



THE SHOW 
MUST GO ON

MRG Conference

Is there still a role for Public Service Broadcasters?

2020 MRG Annual Conference



tapestry

Amy Holder

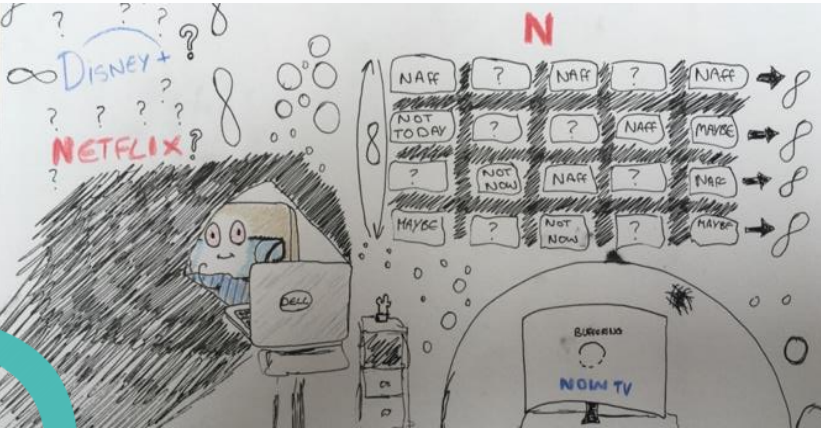
Jemma Ralton



TV IS DEAD



THE FINDINGS ARE FROM NATIONWIDE QUAL & QUANT RESEARCH



20 x “ART CLUB” TASKS



**10 x FRIENDSHIP PAIRED
DEPTH INTERVIEWS**

AMONGST ADULTS AGED 18-65 IN LONDON,
MANCHESTER & EDINBURGH



**ONLINE SURVEY
AMONGST 2,067 VIEWERS**

ADULTS AGED 16-65

Interviews took place during w/c 8th June 2020. Quant survey took place between 23rd – 30th June 2020. At the time of the survey, several lockdown measures had been eased – it was after the announcement (made on 23rd June) of the relaxing of the 2m rule and pubs re-opening on 4th July 2020.



RISE OF THE UNKNOWN

LIVING IN A POST TRUTH WORLD

SHARED IDENTITY BEING CHALLENGED

EROSION OF THE PUBLIC SPHERE

DESIRE TO ESCAPE

THERE ARE A NUMBER OF FORCES WHICH ARE SHAPING VIEWERS' RELATIONSHIP WITH MEDIA



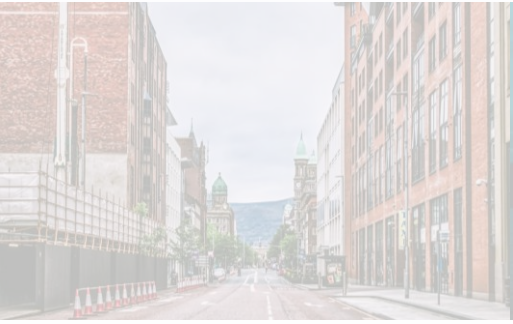
RISE OF THE UNKNOWN



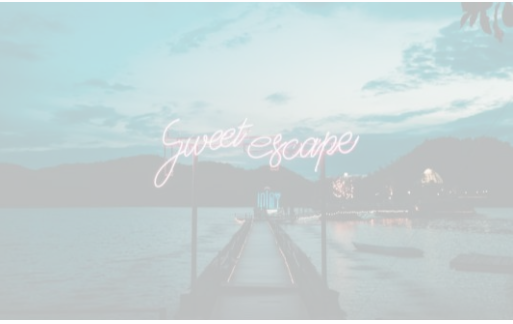
LIVING IN A POST TRUTH WORLD



SHARED IDENTITY BEING CHALLENGED



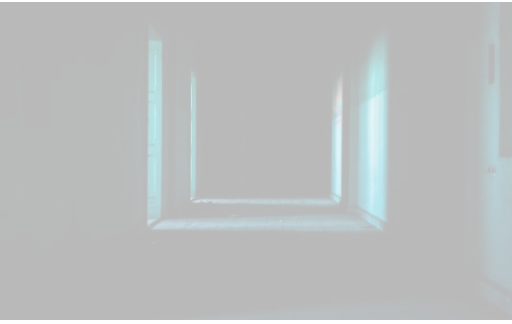
EROSION OF THE PUBLIC SPHERE



DESIRE TO ESCAPE

4 in 10

are **anxious or fearful of the future** and the unknowns that they face



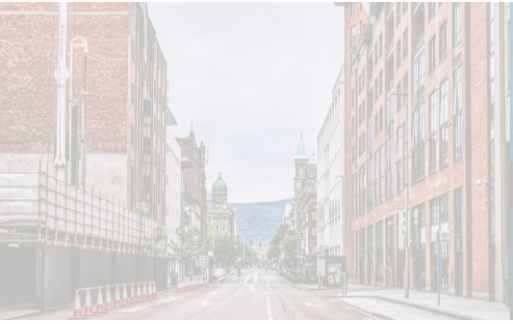
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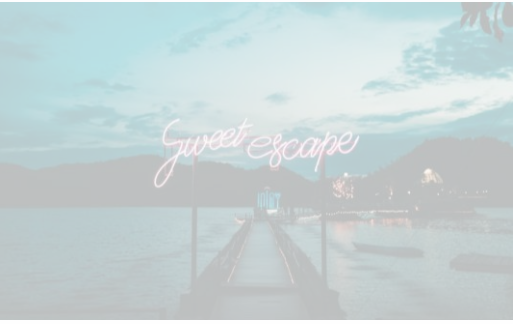
LIVING IN A POST TRUTH WORLD



SHARED IDENTITY BEING CHALLENGED



EROSION OF THE PUBLIC SPHERE



DESIRE TO ESCAPE

“Doesn’t carry fake news”

Is the most important attribute for their news sources



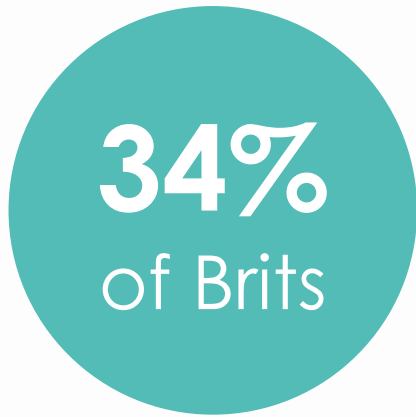
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EROSION OF THE PUBLIC SPHERE

DESIRE TO ESCAPE



Aren't proud to be British



Feel ethnic minorities are **discriminated** against in the news



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DESIRE TO ESCAPE

Amazon's share price has increased

6.4x

In the last 5 years

Household subscribing to SVOD services increased

2.8x

In the last 5 years



RISE OF THE UNKNOWN

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DESIRE TO ESCAPE

Viewers had **3** key needs for their TV viewing during lockdown



DESIRE TO ESCAPE



DURING THE LOCKDOWN, VIEWERS HAD THREE KEY NEEDS FOR THEIR TV VIEWING...

Keep up to date with what's going on

Have **an escape or distraction** from the pandemic

Watch something to help them **relax and unwind**

A3. What have been the three most important things to you when choosing what to watch on television during lockdown?

Base: 2067 Consumers aged 16-65 (nat rep)

FOCUS OF TODAY



- 1. Do PSBs still matter to viewers?**
- 2. Can PSBs remain relevant to an informed generation?**
- 3. Are PSBs still the go to source for the news?**



1. Do PSBs still matter to viewers?



PSBs AND CONTENT PROVIDERS ARE FUNDAMENTALLY DIFFERENT

Whilst the technology is evolving, PSBs are characterised by their **constraints** and content providers by their **unbounded** nature...

PSBs

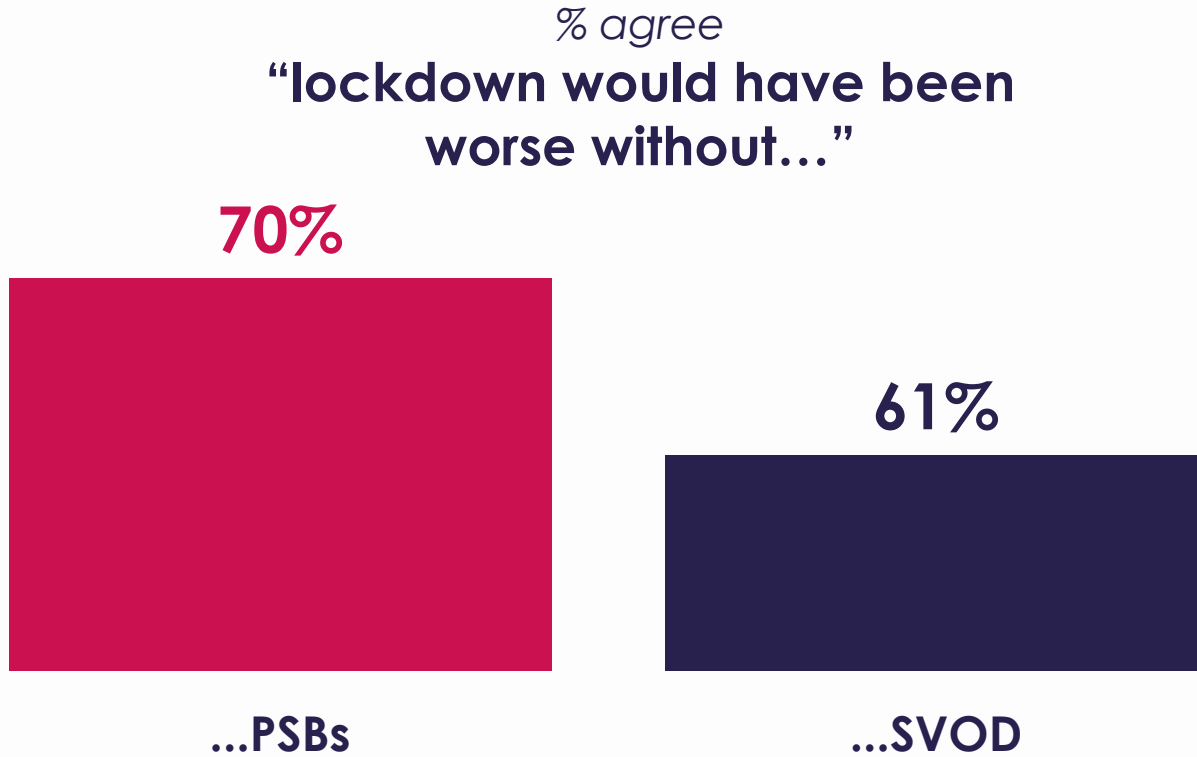
Scheduled
Live
Available regionally, nationally
Editorial filter (push)

Content Providers

On demand
Library
Available globally
Individually curated (pull)



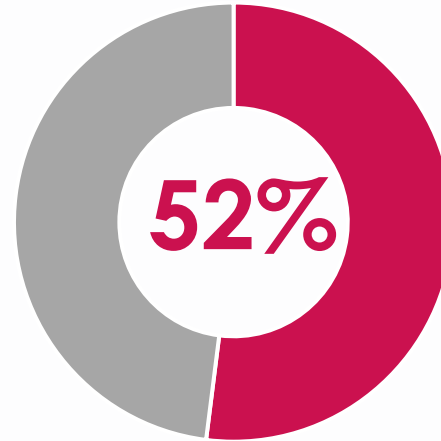
PSBs HAVE HAD THE BIGGEST IMPACT DURING THE LOCKDOWN



A16. How would lockdown have felt to you without each of the following channels or services? Base: 2067 Consumers aged 16-65 (nat rep)

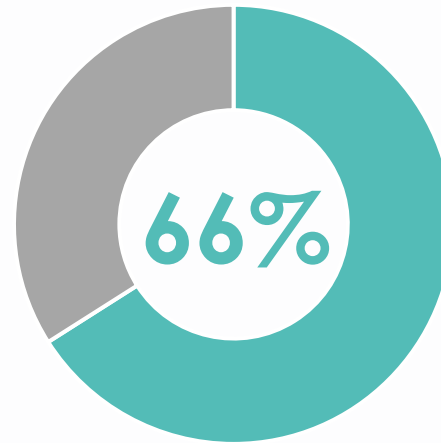
PSBs net includes BVOD services linked to those PSBs e.g. iPlayer, All4 etc.

LOCKDOWN HAS MADE VIEWERS VALUE THE IMPORTANCE OF PSBs



agree

“I have a greater appreciation for PSBs since being on lockdown”



agree

“PSBs have been quick to respond to lockdown, providing relevant shows”

D1. [Public Service Broadcasters] To what extent do you agree or disagree with the following statements? Base: 1031 UK consumers 16-65 answering for PSBs

Base: 2067 Consumers aged 16-65 (nat rep)

CONSUMERS ARE LOOKING FOR THE CONTENT THEY WATCH TO DELIVER AGAINST A NUMBER OF IMPORTANT ROLES, INCLUDING:



- **Entertain** the viewer, allowing an escape into a different world
- Deliver trustworthy facts and **information**
- Help viewers to **calibrate**, understand how to feel, think and act
- Bring people together, allowing viewers to **connect**
- **Representing** us back to ourselves and to others
- Bringing about **change** in a nation

ON THE SURFACE, CONSUMERS ARE PASSIONATE ABOUT THE SHOWS CONTENT PROVIDERS OFFER...



“ When you watch **Netflix**, it's **escapism**, it will just take you away from what's going on
Male, 54, London

“ **I go to Netflix for a break**, I put on some masculine, car crashing, gung ho, shooting and killing type thing. And I can just sit there and watch one after the other
Male, 49, Manchester

...BUT IT'S ENTERTAINMENT FROM PSBs THAT DEFINED LOCKDOWN FOR CONSUMERS

Which programmes defined your lockdown?

41%



any PSB show
(excl. the News)

25%



any SVOD show



A1. Which TV programmes have defined your lockdown and why?
Base: 2067 Consumers aged 16-65 (nat rep)

SHOWS FROM PSBs HELPED TO KEEP PEOPLE ENTERTAINED AND DISTRACTED DURING THE LOCKDOWN



Which programmes defined your lockdown and why?

“Bad Education as it’s a comedy and **kept me entertained** for **many days in this horrible time**

BBC

“Miranda – watched the 2 full series to have a laugh and **take our minds off everything**

BBC

“Friday Night Dinner –
entertaining, funny and good **to pass the time**

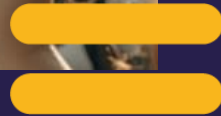
“Gogglebox has provided me with humour and **forgetting what is going on in the world**

IT'S THE BLEND OF ENTERTAINMENT AND CALIBRATION WHERE PSBs' SWEET SPOT LIES



“ Watching **Grayson Perry's Art Club** really, like he even said himself, he felt like he'd got **a glimpse into Britain** from doing the series. It was amazing all the different people submitting so much different artwork. You couldn't guess what was going to be submitted. It was **completely brilliantly varied. I learned loads more.**

Female, 39, London



2. Can PSBs remain relevant to an informed generation?

PSBs ARE UNIQUELY SEEN AS BRINGING THE NATION TOGETHER AS THEY:



everything
is
connected

“Reflect the **diverse** nature of Britain”

“**Represent** my region of Britain”

“Make me **proud** to be British”

“

Hearing people **chat and crack jokes** on The Last Leg or Gogglebox...It's the **closest thing** you can get to having a beer **down the pub** with your mates

Male, 25, Manchester

PART OF THE REASON IS THAT PSBs ARE OPEN TO,
AND FOR EVERYONE, MAKING THEM BETTER ABLE
TO COVER THE ISSUES THAT MATTER

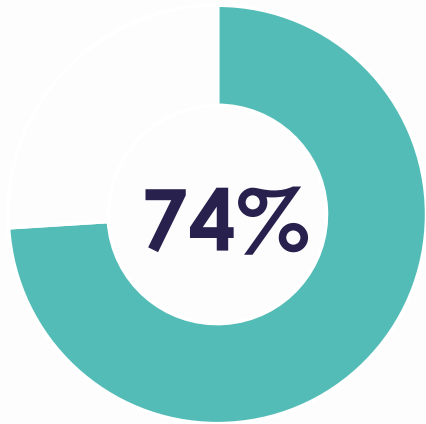
“

Channel 4 is capturing what's going on right now. It's more responsive to the situation. **Netflix is a bit more evergreen** content where you can dip in and out and it's not responding to current affairs or anything.

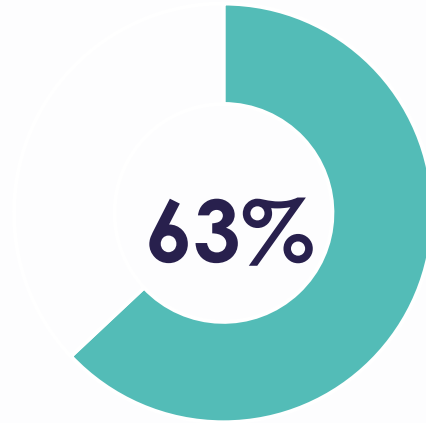
Female, 36, London

OPEN

PSBs KEEP VIEWERS UP TO DATE WITH THE NEWS – AND HELP THEM MAKE SENSE OF THE FACTS



agree “**PSBs keep me up to date** with what’s going on in the world”



agree “**PSBs help me to make sense** of the world we live in”

“

Right now I’m really enjoying watching **Gogglebox** more for a **normal person’s commentary on what’s going on. It’s a lens on how to deal with all the current situations.**

Female, 36, London

D1. [Public Service Broadcasters] To what extent do you agree or disagree with the following statements?
Base: 1031 UK consumers 16-65 answering for PSBs

PSBs HELP VIEWERS FROM THE INSIDE OUT; FOR CONTENT PROVIDERS IT'S MORE A LOOK FROM THE OUTSIDE IN



PSBs

Look from the **inside out**:

- Show us people we can relate to (e.g. showing real, regional NHS stories)
- Take the familiar and show us it through a new lens (e.g. Dispatches documentaries)

Content Providers

Looking from the **outside in**:

- Appeal to us as humans (not citizens of a particular state)
- Show us entirely novel, exotic, distant people or situations we can't relate to (e.g. Tiger King)

“**When we get back to the real world, I'll be watching Dispatches, the News, the documentaries, so you get that balance**

Male, 54, London



3. Are PSBs still the go to source for the news?

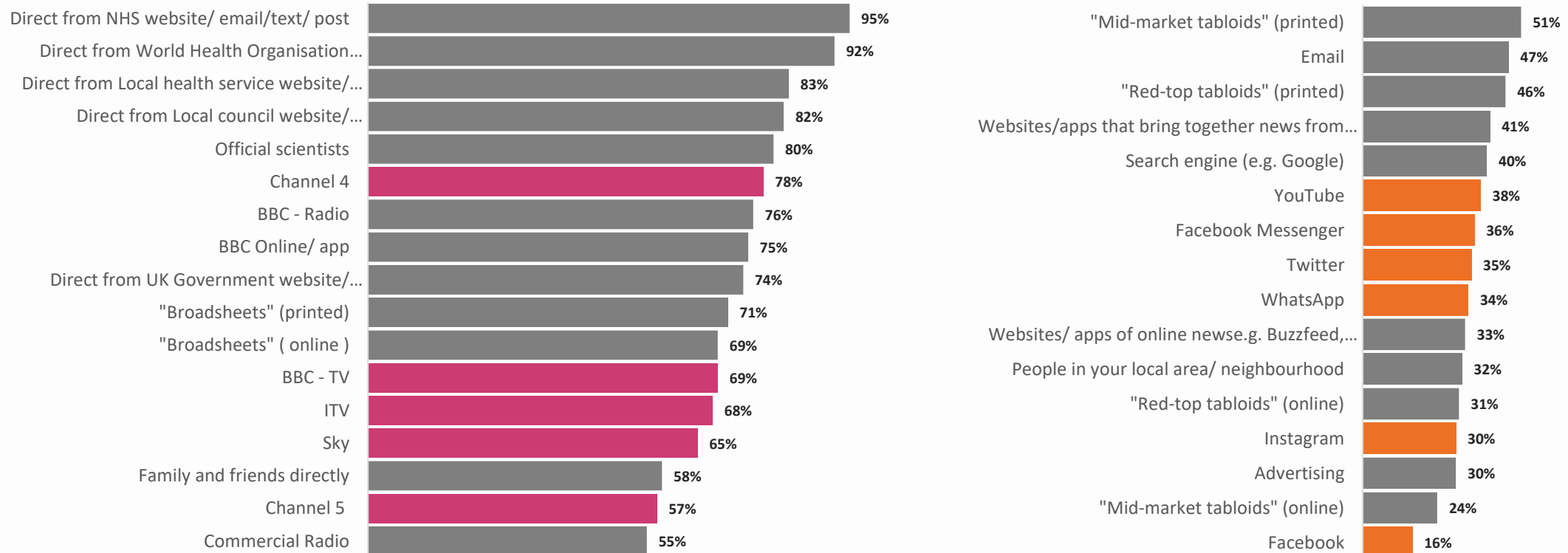


RECENT OFCOM TRUST DATA SHOWS THE DISPARITY OF TRUST LEVELS BETWEEN TV NEWS SOURCES & SOCIAL MEDIA

TV sources

Social Media sources

Trust in the sources for information/news about Coronavirus used in last week (9-11 Oct)



Ofcom Research, in field 9-11 Oct 20

Base: All respondents who are getting information/news about the Coronavirus outbreak and used source

SINCE CV-19, CONSUMERS TRUST NEWS FROM PSBs EVEN MORE THAN BEFORE



Doesn't carry fake news



Offers a balanced, expert point of view



Not afraid to challenge



Portrays the human stories

CHANNEL 4 NEWS DELIVERS AGAINST ALL OF THESE



Doesn't carry fake news



Offers a balanced, expert point of view



Not afraid to challenge



Portrays the human stories



Approaches news stories from a different angle



“ Channel 4 News has been renowned for being an **impartial** News broadcaster with **forthright opinions** that scrutinise people in authority by ultimately **holding them to account**. And the British people typically appreciate it.
Male, 35-44, South-East England

“ Channel 4's newsreaders are **relevant**, seem **genuine** and are **easy to connect** with. They carry out interviews well and ask the questions I want to hear the answers to.
Female, 25-34, North-West England

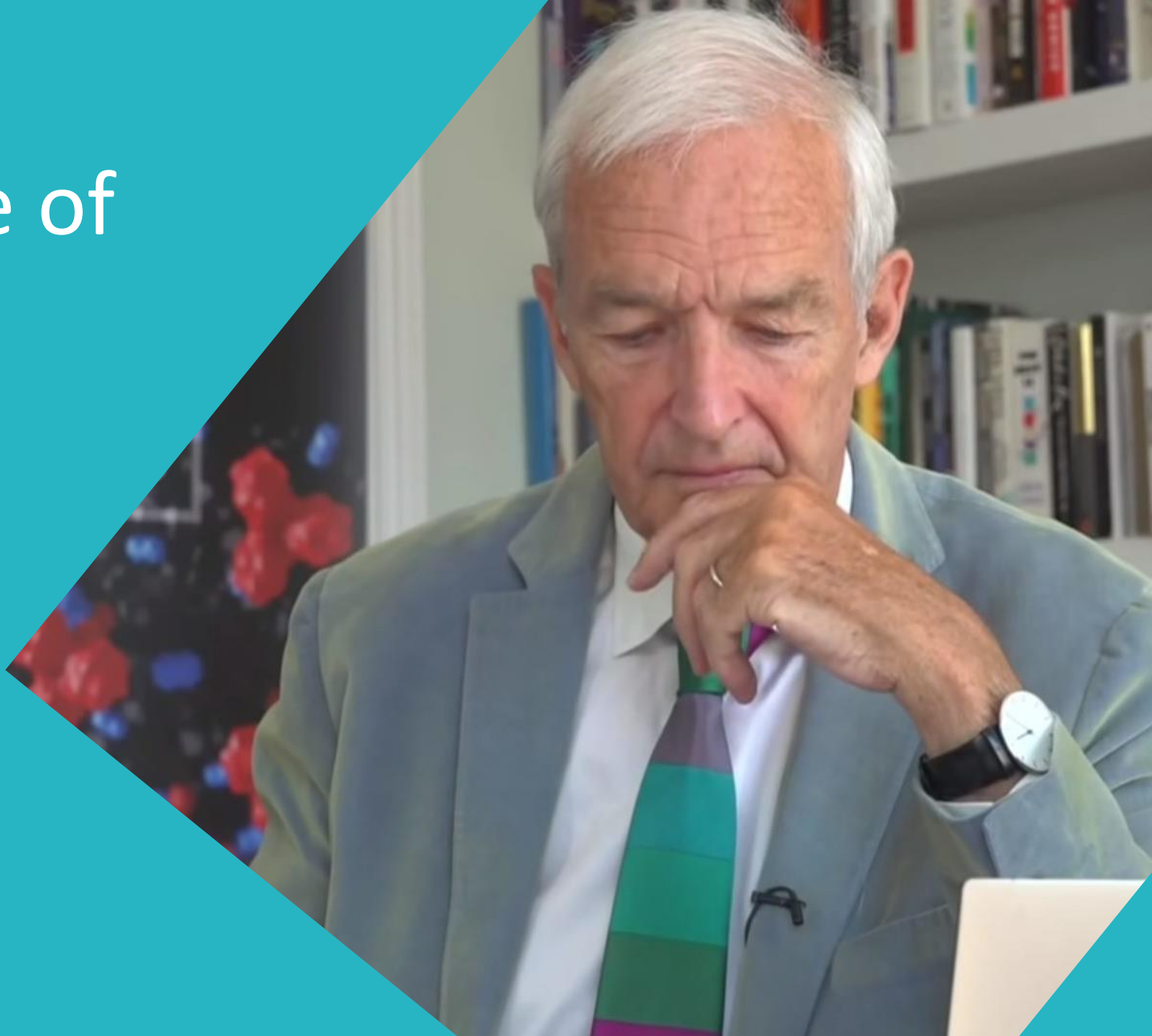
“ It's different than most News programmes. They go **deeper**, get the best reporters in places others don't think of, they cover topics in much more depth and **ask pertinent questions**.
Male, 35-44, North-East England

The importance of PSB News

C4 News has experienced record growth among key audiences – with sustained increased reach since the start of the year

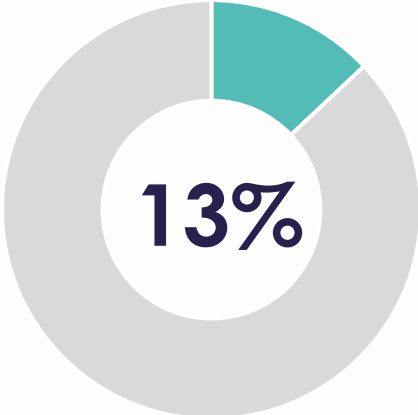
16-34, BAME and ABC1 viewing all posted large gains YoY

Ofcom's Covid-19 research found that C4 was the most trusted national TV source for coronavirus information

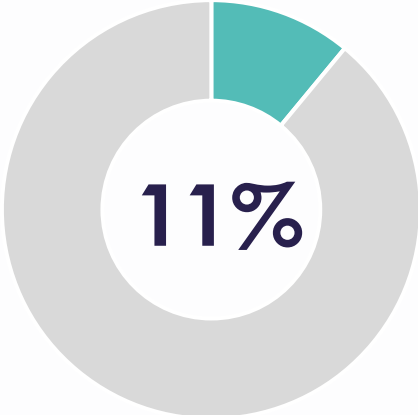


THE NEWS IS AN AREA WHICH VIEWERS DON'T FEEL SVODs CAN DELIVER – AND EVEN IF THEY DID, WOULDN'T WANT TO WATCH

In the future...



Would **expect** SVOD services to show UK news



Would **want** to watch UK News on SVOD services

“Netflix news would be shot in 4K and probably have CGI dragons flying about
Male, 35, Edinburgh

C8. Would you expect services such as Netflix, Amazon Prime Video, AppleTV+ to show the UK news in the future? / C9. Would you want to watch the UK news on services such as Netflix, Amazon Prime Video, AppleTV+ if they showed it in the future?

Base: 2067 UK consumers aged 16-65 (nat rep)

N SÉRIE

LA RÉVOLUTION

DIRECT 8:51 - 9:39

Fort de ses nouveaux pouvoirs, Donatien traque Guy de Montargis, qui lui fait une confession insoutenable. Albert est confronté à un dilemme tragique.

▶ Regarder le direct

jeudi 5 novembre

DIRECT 8:51	N SÉRIE LA RÉVOLUTION	S1 : E4 Chapitre quatre - Les bourreaux Somptueux · Violent · Effrayant	48 m 16+ 2020
9:39	N SÉRIE LA RÉVOLUTION	S1 : E5 Chapitre cinq - Le sang bleu Somptueux · Violent · Effrayant	48 m 16+ 2020
10:28	N SÉRIE MORTEL	S1 : E1 Archi Dead Percutant · Suspense · Série fantastique	49 m 16+ 2018
11:18	N SÉRIE MORTEL	S1 : E2 Flammes. Flammes. Flammes. Percutant · Suspense · Série fantastique	45 m 16+ 2018
12:03	N SÉRIE MORTEL	S1 : E3 Mise à Nudes Percutant · Suspense · Série fantastique	46 m 16+ 2018
12:50	N SÉRIE MORTEL	S1 : E4 Un Mec Toxique Percutant · Suspense · Série fantastique	49 m 16+ 2018



Ultimately, PSBs play a unique role in viewers' lives, making them an irreplaceable part of the TV landscape



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MAKING THE COMPLEX BEAUTIFULLY SIMPLE

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