

Covid-TV: Routes to Content during Covid-19

Prof. Catherine Johnson

University of
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About the research

What does the impact of Covid-19 on TV viewing tell us about the future of public service broadcasting (PSB) in the UK?

- TV viewing across linear and on-demand increased during the first lockdown in spring 2020. However, while viewing of broadcast TV has gradually declined back to 2019 levels, streaming services have retained their uplift.¹
- In May 2020 we returned to 28 people initially interviewed in the summer of 2019 to explore how and why their TV viewing habits changed during Covid-19.
- Across all demographics, our participants integrated streaming into their habitual TV viewing during lockdown. Many turned to video streaming services (such as Netflix and YouTube) to fill the gaps left by the loss of sports, soaps and other beloved PSB programmes. Streaming services were also valued for providing a safe space in which it was easy to avoid stressful or anxiety-inducing content.
- With less time spent watching linear TV, awareness of new PSB shows decreased.

Policy Implications and Recommendations

- Covid-19 has demonstrated the vital role of PSBs in providing high quality news and entertainment that is accessible to all. PSBs are also crucial to the UK economy, accounting for most of the UK's production revenues.
- Streaming services, like Netflix and YouTube, offer valued quality and/or niche content but do not have remits to provide content produced in and for all of the UK across a full range of genres. Although Netflix is increasing its production of UK content, it is oriented to the global market and not mandated in production quotas.
- The dominant position of streaming services within the online TV marketplace makes it hard for PSBs to avoid working with streaming services; from selling content rights to Netflix to placing programming on YouTube.

Levelling the playing field:

- PSBs currently operate in an unequal market online, competing with global platforms like Netflix, Amazon and Google that are not subject to the same regulations as other broadcasters in the UK. The scale of these platforms gives them competitive advantage in the online world. However, because their user data and algorithms are proprietary, it is difficult to assess their impact on PSB viewing.
- To evaluate the impact of streaming services like Netflix, YouTube and Amazon on PSB, regulators need greater access to their proprietary data and algorithms.

Discoverability and Prominence:

- PSB is a 'merit good' which means that it creates positive benefits for society and democracy but is likely to be under-consumed if not freely and easily accessible.
- As people integrate on-demand into their habitual viewing, their relationship with linear TV and PSBs is weakened.
- For the value of PSB to continue to be delivered, revised prominence legislation is needed to ensure that PSB content is accessible and easy to find in on-demand environments and on streaming platforms like YouTube.
- PSBs need access to data to enable them to compete effectively online.

¹Ofcom, Media Nations, August 2020; Ofcom, Effects of Covid on TV Viewing, October 2020

Key Findings

TV played a vital role for most of our participants, providing information about and helping to relieve the stress of Covid-19. PSBs were vital as trusted sources of information, but streaming services were better able to direct people to the content they needed to manage the anxieties of the pandemic.

1. Use of streaming services has become habitual

- In 2019 most participants associated PSBs with high quality, unique content, and many habitually planned their evenings around linear public service TV.
- By May 2020 there was a significant increase in use of streaming services across all ages. On-demand services like Netflix and YouTube were now integrated into the habitual viewing routines of most participants.

'I'm trying not to watch the news because I was getting upset watching it.'
(Polly, 67, F, White, C2)

2. Why streaming has thrived and PSBs missed out

- During Covid-19 PSBs were highly valued as trusted sources of news, but also associated with the anxiety-increasing consequences of news viewing.
- With loved sports, soaps and drama ceasing or reducing production, many participants assumed there was nothing new on PSB and complained about the number of repeats.
- These changing perceptions of PSBs drove participants to experiment with video streaming services.
- Streaming services provided safe, flexible and personalised spaces where participants could explore a wealth of new programming (including from PSBs) without the risk of encountering stressful content.

'Netflix will slot in if there's nothing on that we normally watch. [...] And there's no drama, and there's no *Coronation Street* or that type of a thing. So at that moment we will say we'll watch a film [on Netflix]'
(Melissa, 55, F, White, C1)

3. The rise of YouTube for engaged viewing

- More of our participants were regularly accessing YouTube than in 2019 and using it to watch PSB content, including news, where they could limit consumption to selected short clips.
- The more participants used YouTube, the more they trusted it would offer relevant content to watch.

'We probably watch it a bit more now, the news. Just sort of to keep in touch. But I watch it every night on YouTube. [...] they pick out the best bits [...] and if you don't want to watch the next one you just skip on to the next video and watch that' (Thomas, 55, M, White, B)

Further Information

The full report can be accessed at:

<https://www.hud.ac.uk/cpc/ourprojects/routes>

Contact the Researchers

The research was conducted by:

Professor Catherine Johnson & Ms Laurie Dempsey at the Centre for Participatory Culture, University of Huddersfield.

For more information or to discuss the research findings contact Professor Catherine Johnson: C.Johnson2@hud.ac.uk

'If it's something new, it would surprise me because there's no kind of new drama being made. [...] My awareness of new content is very limited. I'm not aware of anything particularly new.' (Alex, 65, M, White, B)