

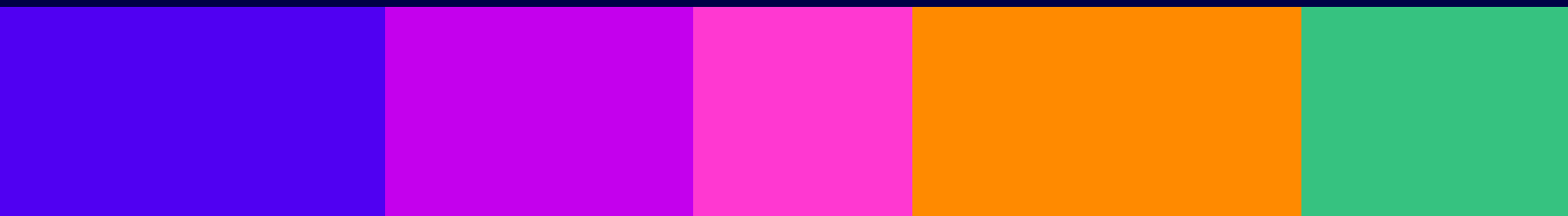
Ofcom



BBC Audiences Review:

Understanding what factors may drive lower satisfaction levels among D and E socio-economic groups

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Overview

Whether on TV, radio or smart devices, audiences are faced with an overwhelming array of choices, with many gravitating towards streaming services and social media as their preferred content platforms. This shift presents a significant challenge for traditional broadcasters as they try to appeal to the widest audiences across all their services.

This is a particular challenge for the BBC given its remit to deliver for all audiences, and its unique funding model. We recognise that the BBC faces financial pressures, however it must continue to find innovative ways of bringing content to audiences across all its platforms.

Since taking on regulation of the BBC, our research has consistently shown that satisfaction levels are lower amongst audiences in what are traditionally called socio-economic groups D and E. People from D and E groups are often referred to as being from a 'lower' socio-economic group, having 'lower' socio-economic status or being from working-class backgrounds. They are more likely to be older, unemployed, have a disability or be retired with only a state pension. These groups make up almost a quarter of the UK population.

We have undertaken an in-depth review, to understand what underlying factors may be driving these lower satisfaction levels. As part of this, we have conducted new research with D and E audiences, including in-depth interviews and focus groups across the UK, and carried out further analysis on the extensive information and data we currently collect in relation to the BBC. We have actively engaged with industry and academic stakeholders, have met with the BBC's strategy, policy, research and commissioning teams and organisations representing these audience groups.

What we have found:

People we spoke to want content to provide escapism and companionship

Being an organisation that enjoys such strong reach, familiarity and longevity will always present challenges when trying to satisfy all audiences. However, many of the people we spoke to felt that the BBC's programming is too dry and too serious compared to other services and are turning to newer voices on social media and podcasts that they found to be more authentic and relatable to their real-life experiences. People said they wanted the BBC to take more risks in producing new and innovative content.

The audiences we spoke to voiced a distinct preference for streaming services such as Netflix and Spotify, due to their hyper-personalised content recommendations. People within D and E groups can often have non-traditional working hours or work shift patterns so the conventional 'peak-time' broadcasting schedule may not align with their daily routines.

People said they still feel connected to the BBC, but may overlook its newer content

Despite these challenges, the BBC still plays a vital part in the media diet of the audiences we have focussed on in this review. When we discussed BBC programming, the shows that were front of mind for many were well-known national staple programming such as *Eastenders*, *Match of the Day* and *Strictly Come Dancing*. People also said they rated its news provision and see the BBC as the home for big, national events.

However, our research recognised that this reputation for classic programming meant there is a risk some audiences may overlook any newer content the BBC is airing. Some felt the BBC does not do

enough to market its new content so people are unaware of the wide range and variety available today.

Audiences feel under or misrepresented by the BBC

People we spoke to made it clear that they want the BBC to do better at authentically portraying their real lives. They feel the BBC can miss the nuanced everyday aspects of the lives of people from working-class backgrounds, and often reverts to stereotypical or ‘tokenist’ characterisations.

However, it is clear from our discussions with the BBC during this review that they remain aware of this issue and we welcome its ongoing efforts to increase representation and deliver more authentic portrayal across its output.

People’s views on the BBC are influenced by more than just content

As we have found in [previous reviews](#), our research has shown there are wider challenges to the BBC’s reputation as people’s views are influenced by more than just the programmes they watch or listen to. Some people said that their trust in the BBC had been damaged by ‘scandals’ or stories about the BBC which have played out in the public eye. As a result, the trust some people we spoke to had for the BBC has been lost and there did not seem to be a way for the BBC to gain it back.

Taking action to improve audiences’ experience of the BBC

This review does not seek to make specific recommendations to the BBC or propose changes to our regulatory framework. Rather, our aim is to provide insights for the BBC to consider in determining its approach to meeting the needs of these audiences. Many of the messages from the people we spoke to as part of this report will not be new to the BBC. We know it is commissioning more content that it believes will be of greater appeal to these audiences. However, the BBC needs to carefully monitor whether this content is cutting through and consider what further action is needed to stop these issues being raised year on year.

In April 2023, we put in place a [new Operating Licence](#) allowing the BBC more flexibility to respond to audience needs. As we continue to hold the BBC to account on behalf of audiences, we will look at the progress the BBC is making in the areas highlighted as part of this review as we continue to assess its performance in meeting the needs of all audiences and delivering its Mission and Public Purposes.

Introduction

This review aims to better understand why some audiences are less satisfied with the BBC

The BBC’s Mission is to serve all audiences in the UK by providing duly impartial, high quality and distinctive output and services which inform, educate and entertain. Achieving this has become more challenging as the media market continues to evolve. Ofcom’s role, as defined by the [BBC Charter](#) and [Framework Agreement](#), is to hold the BBC to account for fulfilling its Mission and promoting the Public Purposes on behalf of audiences.

One way the BBC Charter enables Ofcom to hold the BBC to account is through in-depth reviews “addressing any specific issue of concern” that we identify.¹ These help us understand what people think about aspects of BBC output and identify how the BBC could serve audiences better. This review informs, and has been published alongside, our [Annual Report on the BBC](#) which assesses the BBC’s performance against all areas of our regulation.

As the environment the BBC operates in changes, the regulatory framework must also keep pace with it. In April this year, we put in place a [new Operating Licence](#) fully covering the BBC’s online services, allowing it more flexibility to respond to audience needs while still enabling us to hold it to account.

Since taking on regulation of the BBC in 2017, we have been particularly concerned that audiences in what have traditionally been referred to as socio-economic groups D and E continue to be less satisfied with BBC services, with 55% of people in D and E groups having a positive overall view of the BBC compared to 67% of people in A and B groups.² People in D and E groups are often referred to as having ‘lower’ socio-economic status, being from lower-income households or from working-class backgrounds. They are more likely to be older, unemployed or in insecure work, have a disability or be retired with only a state pension. These groups are highly diverse and make up almost a quarter of the UK population.³

In our last [Annual Report](#) on the BBC we announced that we would be carrying out a review to examine why these audiences are persistently less satisfied with the BBC and seek to better understand their habits, and how the BBC is delivering for them.



Figure 1: The BBC’s Public Purposes

¹ [BBC Charter](#) (Article 51(3))

² Ofcom BBC Performance Tracker 2022/23

³ Socio-economic classification is typically based on occupation and includes the following categories: A, B, C1, C2, D and E.

How we have carried out this review

This review spans the breadth of the BBC’s output and services, cutting across all of the Public Purposes. Our annual research shows that the D and E groups rate the BBC significantly lower than those in other socio-economic groups for the delivery of each public purpose.

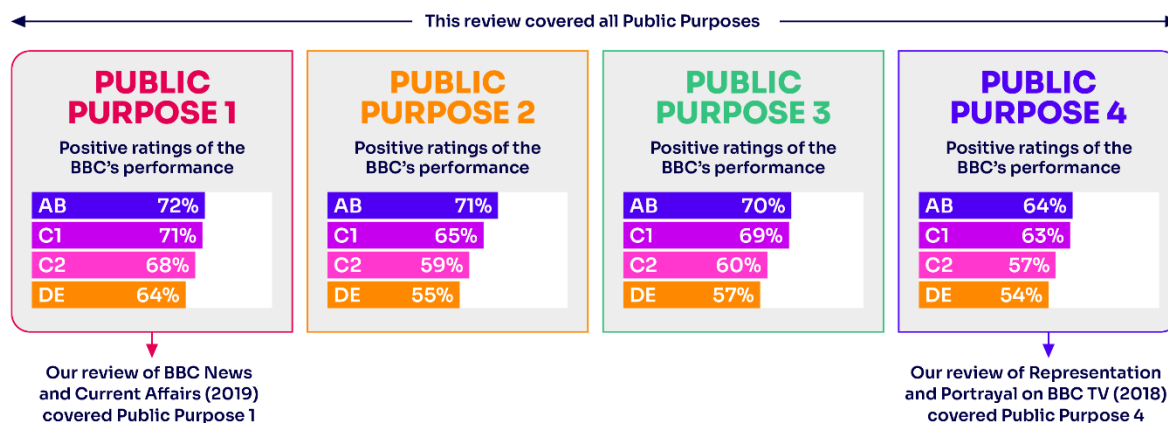


Figure 2: Audience ratings of the BBC’s performance for each Public Purpose (ratings 7-10)

Source: Ofcom BBC Performance Tracker 2022/23

To ensure our review considers the full scope of the BBC’s Mission to serve all audiences, we [identified](#) three areas that allowed us to thoroughly examine these diverse audience groups and their relationship with the BBC. They are:

- **Connection:** we have explored how the BBC connects with these audiences by looking at their wider media consumption, the role the BBC plays in this, and how they access and connect with both the BBC and other media providers.
- **Content:** we have studied how different types of programming serves different audiences and engaged with the BBC to understand its approach to commissioning with diverse audiences in mind.
- **Context:** we know from our previous research that people’s views on the BBC can be shaped by a range of different factors. We have explored whether these issues and any others are relevant to how people form opinions and attitudes to the BBC.

As well as talking to audiences and stakeholders, we commissioned additional research, which allowed us to delve deeper into why certain people continue to feel less satisfied with the BBC’s output across its services.

Factors influencing audience satisfaction are long established

Our previous [thematic review of representation and portrayal on BBC Television](#) (2018) highlighted that some audiences, particularly those outside London, felt their local areas were portrayed negatively and that national and regional stereotypes were used when representing them, their lives and their communities. The people we spoke to as part of this current review highlighted these same issues again, revealing that not enough has been done to address this problem.

Similarly, our [review of the BBC’s news and current affairs output](#) (2019) highlighted that many views of the BBC are shaped by a range of factors with only some relating directly to its content, for example BBC staff salaries, its funding model and ‘scandals’ that involved the BBC. These issues continue to be raised.

The BBC’s latest [annual report](#) acknowledges that some audiences are less satisfied with its content and services than others. The BBC’s audience research for 2022/23 shows that “some audience groups have less satisfaction with the BBC in this regard than others. This year this was the case for C2DE compared with ABC1 audiences and people who are disabled compared with people who are not disabled.”⁴ As part of our own [Annual Report on the BBC last year](#), the BBC told us it was looking at ways to meet the needs of these audiences better and would possibly redirect part of its television budget to make lighter drama, crime drama and comedy drama, as well as factual entertainment competition formats and sports documentaries. In radio and audio, the BBC has told us that it seeks to focus on sports via BBC Radio 5 Live and BBC Sounds to reach these audiences, alongside some targeted speech and music output on BBC Sounds.⁵

In March 2021, the BBC launched its five year [Across the UK strategy](#) which aims to “recreate the BBC as a genuinely UK-wide organisation with a much stronger presence across the length and breadth of the country”. This strategy aims to shift the power and decision-making of the BBC away from London to the UK’s nations and regions.

We have engaged with audiences and stakeholders across the UK

As part of this review, we have conducted further analysis on the extensive information and data we routinely collect in relation to these audience groups and the BBC’s performance. This has included looking at demographic, geographic and attitudinal differences, and media consumption data to understand which content resonates with certain audiences.

We also commissioned 2CV, an independent research agency, to carry out a large-scale qualitative research project with D and E audiences, including in-depth interviews and focus groups. The focus groups were all in-person apart from one online, with a mix of urban and rural locations across the four nations of the UK. They included a range of age, gender and a mix of how often people use the BBC. In addition, in-depth individual interviews were held with people across the UK who are often less well-represented in research including those with visual or hearing impairments, mobility difficulties, or who are neurodiverse.

We have included analysis of 2CV’s research throughout this report and their full research report has been [published on our website](#).



Figure 3: 2CV Research - Focus Group Locations

⁴ [BBC Annual Report and Accounts 2022/23](#), page 131.

⁵ [Ofcom’s Annual Report on the BBC](#), page 36.

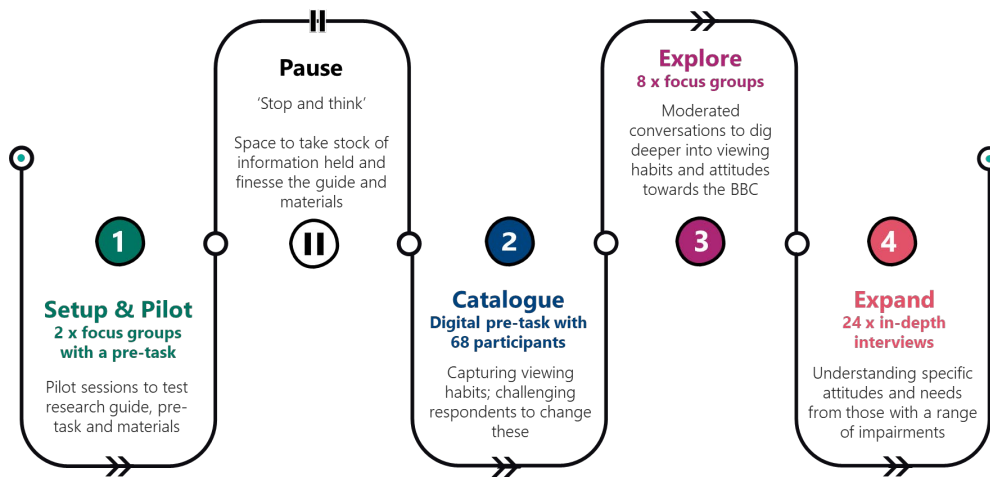


Figure 4: 2CV Research – Approach and Methodology

We have also actively engaged with industry and academic stakeholders, including meetings with the BBC’s policy, research and commissioning teams. We particularly appreciate the input we have had from of a number of charities and advocacy groups that represent many of the audience groups we considered as part of this review.



What we know and what we've learned

Understanding the D and E socio-economic audience groups

Social groups, often called 'socio-economic groups' (SEG) are a way of classifying the population, widely used in the UK by market and audience researchers. There are [six groups](#), as defined by the Market Research Society. The groups include:

- A: Professionals; very senior managers in business; top-level civil servants
- B: Middle-management executives in large organisations, with appropriate qualifications
- C1: Junior management, owners of small establishments and all other non-manual workers
- C2: Skilled manual workers
- D: Semi-skilled and unskilled manual workers, apprentices and trainees of skilled workers⁶
- E: Long-term recipients of state benefits

When classifying a household or an individual's SEG, researchers identify the 'chief income earner' in the household, and the type of job that the chief income earner of the household does. SEG does not consider how much the chief income earner earns, only the type of job they do. For example, someone who is a semi-skilled manual worker (SEG: D) may earn more than a skilled manual worker (SEG: C2) or a small business owner (SEG: C1), but they would sit within a 'lower' socio-economic group. There is, however, a strong correlation between social group and income, with people in lower social groups generally belonging to lower-income households.

When researchers refer to higher (ABC1) and lower (C2DE) socio-economic groups, these are often taken to mean people from middle-class and working-class backgrounds, respectively. Although SEGs do not map perfectly on to social class, when conducting our research and analysis, we found that it was useful to use terms such as 'middle-class' and 'working-class' to ensure participants understood what we meant when we were discussing people's backgrounds. More importantly, using these terms also meant we could mirror the language our participants used to talk about themselves.

Traditional ways of thinking about class are not always helpful for understanding people's current economic and social positions, and their cultural tastes. People's lives are shaped by many personal characteristics, including their ethnicity, gender, sexual orientation, age, socio-economic status and whether they have a disability, as well as life experiences. Many people we spoke to were not particularly attached to the idea of class and spoke more in terms of their individual identities. This added a layer of valuable insight and complexity to this work, as different terminologies and concepts were used by different people, which we have tried to reflect throughout our report. Our approach was also influenced by our programme of stakeholder engagement, including discussions with

⁶ SEGs A-D also includes retired people who also have a work-based pension who, when they were working, were part of each SEG, and retired people whose late spouses or civil partners were part of each SEG. SEG E also includes retired people who are in receipt of a state pension only. Students should be counted as C1.

specialist teams within Ofcom, the BBC and other broadcasting stakeholders, and organisations representing older and disabled people.⁷

SEG remains the research standard for understanding consumers.⁸ It is well-established and many organisations continue to use it including Ofcom, the BBC and other broadcasters, Government departments, other regulators such as Ofgem and research agencies.

However, given the challenges we encountered using this terminology as part of our research, we have decided in this report to use 'working-class' as a descriptor for our participants. Where other characteristics had a bearing on how people connected with and used the BBC, we have taken these into account in our discussion and analysis.

These audience groups are highly diverse

Although D and E groups are the 'lowest' socio-economic groups, these are not necessarily composed of people receiving the lowest income. D and E groups include retail workers, hairdressers, cleaners, labourers, those working in temporary or insecure jobs including zero-contract hours, state-only pensioners and those who are not working or who have never worked. D and E grades include people who feel they are doing well socially and economically, as well as those who may feel isolated and struggle to make ends meet. There also tends to be a lot of movement in and out of the D grade in particular, as people may move in and out of this category as their working status changes.

The make-up of D and E groups differ slightly from the overall population averages. According to estimates from the latest Census, D and E groups make up around 24% of the population (AB 23%, C1 33%, C2 20%), with regional variations across the UK. The highest proportion of D and E households is in the North East of England where they account for 27% of households, compared to 17% of households in the South East.

D and E households are disproportionately likely to be one-person households where the person is aged over 55 (7% of D and E households compared to 4% of all households), or households where the adults are aged 16-34 with dependent children (21% of D and E households compared to 17% of all households). D and E households are also less likely to be White (72% of D and E households, 79% of all households), and more likely to be of another ethnic group.

While this is an extremely diverse cohort of the population, our research consistently shows that, overall, they are more likely to be less satisfied with the BBC. This report explores the interaction between being in a lower socio-economic group and other characteristics – including disability, ethnicity and age – and the various reasons they might have for feeling like the BBC isn't 'for them'.

⁷ By 'disabled' people, we are referring to those who have indicated that have a physical or mental impairment which can have a substantial or long-term impact on day-to-day activities. This definition is based on the medical model of disability and we recognise that these impacts can be as a result of systemic, social barriers rather than because of the disability itself.

⁸ SEG can also be combined with other measures to build a more nuanced picture of certain social groups, for example NS-SEC (which is used as part of the UK Census), and other market research metrics such as ACORN (used by the BBC) and MOSAIC (used by Ofcom).

Media plays a big part in their daily lives

Our analysis shows that people in D and E groups watch more television than other groups. However, people are increasingly moving away from broadcast TV channels and radio stations to online services and there is significantly more competition for audiences, particularly from well-funded and innovative global players, such as Netflix and Spotify.

Those in D and E groups are more likely to watch the BBC compared to the other public service broadcasters (PSBs), accounting for a quarter (26%) of their viewing time.

Just over eight in ten adults (83%) across the country consume BBC content in some form each week. 89% of those in A and B groups consume BBC content weekly, however this drops to 78% for those in D and E groups.⁹ Despite relatively high consumption levels across BBC services, audiences in D and E groups are less likely to say they would miss the BBC than those in other audience groups.¹⁰

We know that D and E groups are more likely to spend more of their weekly audio time on live radio compared to other groups (64% vs 56% for AB groups) and of this listening, a lower proportion is online rather through a radio set.

Our annual research also shows that these audience groups are less likely than some other groups to have traditional pay TV services (e.g. Sky or Virgin Media), subscription video-on-demand (SvoD) (e.g. Netflix, Amazon Prime and Disney+) or own a smart speaker or connected TV.

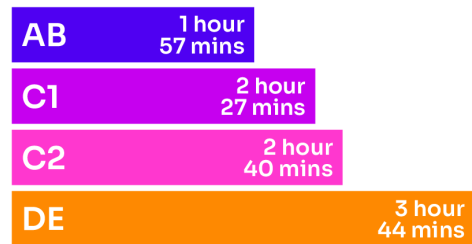


Figure 5: Average daily hours and minutes viewed of broadcast TV, age 4+ - 2022

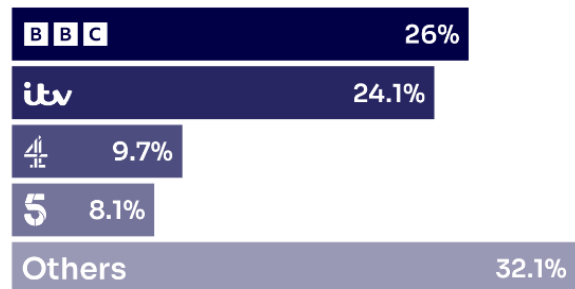


Figure 6: DE's share of broadcast TV viewing - 2022

Source: Barb 28-day consolidated

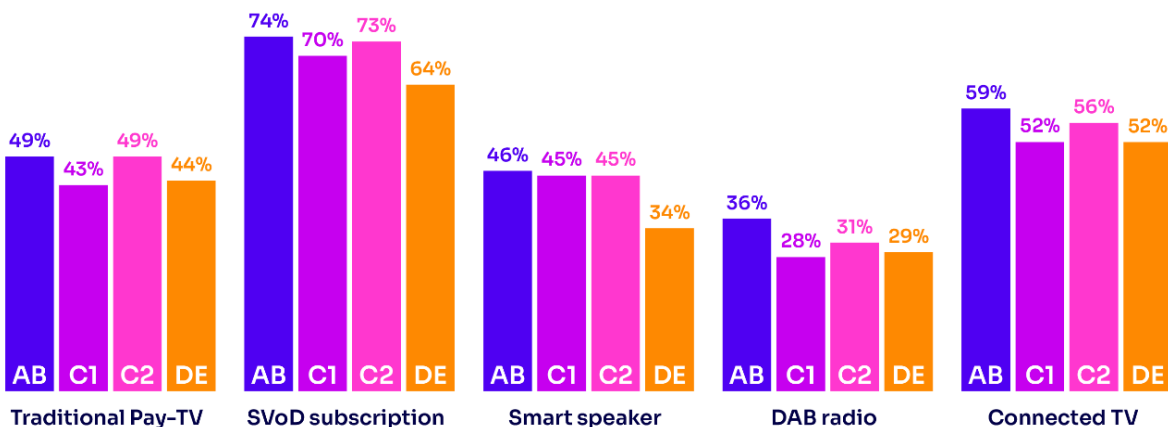


Figure 7: Household device and service take-up and usage

Source: Ofcom Technology Tracker 2023

Satisfying audiences is increasingly challenging

Viewing figures for traditional broadcast TV have been declining for years, as more people use online services to consume their media content. This has coincided with increased choice for viewers and

⁹ IPA TouchPoints wave 1 2023.

¹⁰ Ofcom BBC Performance Tracker 2022/23.

listeners from a wide range of content from broadcasters, streaming services and online platforms who provide almost anyone the opportunity to create and share their own personal content. With more services to choose from, audiences have greater control over what they want in terms of content and from the providers themselves, and can compare one service with another.

Our research found people from D and E groups have greater expectations from the media they engage with, causing them to place greater scrutiny on services. When a service is no longer providing what they want or meeting their expectations, they would be more likely to drop it and move to a different platform.

“I treat the platforms a bit like they’re always on trial. If I get bored of the content available or I don’t feel it’s worth it – I’ll just move on to another provider.”

Derry/Londonderry, Woman, 35-54, socio-economic group E.¹¹

Those in D and E groups are more likely to be unemployed or face financial difficulties compared to those in other socio-economic groups. This can lead to a higher level of scrutiny when considering value for money of services in relation to the quality and content on offer.

People’s lives often don’t fit traditional TV schedules

During our research, some participants voiced reservations about the quality of daytime programming on traditional broadcasters, including the BBC. Many also claimed that they did not use the TV live schedule anymore for the majority of their viewing. Employed people within D and E groups can often have non-traditional working hours or work shift patterns so the conventional ‘peak-time’ broadcasting schedule may not align with their daily routines. Many said one of the appeals of online streaming services was they offered the convenience of on-demand access and the flexibility to watch high-quality content at their convenience, regardless of time and location.

The hyper-personalisation and categorisation of content offered on these services was also highlighted, especially for those that did not want to put too much effort into thinking and searching for something to watch. They liked that these services effectively did this job for them.

The ways that people are discovering new and popular content has also transformed. Traditionally, viewers would rely on post-broadcast discussions with family, friends and colleagues for programme recommendations and reactions, previously referred to as ‘watercooler’ moments. This dynamic was typically tied to ‘appointment-to-view’ scheduling offered by traditional TV broadcasters. However, social media is increasingly being used to discover new content. This was a trend previously associated with younger audiences but this research has shown that it is now prevalent across all groups, regardless of age.

People look to content for both escapism and companionship

We know that individuals within the D and E groups are [more likely to face mental health challenges](#), have a disability, chronic pain and be neurodiverse. For many, TV and radio are often used as tools for escapism and comfort. During our research, some of those that we spoke to expressed a preference for content that felt risk-taking and fun, as it provided them with an opportunity to immerse

¹¹ Throughout the report we use verbatim comments from participants to help illustrate our findings. We have included characteristics that we used to ensure a good spread of participants.

themselves in a different mental space and zone out from some of the issues they face in everyday life. There was a perception among these groups that the BBC's content is more serious, unrelatable and less risky. Streaming services and social media on the other hand are seen to offer more engaging and light-hearted content that provided the escapism and companionship they were looking for.

For those using media as a source of companionship or relief, rewatching familiar shows was a comfort as they knew what to expect, and it tapped into a sense of nostalgia. Global streaming services were perceived as the go-to place to watch high-budget, long-running, often American, series such as *Friends* or *Greys Anatomy*, which were favoured by many we spoke to given the high volume of episodes that were available.

"I also started watching Grey's Anatomy last year, on a streaming service [Disney+] which has become another favourite, due to the vast array of episodes available therefore it is more reliable and consistent - I know I will be able to watch a programme I know I like, and there isn't a shortage of episodes anytime soon, like a friend I can rely on."

Goole, Woman, 18-24, socio-economic group D/E.

The challenge for choice and attention

We also found that people were often using multiple screens throughout the day, frequently at the same time. This varied engagement leads to a scattered focus amongst audiences and can make it challenging for the traditional broadcasters to cut through and retain their attention among shorter, snappier user-generated online content. Many people we spoke to had a preference for social media content in their downtime (especially TikTok and YouTube) as it only required short bursts of attention and can be easily integrated into their daily routines.

[On TikTok] *"You've got videos that are 3, 5, 10 seconds long, you're just looking for really fast content that doesn't take any effort to really pay attention to."*

Cheshire, Woman, 26, socio-economic group D, reported mental health condition

New and emerging voices are perceived to be more authentic

For some audiences we spoke to, content creators such as podcast hosts or 'YouTubers' are gaining influence in mainstream conversations. This poses a challenge for traditional broadcasters like the BBC in appearing relevant and relatable to this diverse group. The people we spoke to said they were increasingly gravitating towards user-generated content created by individuals such as Joe Rogan or KSI, as they felt they were authentic and more likely to reflect their views and experiences than traditional broadcast media, which was seen as 'safe', restricted and appealing to the middle ground. The hyper-personalisation of services such as Spotify and YouTube means that audiences are encountering more and more content from individuals they see as similar to themselves or aligning with their experiences and interests, even the more niche ones.

The BBC's connection with audiences

Ever since its first live broadcast over a century ago, the BBC has enjoyed a prominent role in the UK's culture and everyday life. Its founding values to inform, educate and entertain have spanned generations, each person with their own, varied connections to the BBC and its programming, people and presenters.

The BBC still plays a vital part in the media diet of the audiences we have focussed on in this review, but they are using other providers more as a proportion of their overall consumption compared to other groups. The challenge of meeting the needs of more fragmented audiences for the BBC is greater as it comes under greater financial pressure. We have previously said that it needs to find new ways to engage with those who are consuming the majority of their content online, while continuing to offer a broad range of content across its traditional broadcast outlets, all as it continues to face significant financial pressures. As we have highlighted, there is a lot more choice in what people listen to or watch and the BBC, like many traditional broadcasters, faces a challenge in competing for the share of people's time and attention. Our work has shown that this is especially pertinent for the audience groups featured in this review. We found their media habits involved a wide array of different sources and access points (e.g. their phones, computers, tablets, televisions). They were often multi-screening, and tended to be drawn to content that was immediately engaging.

The fragmented focus and continuous competition for attention has an impact on satisfaction levels, especially for more traditional forms of media – the BBC and other PSBs included. With the proliferation of newer, more engaging content formats and platforms, traditional media is struggling to sustain attention and satisfy audiences.

The BBC is still a popular source of content

Despite these challenges, we know that the BBC still continues to reach a significant proportion of the population. As we noted above, around eight in ten people from D and E groups use the BBC each week.¹² This tells us that while these audiences may have lower levels of satisfaction with the BBC's performance compared with other groups, many still look to the BBC and use it routinely.

During our research, we wanted to explore people's connection to the BBC. This included considering any emotional connection they may have to the BBC and its services, and examining more practical aspects such as how they interact and use the services in their daily lives. We asked when they watch or listen to BBC services, is it through the traditional broadcast channels? Is it through DAB or traditional radio? Do they only stream through BBC iPlayer and BBC Sounds? Do the BBC's mobile apps inform their lives for news, weather and sport? Did they grow up in a household that consumed a lot of BBC content and information? Do they or their children use the BBC as an educational tool via BBC Bitesize or other informal learning content? By considering these questions, we have been able to delve deeper into people's attitudes to the BBC and where it sits in their wider media habits.

Our research included people completing their own media diaries to allow us to understand their wider habits. Some participated in deprivation tasks where they were allowed either only, or no, BBC

¹² IPA TouchPoints wave 1.

content for a period of time. They then participated in focus group sessions or in-depth interviews in their local area that allowed a wide-ranging discussion, including what media services were important to them personally, what they felt were most relevant for people like them, how they used the BBC compared to other services, and how they felt about it as a broadcaster and organisation more generally.

While it was clear that global streaming services such as Netflix, Spotify, Disney+ and YouTube were favourites among these audiences, we found that everyone had the BBC featuring in some form or another in their “media world”.

BBC iPlayer was popular as a service and often used. This mirrors the shift to more people accessing content online and meant that some traditional services (BBC Two, BBC Four, BBC radio stations) were given less attention in their media diet or ignored altogether when people discussed what they routinely used.

Long-standing and established content are the main associations with the BBC

BBC One continues to be important due to its reputation as a go-to source for news, current affairs and breaking stories. Despite a gradual decline over time, BBC One continues to be ranked as the top used news source in our annual [News Consumption Survey](#), ahead of ITV and Facebook.¹³ Audiences we spoke to also thought of BBC One as being important for well-known national staple programming such as *Eastenders*, *Match of the Day* and *Strictly Come Dancing*.

These particular programmes have been around for a number of decades, illustrating the BBC’s strength in connecting to audiences through well-established titles. Some said that they particularly relied on the BBC when they were growing up when channels were limited to terrestrial PSBs. Other programmes that were front of mind for many audiences were also more classic or older titles such as *Porridge*, *Gavin and Stacey* and *Holby City*. These findings suggest that its reputation for classic programming meant there is a risk some audiences may overlook any newer content the BBC is airing, leading them to think that the BBC is potentially ‘stuck in the past’. Some felt the BBC does not do enough to market their new content so people are unaware of the wide range and variety available today.

BBC iPlayer is still primarily seen as a ‘catch-up’ service

A lack of knowledge of new or newer content on BBC iPlayer is an issue that audiences have raised with us before. Earlier this year, we [published](#) research that looked specifically at the BBC’s online services. It found that people who tended to use BBC iPlayer for catch-up viewing found it easier to access well-known BBC shows which were often prominent via the BBC iPlayer homepage, whereas discovering lesser-known or more niche content required more effort when browsing. Some felt a better balance could be struck between helping audiences find familiar and known content and helping them discover ‘new to them’ options.

¹³ [Ofcom News Consumption Survey 2023](#).

“I just have that mindset of using it for catch up. I’ve never thought to search iPlayer in the way I would do other streaming services. Maybe that’s just your mindset.”

Woman, Scotland

Jigsaw Research – BBC Online Services (March 2023)

Research done as part of this review echoed these previous findings about BBC iPlayer. Those we spoke to in the D and E groups highlighted that they consumed media for two main reasons: escapism and companionship. These reasons could be similar to any other groups, but the D and E people we spoke to made it clear that consuming media for them was a distraction, a time away from the challenges of modern-day life. Their attraction to streaming services, which offer a more targeted and personalised choice, gave them the comfort of not having to think too much about what they were going to watch, as the algorithm would essentially do it for them. This enabled an easy connection with these services which they did not feel with BBC iPlayer, which was seen to be more a library of older content, accessed when the user knows the particular programme they are looking for, not for discovery.

Some expressed a sense of feeling restricted when using BBC iPlayer, as they believed its catalogue to be significantly smaller than that of other platforms. They particularly appreciated Netflix for its perceived constant addition of new content, which was felt to assure viewers of an endless supply of material to watch, coupled with how they deliver personal recommendations more effectively.

However, it is important to highlight that while BBC iPlayer’s content library is indeed smaller than Netflix’s, it still offers a substantial amount of content, with a total of 28,439 hours available in 2022, in contrast to Netflix’s 49,690 hours. It also offers more than the other PSB on-demand services though this is not always recognised by audiences.¹⁴



Figure 8: Hours available on BVoD and SVoD services
Source: Ampere Analysis

“With iPlayer it feels like there’s less available compared to other streaming services. Like, Netflix has always got new stuff coming out, and Channel 4 has always got a lot of new stuff on their catch-up website.”

Dunfermline, Woman, 27, socio-economic group D, reported mental health condition

BBC Three has a clearer identity with younger viewers

The BBC does appear to be able to cut through when targeting a specific demographic. For example, some of our research participants, especially those in our younger groups, said that they felt BBC Three had a clear identity. They saw it as somewhere they could go to find comedy content, a genre

¹⁴ Ampere Analysis, accessed July 2023 – figures represent the duration of all titles available on VoD catalogues across 2022. Titles are deduplicated by Ampere Analysis to ensure there is no double-counting over hours.

identified as important across the range of demographics we spoke to. Programming on BBC Three was also seen as ‘edgier’ and participants would like to see more ‘risky’ content from the BBC, something we will touch on in the next chapter.

Last year, the BBC re-launched BBC Three as a broadcast channel, after moving it to an online only service in 2016. Our analysis of all audience groups has shown that while it is facing some challenges in attracting viewers, those who do watch it, like many we spoke to within our groups, rate it favourably with around three in five BBC Three viewers in the last six months stating they were satisfied with the channel.¹⁵

These audiences feel the BBC does informing and educating well

In trying to understand more about how people feel connected to the BBC, we wanted to not just talk directly about specific content, but get them thinking about how the BBC serves audiences across the UK more widely. We therefore introduced the BBC’s Public Purposes to our participants to start a discussion on this wider role the BBC has in the UK. When shown the purposes, people highlighted that of the four purposes, news and education stood out as those they felt the BBC was good at. They saw the BBC as the home of big national sporting events, such as Wimbledon or the Olympics and other ceremonial or traditional events such as Royal Weddings or, more recently, the death and funeral of HM Queen Elizabeth II.

When discussing radio, our participants showed little appetite for daily listening, especially to the BBC’s stations. The only time they found themselves listening to the radio was while travelling in their cars with Spotify, Apple Music and other audio streaming services far preferred at other times due to their ability to personalise listening to their favourite music and artists. Industry data shows that D and E groups are more likely to listen to commercial radio such as Global or Bauer stations (67%) on a weekly basis than the BBC (46%).¹⁶ These groups preferred listening to music and were less inclined to want to listen to speech radio.

Original BBC content is also being watched on other services

We found that people are often watching content that the BBC has originally commissioned, funded and shown on its TV channels and BBC iPlayer, through other streaming services such as Netflix and Amazon Prime. Examples of this included programmes such as *Peaky Blinders* and *Killing Eve* as examples of high-quality, enjoyable programming that they did not realise were originally BBC programmes.

During our research, we showed participants a wide range of BBC content, past and present, and some were surprised to discover many were BBC programmes. When discussed in our research, it highlighted that there is a risk people may not give the BBC enough credit for making different types of content that they found appeals to their tastes and preferences. This could then potentially feed into less positive views on the BBC’s content offering overall.

¹⁵ Ofcom Public Service Media Tracker 2022.

¹⁶ RAJAR Q3 2023 adults aged 15+. In comparison, commercial and BBC stations reach the same proportion of AB adults (68%).

"I really liked Killing Eve, I didn't know that was BBC, I don't know who did it, I think I watched it on Netflix? But yeah, that was a really good drama."

East Midlands, Woman, 19, socio-economic group E, reported Chronic/fluctuating illness.

The BBC consistently exceeds its accessibility targets

The D and E social groups are more likely to include older or disabled people than any other group. As such, we ensured we included people with different types of disabilities as part of our research and they told us that TV, radio and online platforms play an important role in their daily lives.

The BBC is subject to the highest subtitling target of all broadcasters (100%) and has committed to audio describing 20% of its programming (the target set is 10%) and in practice achieves more than this (e.g. 42% described on BBC Four in the first half of 2023).¹⁷ It has also innovated in its provision of access services, such as with live audio description of *Strictly Come Dancing* which began with the 2023 series. The BBC doesn't yet have accessibility obligations on BBC iPlayer and other video on-demand content, but according to its latest Annual Report, in 2022/23 it provided subtitling on 87% of BBC iPlayer programmes, audio description on 14% and sign interpretation on 8% of content.

More generally, the BBC's Research & Development team conducts a range of [projects](#) contributing to general understanding of accessibility technology and user preferences. We understand that the BBC's [subtitles guidelines](#) are used by some other broadcasters to inform subtitle production. Ensuring the quality of access services is a priority for Ofcom – we are currently [revising our guidelines on the provision of television access services](#) and carrying out research with disabled audiences, to expand the advice offered on making high quality, usable access services across broadcast and on-demand content.

The BBC must continue to consider how it connects with audiences

Our research with D and E audience groups has shown that the BBC is still an important part of these audiences' media lives. We have identified specific services, content and areas of its delivery that the people we spoke to enjoy and feel are important. Some participants also told us that the BBC feels 'old fashioned', both in terms of its content and the delivery of its content. If the BBC is to serve all audiences, it must identify different ways of connecting with diverse audience groups.

During this review, we met with controllers and commissioners from across BBC TV and radio, and it is clear that they see increasing relevance to these audience groups as a key priority. We were particularly interested to hear how partnerships have been important in this area, including at big events such as *Radio 1's Big Weekend*, *TRNSMT Festival* and *Glastonbury*, ensuring that people can access and enjoy the performances even when not being there, especially where cost could be seen as a barrier for some.

Our annual reports on the BBC's performance have noted that the BBC could be more ambitious in its approach to partnerships and this could be a good way to engage with different audience groups. While it is no doubt important that the BBC continues to have relationships and work with screen industry partners and educational organisations, it could consider how they can partner with organisations that speak more specifically to working class audiences.

¹⁷ Ofcom's Television Access Services report measures the extent to which broadcast television channels carry subtitles, audio description and/or signing. The report for Jan – June 2023 can be found [here](#).

[Last year](#), we noted that the BBC had developed a framework to assess the impact of partnerships and were in the early stages of implementing it.¹⁸ The BBC has since told us it has undertaken surveys to understand which audiences its current partnerships reach and it is working to create creative content partnership projects to improve its relevance to audiences, including those within D and E socio-economic groups. This is welcome progress and we will be particularly interested in how this develops over the next year.

¹⁸ [BBC Annual Report 2021/22](#), page 27.

The BBC's content

This section sets out some of what we know about the content people in D and E audience groups consume and discusses what participants liked and disliked about BBC content. Those we spoke to tended to focus on TV content shown on the BBC's broadcast channels or BBC iPlayer, rather than BBC Radio or the BBC's other online services such as BBC Sounds, the BBC website and apps, particularly when discussing representation and portrayal. As a result, in this chapter TV is our main focus, though Ofcom's remit to hold the BBC to account includes assessing performance across TV, radio, and online.

As highlighted in the previous chapter, our research shows that people in D and E groups often turn to TV or radio for escapism and companionship. Many of those we spoke to suggested that content which feels current, fresh and risk-taking tends to appeal to their desire for escapism, whereas programming which is familiar, reassuring and allows for comfort-watching, or taps into a sense of nostalgia, appeals to their desire for companionship. People's tastes are individual so it is difficult to draw concrete conclusions about what types of content people use for escapism and companionship; what allows one person to 'escape' might be a familiar comfort-watch for someone else. What is clear from our research is that the BBC isn't 'top of mind' for fulfilling these needs, rather, most of our participants said they turned to the major online providers.

The BBC is no longer the core provider of entertainment content

Those included in our research consumed or had consumed content on the BBC, and many people singled out programmes that they felt were world-class such as *Line of Duty*, *Happy Valley*, *Match of the Day* and *Strictly Come Dancing*. However, increased competition has challenged the BBC's status as the core provider of top-tier content for UK audiences. With the rise of services like Netflix, Amazon Prime, Disney+, and Apple TV, people we spoke to felt that, while the BBC still produces a lot of quality programming, it no longer stands out in a crowded field.

"The big international streaming companies have surpassed them in terms of quality."

Glasgow, Man, 25-34, socio-economic group E.

A key issue, raised by a number of people that we spoke to, was that BBC programming is increasingly seen as dry and serious compared to other PSB channels and the major streaming services. While this was seen as appropriate for some genres (such as news and current affairs, and certain dramas), overall our participants felt there was more 'fun' content available elsewhere and often turned to other channels or to streaming services for more light-hearted programming.

BBC content was also seen as increasingly 'safe' and, by some, overly politically correct. In explaining how the BBC has become 'safe' people mentioned past programming they had enjoyed but felt wouldn't be made any more, or they mentioned presenters and talent that they felt the BBC used to employ but wouldn't now (e.g. Ricky Gervais¹⁹, Jeremy Clarkson).

¹⁹ In May 2023, the BBC announced that Ricky Gervais had directed a short film – 7Minutes – for the BBC, his first BBC project since 2013.

“BBC, to me is more of a serious TV than ITV is. Like, if you want a bit of light ier relief, you watch ITV.”

St Mellons, Woman, 35-54, socio-economic group E.

This shift was seen as having a particularly negative effect on the BBC’s comedy output. Many of our participants felt the BBC used to produce world-leading comedy content but that this is now often seen as not edgy enough for modern tastes and they miss the ‘fun’ element of the BBC’s programming. As part of this review, we spoke to BBC commissioners who told us that they are aware of this concern among audiences.

The BBC does still produce high quality, hit programmes

Despite the issues raised by our participants, people in D and E groups still consume a lot of BBC content. And alongside previous flagship commissions – *Gavin and Stacey*, *The Office*, etc – the BBC is still seen as leading the field in some genres, including news on television and radio (as discussed in the previous chapter), factual documentaries, nature programming, and high-end drama.

While there was a lot of affection for flagship BBC entertainment programmes such as *Strictly Come Dancing*, there was a sense that the BBC was increasingly reliant on established programmes and formats, and that this element of the BBC’s portfolio needed a refresh.

Analysis of top programmes showed that what plays well among D and E audiences tends to play well across all audience groups, suggesting while there will be certain programmes that do better among D and E audiences, high-quality content tends to cut across all SEGs. Titles that skewed more to D and E audiences over the past year include *Hungry For It*, a BBC Three programme hosted by Stacey Dooley, *Movies with Ali Plumb*, a BBC Three film review programme presented by BBC Radio 1’s film critic, and *Pretty Little Liars*, a US teen drama shown on BBC Three.²⁰

But people we spoke to said they continue to feel under or misrepresented by the BBC

The Charter states that in fulfilling its Public Purpose 4, the BBC should reflect the diversity of the UK in its output and services. In doing so, the BBC should accurately and authentically represent and portray the lives of people across the UK and raise awareness of the different cultures and alternative viewpoints that make up society.

In 2018 we conducted an [in-depth review of Representation and Portrayal on BBC Television](#). We emphasised the importance of accurate representation and portrayal, noting that it is vital to the BBC’s future. The report showed that because of its unique funding model, audiences have high expectations of how the BBC should represent and portray the UK. They hold it to higher standards than they do other broadcasters and streaming services, and they expect the BBC to get representation and portrayal right.

²⁰ Barb 28-day consolidated 2022/23. Minimum 50k DE audience size. Ranked by DE adult profile (base adults).

We found in that review that people with particular characteristics, and who belonged to certain social groups, felt let down by the BBC’s representation and portrayal of them. Our latest research suggests that there are still challenges for the BBC in this area.

Earlier in this report, we broke down the composition of the D and E groups, using Census data to show that there are geographical concentrations of people in D and E groups, and that people in these groups are more likely to have a disability. As part of our research, we asked people about how the BBC represented them, and the communities that they were part of. The findings from this part of the research were hugely varied, but we identified three key recurring themes that we first highlighted in our 2018 review: representations of social class, disability, and of the UK’s nations and regions.

Participants from working-class backgrounds still feel the BBC does not represent them

Overall, people we spoke to felt there is little representation on the BBC of what they called “*real life*”²¹, “*normal lives, working-class lives*”²² or “*y werin bobol*”²³ (“ordinary people”). A regular observation highlighted in our research was that the complexity of ordinary life – encompassing people’s struggles and difficulties but also their joys and successes – was generally absent from BBC content, and that where D and E groups were represented, they were either criticised or caricatured. When asked what they wanted to see more of on-screen, one participant from our focus groups said:

“Real life. Show our real struggles and show we’re mostly happy. Show her looking after the grandkids. Or her, dancing with her hubby in the kitchen. Show real life.”

Gosport, Woman, 55+, socio-economic group D/E.

Many of those we spoke to as part of this review felt that the BBC was under-performing in how it represented people from working-class backgrounds and that they were absent or only shown occasionally. They also told us that where they were represented, they were poorly portrayed. This echoes findings from our 2018 [review](#), where we said that “some people feel BBC content reflects the lives of middle-class people more than those from other backgrounds”. The BBC itself is aware that its representation and portrayal of people from working-class backgrounds can be lacking, stating in its [Creative Diversity Report](#), that “often those from lower socio-economic backgrounds are depicted negatively, fuelled by stereotypes and seen as the object of ridicule”.

People we spoke to as part of this review also said that the portrayal of people from working-class backgrounds tended to focus on extreme stereotypes, for example emphasising criminality, drink and drug cultures, and financial hardship:

“The BBC do occasionally show working class people, but when they do it’s not like they’re shown in a good light. They’re either being criticised or laughed at.”

Derry/Londonderry, Woman, 35-54, socio-economic group E.

For our participants, this was the case across much of the BBC’s TV content, from comedies and dramas to factual and unscripted or reality TV programming.

²¹ 2CV Research Participant - Gosport, Woman, 55+, socio-economic group D/E.

²² 2CV Research Participant - Goole, Man, 18-34, socio-economic group D/E.

²³ 2CV Research Participants in Welshpool focus group.

Some of our participants said that, where working-class people were represented, the working-class position of the characters tended to be the focus of the story, rather than just incidental. In this respect, people in our research felt that working-class lives were always presented as ‘other’ to the norm:

“But the only things that you see are the working-class on this list²⁴ is like the Royle Family... The joke is that the people are dumb and there's not any celebration of the majority of the people in the country. You look at the storylines that EastEnders had, it's just silly. It's not real, do you know what I mean? They're basically telling working class people your lives are just not interesting. So, if we're going to make something about you, there's got to be some other secondary circumstance that makes it interesting.”

Goole, Man, 18-24, socio-economic group D/E.

Our research has highlighted that simply introducing wider representation is not enough to ensure authentic portrayal. People were wary of ‘tokenist’ attempts to include them or their communities and often found it patronising. Without authentic, sensitive portrayal, many of those we spoke to did not find the content that the BBC produces that featured people from D and E groups particularly appealing, and in some cases they felt exaggerated stereotypes about those from working-class backgrounds can do more harm than good.

However, it should be noted that this was not a universal viewpoint. Some participants felt that the BBC did well to represent the breadth of UK society including people from working-class backgrounds, though they did still see some room for improvement:

“Total rubbish that the BBC is here for the haves not the have nots! Perhaps 30 years ago, but not now. Look at Happy Valley, Last Tango in Halifax, Royle Family. It's for people like me - but I would like to see even more positive representation. People on benefits - not scroungers, single parents - positive role models.”

Gosport, Woman, 55+, socio-economic group D/E.

Many said they still had faith that the BBC could improve representation and portrayal of people from working-class backgrounds, citing well-known and popular programmes that they felt did this well, such as *The Royle Family*, *Gavin and Stacey* and *Still Game*. However, our research has shown that even this ‘classic’ content can fall foul of contemporary standards regarding what is acceptable or respectful and not everyone felt these programmes were examples of ‘good’ representation or authentic portrayal.

Viewers feel the BBC can be selective in its portrayal of disability

TV can be particularly important for disabled people. Viewing time is much higher among disabled adults than among adults who do not have a disability. Disabled adults account for 21% of the total television viewing audience and watch on average over twice the amount of TV each day as those who do not have a disability (5hrs 20 mins vs 2hrs 38mins). BBC One is also the most watched channel for

²⁴ Research participants were shown a ‘BBC sensorium’ as part of their discussion groups to facilitate discussions surrounding BBC content and values. See Page 63 of [2CV's report](#) for more information.

disabled adults, which gives the BBC a central role in how society sees disabled people on TV and how they see themselves.²⁵

People in our research told us that, while the BBC tended to represent and portray people with disabilities better than some other broadcasters, it could still be selective in its portrayal. For example, one person stated that only disabilities deemed ‘fashionable’ tend to appear onscreen, side-lining those with disabilities that are more difficult to portray.

Despite the issues that we – and the BBC – know exist around representation and portrayal of people with disabilities, our research highlighted that though representation and portrayal of disabled people could be improved, the BBC was praised for playing an important role in satisfying the overall viewing needs of disabled audiences. However, we will continue to monitor perceptions of representation and portrayal as part of our ongoing performance assessment of the BBC.

People in the nations and regions still see the BBC as ‘London-centric’

In our 2018 [review](#) we said that “understanding and representing UK society in full, across the nations and regions, helps the BBC resonate as a distinctive broadcaster”. We feel that, given its unique funding and remit, the BBC must continue to lead in this respect, producing content that connects with people across the UK.

We have highlighted in some of our previous Annual Reports on the BBC that satisfaction among audiences in Scotland, Wales, and Northern Ireland was lower than average. However this year, for the second year in a row, favourability towards the BBC is broadly the same for those in the nations as it is across the UK as a whole. Our research gave us the opportunity to hear first-hand, and in detail, what some people in the nations felt about how the BBC represents and portrays them and their communities.

We found that people living in the nations and in the English regions feel that the BBC focuses disproportionately on London and the south-east of England. People in the nations told us they do not feel the BBC sufficiently represents the area that they live, and when it does, portrayal often defaults to stereotypes:

“There's not a lot of Northern Irish. There's not a lot of Scottish. There's not enough Welsh. Suppose when you do think about it, it's mainly England, but it's a White England middle-class.”

Derry/Londonderry, Woman, 35-54, socio-economic group E.

People we spoke to in Scotland had particularly negative views of the BBC and told us that they felt it focused mainly on England, particularly the south-east of England, and that they saw very little Scottish representation. They also felt the portrayal of Scotland across BBC TV channels frequently reverted to national and regional stereotypes, for example focusing on crime and poverty in the Central Belt and the ‘unspoiled’ natural landscapes of the Highlands. Viewers felt that BBC content in general does not portray the distinctive characteristics of different people and communities around Scotland. Among our participants in Scotland, there was little reported use of radio, including of BBC Radio Scotland or BBC Radio nan Gàidheal.²⁶

²⁵ Barb 28-day consolidated, 2022/23.

²⁶ BBC Radio Scotland reaches an average of 827k adults in Scotland each week; of these, 19% are in D and E households. RAJAR Q3 2023.

In Wales, we found that geographical representation is hugely important and people were excited to see Wales on screen. In our Cardiff focus group, there was a consensus that the BBC does do national and regional representation better than other broadcasters. In our focus group in rural, north Wales however, our participants tended to focus on the BBC as a 'brand' rather than focusing on content they may watch or listen to. When pressed on the BBC's content, many acknowledged that it was of very high-quality, but still felt the BBC primarily focuses on the interests of the Welsh cities such as Cardiff and Swansea. Our participants found it hard to get past a feeling of marginalisation. There was a desire for more programming that featured Wales, and for a more sensitive and nuanced portrayal.

In Northern Ireland, people greatly appreciated Northern Ireland-focused programming on BBC TV and radio. Recent flagship programming such as *Once Upon a Time in Northern Ireland* was seen as offering a nuanced picture of life during the Troubles. As in the other nations, people expressed a desire to see more coverage of Northern Ireland on the BBC and other PSB channels. In line with media behaviours we report in our annual [Media Nations](#) reports, those in our research highlighted that radio, particularly local radio, is important to people in Northern Ireland. While commercial radio appealed more for background listening, BBC Radio Ulster was frequently mentioned as a key station for listeners. BBC Radio Ulster had specific associations for our participants in large part due to the reputation of Stephen Nolan, who hosts a daily phone-in show that participants felt courted controversy. Around a fifth of BBC Radio Ulster's audience are in the D and E groups and 58% of them listen to *The Nolan Show* each week.²⁷ There was also a desire for the BBC to feature more diverse Northern Irish voices.

BBC presenters are perceived as out of touch with ordinary people

A common theme running through much of our research concerned BBC presenters and on-screen talent. People told us that they felt that presenters who came from D and E backgrounds, or who spoke with regional accents, still felt very 'BBC' – that is, they behaved and spoke in ways that didn't feel particularly authentic or relatable. There was also a sense that people who have worked with the BBC for a while are seen as becoming part of 'the establishment', and as a result presenters who once seemed like fresh new talent can quickly become 'stale'.

Some of those in our research linked the lack of authentic and relatable talent to their sense that the BBC was unwilling to allow presenters to speak freely, because they always had to 'toe the party line'. In this respect the BBC was seen as unable to keep pace with the kinds of unvarnished opinion that the people that we spoke to said they sought out from video sharing platforms, social media, and established commercial radio stations.

In addition to this, the reported salaries of some BBC presenters contributed to a sense that the BBC is out of touch with ordinary people, particularly during the current cost-of-living crisis. However, it was also understood that the BBC faced increased competition from streaming services and privately funded broadcasters and channels that were able to pay extremely high salaries. In this respect, the BBC was seen as facing competition from new entrants to the market not just in terms of content, but in terms of competition for talent too.

²⁷ RAJAR Q3 2023.

People are turning to user-generated content for more authentic representation and portrayal

Our analysis shows that more and more of people's screen time is spent watching user-generated content published on video-sharing platforms (VSPs) such as YouTube or social media platforms such as TikTok.²⁸ Many of the people we spoke to told us that they liked the content they found on VSPs and social media, and that they felt it was more authentic than what they could find on traditional broadcast channels and radio stations:

"I think one of my big issues with the BBC would be that a lot of the stuff that's being put out for people our age ain't [sic] being made by people our age. It's just like a very bad attempt at Gen Z humour. Get down with the kids. It's a bit cringey. Whereas YouTube, Twitch, Instagram the stuff is being put out by us so it's more authentic and it's not like they're not trying to win us over."

Goole, Man, 18-34, socio-economic group D/E.

Our analysis shows that younger adults are still more likely to consume content through VSPs and social media. However, our research has shown this to be changing with older adults also now consuming more content through these platforms than ever before.²⁹

As we highlighted earlier, the diversity of content available on social media platforms greatly appealed to the people we spoke to. Participants told us that they valued YouTube in particular because it allowed them to access content that spoke to their very individual interests. YouTube, TikTok and podcasts – accessed via a range of platforms – were also seen as a way to access voices that were 'outside the mainstream'. People mentioned well-known and controversial voices such as Joe Rogan, Jordan Peterson, and Mr Beast as examples of commentators who were valued by our participants, but who they felt were unlikely to ever find a home on traditional broadcast television or radio.

Participants told us that they consumed a range of content on YouTube or on social media platforms, including news and opinion. Despite the fact that more and more people are consuming news from these platforms, our most recent [News Consumption Survey](#) shows that people still rate television news highly for quality, trust, and accuracy, whereas news sourced via social media is rated lower on these attributes.

User-generated content was also seen, for some of our participants, as more accessible because of its short-form nature; it was seen as a way to relax and a good way to consume bitesize pieces of news and opinion, as well as purely for entertainment. It was particularly appreciated by people we spoke to who were neurodivergent.

The BBC must continue to consider how it portrays these audiences

Our research has shown that audiences in D and E groups felt that the complexity of their lives was often absent from BBC content and that, where D and E groups were represented, they were either criticised or caricatured. They made it clear that the BBC needs to do better in authentically portraying their lives and communities.

These messages are not new as they have been raised in previous research carried out by both us and the BBC. From our regular discussions with the BBC, we know it is taking action to improve in this area.

²⁸ [Media Nations 2023](#).

²⁹ [Media Nations 2023](#).

As we have said already, we have met with a number of different teams from the BBC. This has included its Creative Diversity Unit which supports commissioners and productions to create content that better reflects the public it serves, through both on-screen and off-screen interventions. These discussions, along with this year's [Diversity Commissioning Code of Practice \(DCCoP\) Report](#) and [Commissioning Supply Report](#), point to the range of work the BBC is undertaking to help improve representation and portrayal in front of and behind the cameras and microphones.

In addition to initiatives such as the £112m [Creative Diversity Commitment](#)³⁰ and the [DCCoP](#) (which provides a framework for improving on and off- screen/air diversity on BBC productions), the BBC has specific off-screen schemes focused on the representation of particular under-represented groups. For example, *Access First Titles* are a small number of productions that work with the BBC's Creative Diversity team and access coordinators to increase disabled talent on production teams. The initiative enabled *Silent Witness* to hire disabled talent into five off-screen roles covering script researchers, directors and team assistants.³¹ In addition to its own bespoke schemes, the BBC is also collaborating with other broadcasters on cross-industry initiatives such as the [TV Access Project \(TAP\)](#) which is focused on improving access to industry jobs for Deaf, Disabled and/or Neurodivergent talent.

On-screen and on air the BBC cites a range of recent programmes across genres that have authentically included the lives and talents of people from underrepresented groups, including: BBC Radio 4 drama *Pride & Protest* – from a disabled writer featuring disabled performers; BBC Three cooking show *Hungry For It* where the host, judge and 50% of the contestants were from underrepresented groups, and where the majority of those on screen were from lower socio-economic backgrounds; BBC One's *Freddie Flintoff's Field Of Dreams* documentary featuring a diverse group of boys from Preston; and *Black Ops* – created by and starring top Black British comedy talents Gbemisola Ikumelo, Akemnji Ndifornyen and Hammed Animashaun.

In scripted content more broadly the BBC reports using best endeavours to cast people with lived experience of disability in disabled roles and to cast disabled actors in roles not specifically written to be disabled, and in unscripted productions for at least one contributor, presenter or performer with a lived experience of disability to feature in all programmes.³² BBC Children's cast neurodivergent leads in CBBC drama *A Kind Of Spark* while BBC One's drama series *Ralph and Katie* featured Leon Harrop and Sarah Gordy, two lead actors with Down syndrome, as well as disabled extras. Off-screen the production also engaged a disabled director, writers and trainees.

We recognise and welcome the BBC's ongoing efforts to increase representation and deliver more authentic portrayal across its output. We continue to encourage it to thoroughly assess the immediate and longer-term impact of its productions and initiatives on audiences' experiences and perceptions of the BBC as well as the effect on the make-up of industry's workforce.

Both we and the BBC recognise that diverse off-screen talent is vital in order to produce content that authentically speaks to diverse audiences across the UK. We meet regularly with the BBC to discuss progress against its on-screen and workforce diversity targets, reporting on the diversity of its workforce in both our Annual Reports on the BBC and in our EDI in broadcasting reports.

In terms of ensuring the BBC meets the needs of audiences right across the UK, we know it is moving jobs and investment out of London and into the nations and regions as part of its [Across the UK strategy](#). This strategy entails moving more decision makers outside London, including commissioners.

³⁰ The BBC committed £100m spending on diverse TV content and £12m diverse radio content between 2021-22 and 2023/24

³¹ [BBC Commissioning Supply Report 2023](#), page 8.

³² [BBC Commissioning Supply Report 2023](#), page 8.

It now has 30 commissioners based outside London, up from 24, and [five new](#) assistant commissioners in the nations and English regions. We have said in our [Annual Report on the BBC](#) this year that as it continues to implement this strategy, and more production shifts away from London into the nations and regions, we will continue to monitor how these changes impact audiences and audience satisfaction.

Attitudes are shaped by more than just programmes

Everyone knows the BBC. It is one of the most recognisable organisations and brands in the UK and has a special place in the cultural life of the nation. Being an organisation that enjoys such strong reach, familiarity and longevity will always present challenges when trying to satisfy all audiences. In aiming to fully understand why the audience groups we have considered are less satisfied with the BBC compared to other groups, we have found that audience perceptions of the BBC can be shaped by a wide range of factors, that do not always relate to BBC content.

We consistently find in any research on the BBC that people hold it to a higher standard than other media organisations, in part due to its unique funding model. We must consider this when we assess its performance and compare the BBC to other media providers in our role of holding it to account on behalf of audiences.

In 2019, we conducted a [review](#) of the BBC's news and current affairs output. We discovered that when it came to opinions on the BBC's ability to deliver impartial news, it was not just the news content that was influencing people's viewpoints and attitudes. A wide range of factors including how the BBC is funded, specific stories about the BBC and how it was portrayed in the wider media all had an effect on people's views. This is something that BBC has been addressing since we published that review and we have taken stock of the changes they have made in our [Annual Report on the BBC](#) published alongside this review.

Our work this year has found that this is not just applicable to the BBC's news and current affairs output. It has showed again there are wider challenges to the BBC's reputation as people's views of the BBC as a brand continue to influence their overall perception of the BBC. Through our research we explored peoples' perceptions and discovered a variety of responses, with some attitudes changing dependent on which elements of the BBC were being discussed. For instance, someone could have provided a more negative response when discussing the BBC as an organisation or as a news provider, but specific channels or stations, shows or presenters, elicited a much more positive response. This shows the nuances and challenges when trying to understand why these specific audience groups have been consistently less satisfied than other groups. It also highlights once again that the BBC has multiple opportunities for how they connect with different audiences due to the range of services it offers.

Nonetheless, many of the people who use the BBC from D and E audience groups hold positive views and highlighted positive experiences of the BBC throughout their lives. These people tended to reference the traditions of the BBC as being important to them. They saw it as part of the 'national identity' and enjoyed what they saw as distinctly British content of high-quality including *Happy Valley*, *DIY SoS* and *Children in Need*. We found those participants that had a more upbeat attitude to the BBC

The Most Famous Brands in Q3 2023

Fame is defined by the % of people who have heard of a brand

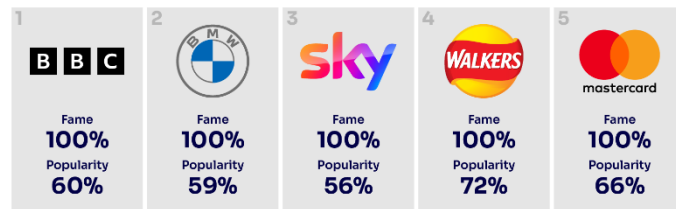


Figure 9: Famous Brands in the UK

Source: [YouGov](#)

were more likely to be older, owing much of this to the fact they had grown up with the BBC as a regular staple in their life from childhood.

During our research, those that were more negative towards the BBC often led with specific issues that were not directly related to content but related to wider issues to do with the BBC as an organisation. These included stories about the BBC which were played out in the public eye across other media outlets. People spoke of these issues or ‘scandals’ relating to specific personalities who had historic ties to the BBC, such as Jimmy Savile. These experiences, stories and issues have damaged the trust and respect some people had for the BBC and for many, there did not seem to be a route for the BBC to gain it back.

“The scandals leave you feeling - what is going on in that place? Breaks trust and impacts on things like BBC news - are they giving the full story?”

London, Woman, 37, socio-economic group E, reported mobility issues

In addition, there was a perception that the BBC had an elite, male-dominated culture that would often ‘look after their own’. Another non-content related issue that was raised was a perception that people in the BBC earned disproportionately high salaries, with people feeling that it reinforced the perception that the BBC is run by an exclusive, upper-class group of white men. In general, our participants did not believe that they would have the interests of people like them when making decisions on what and who should be part of the BBC. Our latest BBC workforce data³³ shows the representation of women (50%) in the senior leadership team is broadly in line with the wider UK workforce (48%).³⁴ Staff from minority ethnic backgrounds and those with disabilities who provided data are under-represented, accounting for 7% and 9%³⁵ of the senior leadership group respectively, compared to 14%³⁶ and 16%³⁷ of the wider UK population.³⁸

Some people within the groups talked about a dissatisfaction with the licence fee. Some compared the licence fee regime to what and how they pay for streaming services such as Disney+ and were frustrated that they felt they were ‘forced’ to pay it. The people we spoke to enjoy the ability of being able to cancel, subscribe and re-subscribe to services in a fluid nature dependent on their viewing. As a result, the licence fee felt outdated for many of them and therefore had an impact on their wider view on the BBC.

The BBC must continue to reflect on how people’s views and trust can be shaped by a number of factors

We have highlighted a number of non-content related issues that people we spoke to said have an impact on their view of the BBC as an organisation and how much trust they feel able to put in it. We noted that ‘scandals’ reported in wider media, issues such as the licence fee, and a general sense that the BBC does not consider ‘people like them’ when making decisions are factors which affect people’s views of the BBC.

³³ BBC data, 2023 supplied in response to Ofcom’s EDI /UK public services workforce survey 2023. Figures in the main text are based on ‘visible’ data i.e. only on those people in the workforce who provided information.

³⁴ When including unknown categories (total data) women represent 49% of staff at senior management level.

³⁵ When including unknown categories (total data) the figures for staff from minority ethnic groups and staff with disabilities remain and staff remain at 7% and 9% respectively.

³⁶ ONS Labour market statistics [A09: Labour market status by ethnic group](#)

³⁷ The population average for people with a disability is based on economically active people aged 16-64 ONS Labour market statistics [A08: Labour market status of disabled people](#).

³⁸ [Ofcom's annual report on the BBC 2022-23](#).

While we recognise that certain issues may be outside the BBC's control, there are some steps it could take to limit the potentially negative effect that any future issues might have on its relationship with audiences. It could consider how it listens to audiences' concerns, and clearly explain the action it takes when issues do arise. In our Annual Report on the BBC, we highlight that it can do better in explaining to audience what it is doing, and why, when it comes to its services.

By doing so, the BBC may be able to tackle some of the issues we have drawn out in this section, and ultimately regain the trust of some people who may have lost faith in the BBC as an institution.

What's next?

The overall objective of this review was to examine the drivers of lower levels of satisfaction with the BBC among D and E audience groups compared to others. Our stakeholder engagement, research programme and analysis of the information we routinely collect has provided us with greater insights on the challenges the BBC faces.

By speaking to people from a range of backgrounds across the UK, who have different engagement levels with the BBC, we feel we have revealed a better understanding of their attitudes towards the broadcaster.

This review did not seek to make specific recommendations to the BBC or propose changes to our regulatory framework. Rather, our aim was to provide insights for the BBC to consider in determining its approach to meeting the needs of these audiences.

It is also vital for us, as the BBC's independent regulator, to ensure we fully understand what audiences are looking for from the BBC when we are assessing its performance and approach to delivering its Mission and Public Purposes.

There are significant challenges in grabbing and holding audiences' attention

This review highlighted that many people now exhibit a scattered focus when it comes to their media consumption; sometimes feeling distracted with a range of content vying for their attention and at other times deeply engaged in one source. We recognise that this makes it challenging to ensure that content captures and retains people's attention, which can make it harder to stand out or resonate.

It is clear from our findings that the challenge in meeting the needs of these audiences is becoming more difficult not just for the BBC but for all broadcasters, in the face of competition from streaming services and social media. With the continued growth in the availability and use of these platforms and services, content is accessible at all times and from all over the globe.

We know comparisons with these other platforms and services can have an impact on people's attitudes towards the BBC. Unlike some of its competitors, the BBC has specific responsibilities to deliver content that appeals to all audiences across the UK. In a market where not all services have the same obligations, these comparisons highlight the distinct challenges the BBC faces in striving to meet the expectations of UK audiences. We must continue to consider this as we assess the BBC's performance and audiences' attitudes towards its delivery of the Mission and Public Purposes.

Opportunities remain for the BBC to deliver for these audiences

However, our work has also shown that people do have a connection with the BBC in some way or another. We know these audience groups consume a lot of content, with the BBC still a firm part of their media habits, in some form. Many also talked of their admiration for much of what the BBC does. This is a strength that the BBC should harness to ensure that connection with these audiences is not lost. The BBC will not be able to rely on popular content of the past, that for many were the only shows available, to ensure that association continues.

We said earlier in our report that participants felt the BBC was dry and serious compared to other broadcasters and services. People said they wanted the BBC to take more risks in producing new

content and also to try and recapture some of the ‘magic’ of the classic content that they used to enjoy, that they felt the BBC would be too risk-averse to make now.

We have emphasised this point in our Annual Report on the BBC this year, encouraging it to take risks and innovate by experimenting with different formats, reaching audiences in new ways and innovating in how it makes content more accessible to all audiences.

Authentic portrayal is still an issue for audiences

It is clear from our work that people want the BBC to do well and they do hold it to a higher standard than other media organisations. However, to effectively serve all audiences, the BBC must consider if and how people from all audience groups- including those from D and E groups - are represented and portrayed in its content.

Overall, our participants felt that there is little representation on the BBC of what they called “*normal lives, working class lives*”.³⁹ People we spoke to felt that representations of the complexity of ordinary life was generally absent from BBC content, and that where ‘people like them’ were represented, portrayal often reverted to stereotypes.

Our research shows that people greatly value programmes that reflect their lives.⁴⁰ The BBC’s future success and sustainability depends on its ability to remain relevant to - and connect with - all audiences. Evidence suggests that D and E audience groups increasingly feel the BBC is not relevant to them, and that its management, programming and even its presenters are out of touch. It is imperative the BBC does not let these audiences drift away.

The BBC should be clear with audiences on meeting their needs

The diversity of the people we spoke to stood out during this review and highlighted that considering D and E groups together as one homogenous group risks not fully understanding their needs. We know the BBC collects a vast amount of information on its viewers, listeners and users and we are always keen to learn more about its approaches.

As part of this review and also our wider BBC programme of work, we have met with the BBC’s commissioning, research, data and policy teams. During these meetings, we have seen some of the data and insights the BBC uses to understand its audiences. We are discussing with the BBC about seeing this data on a more regular basis so we can be more informed about how their strategies are performing. This review has enabled us to see more of how the BBC measures its own performance and we look forward to better information-sharing in the future.

However, it is important for the BBC to also set out its plans to audiences, not just to Ofcom. The BBC will need to continue to make changes, and to transform its services, working harder to bring audiences along with it as it does so. That means offering a better, more thorough explanation of what it is doing and why, and what any changes mean in terms of the services audiences can expect to receive. In our [Annual Report on the BBC](#) this year we have highlighted examples of it not fully explaining to audiences the changes it is making. It is also vitally important that the BBC monitors the impact on audiences of any changes it makes and adapts them if they are not working.

³⁹ 2CV Research Participant - Goole, Man, 18-34, socio-economic group D/E.

⁴⁰ [Ofcom’s thematic review of Representation and portrayal on BBC television \(2018\)](#).

Our approach to assessing the BBC's performance

Earlier this year, we [updated the BBC's Operating Licence](#) in order to provide the BBC with more flexibility to deliver for its audiences, especially online. As part of this, we introduced new online distinctiveness and discoverability conditions for its online services, including BBC iPlayer, BBC Sounds and the BBC website and apps. You can read more on the approach we intend to take to assess the performance in these areas in our [Annual Report on the BBC](#).

This review has highlighted how important these areas are for audiences, including D and E groups and where the BBC is often seen to be trailing others in the market. As participants have made clear, they do not expect the BBC to be the same as a global streamer and they value some of the content they offer that is distinctly for the UK. BBC iPlayer remains popular with many, but they feel the BBC can do better with its functionality and levels of personalisation.

As part of the updated Operating Licence, we have placed requirements on the BBC to ensure that it makes certain types of content, including news and current affairs, some informal learning content, original UK content and nations and regions content more easily discoverable on its online services.

Following the publication of the updated Operating Licence, we are [reviewing our monitoring](#) of the BBC's performance to ensure it aligns with the new condition and allows greater flexibility.

The findings from this review will also inform that process by considering how we can recognise the complexities of audiences. Socio-economic groups are a long-established way of categorising people and representing 'class' in research. While we need to use broad categories to enable us to identify audience groups that are being less well-served by the BBC, we also want to find feasible ways of recognising the complexities within these broader groups. For example, doing more intersectional analysis where sample allows, using geodemographic analysis tools, more attitudinal ways of grouping people and considering further measures of socio-economic class.

As we continue to assess the BBC's delivery of its Mission and Public Purposes, we will consider what we have learnt as part of this review. The BBC has made clear that they are taking steps to address many of the concerns that audiences raised during our research, and we will continue to monitor progress as part of our regular engagement with the BBC and stakeholders.