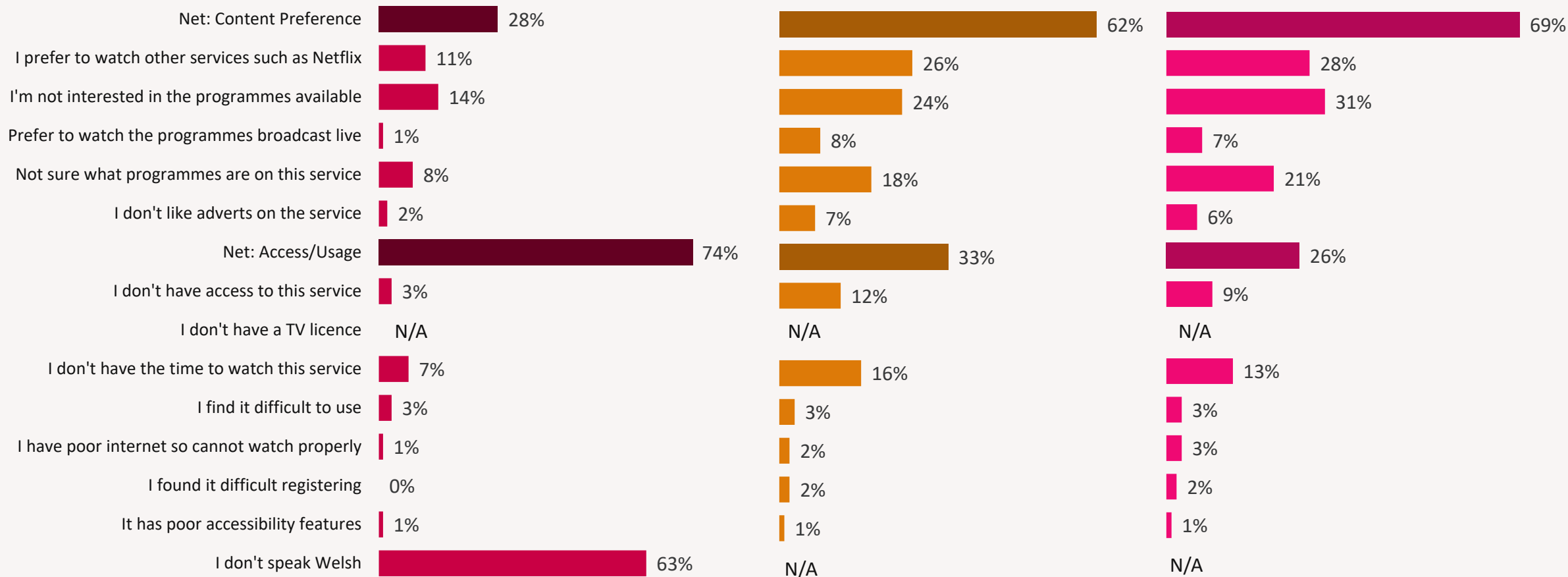
Likewise, main reasons for not using All4 and My5 tend to be around content preferences, while for S4C Clic, language is the main reason.

Reasons for not using BVoDs

S4C Clic

All4/All4+

My5



Source: Ofcom Public Service Media Tracker 2022

Q34. Earlier you mentioned that you haven't used the service in the last 6 months or more. Why don't you use this services?

Base: All who have not watched BVoD channel in past 6 months: S4C Clic (276) All4 or All4+ (1552) My5 (1900)



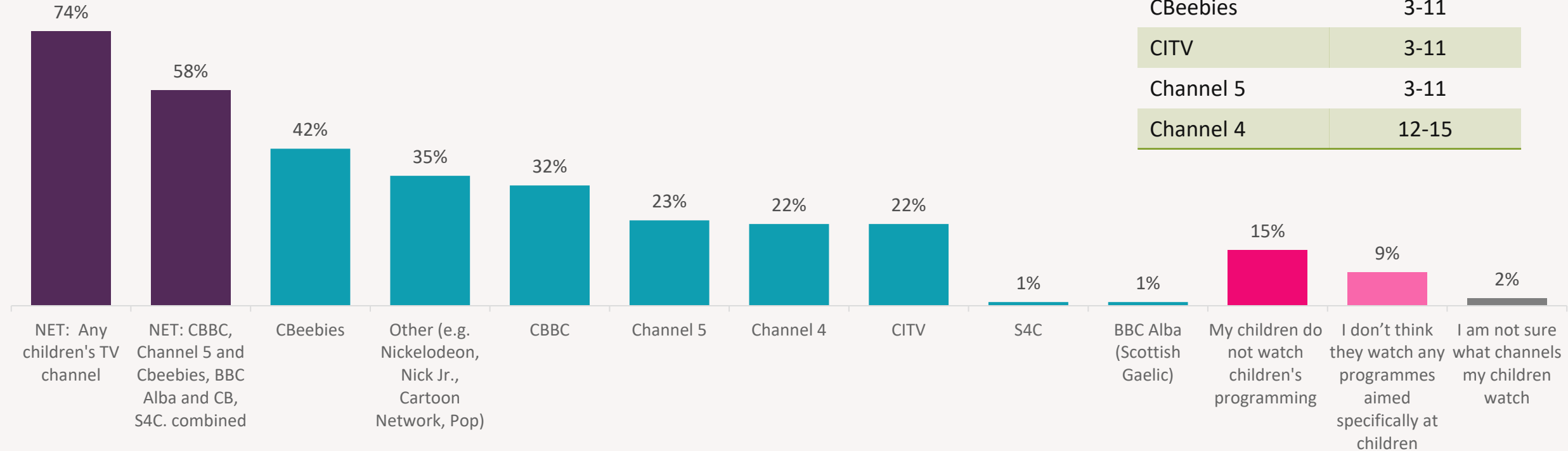
Section 4

Children's broadcast



Around three quarters of parents say their children watch at least one children's TV channel, just under three in five say they watch a PSB.

Channels watched by children



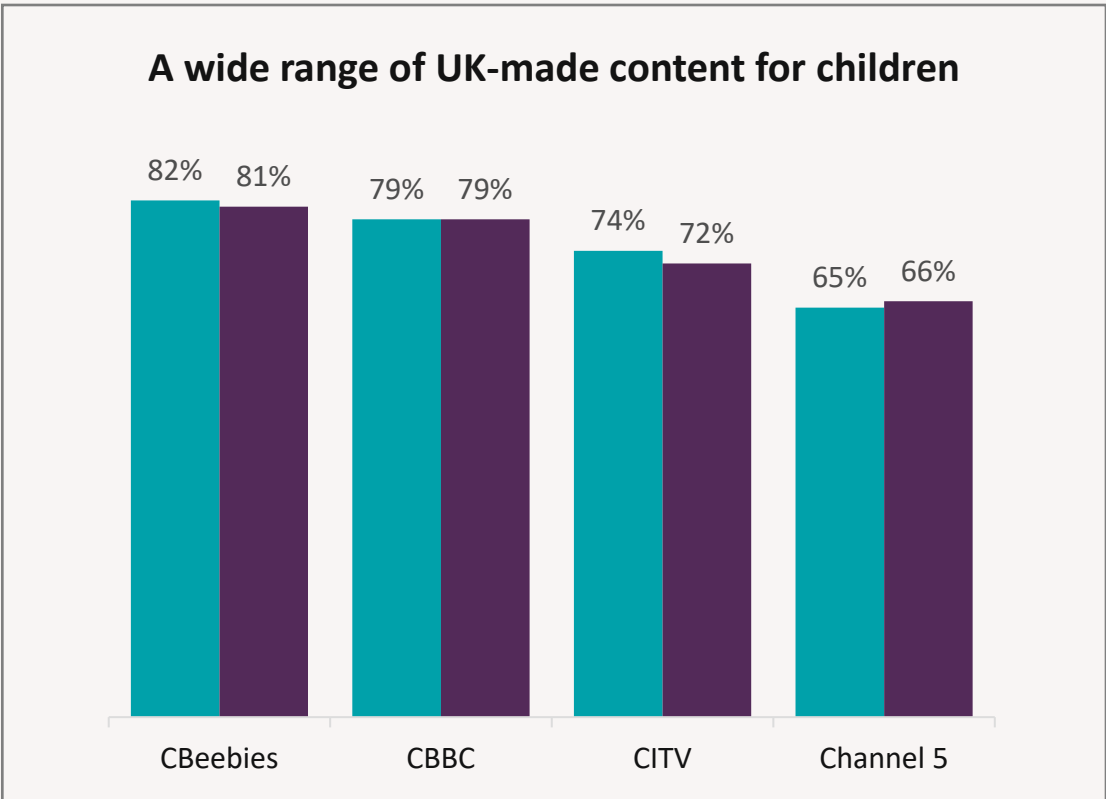
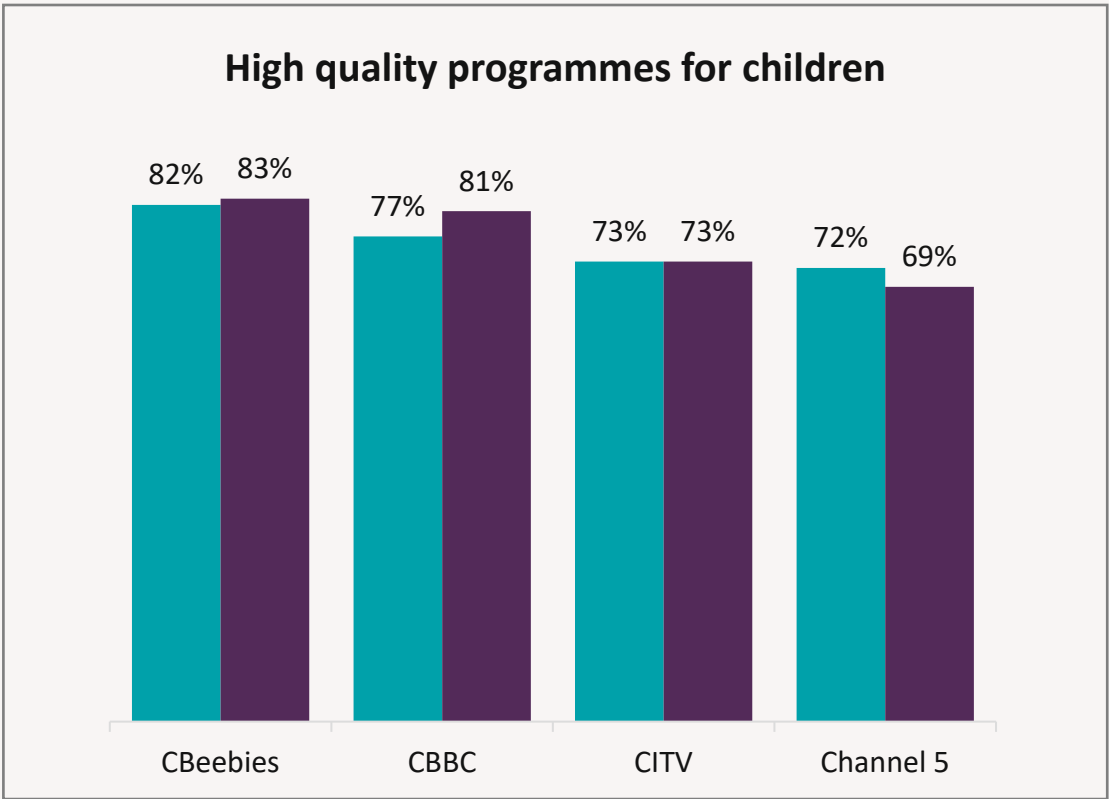
Service	Age of audience
CBBC	3-11
CBeebies	3-11
CITV	3-11
Channel 5	3-11
Channel 4	12-15

Figures are in line with 2021

Source: Ofcom Public Service Media Tracker 2022
 Q19. On which of these channels have your children watched programmes in the past 6 months?
 Base: All respondents who are the parent/guardian for children under 16 (768)

CBeebies remains the strongest in delivering high quality and range of children's content, closely followed by CBBC.

Rating (7 to 10) of delivery of children's programmes

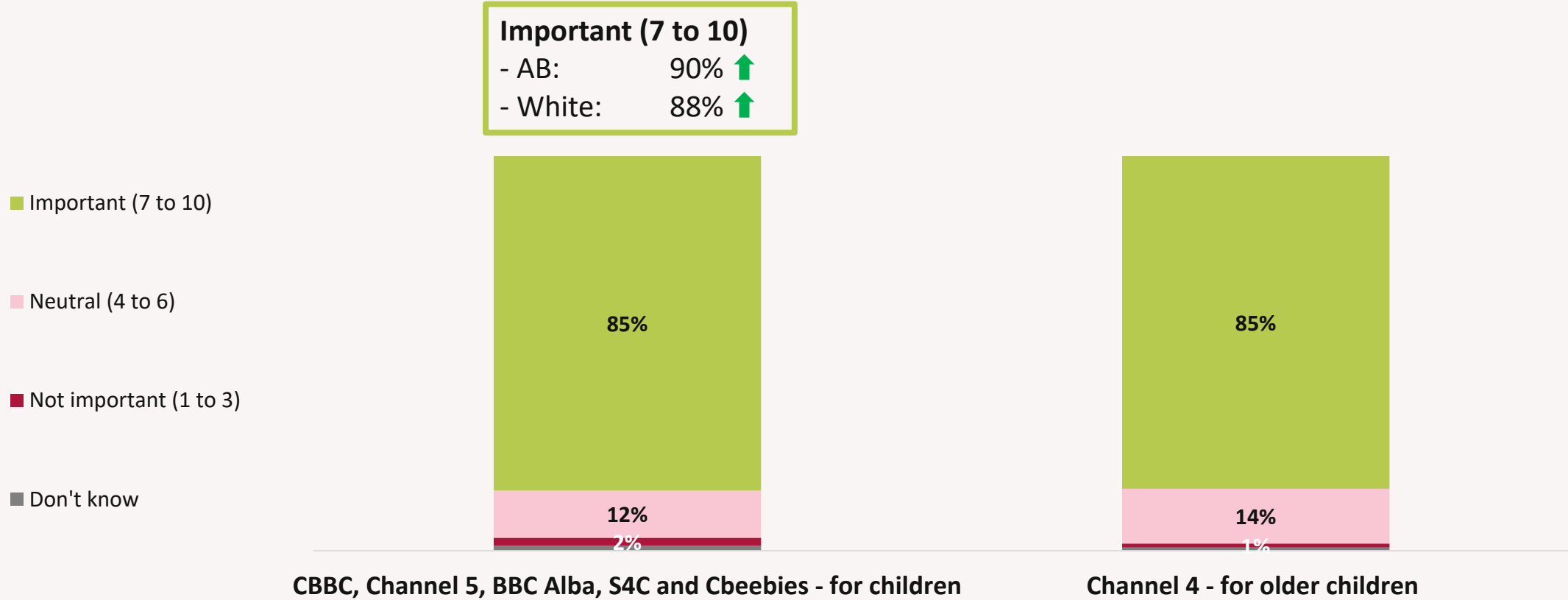


2021 2022

Please note, rating of delivery for older children's programmes on Channel 4 is unavailable due a base size below 100

For a majority of parents, high quality and UK made programming for children and older children is important.

Importance of providing high quality and UK-made programmes for children



↑ Significantly higher/lower than Total

Source: Ofcom Public Service Media Tracker 2022
 Q31. And how important, if at all, do you think it is that CBBC, Channel 5, BBC Alba/ S4C and Cbeebies. combined provide a wide range of high quality and UK-made programmes for children?
 Base: Those whose children (Age 3-15) watched service in last 6 months (428)
 Q32. And how important, if at all, do you think it is that Channel 4 provides a wide range of high quality and UK-made programmes for older children? Base: Those whose children watched Channel 4 in last 6 months 2022:
 (157)

SVoD Delivery



Netflix performs strongest on range, relevance, appeal and ease of use but BritBox is seen as best for UK and regional audiences, and, along with YouTube, giving a unique perspective.

Rating well (7 to 10) of delivery of attributes

	Sky On Demand or Sky Go		Netflix		Amazon Prime Video		NOW TV		Disney+		BritBox		YouTube	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
Appeals to a wide range of different audiences	72%	75%	82%	82%	77%	76%	71%	71%	73%	75%	69%	73%	78%	79%
Provides services that are easy to find my way around	72%	75%	82%	82%	72%	74%	69%	69%	78%	79%	73%	73%	72%	73%
Easy to find something I want to watch	71%	76%	80%	81%	71%	71%	67%	68%	74%	76%	73%	74%	71%	73%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	73%	75%	75%	76%	72%	72%	69%	68%	63%	67%	67%	70%	65%	69%
Programmes that are relevant to me	69%	71%	75%	77%	68%	68%	62%	68%	68%	72%	69%	74%	67%	69%
Programmes that I can watch and talk about with people I know	65%	69%	75%	79%	67%	69%	62%	65%	70%	74%	66%	66%	60%	63%
Programmes which feature people from different backgrounds	66%	69%	72%	74%	65%	67%	62%	60%	64%	67%	65%	70%	67%	71%
Programmes that are different in their approach to other providers	58%	64%	66%	67%	60%	60%	57%	58%	63%	66%	67%	69%	63%	67%
Programmes made for UK audiences	63%	67%	58%	62%	54%	58%	59%	62%	57%	58%	72%	81%	53%	59%
Programmes that help me see things from a different angle/perspective	58%	62%	59%	60%	54%	55%	54%	55%	52%	54%	64%	64%	62%	64%
Programmes that feature people like me	56%	61%	54%	57%	52%	51%	55%	54%	51%	51%	65%	69%	56%	59%
Programmes about science, arts, culture and religion	58%	62%	55%	54%	51%	49%	55%	51%	51%	48%	63%	62%	57%	61%
Programmes that help me to understand what is going on in the world today	60%	60%	48%	48%	45%	45%	53%	51%	45%	44%	61%	55%	59%	62%
Broadcast events that bring the nation together for a shared viewing experience	56%	61%	46%	50%	44%	43%	53%	51%	50%	50%	62%	64%	42%	47%
Programmes that feature my region /country	41%	42%	31%	32%	30%	30%	42%	41%	34%	33%	60%	59%	38%	42%

Concept Areas
Diversity
Quality/Range
Audience
Shared Viewing

Green/Red =Significantly higher/lower than 2021

Source: Ofcom Public Service Media Tracker 2022

Q38. Well (7-10) Summary - How well or badly does it provide ...

Base: All who watched channel in past 6 months 2021- 2022: Sky On Demand or Sky Go (899-875), Netflix (2155-2139), Amazon Prime Video (1818-1826), NOW TV (679-595), Disney+ (1057-1227), BritBox (339-267), YouTube (2353-2185)