

Covid-TV: Routes to Content During Covid-19

Executive Summary:

Covid-TV compares the TV viewing behaviours of a demographically representative sample of 28 participants interviewed in the summer of 2019 and again in the last two weeks of May 2020. These interviews allow us to get behind the data in order to explain why TV viewing increased during lockdown and why video-on-demand (VOD) services have been thriving and public service broadcasters (PSBs) risk missing out.

1. VOD Has Become Habitual, Even For Older Viewers

In 2019, many of our participants had used a VOD service, but there was a clear generational divide. Our younger participants (35 and under) habitually defaulted to on-demand services in their routine viewing habits. By contrast, our older participants were more likely to default to linear TV. Some had never used a subscription-video-on-demand (SVOD) service, others subscribed to a SVOD service but rarely used it.

By May 2020, most of our participants were turning to VOD as part of their habitual TV viewing activities. VOD was often integrated with linear viewing. Some started on linear and turned to VOD if they couldn't find anything to watch, or associated linear with daytime and VOD with the evening. Our older participants were far more likely to have discovered SVOD during lockdown and more of our participants across all demographics were using YouTube.

2. TV is Valued More Highly

The more widespread adoption of VOD services can be explained, in part, by the increase in TV viewing, with most of our participants watching more TV since lockdown. However, it was not just the amount of time spent with TV that had increased. TV was playing a positive role in helping people to manage the stress and anxiety of Covid-19. This led to our participants placing a higher value on TV in their everyday lives.

3. The New Need States of Covid-TV

Covid-19 has altered people's motivations for watching television. Five new need states were driving our participants' television viewing. Four of these – Sanctuary, Companionship, Connection and Escape – served, in different ways, to relieve the stress and anxiety of Covid-19. The fifth need state – Information – was crucial as people turned to TV news as the most trusted and reliable place to understand the rapidly changing situation surrounding Covid-19 and lockdown. However, accessing news and information about Covid-19 also led to increased anxiety, driving our participants to avoid, or seek ways to regulate, their TV news consumption.

The new need states of Covid-TV altered our participants' routes to content. As people valued time spent watching with family more highly, finding content for shared viewing became the most important factor in deciding what to watch. Our participants' choice of content was also more likely to be shaped by mood, with some actively seeking out programming that was light and easy, while avoiding darker subject-matter. Reviews of programmes and marketing also declined in value, in part because some of our participants were less inclined to experiment with new content, turning instead to the safety of familiar programmes and genres.

4. SVOD is Thriving, PSBs Risk Missing Out

SVODs have been particularly effective at fulfilling the four anxiety-reducing need states of Covid-TV. They were seen by our participants as safe spaces to find content to escape into, as well as to seek solace from, and to avoid exposure to, programmes that might cause stress. SVOD enabled flexible viewing that could fit into the routines of the whole household. At a time when TV had become a central talking point, SVODs also made it easy to find programmes that others were discussing, helping our participants to maintain vital relationships while socially isolated.

Our participants did turn to PSBs for programming that fulfilled the anxiety-reducing need states of Sanctuary, Companionship, Connection and Escape, but PSBs suffered from their associations with news and linear TV. PSBs were highly valued as trusted sources of news and information about Covid-19, often far more so than before, but were also associated with the anxiety-increasing consequences of news viewing. Linear TV was appreciated for providing a wider range of genres than SVOD. However, this also meant that PSBs were sometimes associated with lower status, ephemeral and disposable content, while SVODs were viewed exclusively as sources for higher-status genres, specifically dramas, documentaries and movies. With reports of TV productions being suspended, many participants assumed that there was nothing new on PSB, often complaining about the number of repeats they encountered on linear TV. This drove them to SVOD services where they found rich libraries of content. Repeats were more acceptable for the genres found on SVODs than the light entertainment, reality TV, news and events programmes associated with PSB.

5. The Rise of YouTube For Engaged Viewing

SVODs were not the only on-demand platforms that were thriving during Covid-19. More of our participants were making regular use of YouTube. In 2019, YouTube was largely associated with niche and distracted viewing. By May 2020, participants were spending longer on YouTube and using it to access the kinds of programmes and genres that they previously associated with PSBs, or even SVODs. YouTube fulfilled all the need states associated with Covid-TV in ways that were highly personalised. Aided by YouTube's recommendations and channels, our participants curated their own content libraries, and as their usage increased YouTube became a reliable place to find relevant content that built on their previous viewing behaviour.

The Implications of These Findings: Datafication and Platform Inequality

- The success of SVODs and YouTube during lockdown demonstrates the advantages of datafication. Global platforms, like Netflix, Amazon and YouTube/Google, are able to create highly personalised experiences for viewers because they have access to large amounts of proprietary data that enables them to make effective recommendations to users. It is this scale of data that enables Netflix and YouTube to guide viewers reliably to the content that helps them to manage the anxiety of Covid-19.
- This is a highly unequal market. Global platforms operate at a scale that national broadcasters, such as PSBs, cannot compete with. Their dominant positions within the online TV marketplace mean that PSBs can't avoid working with these platforms; from selling content rights to Netflix to placing programming on YouTube.
- Some of the challenges for PSBs will be short-lived. As production recommences, people will return to PSBs for the much-loved content that they provide; from soaps and light entertainment, to dramas and event programmes, like *Strictly Come Dancing* and *The Great British Bake Off*, that bring the nation together.
- However, these findings point to wider structural challenges for PSBs as on-demand viewing becomes more prevalent.

Recommendations:

For Policy-Makers

- Covid-TV points to the inequalities in the contemporary online TV marketplace, where a small number of global platforms can exert competitive advantage. Regulatory interventions are needed to ensure that the UK's national PSBs can continue to fulfil their remit to serve the public and have fair and equal access to the market.
- The CMA report into the Online Advertising Market claimed that a new regulatory regime is needed to tackle the market power of Google and Facebook. Many of the CMA's findings translate across into on-demand TV.
- As platforms like YouTube become more popular, PSBs must use them to reach audiences. Yet the terms of trade are not equitable and changes to platform algorithms can affect the visibility of PSBs' content on these sites.
- A fair trading principle along the lines of that proposed by the CMA for PSBs (and other content providers) when negotiating with platforms would help to level the playing field.
- Prominence legislation is needed to ensure that PSB content is accessible and easy to find in on-demand environments.
- Greater data transparency for regulators and policy-makers to be able to evaluate the role of platforms within the market is required.

For Public Service Broadcasters

- PSB programmes and services remain highly valued, but PSBs face structural challenges.
- Linear TV remains central and formed a habitual part of the TV viewing for most of our participants. PSBs play a vital role as providers of linear TV, which is essential for those UK citizens not able to access TV on-demand. Linear is also an effective way of serving certain need states, particularly for more distracted or shared viewing experiences.
- However, as on-demand becomes integrated into people's viewing habits, PSBs need to re-evaluate the relationship between linear and on-demand. This will involve developing new scheduling strategies and mechanisms to enable people to navigate effectively between linear and on-demand in ways that help them find the content that matters to them.
- Over both waves of our research, there remained a persistent association of PSBs' broadcaster-video-on-demand (BVOD) services with 'catch-up'. Increasing the amount of time that content spends on BVOD services like iPlayer has helped to shift this perception, but more work needs to be done.
- BVOD services are not the same as SVODs, but play a unique and valuable role in providing access to a wide range of programmes, as well as live streams of linear TV. Through marketing and interface design, PSBs could do more to communicate the value of their BVOD services as places to find rich, deep and varied catalogues of content to meet a wider range of needs than SVOD.
- PSBs should also consider novel ways of providing news through their BVOD services, borrowing from the success of YouTube.
- As people spend less time on linear TV, they encounter fewer on-air trailers for PSBs' programming. This makes marketing beyond linear TV more important.
- BVODs should shift from a linear approach to trailers, where trailers play before a selected programme, to an on-demand approach, where trailers can be actively selected by users from within the user interface. This strategy, adopted by Netflix and Amazon, was highly valued by our participants.

Covid-TV:

Routes to Content During Covid-19

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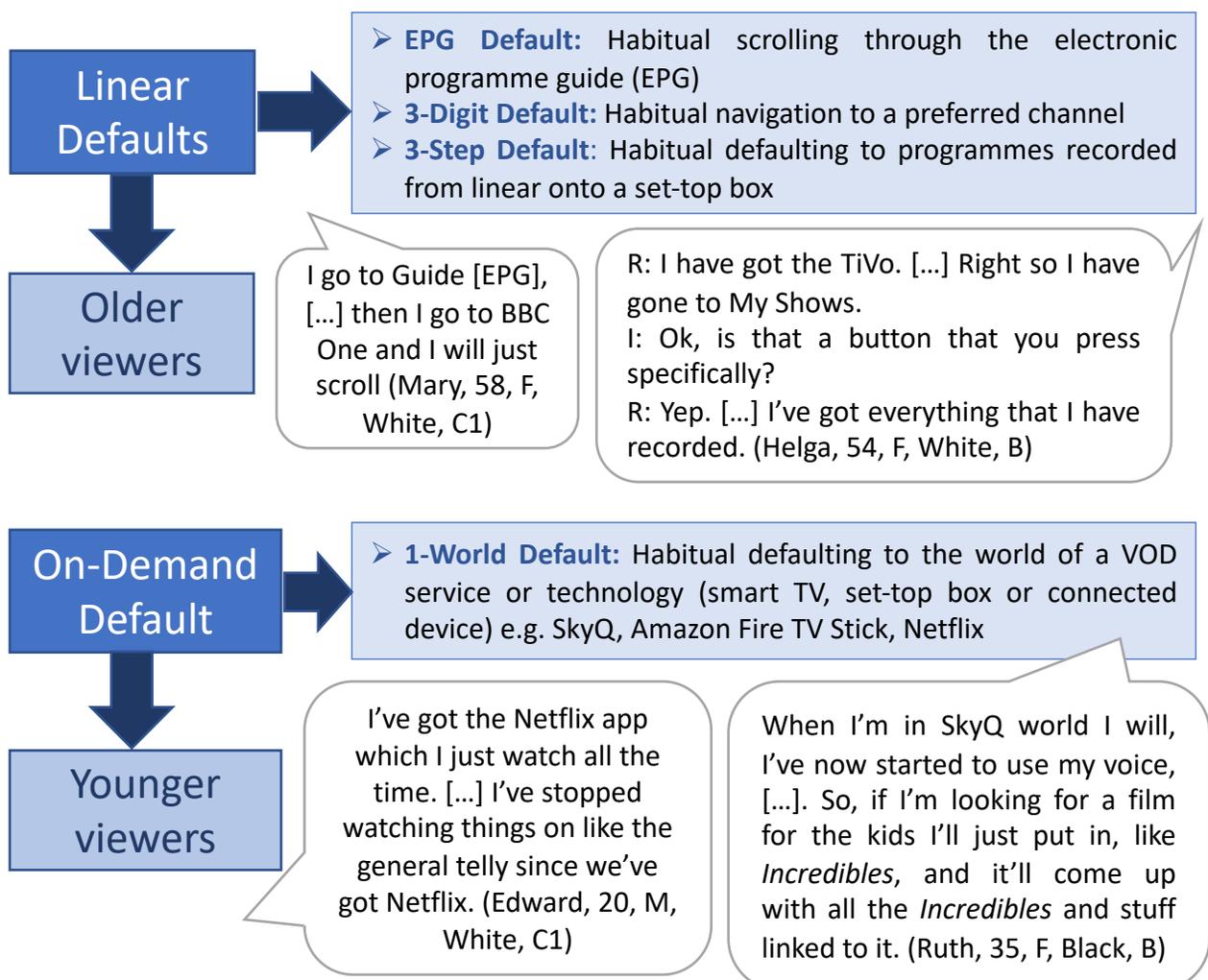
1. VOD Has Become Habitual, Even For Older Viewers

Key Takeaway: During Covid-19, VOD viewing has become increasingly integrated into the habitual viewing routines of all demographics, not just younger viewers.

Before: Linear dominated for older participants

Our younger participants habitually used VOD services, such as Netflix and YouTube. Our older participants tended to rely on linear TV or recordings on their set-top box to find TV content. They had a strong knowledge of the linear schedules and habitually used PSB channels. Some had never used a VOD service, others subscribed to a SVOD service but did not use it regularly.

Our research in the summer of 2019 identified four default, habitual routes that people took to TV content. Most participants adopted multiple defaults depending on time of day, technology, who they were watching with and whether they were browsing or seeking specific content. However, the three defaults associated with linear TV were most common across the sample and particularly with viewers over 35. By contrast, all participants 35 and under habitually defaulted to on-demand viewing.



After: Most participants are habitually using VOD

By May 2020, VOD services had become an integral part of most of our participants' daily viewing habits, often combined with linear viewing. Although linear channels, the EPG and set-top-box recordings remained important routes to content, 24 of our participants adopted a 1-world default in their habitual viewing behaviour, double the number in 2019.

Some participants would start with the EPG or 3-digit default but would turn to VOD if they couldn't find anything to watch. Others associated linear TV with daytime and VOD with the evening. By May 2020, our older participants were far more likely to have discovered SVOD and integrated it into their habitual viewing behaviours, and more of our participants were turning to YouTube regularly and for longer periods of time.

I think it's [lockdown] accelerated a trend, which is mostly a trend away from live TV and to streaming services. [...] I'd say there wouldn't be many days we wouldn't watch something on Netflix. It's something I would say has probably now become our most common platform. (Fred, 65, M, White, B)

[Lockdown has] meant that really, we've looked more at using the catch-up programs. We have actually got Netflix now, which we didn't have before [...] And my son keeps saying we ought to get Amazon Prime. (Liam, 68, M, White, B)

I: Recordings used to be a very big part of what you watched beforehand. Have the likes of Netflix and Prime replaced that?

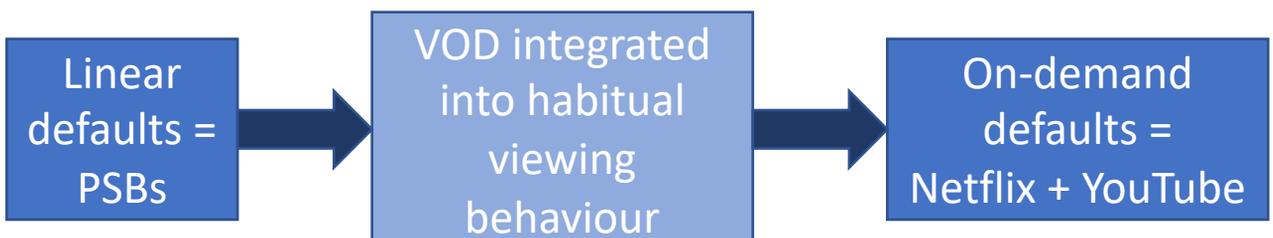
R: Yeah. Definitely. [...] Prime or Netflix [...] we've flipped between both of them more than the normal TV. (Helga, 54, F, White, C1)

PSBs Risk Being Left Behind

Many of our participants described regularly watching and enjoying a range of PSB programmes, channels and services. However, as Covid-19 has accelerated the integration of VOD into the TV viewing routines of our participants, PSBs risk being left behind. PSBs suffered in comparison with VOD services, often associated with a lack of new programmes, disruption to the linear schedules and a rise in repeats.

To understand why VOD is thriving during lockdown it is necessary to examine the way that Covid-19 has changed the role of TV in our everyday lives. During Covid-19, what people need from TV has changed, and this has altered viewing behaviours and people's attitudes towards television in ways that affect VOD differently to PSB.

In the following sections we explore the changing value of TV viewing, unpack the new need states of TV viewing during lockdown, and use these to explain the rise of VOD during Covid-19 and why PSBs risk being left behind.



2. TV is Valued More Highly

Key Takeaway: Since lockdown TV has played a far more important, positive and highly-valued role in people's everyday lives.

Before:

Our participants had a range of attitudes towards TV, from being dismissive, to appreciating the role of TV in their lives. For some TV was something to 'kill time' or 'switch off.' For others it was for 'relaxing, chilling.' Even our high television viewers were rather embarrassed by their own viewing: 'I watch quite a bit of TV: probably, I think, too much.' (Fred, 65, M, White, B).

After:

During Covid-19, TV has become so much more than just a replacement for lost activities and a time-filler for the void created by being furloughed, having social lives curtailed or no longer commuting. People were not just watching more: their emotional relationship with TV had been transformed. For most people, TV was playing a crucial and positive role in helping them to manage the stress and anxiety of Covid-19 and mattered to them so much more than before.

Jumana's Story:

From 'I wouldn't miss it' to 'It's gonna go where my MBE was'

Before:

When we met Jumana (54, F, Asian, D) in the summer of 2019 she was a light TV viewer. She rarely watched her main TV set, preferring to selectively watch British and Pakistani soaps on her phone in bed at the end of the day. Watching TV felt like a waste of time in her busy life.

I'm not much of a TV person, because I don't really sit here and put the TV on and think 'oh, I'm gonna watch something and spend hours on the TV' [...] if that TV wasn't there, I wouldn't miss it.

After:

After lockdown, Jumana's engagement with and attitude towards television changed drastically. The return of her grown-up sons to the family home led to nightly family viewing in the living room: watching quiz shows and nature documentaries on linear, along with Bollywood movies on Netflix, brought them together as a family. This has changed Jumana's emotional connection to television, from being of little value to feeling indispensable. Watching TV with her family revealed content she didn't know was available, encouraging her to watch more. TV has become so important that it is going to replace her MBE in pride of place in her living room.

[We have now started] watching current TV. We started watching that *Who Wants to Become a Millionaire?* [...] we'd watch it and everybody'd answer the questions and see who would win. And so we started watching TV, which we never did. [TV's] giving family time, you know. [...] you're spending the time with your family. You're sitting there, you're engaging in stuff, you're talking about stuff. If you wasn't then you wouldn't have that to discuss, would you? I think in the lockdown, TV's playing a major role.

Because we have been watching that much TV [...] we decided to mount the TV on the wall. [...] Because it was in the corner [...] Now because we've been watching it, it's gonna be mounted up on the wall [...] it's gonna go where my MBE was, on the wall, right?

3. The New Need States of Covid-TV

Key Takeaway: Covid-19 has transformed people’s motivations for watching television, leading to new need states that VOD is particularly well suited to fulfil.

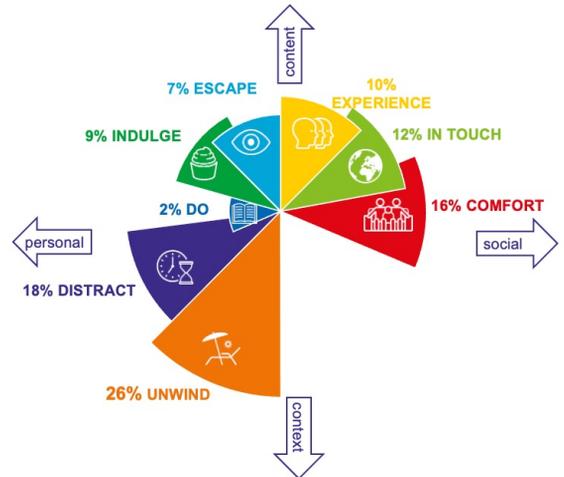
Before:

In 2019, our participants’ TV viewing largely aligned with the eight need states identified by Thinkbox in 2018 that drive people’s motivations for watching TV.

After:

With people facing increased anxiety and altered work, social and domestic lives, the motivations that underpin TV viewing have changed.

- ❖ Reducing anxiety and stress has become a primary motivation for TV viewing, reflected in the Sanctuary, Companionship, Connection and Escape need states.
- ❖ The need for information is vital but is associated with increasing anxiety and needs to be regulated.
- ❖ The Unwind (relaxing with low effort content), Distract (filling time) and Indulge (personal viewing) need states figured less prominently than in 2019.



Source: Thinkbox, 'The Age of Television' (2018)

The 5 Need States of Covid-TV:



Sanctuary

The need for reassurance and to feel safe.

TV is fulfilling a new and distinct need state in providing reassurance and a feeling of safety during the anxiety of living with a global pandemic.



Companionship

The need for shared time with household members.

Aligning closely with Thinkbox’s comfort need state, during lockdown TV has fulfilled an increased need for households to come together.



Connection

The need to feel connected to other people.

As the ability of people to socialise has been curtailed, TV’s role as social glue has come to the fore.



Escape

The need to lose yourself in another world.

TV’s ability to transport you away from everyday life has become even more vital as people found their daily lives constrained by lockdown.



Information

The need to be aware of what’s happening in the world while regulating anxiety.

Seeking information has been a crucial need state during Covid-19. But under lockdown this need state has become associated with increased anxiety for many people, leading to the need to regulate news viewing.



Sanctuary: 'The real world is challenging enough'

❖ The need for reassurance and to feel safe

Covid-19 has increased people's anxiety levels, and they have turned to TV for reassurance. Sanctuary refers to the feeling of safety that TV viewing can bring. This need state included seeking out content that was light and/or familiar, as well as actively avoiding content that was dark or challenging. VODs excelled as sanctuaries that limited encounters to 'safe' programmes.

Tone and subject-matter:

- Avoiding stressful or darker content and actively seeking out lighter and easier content.
- Sanctuary covers a range of genres, from Marx Brothers movies, to *Rich House, Poor House*, from *This Morning* to *Emmerdale*, from *Dad's Army* to sports highlights.
- Being more directed in routes to content in order to avoid exposure to programmes that might be upsetting or anxiety-inducing.
- VODs as safe spaces where you can easily avoid stressful content.
- Linear TV as a less safe space where you might accidentally encounter upsetting content.

I definitely don't want to watch things that are of a depressing nature, whereas prior to lockdown I might've been more open to watching it. [...] I want my life to be lighter, easier, less stressful, and I don't want any television to give me any negativity. (Alex, 65, M, White, B)

Nothing too sad [...] nothing tragic. [...] If it's something that's controversial, a crime documentary [...] I would normally watch a recording. But last night I just flicked through it and thought 'I don't want anything too serious.' (Helga, 54, F, White B)

There's been a drift towards stuff which is relatively unchallenging. I mean, the real world is challenging enough. (Fred, 65, M, White, B)

I started watching *You* and it became a little bit dark and twisted for me, so I thought, 'No, I don't want this as well as what's going on in the world.' I don't really want anything else to add to my fears. (Helen, 30, F, White, E)

Repeats and re-watching:

- Actively seeking out familiar programmes, channels or scheduling slots.
- Re-watching films and TV series.
- Continuing series that have already been started.
- Reducing or stopping experimentation with new content.
- VODs' recommendations made it simple to find safe and familiar content.

So they're normally the same genre of films, the same style and type. So I'll probably watch one of those just because I know it makes me feel good because going to work is tiring and hard because everybody else is at home. [...] So my feel-good film is really a relaxation where I can sit down, watch it, not feel guilty [...] Just something like *P.S. I Love You*. That's one of my favourite films. I can watch that every day. (Helga, 54, F, White, C1)

That's really what I'm watching on BritBox. I'm watching what I used to watch 20 years ago kind of thing. [...] It's probably comfort. (Mary, 58, F, White, C1)

I've really just gone for like the classics or whatever. I've actually watched more films that I've seen before, than new ones, really. (Edward, 20, M, White, C1)



Companionship: Back around the TV set

❖ The need for shared time with household members

Aligning with Thinkbox's 'Comfort' need state, during Covid-19 TV has been the focal point around which households have come together for shared communal experiences.

Before:

In 2019, TV viewing had become increasingly individuated. Our younger participants often watched in their bedrooms. Couples described using personal devices to watch different content, even when in the same room. Individual viewing preferences dominated.

After:

For many of our participants, the role of TV in their households had completely transformed from an individual to a communal experience. For these participants, TV brought the family together each night in a shared experience that was important in managing the anxiety of Covid-19. For some participants, being furloughed or not commuting had relieved stress at home, opening the door for a shift from individual to shared viewing.

New content choices:

- Nostalgic re-viewing: re-visiting earlier shared viewing experiences.
- Programmes that everyone can enjoy, often chosen together and saved for collective viewing.

New viewing habits:

- Return to the TV set: putting aside personal devices to gather nightly around the TV set.
- Recommendations and flexible availability of content to fit viewing around the different needs and routines of the household – VOD excels at this.

One of the biggest things that has changed, is that collectively as a family we've downloaded quite a few series and we've sat there in the evenings and watched them together, which rarely happened prior to the lockdown, to be honest. [...] I think it makes us feel a little bit better that we've all started watching something together and talking about it and what have you. And it's almost like an event that happens every day. You know, there's that structure and routine to it. (Musa, 50, M, Asian, C1)

[Our TV viewing has] completely changed. [...] we've actually spent a lot more time together in the same room watching telly together and, you know, probably talking a lot more [...] we both sit down and say, 'should we sit down and watch film and open a bottle of wine?' (Helga, 51, F, White, C1)

It has been really nice to be able to all sit down together as a family and watch [TV] together as a family. And that's the reason I got the Disney+ because adults can get into Disney movies as well. (Uri, 36, F, Asian, D)

We're watching *Money Heist* [...] it's one of those things I never got around to watching and then it was lockdown, and I was like, yeah, I'm gonna start it. And then my dad was saying he wanted to watch it. So then we just – because none of us had seen it – [...] oh, we'll just start it together then and watch it. [...] I'm not really watching TV like on my own. I really watch it with my family. (Meera, 20, F, Asian, C1)



Connection: TV as *the* Covid-19 talking point

❖ The need to feel connected to other people

Aligning with Thinkbox's 'Experience' need state, TV has become *the* talking point during Covid-19. With social activities curtailed, watching TV provides fodder for conversations, helping people to maintain social bonds when there are fewer opportunities to meet face-to-face.

Before:

- ❖ TV was one amongst a wide variety of topics for social conversations.
- ❖ Wanting to participate in shared experiences motivated some participants' TV viewing.

After:

- ❖ With fewer everyday activities to talk about, TV has become an important shared topic of conversation through which friends, family and workmates can retain their social bonds.
- ❖ Zoom has become the new water cooler: with fewer opportunities to meet face-to-face, TV is providing a talking point for online conversations.
- ❖ More people described specifically watching shows to be able to participate in conversations with friends and family.
- ❖ Our younger participants used remote co-viewing experiences to re-capture the social experience of TV viewing lost during lockdown.

New viewing habits:

- Not just live viewing experiences: during Covid-19, the ability to be able to participate in shared conversations about TV was driving the Connection need state.
- On-demand viewing became more important, enabling viewing of programmes that people were talking about and allowing for participation in conversations.

I woke up and everyone – it was all over social media – like this *Tiger King* documentary. And then at the [work] conference call, about 11 o'clock, [...] everyone was going, 'Have you watched the *Tiger King*? Have you watched the *Tiger King*?' So I thought, right, okay, we're gonna watch it tonight. We'll watch it tonight. We better watch it before everyone else does and starts telling us what happens. (David, 28, M, White, C1)

Even old things that were on years ago that never interested us at the time. We're watching those probably because we're desperate to watch what everybody else is watching. And to keep in with, you know, to keep that connection with friends that we haven't seen physically. That's our common connection. (Helga, 54, F, White, B).

It's not good, is it, if you've not watched it and you don't know what they are talking about. [...] sometimes you end up just watching things so you could be part of a conversation. (Gemma, 60, F, White, C2)

[Re Netflix parties] it's really lovely because it's just so nice being able to pause the video for everybody at the same time. It's just such a tiny thing and yet it makes a massive difference. [...] Everyone's at the same place and it's nice being able to have the video and the text on screen at the same time. [...] We're kind of waiting for everybody [from my University household] to get to the same point in *Call the Midwife*, and then we're all going to watch the finale of *Call the Midwife* together [...] so that we can pretend that we actually finished together. (Rebecca, 18, F, White, C2)



Escape: 'It's something I get lost in'

❖ The need to lose yourself in another world

The Escape need state differs from the Sanctuary need state in being focused specifically on the need to lose yourself in another world and become immersed in content. Where Sanctuary is all about the feeling of safety, Escape speaks to the desire for new and different experiences.

Before:

❖ In 2019 the Escape need state was primarily associated with our TV enthusiasts.

After:

- ❖ During Covid-19, the Escape need state was more important to a wider range of participants.
- ❖ Our participants described actively seeking out content to block out the stresses of the outside world and forget about living through a global pandemic.
- ❖ Some of our participants saw lockdown as an opportunity to be more experimental, being more willing to try new programmes and genres that they might have previously overlooked. This was partly because they had more time on their hands for television viewing.

New content choices:

- Programming that is engrossing, immersive and bingeable was particularly valued.
- VOD as a valued source of bingeable programming.
- Not just dramas and movies: people also valued factual entertainment shows, particularly those that take you away from the everyday reality of living through Covid-19.
- Experimentation with new programmes and genres.

When the TV's on you can just lie back and it can submerge you in a world. [...] Especially films and stuff, you can go from your everyday life and you can come in, you've not had a great day at work, and you can watch some comedy and you can laugh your head off.
(Jarrod, 19, M, White, C1)

[Re. *White Lines* on Netflix] It was very cheesy. [...] I think it was quite nice, 'cos it was all like nice setting, and it was in Ibiza with all nice beaches. Just very easy, very easy.
(David, 28, M, White, C1)

I think it's probably just, you know, anything travelling related. I've done a fair bit of travelling in my life and I've got a backpacker's spirit in me. So you know it's the things like *Race Around the World*, anything that fits that. (Carrie, 35, F, White, C1)

I don't know what it is about home improvement shows when I'm stressed. [...] It's something I get lost in. It calms me down. It actually allows me to think clearer, which sounds funny, but it does. At the end of it, I feel quite motivated and inspired. (Ruth, 35, F, Black, C1)

Outside of lockdown, sometimes you can sort of half-watch a program. It's almost like in the background, yeah? I think [now] I would want something more quite, you know, something that will be engrossing that you can really, you know, get into. And so it blocks, you know, distracts you away from other stuff. (Fred, 65, M, White, B)



Information: TV news is essential viewing...

❖ The need to be aware of what's happening in the world while regulating anxiety

During Covid-19, people's need to be aware of what's happening in the world was focused on news and information. TV news was particularly valued by all age groups as a source of information about Covid-19 but caused anxiety for many and needed to be regulated.

Before:

- ❖ For some of our participants TV news was a central part of their TV viewing.
- ❖ Participants often had specific TV channels that they went to for news.
- ❖ For others news did not feature in their habitual TV viewing.

After – Early lockdown:

- ❖ All of our participants talked about turning to television for information on Covid-19.
- ❖ At the start of lockdown most participants regarded TV news and the daily government briefings as appointment to view and valued TV news far more than before.
- ❖ Many people introduced specific news bulletins into their habitual TV viewing.
- ❖ Younger viewers came to TV news, often for the first time, finding it more trustworthy than social media.
- ❖ Public service broadcasters were particularly valued as trusted sources of news.

The value of TV news:

TV news was used by participants to help them:

- make decisions about lockdown
- to understand how the virus was progressing
- to stay informed about changes to the lockdown rules
- to be able to participate in conversations about Covid-19

When it started, I was watching a lot more news. A lot more news. I just- I couldn't not listen. I was listening to Radio 5 Live when I was in the kitchen, and then as soon as I finished work, I'd turn on the telly at five o'clock and I'd be watching news. (David, 28, M, White, C1)

The reason I was prepared for it [lockdown] was because I'd been watching BBC News [...] I realised it's importance pre-lockdown, when me and my partner were talking, and we were talking and she's just like, 'I think there's going to be a lockdown.' And I said, 'Do you really think so?' And I started looking at the news, I'm just like, 'Yeah, there will be lockdown.'
(Jarrod, 19, M, White, C1)

I think the ability to get some at least relatively unbiased information is quite useful. [...] Because [with] some of the Internet areas, its very difficult to decide just how truthful some of it is. Whereas with the TV, it's a bit different- [...] It's easy to knock the BBC for a certain amount of left-wing bias, for example. But in general terms, at least there is, to my knowledge, is that it is at least relatively truthful. (Liam, 68, M, White, B)

I think it's providing me with information which is good because obviously in a village, you are, isolated from the world. So the television is very important to inform you. (Alex, 65, M, White, B)



Information: TV news is essential viewing... but upsetting

After – Late lockdown:

The Information need state was where we saw the biggest change during lockdown.

- ❖ Information about Covid-19 is vital, but the TV news can be distressing and frightening.
- ❖ Many of our participants described reducing their TV news consumption as lockdown progressed because they found it increased their levels of stress and anxiety.
- ❖ Some participants reduced their TV news consumption because they disliked what they perceived as negative reporting. For these participants information about Covid-19 was valued more than analysis and critique.
- ❖ A small number of participants claimed to watch little or no television news, often specifically avoiding watching news on television. These participants either regarded TV news as depressing – ‘morbid and boring’ (Hank 22, M, White, C1), ‘doom and gloom’ (Ruth, 35, F, Black, C1) – or they had lost faith with television journalism.

Regulating news consumption:

Some participants adopted strategies to regulate what and how much news they watched:

- Tuning in only for specific programmes at certain times of day, such as for an evening news bulletin or the 5pm updates.
- Avoiding 24-hour news.
- Seeking alternative sources of news, such as daytime TV.
- Using YouTube as a way of accessing news from the BBC and ITV, as it facilitated more control over how much and which stories were watched.

I certainly don't watch the coronavirus updates every day. [...] We have to balance what's right for us where we want to know what's going on and we're aware of various scandals and things and get the news, but don't be obsessive about it. (Fred, 65, Male, White, B)

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

We stopped watching the news because [...] it gets you wound up. [...] They're just sort of a bit depressing. (Thomas, 55, M, White, B)

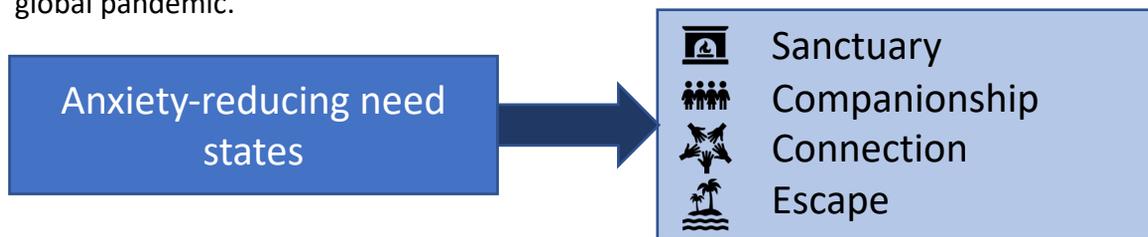
I've found out bits of news, 'cos [my husband] will still watch it [but] he won't put it on when we are having tea because I end up crying. [...] I do try and watch if, sometimes the speech [Covid-19 briefing], but that's all I want to watch.

When it becomes the questions afterwards, that when [the news] goes off because I think that is so wrong. (Natalie, 55, F, White, C1)

I do watch *This Morning* in the morning and watch a lot about the virus and what's going on and it keeps me updated, but in a more comforting way than the news. [...] I do watch the news now and again, but I haven't tuned in with the news for about two weeks, since Boris did his last talk. [...] I used to watch the news a lot more when the lockdown period wasn't here and everything was fine, but now I feel a bit scared and worried about what they're going to say. So I don't really tune in as much. It just upsets me. (Helen, 30, F, White, E)

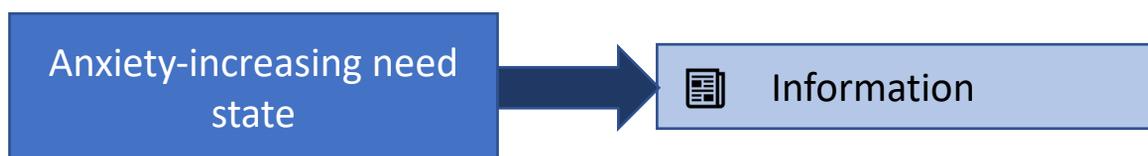
Anxiety-reducing need states

Sanctuary, Companionship, Connection and Escape can all be understood as anxiety-reducing need states driven, in different ways, by the need to manage the stress of living through a global pandemic.



Anxiety-increasing need state

By contrast, the Information need state, while vital, is associated with increasing anxiety during Covid-19. Therefore, the Information need state combines the need to be aware of what is happening in the world with the need to regulate the consumption of news and information, in order to manage the anxiety that it can cause.



New Routes to Content Under Covid-19

The changing need states during Covid-19 have altered people's routes to content. We asked participants to identify the one most important thing in helping them to decide what to watch. In May 2020, household dynamics topped the list. Mood had become more important to the desire to watch a specific programme or genre. Reviews of programmes and marketing were less important as people were more cautious about trying new shows and watching less linear TV (a primary source for accessing trailers).

Routes to Content: Aug/Sept 2019	Covid-TV: May 2020
Platform/service features (8 people): EPGs, recommendations, categories, search and descriptions within user interfaces (UIs).	Household dynamics (8 people): Content for shared viewing within the household.
Word of mouth (8 people): Recommendations from friends, family and colleagues, including social media.	Platform/service features (7 people): EPGs, recommendations, categories, search and descriptions within UIs.
Marketing (5 people): Trailers – on-air, through social media and in UI's.	Content features (6 people): The desire to watch a specific programme or genre (mood).
Content features (5 people): The desire to watch a specific programme or genre (fan interests).	Word of mouth (4 people): Recommendations from friends, family and colleagues, including social media.
Reviews (4 people): In newspapers, TV magazines and online.	Reviews (2 people): In newspapers, TV magazines and online.
	Marketing (1 person): Trailers – on-air, through social media and in UI's.

Rebecca's Story:

From individual experimenter to 'I can't bring myself to start something new'

Before:

In 2019 Rebecca (18, F, White, C2) was on the brink of moving to university. She lived with her parents, but rarely watched TV with them: instead, she was experimental and open minded, seeking critically-acclaimed content that she watched alone on her laptop.

Currently I tend to find out about it based on what people are talking about on Twitter. So I follow a lot of journalists, [...] film critics and art critics and art correspondents. So if a lot of them start talking about something I'll be, like, 'oh, that sounds like an interesting thing to watch.'

After:

Sanctuary: By lockdown Rebecca was back at home and deeply anxious about Covid-19. She was afraid of any content that may be mentally taxing and sought familiarity and comforting TV. From actively seeking out new things to watch, she now can't bring herself to start new programmes and is avoiding ending series too, because it would make her too anxious.

I just kind of want stuff that's comfortable, I guess. Stuff I'm familiar with that doesn't make me think too hard [...] I think my brain is doing enough thinking on its own. It doesn't need prompting.

I've been less keen on trying new programmes. I've noticed quite distinctly, people keep on recommending stuff and I'm like, 'oh, not sure I can bring myself to start something new.' And also I'm finding endings of things quite difficult.

Companionship: Since Covid-19 Rebecca has taken particular solace from time spent every evening watching TV with her family.

Sitting down with my parents to watch *The Crown* at the end of the day is comforting in that it's the end of the day, we're winding down, we're together as a family.

Connection: Rebecca has turned to virtual co-viewing of Netflix and YouTube to maintain relationships with the friends she can no longer meet in person.

I watch alongside other people as a sort of Netflix party, and YouTube and stuff like that. We're doing it together, so there's kind of that idea that we're still maintaining those relationships even when we're really far apart and we're just kind of using television as a catalyst to that, something to focus things around because we're awkward and British, we don't talk about feelings. So just be like we're really here to watch TV, but we'll just talk about how messy life is on the side of that.

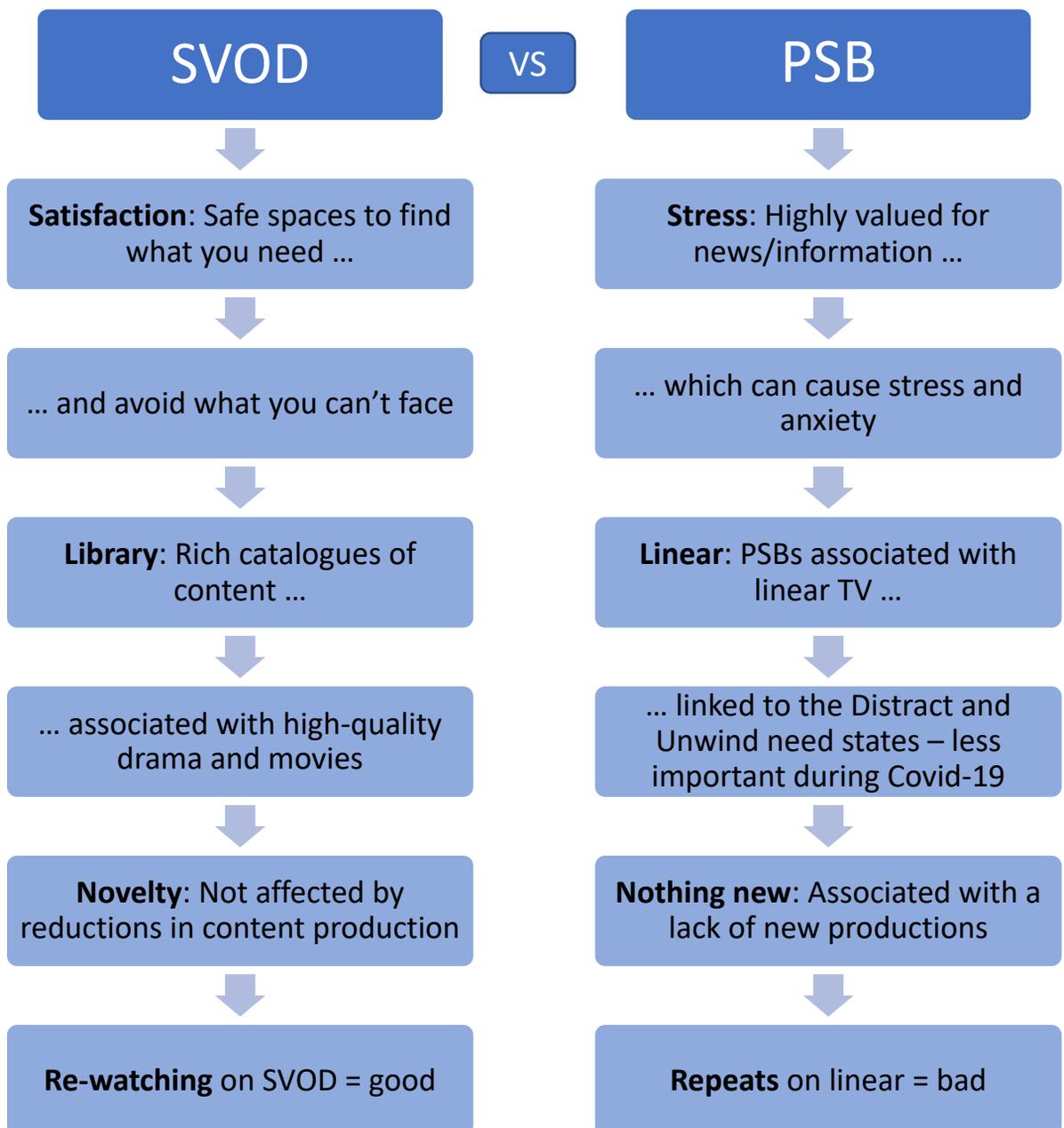
Information: Before lockdown Rebecca did not use the TV for news and information, preferring to read online or use social media. Since lockdown, TV news has become a habitual part of her TV-viewing routine.

I had not really watched the news regularly at all for a number of years. [...] Whereas now because everything's happening so rapidly, and sort of chaotically, and we want somebody to explain what the government briefings mean because we don't want to watch them every day because they're really depressing, we are essentially watching the news every night because we're like, we just want to know what's happening in the world. I'm definitely watching it, I'd say like 90 percent more than I was before, and a lot more in sort of TV form.

4. SVOD vs PSB: Fulfilling the Need States of Covid-TV

Key Takeaway: During Covid-19, SVODs have been more successful than PSBs in fulfilling the anxiety-reducing need states of Covid-TV.

- ❖ SVODs are thriving during Covid-19 because they have fulfilled the anxiety-reducing need states of TV viewing. Because they don't provide news, they avoid the negative associations of the Information need state.
- ❖ PSBs suffer from their associations with linear TV, reports of reductions in new productions and a rise in repeats. The positive benefits attributed to SVODs do not always carry over to the BVOD services of PSBs.



1. Satisfaction vs Stress: SVODs win over PSBs in regulating anxiety

SVODs were strongly linked to the four need states that are associated with relieving anxiety:



Sanctuary: SVODs are safe spaces to find content to suit your needs and avoid exposure to content that might be troubling, difficult or stressful.



Companionship: SVODs provide the flexibility to fit shared viewing around the needs and routines of the whole household.



Connection: SVODs help people to find content that others are discussing so that they can participate in conversations with friends and family.



Escape: SVODs are a reliable place to find bingeable content to escape into.

I went to Sky Cinema and Sky Store to see if there was anything new out and there wasn't anything that matched what I like looking at. And then I was like, actually, you can do this better on Netflix. So I just went to Netflix and went to something that was recommended me, because I always watch that kind of stuff. So it would be in there if it was going to be anywhere. (Ruth, 35, F, Black, B)

That's probably why I'm watching films [on SVODs] because that's my come down off the situation because I'm completely aware of what is happening. (Helga, 54, F, White, C1)

I think at the start of lockdown, I [thought] this is a time when I could catch up on all those shows that people told me that I should have been watching. Branch out and sort of expand my tastes and get a bit more sophisticated. But it has very quickly degenerated into the *Vicar of Dibley* and *Derry Girls* [on Netflix] (Rebecca, 18, F, White, C2).

PSBs were primarily associated with the Information need state, which is a source of anxiety for many participants. Our participants did discuss PSB programmes in relation to the need states of Sanctuary, Companionship, Connection and Escape. However, when asked specifically about the value of PSB, they focused on news and information.

BBC, more of a role when it comes to the facts, you know, the news, which leads me on to say I've probably watched more news than I've ever done since lockdown. (Nigel, 56, Male, White, C2)

BBC has definitely, both of them [BBC and ITV] have become more essential. Not in terms of, necessarily, programming, like putting shows out there. [...] But I think they become important at communicating news. (Jarrod, 19, M, White, C1)

I: What role would you say TV channels like BBC One and ITV have in your life at the moment? Are they more or less important during lockdown?

R: More. Because we get the updates, we get the facts. [...] You get to know what's happened, what is happening, and what will happen. (Helga, 51, F, White, C1)

BBC is my go-to channel. I want the news and local news on that. (Alex, 65, M, White, B)

The BBC has become more important [...] because it's all about the news. (Melissa, 55, F, White, C1)

2. Library vs Linear: perceptions of PSBs tied to linear

SVOD services were associated with rich and accessible libraries of quality dramas, documentaries and movies that were highly valued by our participants.

Fortunately just before lock down started Sky notified us that 'would we like the new up-to-date box, free?' [...] which has been a godsend really because now we have Netflix, and YouTube and everything [...] I'm watching *Orange is the New Black*, there's been a few films as well, I can't name them all because I forgot we've watched that many. (Gemma, 60, F, White, C2)

It's a bit like, sort of a bit like a library, if you know what I mean. Because, you know, it's there, Britbox is there with all these programmes. [...] I can just dip in and out whenever I want because it's just always there. (Mary, 58, F, White, C1)

R: We're watching a lot of Netflix.

I: I think you had it last time but never used it.

R: There's a lot of films, there's all kinds of film, you know, English and there's Bollywood films that they have. (Jumana, 54, F, Asian, D)

PSBs are strongly associated with linear TV.

- ❖ Linear TV is particularly effective in fulfilling the Distract and Unwind need states, which have been less important during Covid-19.
- ❖ Linear TV is valued for providing a wide array of genres, but many of these are lower status or ephemeral, such as soaps, light entertainment, quiz shows and news/current affairs.
- ❖ Participants often described turning to linear PSBs for something more disposable to watch in the daytime or with dinner, but to SVODs at prime-time for a movie or drama series. Because linear is time-bound, SVOD is seen to offer more choice and flexibility.
- ❖ The association of PSBs' BVOD services with linear catch-up persisted, although there was greater awareness that they were providing more box sets.

Netflix that's more of a box set mentality [...] so I won't start watching in the day because I would probably just flip through TV guides [EPG] if I had half an hour in the middle of the day and end up watching things they [the kids] like, you know, *Come Dine With Me* or *Friends* or something. But in an evening, I would be more inclined to go on to the movies, look through recordings or have a little glance at Netflix. (Carrie, 35, F, White, C1)

I'm not watching anything current on telly, only news, the *6 O-Clock News*. [...] As soon as I sit down, I'll see what's on [linear TV] and then go on to Amazon [...] I never end up staying on the telly. I just go straight to Amazon. (Helga, 54, F, White, C1)

We've watched less on the live TV, but I will have a look at the TV guide on the TV and just see what's on at the start of the evening. And I have to say probably 9 times out of 10 there's nothing there that I'm keen on watching. [...] Often I clock that there's something that we might want to watch and then I'll probably watch it on the streaming service. (Fred, 65, M, White, B)

I'd say the big difference is there's a lot of back issues now on the catch-up programmes. [...] So we've got a list of items that probably wouldn't have been on catch-up had it not been for releasing a load of stuff during lockdown. (Liam, 68, M, White, B)

3. Novelty vs Nothing New: PSBs associated with disruptions to production

SVOD was a novelty where many of our participants were enjoying finding a wealth of new content (particularly dramas and movies) to watch and loved content to re-watch.

We did go through a phase of, like, we'd go through all the old films [on Disney+], like we watched *Cinderella*, *Peter Pan* and stuff like that. [...] but they've also got like Marvel on there, so that was quite good. And they've got *Star Wars*. My dad loves *Star Wars*. (Meera, 20, F, Asian, C1)

Britbox, I don't know whether it is for everybody, but to me it's made for old people. [...] it's got all old programmes on. I'd forgotten how absolutely brilliant Dawn French was in *Vicar of Dibley* and she is just unbelievable. So I've been watching a few *Vicar of Dibley* [...], *Morse* and *Lewis* and *Midsomer Murders*. (Mary, 58, F, White, C1)

PSBs were more likely to be associated with a lack of new programmes. Our participants were keenly aware of the disruption to TV production caused by Covid-19, leading to the perception that there were no (or very few) new shows being made by the PSBs and a sense that the linear schedules had been disrupted. The soaps were particularly missed and often substituted with SVOD. As people's use of, and affinity with, the linear schedules had weakened they became less aware of new shows coming to linear TV.

When you'd get home from work, you'd scroll through and be like 'oh, that looks like a new program on Channel 4,' whereas now, I'm not doing that as much cause I'm kind of thinking there's nothing new that's going to be on. [...] Now, I'm more just going – when you open Sky up, it brings like all your recordings and like 'continue watching this' on Netflix. (David, 28, M, White, C1)

[The BBC] can only really do reruns of stuff at the moment, they can't really present anything new. They do occasional new stuff but it's not really the same. You know, it's often, say they're doing an interview show, it's often on Facetime or whatever. (Jarrod, 19, M, White, C1)

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)

Normally I watch a lot of soaps. [...] It's not on every night, and now it's just limited. So I've been watching some stuff on Netflix. [...] I'm watching more films that I used to do. (Randell, 44, M, White, D)

I [previously] would have the news on at six o'clock, so while I'm eating my tea or whatever. But at the moment I would definitely not put the news on 'cause I am sick of hearing all about this. [...] I just think, 'Oh, you know what, tonight, I just want to watch a *Miss Marple*.' So then, I would just go straight to BritBox. (Mary, 58, F, White, C1)

4. Re-watching vs Repeats: Linear repeats are bad, re-watching on SVOD is good

SVODs were valued as a place to re-watch loved content, such as movies and high-budget dramas.

PSBs were criticised for showing repeats in their schedules. There was a strong perception that there were more repeats on linear TV. This often drove people to SVODs. Repeats were more acceptable for certain genres favoured by SVODs (comedy, drama, movies), than the light entertainment and event programming often associated with PSB.

I: Have TV channels like BBC One or ITV become more or less important during lockdown, or the same?

R: I feel like they're trying to be more, but they have become less because I feel like a lot of everything that they're showing is just a repeat. [...] They put on *Through the Keyhole* and then before they've got *Ninja Warrior* on, but with those they're re-runs and everyone's already seen it. It's kind of like, what's the point? I thought, 'we've already seen this.' And then with BBC, they were putting on *Gavin and Stacey* every, I think it was every Saturday.

My dad's like, every British person loves watching it. Like, it doesn't matter how many times we've seen it, they'll still watch it again, but then that's only half-an-hour everyday.

(Meera, 20, F, Asian, C1)

I: So, has it been because of lockdown that you've got hold of Netflix?

R: Yeah. Because what else is there to do? I mean we always have our tea at night for *Come Dine With Me*. [...] but they're all repeats. (Polly, 67, F, White, C2)

I: Have the TV channels like BBC One or ITV become more or less important under lockdown?

R: Well, I'll probably say less important. [...] Because there's just the same old programmes on it that we don't watch anyway. And then [...] with like Netflix and things like that, they've got more variety [...] and you can specifically target what you want to watch. (Thomas, 55, M, White, B)

Gemma's Story: 'I just feel blessed that we got Netflix'

Before:

Gemma (60, F, White, C2) was interested in content on SVOD but did not bother sourcing it: she felt there was plenty of content readily available on PSBs.

I'd really like to have watched one called *The Crown* [...] but it was on something we haven't got, [...] there was so many other things to watch at the time, I have sort of let that one go [...] it's a struggle to get to watch what we watch; do you know what I mean?

After:

A combination of receiving a new Sky Box and lockdown led her to investigate Netflix's offering, and she's been incredibly pleased with the wealth of content now available.

I've been watching a lot more TV, obviously because there's nowhere you can go. I'm still very much the same on like my dramas and films and true stories and whatever. I'm watching several on Netflix at the moment. I just feel blessed that we got Netflix.

Melissa's Story: From PSB staple to Netflix convert

Before:

Melissa (55, F, White, C1) tended to plan out her evening based on what was on the PSBs. She had a clear idea of what content she could find on the different channels on specific days. She was impressed by the drama and documentary offering on (especially) BBC and ITV. Her dependency on her husband to navigate the channels for her meant she rarely explored beyond her familiar terrain and was heavily reliant on PSB advertisements for new content. Thus her positive perceptions of new PSB content were vital in driving her viewing.

They are always advertised. Whenever one is about to finish, there is another one being advertised. [...] Like the *Dr Foster* one, that was very good. And it is coming back again. In fact, not long ago they were showing you some on there that are coming back. They were just reeling them off, it was things like *Killing Eve* and things like *Dr Foster* and maybe some others as well, gripping dramas.

[TV adverts] show you something that is coming up. You think 'oh that looks good, *Deepwater*, I am going to watch that' [...] we like the BBC dramas as well.

After:

During lockdown Melissa discovered Netflix after her son downloaded and signed into it for her. She was impressed by the array of new and unexpected content on Netflix and enjoyed searching for new content herself. PSBs still featured but were not the final destination for evening viewing: instead, Netflix was turned to for the prime 9pm slot. This was magnified by her sense that there were fewer new releases on PSBs, whereas everything on Netflix felt new.

'R: My son says 'we've got our Netflix you can use our code' [...] And now we're thinking you know what, I think we're gonna have our own Netflix. [...] We're watching more and more films at night.
I: Okay. That's really interesting, 'cause last time you were quite an ITV, BBC One sort of person.
R: That as well, but now when that's all finished, sort of about say at nine o'clock time or maybe even sooner, we're watching a film.

I don't want to watch something I've already watched just for the sake of watching something. I'd rather do something else. Watch something else, go on Netflix and watch something. [...] I can't stand repeats, I find them very annoying.

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].

New Priorities for PSBs

Covid-19 has accelerated the uptake of SVOD across all demographics, because SVODs are particularly well-suited to the need states of Covid-TV. Some of the challenges for PSBs will be short-lived as production recommences. Others will continue beyond the immediate context of Covid-19. To address the short and long-term challenges PSBs need to prioritise the following:

1. Sanctuary vs Stress

- ❖ The role of PSBs in providing news and information is highly valued and should not be curtailed.
- ❖ But PSBs could do more to help people to regulate their news consumption by:
 - ❖ offering news and information in bite-sized chunks where people can select the stories they view
 - ❖ offering news and updates in a variety of forms (factual, analytical, light) to meet different needs
 - ❖ distinguishing news items that provide information from those that provide critique and making them easily accessible on-demand
- ❖ PSBs' BVOD services could facilitate the new routes to content that have emerged during Covid-19, helping people to find content for shared household viewing or to suit the moods of the anxiety-reducing need states of Covid-TV.

2. Library vs Linear

- ❖ People have strong knowledge and expectations of the linear schedules. As the schedules have been disrupted during Covid-19, people's habitual viewing behaviours have been disturbed, accelerating their move towards SVOD.
- ❖ PSBs need to reconsider the role of the linear schedules in a hybrid linear/on-demand world. People will make an appointment to view content on linear, but the schedules need to be consistent and dependable.
- ❖ As the Distract and Unwind need states associated with linear TV have become less important, PSBs need to do more to communicate how linear can fulfil the anxiety-reducing need states of Covid-TV.

3. Novelty vs Nothing New

- ❖ To shift the perception that there is nothing new on linear/PSBs, marketing the new content returning to linear TV and coming to BVOD should be a priority.
- ❖ As people's habitual viewing of linear declines, on-air trailers become less important as a way of learning about new and returning shows, making other forms of marketing more crucial.

4. Re-watching vs Repeats

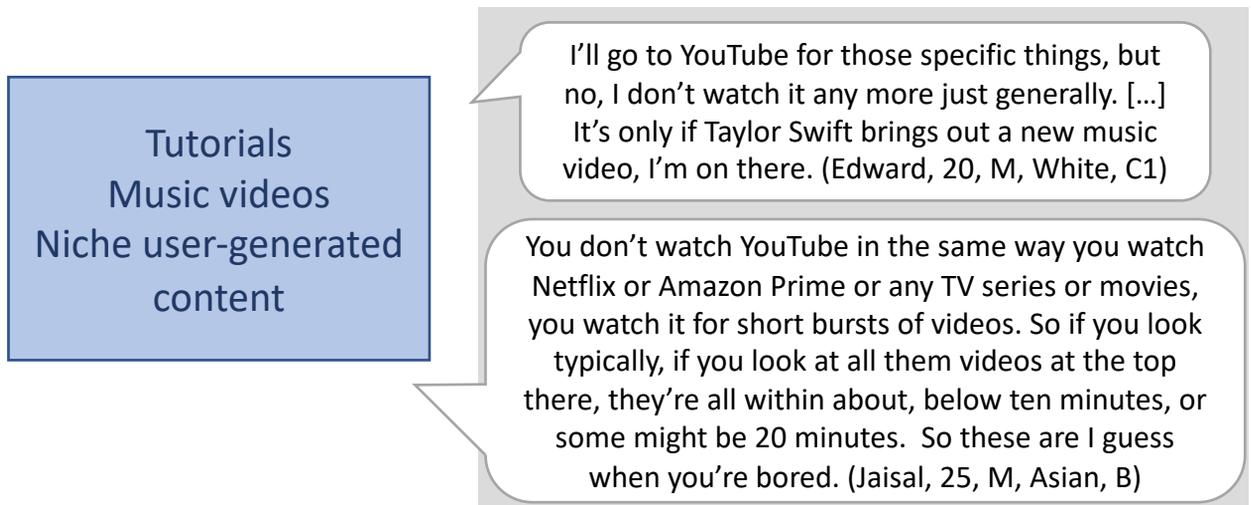
- ❖ PSBs offer a wide range of content that is highly valued by viewers. Their BVOD services have to do a more complex job than the SVODs in offering access to a wider range of genres that fulfil different kinds of need states and link linear and on-demand.
- ❖ The PSBs BVOD services are no longer just places to catch-up on content missed on linear, but this perception persists and needs to continue to be addressed in marketing.
- ❖ PSBs could also learn from SVODs like Netflix which design the interfaces of their VOD services to create the appearance of an abundant library with no limits.

5. The Rise of YouTube For Engaged Viewing

Key Takeaway: Our participants were making more habitual use of YouTube. Its content supported all the Covid-TV need states in ways that were highly personalised and oriented to people’s specific interests. YouTube was also a valued site for accessing PSB content.

Before: YouTube for niche, distracted viewing

While a minority of participants were using YouTube to fulfill the needs associated with linear TV and SVODs (such as information and escapism) many were only accessing it with specific content in mind. It was associated with instructional videos to be accessed throughout the day, but also often used for distracted viewing, as a background to, or filler in-between, other activities. YouTube was also more likely to be regularly used by our younger participants.



After: YouTube for engaged viewing of TV content

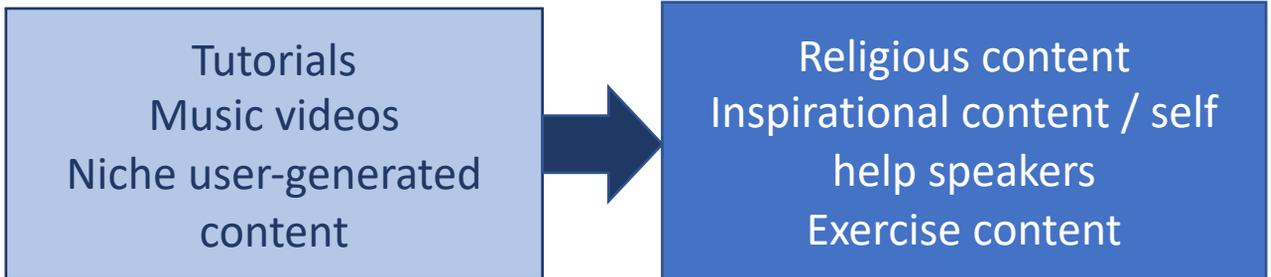
During lockdown, a wider range of participants increasingly considered YouTube to be a content platform. They were spending longer on here and now browsing, rather than solely seeking targeted content. While the ‘first line’ was often still YouTube-specific content, they were now finding the kinds of content that was previously associated with PSBs and even SVODs. ‘User-generated’ now implies a quality and in-depth expertise. YouTube is able to fulfill all of the need states of Covid-TV, but without the negative associations that PSBs accrue for providing news and information.



How did YouTube go from distracted to engaged viewing?

Drawing people in by substituting for missed activities during lockdown:

The loss of activities during Covid-19 meant that our participants turned to YouTube to fulfill everyday needs that were not met elsewhere. YouTube's reputation for practical help – combined with recommendations and direct links to content to replace in-person activities – meant many participants relied on the platform during this time for new content.



I remember seeing that Joe Wicks PE thing because I'd heard from the news that Joe Wicks was this big thing and becoming the nation's PE teacher and all of that [...] I did then think, 'Ooh, do you know what? I'll have a go at that.' And, you know, I was turning the TV on [for] something else and I put that on instead, and it streamed one of his PE sessions. (Carrie, 35, F, White, C1)

Because of Ramadan, I've been watching a lot of these [videos from a] scholar from Africa. [...] I like how his words are so meaningful. How they put everything in the context for you and make you understand things. And he just, it feels like everyday and he puts a quote or something, it feels like he's talking to you. And he's really, really good and puts everything into perspective for you. I've been watching him a lot on YouTube. (Jumana, 54, F, Asian, D)

Targeted recommendations drive viewing of new content:

As awareness grew, participants were drawn to the short, succinct and personality-driven nature of YouTube. The algorithm facilitates a natural flow from one video to the next, and participants found themselves following suggested content and in turn discovering new content creators/channels, that they became increasingly attached to.



How did YouTube go from distracted to engaged viewing?

Recommendations, channels and search effortlessly take people to valued content:

By fulfilling the needs motivated by lockdown, more positive brand associations and content expectations with YouTube were built. As familiarity with the platform grew, participants began to actively explore more within the platform, seeking out what content was on the platform and feeling pleasantly surprised by the wealth of content that was available. YouTube was particularly valued for being able to fulfil specific and personal viewing interests that were not fulfilled by mainstream TV.

Participants began to actively search for content, selecting what was relevant and bypassing what seemed superfluous. Aided by YouTube's recommendations and channel subscriptions, they were able to create their own content library, developing their own patterns of use and content interests. YouTube became an increasingly enticing platform as participants knew it would offer relevant content that built on their previous viewing.

The increased availability of YouTube on the television set also broadened people's access to, and use of, the platform. It became a destination for both specific and exploratory content, with participants beginning to incorporate it in their habitual viewing behaviour.

Summaries of PSB news
Highlights from PSB content
Documentaries
Content generated by loved TV personalities

I tend to get on YouTube because you get some really good documentaries. [...] I'm into history a lot, [...] like the Native Americans in America, that sort of thing. There's loads of that I can, like documentaries that you get on YouTube. (Thomas, 55, M, White, B)

It's obviously very specialist. [...], so there's a series about the First World War, which I know has been on the telly many, many times, but it's much more detailed and it covers parts of the war and the aftermath, which is of particular interest to me. The aftermath which you don't get on mainstream TV. [...] I'd say they tend to be my fillers. So they're short, I mean, maybe 10 or 15 minutes. (Fred, 65, M, White, B)

So I was looking into a specific actor, about his bio, blog or something that came up on Instagram. So I Googled it. [...] And then it took me to YouTube. [...] He was doing a morning show and like he came up on it and was talking and stuff like that. So I clicked on it and I watched it. So then after that, all these morning shows came of all different actors that, you know, were relevant. I thought, 'Oh!' [...] So then when I'm done, that would make me watch another one and another one and another one. And that's what I started doing now. I started watching lots of morning shows [on YouTube]. (Jumana, 54, F, Asian, D)

YouTube Fulfills All 5 Need States of Covid-TV

YouTube caters for all the need states of TV viewing during Covid-19. It is particularly effective at allowing participants to regulate the content they engage with to suit their moods and desires at any given time. The personalisation opportunities with YouTube provide control over content, which helps need states to be met and allows people to regulate the anxiety associated with the information need state.



Sanctuary

The ability to watch short, punchy, and focused content – without any nasty surprises – means that YouTube effectively provides a safe sanctuary for viewing.

I sometimes have my own little fillers on YouTube. Old *Sherlock Holmes* episodes from the ITV series back in the '70s. I found those quite comforting to watch. [...] I think something related to Sherlock Holmes might have been, for some reason, recommended. (Fred, 65, M, White, B)



Companionship

While often viewed alone and individualized, YouTube has supplied content that can bring families together, such as child-friendly content and exercise classes.

When we first came in lockdown, they were doing sessions in the garden, exercise sessions [...] using YouTube. [...] I would like to half-heartedly semi-join in. (Musa, 50, M, Asian, C1)



Connection

YouTube's recommendations and channel subscriptions allow for a sense of connection and intimacy to be built with content creators, where participants seek familiar, trusted and appreciated content over and over again.

I was searching the game which is *Call of Duty* or *Warzone*, how to improve. [...] Once you start consuming some of them videos through searching for them, they will start pushing you the most popular content creators. (Jaisal, 25, M, Asian, B)



Escape

YouTube is a rabbit hole, where participants are happy to be guided from video to video. Participants became increasingly aware of longer-form content available here, immersing themselves in documentaries or spin-offs from other favoured content.

[YouTube is] really anything and everything to be honest. [...] I can start with one genre and end up somewhere totally different. (Nigel, 56, Male, White, C2)



Information

YouTube became a vital source of news during lockdown, as the ability to control information and content was deemed a key feature. Participants engage with PSB news but on YouTube, selecting news clips to remain informed, but moving on before anxiety peaked.

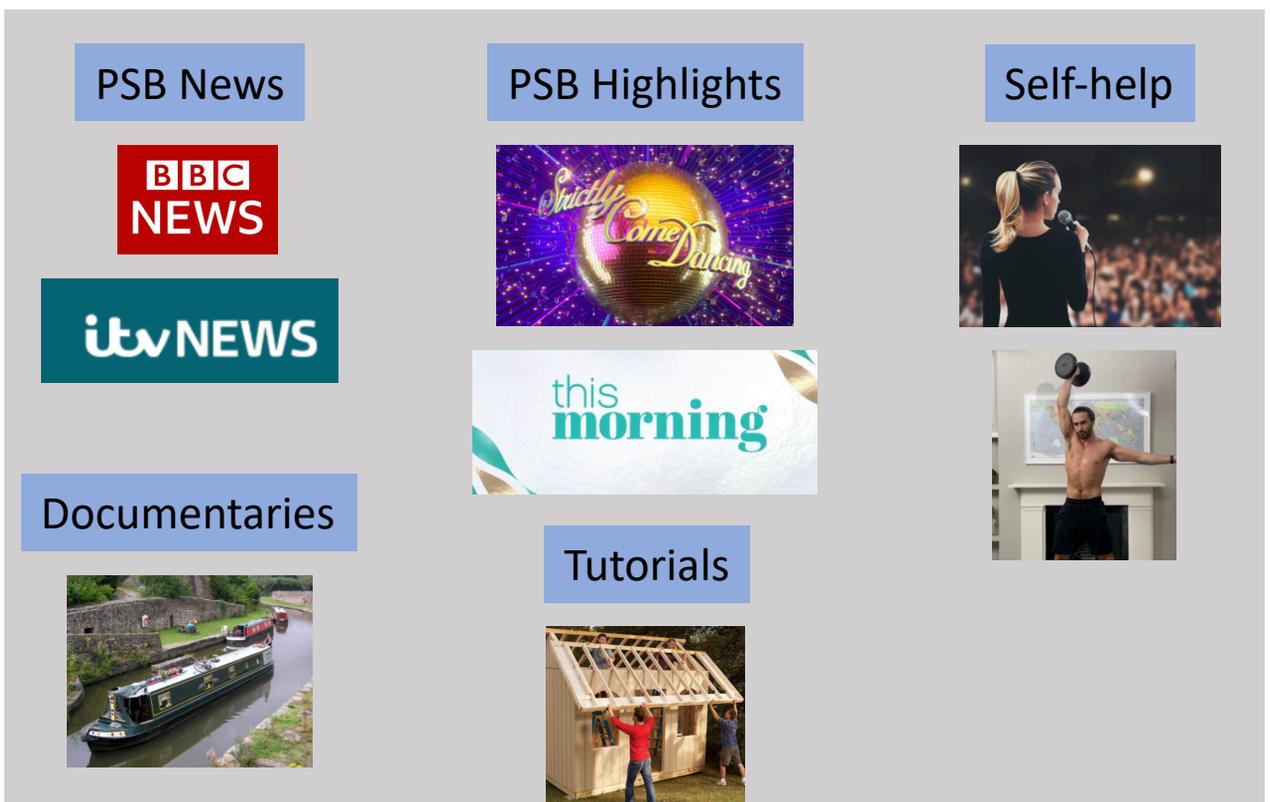
On YouTube it's just the fact that you can turn it off if you don't want to watch it. Just go into the next video. [...] The majority only last about 5 minutes of extracts from the news and they pick out the best bits [...] and if you don't want to watch the next one you just skip on to the next video and watch that. (Thomas, 55, M, White, B)

What Does This Means for PSBs?

YouTube allows access to PSB content without the commitment of going to the channel and watching full programmes. It is valued for providing edited and summarised videos of lauded PSB content (such as news coverage, government announcements, entertainment programmes), without the inconvenience of time restraints associated with linear viewing.

Lower brand expectations (where participants previously associated YouTube with user-generated content or 'light' entertainment, such as music videos) means participants are impressed when they find 'high-end' content on YouTube typically associated with PSBs, such as documentaries.

Smart TVs and home page applications facilitate 1-world access to YouTube. Some were substituting browsing through linear TV in favour of browsing through YouTube.



Martin's Story: From YouTube occasional to YouTube staple

Before:

Martin (45, M, White, C2) was a low TV viewer, typically only watching it with his family members or for specific sports events. He did use YouTube, but associated it with children's content or tutorials.

[I use YouTube] for the kids when we're on holiday, you know, I put, well when we're travelling in the car I'll put Mr Bean on the phone and balance that up behind my seat somewhere so that they can watch it.

After:

During lockdown Martin discovered YouTube for himself and was drawn to the vast collection of content that appealed to his interests. He was able to pursue personal interests as well as immerse himself in content that elaborated on programmes he had seen on PSBs. Being able to access YouTube on his smart TV meant that he started to make more regular use of the platform. Although Martin still infrequently turns to TV as an activity, his directed viewing on YouTube is prolonged by tailored recommendations that encourage him to keep watching.

I've also been watching [...] Robbie Cumming, *Canal Boat Diaries*, it's quite good, so I watch that [...] It was on telly, it was on BBC Four. [...] And I watched it, and then I Googled him. And I didn't know he was on YouTube, because he's got his own YouTube channel, I only thought it was one on BBC Four, I think it was about half a dozen episodes and I was a bit sad when it finished because I used to like that. But I went on YouTube and it's very similar to what's on telly, but all his own work, so I started watching them. [...] It's all changed since I've had this smart TV and it's great 'cause I go on YouTube on that. [...] So yeah, I've been watching quite a lot on there.

Thomas's Story: YouTube for regulating news

Before:

Thomas (55, M, White, B) had relatively limited engagement with the TV news. He was highly critical of news on terrestrial television and preferred to access it on the internet.

I can get the news on internet as well so why, why pay for terrestrial TV. [...] 'Cause it's rubbish!

After:

The uncertainty of Covid-19 and the lockdown led Thomas to engage far more with television news. However, he opted to seek his news as and when he wanted it on YouTube, rather than tuning in to linear TV. TV news on the BBC and ITV was deemed boring, long-winded and anxiety-inducing, whereas on YouTube Thomas could source only the announcements and information that were relevant and appropriate for him.

We stopped watching the news quite a long time ago. 'Cause that was just boring or was just depressing. [...] We probably watch it a bit more now, the news. Just sort of to keep in touch. But I watch this every night on YouTube. [...] it's all there in one area. You don't have to go to different pages on the Internet. I just go [to YouTube] then you put the search engine, you put in 'Covid-19', and it'll bring a list of channels and everything that has something to do with Covid-19. [...] A lot on the virus thing is [on] an actual special channel thing on YouTube- [...] that shows all the different interviews and announcements that have been made so you can get to go watch it live, or you can, if you want to, watch a recording of it.

6. Covid-TV: Activities, Method and Sample

Context:

Covid-TV gives a unique insight into how TV viewing behaviours have changed pre- and post-Covid-19 by building on the Routes to Content research conducted by the University of Huddersfield in August/September 2019. In that study we interviewed 30 people in their homes about how they found and made decisions about what television to watch. Covid-TV returned to 28 of these people in the last two weeks of May 2020 to find out what impact Covid-19 had on people's television viewing habits. You can read the findings of the Routes to Content research here: <https://research.hud.ac.uk/institutes-centres/cpc/ourprojects/routes/>

Activities:

- ❖ We undertook qualitative research that asked people how their lives and TV viewing had (and had not) changed during Covid-19.
- ❖ We examined the factors that shape viewer choices about what to watch before and during lockdown and considered whether any changes we observed might be temporary or might continue after lockdown.
- ❖ Our research covered the period after 11th May 2020 when lockdown restrictions were relaxed as people were encouraged back to their workplaces, were allowed unlimited outdoor exercise and could drive to other destinations.

Method:

- ❖ We approached the 30 participants from our Routes to Content project and 28 of them were able to participate in this research.
- ❖ We conducted hour-long semi-structured interviews with these 28 participants via Skype, Zoom or phone between 19th and 29th May 2020.
- ❖ Participants were asked about changes to their household since lockdown and their feelings about lockdown and Covid-19. We explored how their TV viewing had changed since the introduction of lockdown in March 2020.
- ❖ Participants were also asked questions about awareness, promotion and marketing, the role of friends, family and communities, devices and services, and their TV viewing routines.
- ❖ We also asked if their TV-viewing behaviours had changed from the start of lockdown in March to the time of the interview in late-May.

Sample:

- ❖ All participants had previously been interviewed for the Routes to Content research.
- ❖ Range of socio-economic groups, races and ages, including disabled participants.
- ❖ Mix of engagement with left and right-wing news.
- ❖ Mix of hours spent watching TV.
- ❖ Range of devices and services (Freeview, pay-TV, BVOD, SVOD etc.) used to watch TV.
- ❖ Participants based in Manchester and Nottingham from rural, suburban and urban locations.
- ❖ Range of impacts from Covid: retirees, key workers, working from home, adult children returning home, furloughed, home schooling, redundancy, living alone, and self-isolating.

Covid-TV: Routes to Content During Covid-19

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