

## **Public Service Broadcasting: Research and questions for the future**

### ***What do we know?***

Research on public service broadcasting shows that people value it for:

- Accessing content you can't find elsewhere (e.g. specific dramas, reality TV, sports, national events)
- Accessing high quality, reliable news
- Providing an outlet for British-made content and for programmes set in British communities
- Providing content that facilitates connections with other people (e.g. bringing the family together to watch a programme, providing a topic of conversation with friends, giving people a sense of 'Britishness')
- Supporting the British creative industries including TV production and related industries

We also know that:

- Public service broadcasters still account for over half of all viewing in the UK, but this varies across age groups younger people watch less public service content and use the public service channels less
- Some areas of the UK are able to access public service broadcasting more easily than others
- Some types of programming still receive less attention than others (e.g. religion) even though they are included in the public service content remit

Within the broadcast industry:

- The industry itself is not very diverse, with low representation of marginalised groups among writers, producers and in executive decision-making positions
- There is a skills shortage in the industry that needs addressing
- The public service broadcasters are essential to the survival of the British TV production industry, because they provide the most investment in original domestic programming

### ***What is changing?***

The context for public service broadcasting funding, production and viewing is changing:

Funding and production:

- Public service broadcasters who depend on advertising for their revenue are under pressure; their income is stagnating or falling as advertisers move to other outlets and online (and this may be made worse by the pandemic)
- Budgets for all broadcasters are under pressure because of the pandemic, which means that money will be more scarce for some time to come
- Public funds will be under pressure following the pandemic, potentially endangering this source of income

- Third-party funding for UK production (e.g. via collaborations with other broadcasters or overseas production companies) may also decline, because of the more competitive landscape and the expected global recession following the pandemic
- New technologies mean that skill sets change fast, and that expectations about how and where to host public service content are also evolving

#### Viewing

- People are changing their viewing habits (e.g. by viewing on mobile phones, laptops, or at a time of their choosing rather than on a fixed schedule)
- Public service broadcasters no longer have a monopoly on public service-style content – you can find many similar types of programmes available from non-PSB sources, such as Netflix, or Sky.
- Public service content can be accessed across many different devices and platforms as well as via the original broadcaster (e.g. via YouTube, Netflix), so it's not always clear that the content comes from a public service broadcaster
- The broadcasting landscape is more competitive: people are watching about the same amount of television in total, but less of what they watch is from public service broadcasters (particularly for young people)
- The more complex landscape for watching means that it can be harder for people to find content, and more confusing to know which broadcaster the content comes from.

#### ***What questions does this raise for the future?***

All these changes mean that the current model of PSB is open to debate. What might a public service broadcasting model for the 21<sup>st</sup> century look like? Questions to consider include:

#### Definition

- How might we think about the *idea* of 'public service'?
  - o *What values are important? Are there values that are common to all of us, or not?*
  - o *What might make 'public service broadcasting' unique, compared to other services that produce similar types of programmes?*
  - o *Who should it apply to? Only TV broadcasters, or radio, streaming services, platforms (YouTube, Facebook) and others that host or make public service-style content?*
- How should we decide whether public service broadcasting is *viable* and *valued*?
  - o *Numbers of viewers across different platforms? Advertising revenue? Quantity or quality of programming? Original programming? The feeling of connection and identity that it offers people?*

#### Production

- Who should *produce* and *deliver* public service content?
- Should all companies who *produce* and / or *deliver* such content be monitored or regulated?

- How should we balance the role of public service (e.g. the BBC, Channel 4) and non-public service (e.g. Netflix, Sky) broadcasters in ensuring public service-style content is provided?
- Could public service media help to address inequalities in the production industries? How?

#### Content

- What kind of content should be identified as 'public service'?
- How should we prioritise different types of content?
  - o *Is it more important to fund what is popular, or to prioritise programmes that might not be commercially viable otherwise (e.g. content that caters for minority interests)?*
- How should decisions about content priorities balance the three objectives of entertaining, informing and educating audiences?

#### Viewing

- How should public service content be available to viewers?
  - o *What should the balance be between making it available as widely as possible, on any platform, and preserving the audiences for specific broadcasters (e.g. those who watch the BBC or ITV)?*
- How might a new strategy help to preserve or even grow public service media audiences?
- How might inequalities in representation be addressed?
  - o *What about if people don't have access to the internet? Should the model take that into account given that more and more people watch things online or via streaming services?*