

BBC Three

Public Interest Test

April 2021



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This research project explored audience reactions to the BBC's proposal to reinstate BBC Three as a linear TV channel

As part of the BBC's exploration of potentially returning BBC Three as a linear channel, a **Public Interest Test (PIT)** was required to explore the appeal and impact of BBC Three becoming a regular TV channel once again. This PIT had the following objectives:

Overall: to get a robust and reliable view of what audiences perceive as the personal and public value of the BBC's proposals to reinstate BBC Three as a TV channel

By testing this hypothesis: bringing BBC Three back as a linear channel increases the public value of the service



We tested the public value of the proposed changes using a combination of quantitative and qualitative methodologies

Quantitative methodology

We ran a **15 minute online survey** with **3,281 respondents** to understand current associations with BBC Three, the appeal of BBC Three launching as a linear channel, and how this might impact existing services in the market.

In the survey, we explored the following:

- Demographics and brand favourability
- Current TV and video consumption
- BBC Three awareness, usage and perceptions (current)
- Likelihood of watching new TV channel and perceptions
- Impact on services currently used (including time taken away from each)
- Societal impact of BBC Three launching as a TV channel

Qualitative methodology

We conducted **20 x 2 hour 'Extended Group' sessions via Zoom** with a mix of different audiences to explore and compare reactions, from a personal and societal value perspective, to the concept of BBC Three becoming a linear channel again.

In the sessions, we explored the following:


- Linear TV consumption and BBC attitudes
- (S)VOD consumption behaviours, with a focus on BBC Three
- A BBC Three content evaluation (via BBC Three on iPlayer exploration)
- Responses to the proposal of BBC Three becoming a TV channel
- Expected personal and societal impact of the proposed changes
- Evaluation of proposed changes against BBC Public Purposes

The qualitative stage involved 20 x 2-hour extended digital group discussions across the UK with a carefully designed sample

20 x 2 hour Extended Zoom Groups (100 participants)

12 x 16-34

4 x 16-17


 1 x 16-17
Heavy / mid BBC
ABC1


 1 x 16-17
Heavy / mid BBC
C2DE


 1 x 16-17
Light / non-BBC
ABC1

 1 x 16-17
Light / non-BBC
C2DE

4 x 18-24


 1 x 18-24
Heavy / mid BBC
ABC1

 1 x 18-24
Heavy / mid BBC
C2DE


 1 x 18-24
Light / non-BBC
ABC1

 1 x 18-24
Light / non-BBC
C2DE

4 x 25-34

 1 x 25-34
Heavy / mid BBC
ABC1


 1 x 25-34
Heavy / mid BBC
C2DE


 1 x 25-34
Light / non-BBC
ABC1


 1 x 25-34
Light / non-BBC
C2DE

8 x 35-55+

4 x 35-54


 1 x 35-54
Heavy / mid BBC
ABC1

 1 x 35-54
Heavy / mid BBC
C2DE

 1 x 35-54
Light / non-BBC
ABC1


 1 x 35-54
Light / non-BBC
C2DE

4 x 55+

 1 x 55+
Heavy / mid BBC
ABC1

 1 x 55+
Heavy / mid BBC
C2DE

 1 x 55+
Light / non-BBC
ABC1

 1 x 55+
Light / non-BBC
C2DE

The qualitative sample was designed to ensure a mix of the following across the sessions:

- Ages
- Locations
- Socioeconomic profile (ABC1, C2DE)
- BAME relevant to the location
- BBC engagement across TV / Radio / Online
- Pay TV and FTA households
- SVOD, BVOD and AVOD usage
- Attitudes towards the BBC

Quantitatively, we spoke to a sample representative of the online population, as well as a boost of 16-34 year olds

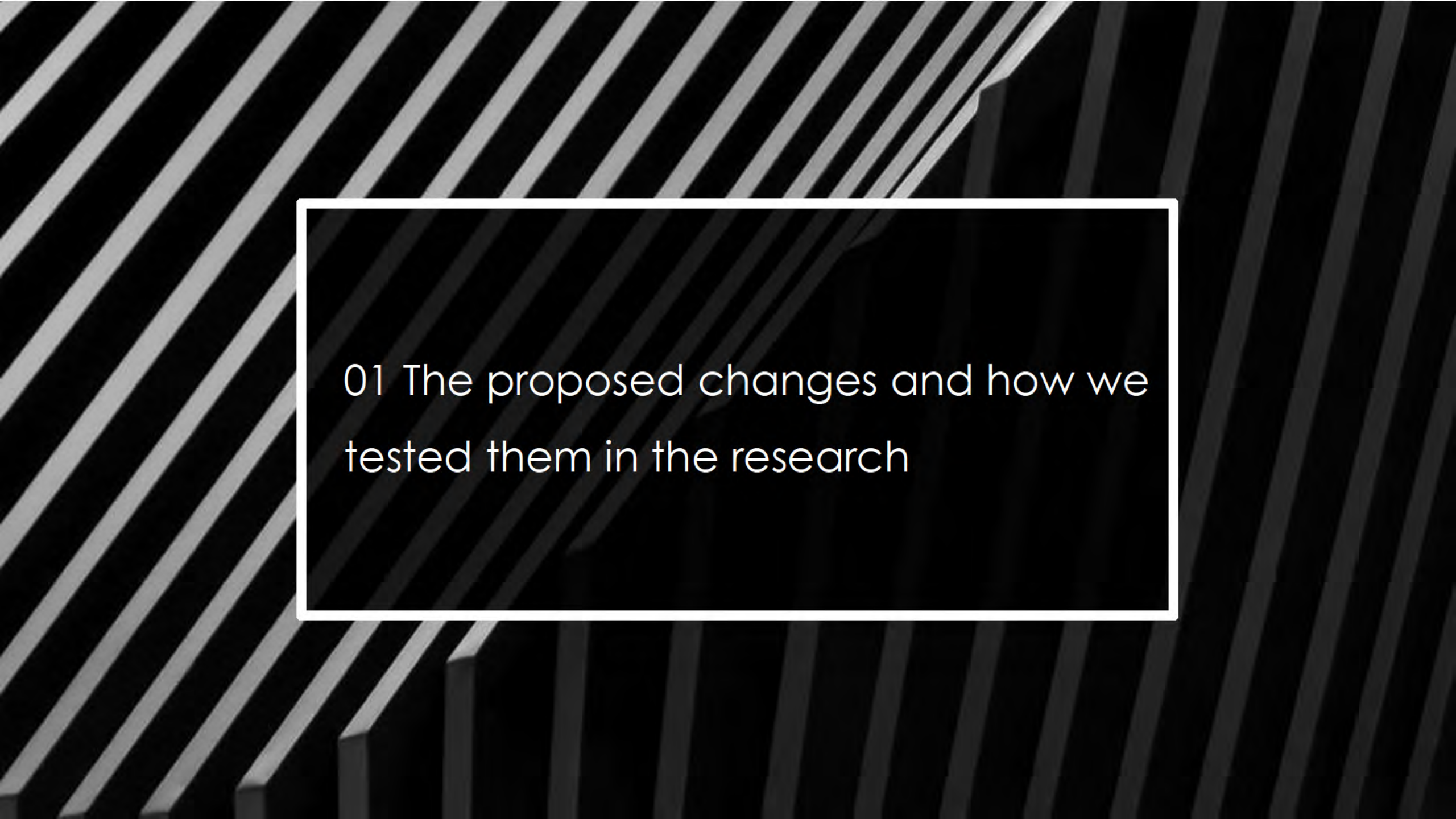
We spoke to **3,281 respondents** as part of the quant survey. 1,568 of these were representative of the UK online population, with quotas set gender, age, SEG, region and ethnicity.

We also spoke to a further 1,713 respondents aged 16-34, which when combined with the respondents in this age group from the main sample, gave us a total of **2,185 respondents aged 16-34**. Again, quotas were set on this group to ensure they were representative of this age group within the total online population.

Our sample has meant we have robust numbers of typically under-served BBC audiences, with total base sizes for each shown on the right-hand side.

	UK online population sample (n=1,568)	16-34 sample (n=2,185)
C2DE	673	978
BAME	178	438
Nations	258	310
Non big city	1,156	1,376
Weak internet access*	176	434

**Weak internet access has been defined as those who say it is difficult to stream or download video content on their broadband connection*

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01 The proposed changes and how we tested them in the research

In the qualitative group sessions we established perceptions of BBC Three at 3 different stages



SPONTANEOUS

- Word associations with BBC Three
- How BBC Three compares to other TV brands
- **Score out of 10**
- **Open discussion**



PROMPTED

- Time to explore BBC Three channel section of BBC iPlayer independently
- Create a Watch List of content interested in on BBC Three
- **New Score out of 10**
- **Open discussion**



POST CHANGES EVALUATION

- Proposed changes introduced in a step-by-step guide
- Clarity of understanding ensured throughout
- **Final score out of 10**
- **Open discussion**

The proposed changes and how these were explained to audiences in a step-by-step guide

WHAT IS BBC THREE?

BBC Three produces Dramas, Comedies, Entertainment shows and Documentaries that tell real stories featuring young people from across the UK.

It currently makes shows to release on BBC iPlayer, but does not have its own television channel currently, having moved BBC Three online in 2016.

The BBC is exploring re-launching BBC Three as a TV channel that would be available on all major television services, such as Freeview, Sky and Virgin – in the same way that BBC One, BBC Two and BBC Four are.

The channel would air from 7pm in the evening until 4am in the morning, 7 nights a week.

BBC Three shows will still be released on BBC iPlayer, as currently – but the TV channel gives another option to discover and watch programmes in a convenient way.



A TV CHANNEL WILL PROVIDE A CONVENIENT PLACE TO DISCOVER ALL OF BBC THREE'S PROGRAMMES...

Competition shows	Real & unfiltered entertainment shows	Big drama movies
Fresh and exciting comedy from the UK	Documentaries and factual series	

...AS WELL AS A PLACE FOR BBC THREE TO BRING NEW SHOWS TO TV

Spin off of popular shows (EXAMPLES ONLY)	
Live sport and highlights shows (EXAMPLES ONLY)	Music, concert and events (EXAMPLES ONLY)

HOW A CHANNEL SCHEDULE MIGHT LOOK

7PM-8PM	WEEKDAY	11PM-12AM	12AM-4AM
REPEATS	NEW ENTERTAINMENT, DRAMA, DOCUMENTARIES	CLASSIC BBC THREE	LATE NIGHT REPEATS
WEEKEND			
LIVE SPORT NIGHT	FILM NIGHT	EVENT NIGHT STACK	

HOW WILL THE NEW BBC THREE TV CHANNEL WORK WITH BBC IPLAYER?

All BBC Three shows that are shown on the BBC Three TV channel will be available to watch on BBC iPlayer.

Most BBC Three shows will be available to watch in their entirety, as boxsets. For others, it could be at the same day as the first episode is shown on the BBC Three channel.

Some shows will continue to be released weekly, but in future would be available on both the BBC Three TV channel and BBC iPlayer at the same time.

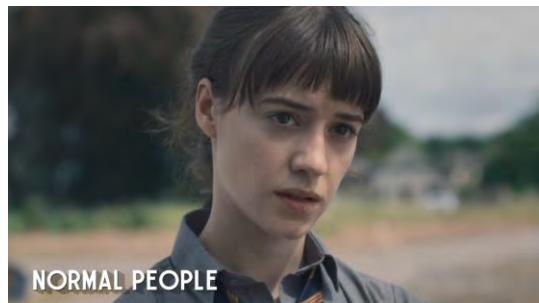
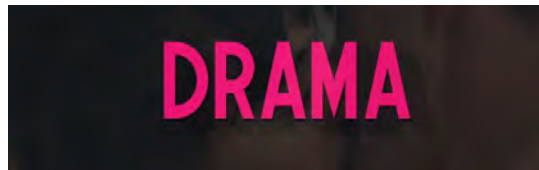
BBC iPlayer will continue to be the place where audiences can go to watch the back catalogue of BBC Three content across all genres.





BBC Three Showreel

A short showreel was used to give audiences a sense for what the linear BBC Three channel may look and feel like



In the quant stage we showed the same stimulus as the qualitative stage to understand the impact of the new channel

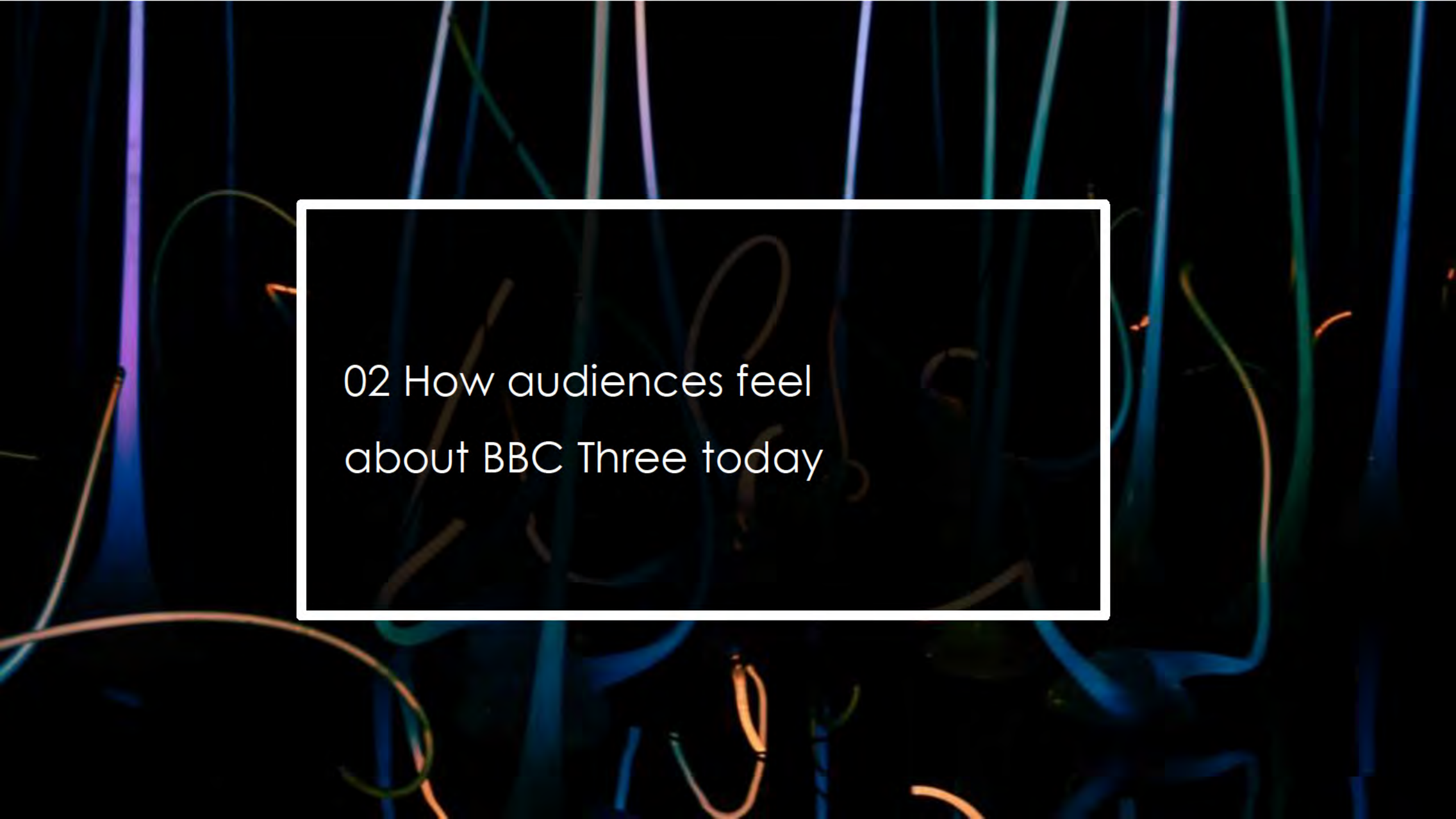
PRE EXPOSURE TO STIMULUS

- Demographics
- Current TV behaviours (channels watched, services used etc.)
- Favourability towards media brands
- Specific interaction with iPlayer (channels watched, frequency of watching each, routes to content)
- Current perceptions of BBC Three
- Current favourability towards BBC Three

POST EXPOSURE TO STIMULUS

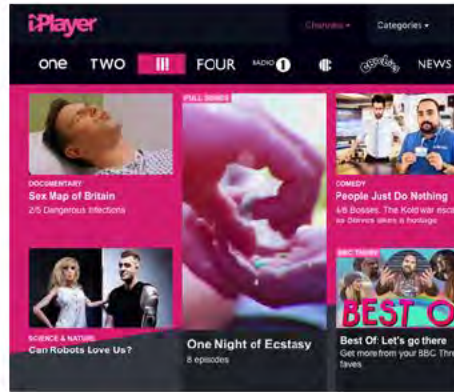
- New favourability towards BBC Three
- New perceptions of BBC Three (same statements asked as pre exposure)
- Likelihood to watch new channel
- Frequency of watching new channel
- Personal impact of new channel
- Wider impact of new channel
- Impact on BBC iPlayer usage
- Societal impact of new channel



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02 How audiences feel
about BBC Three today

There is a lack of awareness of the BBC Three brand - especially amongst lighter BBC consumers



There's confusion around BBC Three's brand identity

Overall, it **isn't clear what differentiates BBC Three** from other BBC services or that the brand targets young people – with several confusing it with the BBC Four channel

BBC Three's relationship with the iPlayer is unclear

There is **mixed awareness of the online switchover**, creating confusion over whether BBC Three is a live TV channel or 'just' a part of BBC iPlayer – resulting in **limited exposure to content**

Ex-channel viewers have grown distant from the brand

Some older audiences, for whom the channel was a staple of their TV repertoire, had **not made the 'effort' to follow the service online** - so its **meaning and prominence had faded** and been replaced by VOD

Driven by historical channel associations

Given the uncertainty over BBC Three's proposition and how to access it, **channel associations are inconsistent** and often **rely on limited pre-switchover memories** (e.g. Family Guy, 2 Pints of Lager etc.)

Unlikely to be able to think of specific BBC Three shows

There is **low attribution of standout shows back to BBC Three** - at best they're just 'BBC shows' and at worst they're linked to Netflix or other channel brands

There is a lack of awareness of the BBC Three brand - especially amongst lighter BBC consumers

There's confusion around BBC Three's brand identity

“

When programmes end up on the main iPlayer homepage, **there's no main distinction for me**

25-34, Heavy/mid-BBC, Scotland

BBC Three's relationship with the iPlayer is unclear

“

Was Normal People on BBC Three? Because **I watched it through iPlayer**, I'm not sure if that was through that channel or not?

16-17, Light/non-BBC, North

Ex-channel viewers have grown distant from the brand

“

It definitely **went downhill when it went online**, they wouldn't be bringing it back if it worked online...

55-74, Heavy /mid-BBC, Scotland

Driven by historical channel associations

“

Back then on BBC Three...**there was nothing new**. I loved Russell Howard's Good News but there was nothing new on

18-24, Heavy/mid-BBC, North

Unlikely to be able to think of specific BBC Three shows

“

I've watched Bad Education but for some reason **I've always thought it was on Channel Four...**

25-34, Light/non-BBC, Wales

The BBC masterbrand can influence perceptions, particularly among 16-34s who see the BBC as too 'stuffy' or 'not for them'



Younger audiences consistently feel the **BBC isn't 'for them'**

- 16-34s typically **feel content is aimed at older viewers** (i.e. 35+) with many describing the BBC as being for their parents / grandparents
- They tend to associate the BBC with being **'traditional'** or **'stuffy'** and lacking in variety, limited to period costume dramas and news content

This perception can **create a barrier** to further engagement with the BBC

- **Used for specific shows** (Planet Earth etc.), but day to day use is limited
- Go to **iPlayer to 'catch up'**, **rather than to browse** – it's not widely seen as a destination for discovery

“ The BBC feels like an **age old institution** and **that's reflected in the content** they produce as well

25-34, Heavy/mid-BBC, Scotland

But perceptions are often worse than the reality, with audiences more favourable and interested after further exploration

Prompted exploration of BBC Three **challenges BBC masterbrand pre-conceptions**, particularly among the target audience (16-34)

There is **surprise at how 'current' BBC Three programming is**; with a mix of reality shows, provocative documentaries and wider representation

Some feel that by tackling more 'taboo' topics affecting young people, that **BBC Three has a more contemporary 'vibe'** and is likened to C4

The majority of audiences are **able to find something that appeals to them** and claim they will seek examples out after the research

Older viewers (45+), **despite recognising it's not 'for them' still feel that BBC Three has potential to attract wider audiences** – with Stacey Dooley docs and dramas appealing most (though less so with male audiences)

“ I was **quite shocked** to be honest, I wasn't expecting there to be so many programmes that I would be interested in watching

25-34, Light/non-BBC, Wales



Netflix is king for 16-24s and the availability of BBC content on there contributes to the misattribution of programmes

Netflix is **seen as the go-to service for on demand content**, particularly among younger viewers (16-24)

- The **range of content** fuels the impression that there's **always something to watch**, e.g. drama, reality, documentaries etc.
- The **volume of boxsets / series** available mean viewers **can immerse themselves in content** without interruption
- This means that unlike iPlayer, where they have to make a 'conscious effort' to explore beyond specific shows, they're **more likely to browse**

Following the forced exposure task, there was some **surprise to discover they had already watched (and enjoyed) BBC Three** – outside of iPlayer

This highlights how BBC Three **struggles with misattribution** for some of its biggest shows

However, as audiences become more aware of this, they begin to recognise **BBC Three has more for them** than they often initially realise

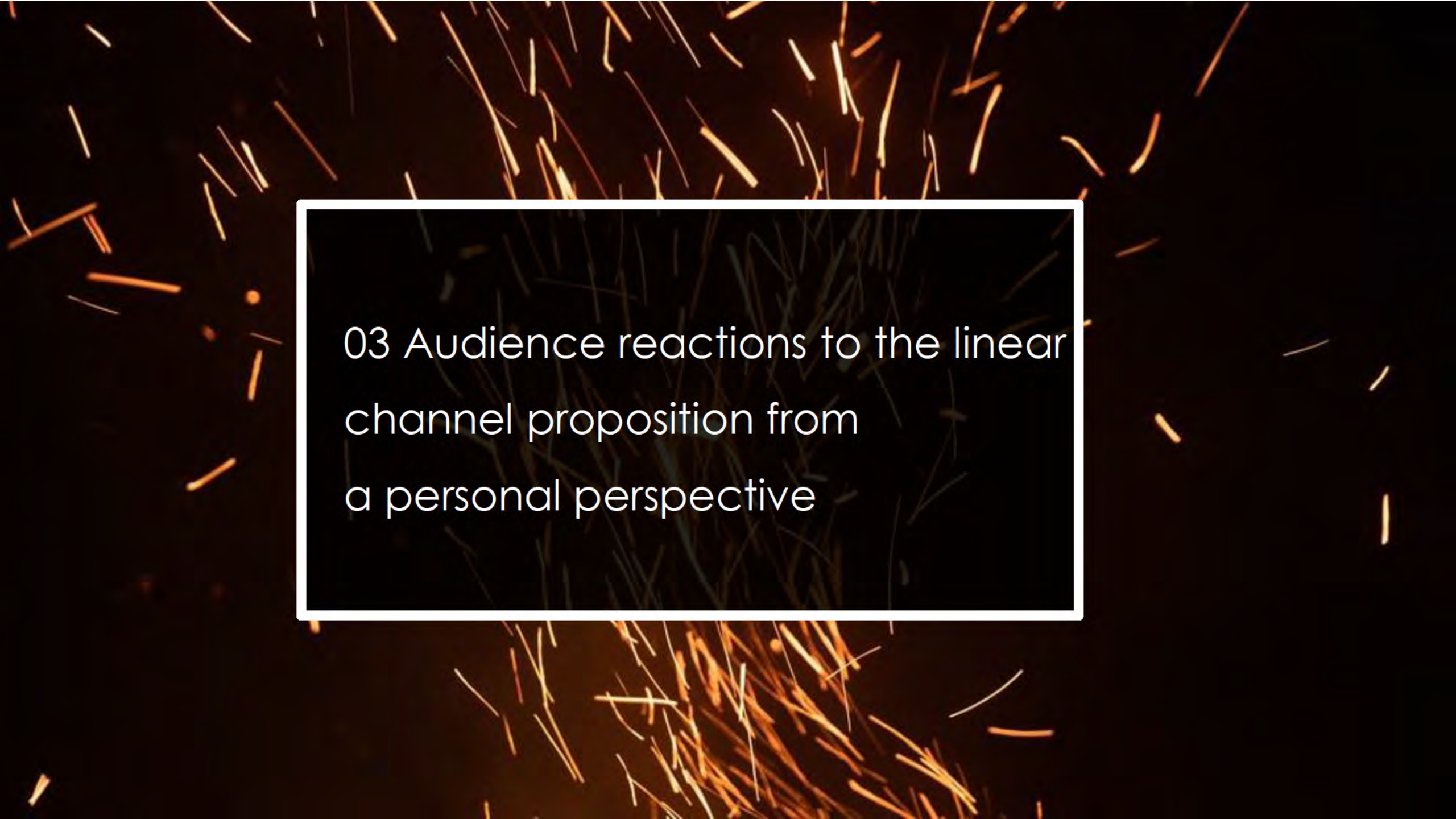


“ Like ‘This Country’ **I’d forgotten where it originated from**. Different providers show it now so **I forgot that it’s from BBC Three**

16-17, Heavy/mid-BBC, Midlands

“ I think they’ve done themselves over by giving Netflix their best shows... **if they weren’t on Netflix I’d absolutely be watching more iPlayer**

18-24, Heavy/mid-BBC, North



03 Audience reactions to the linear
channel proposition from
a personal perspective

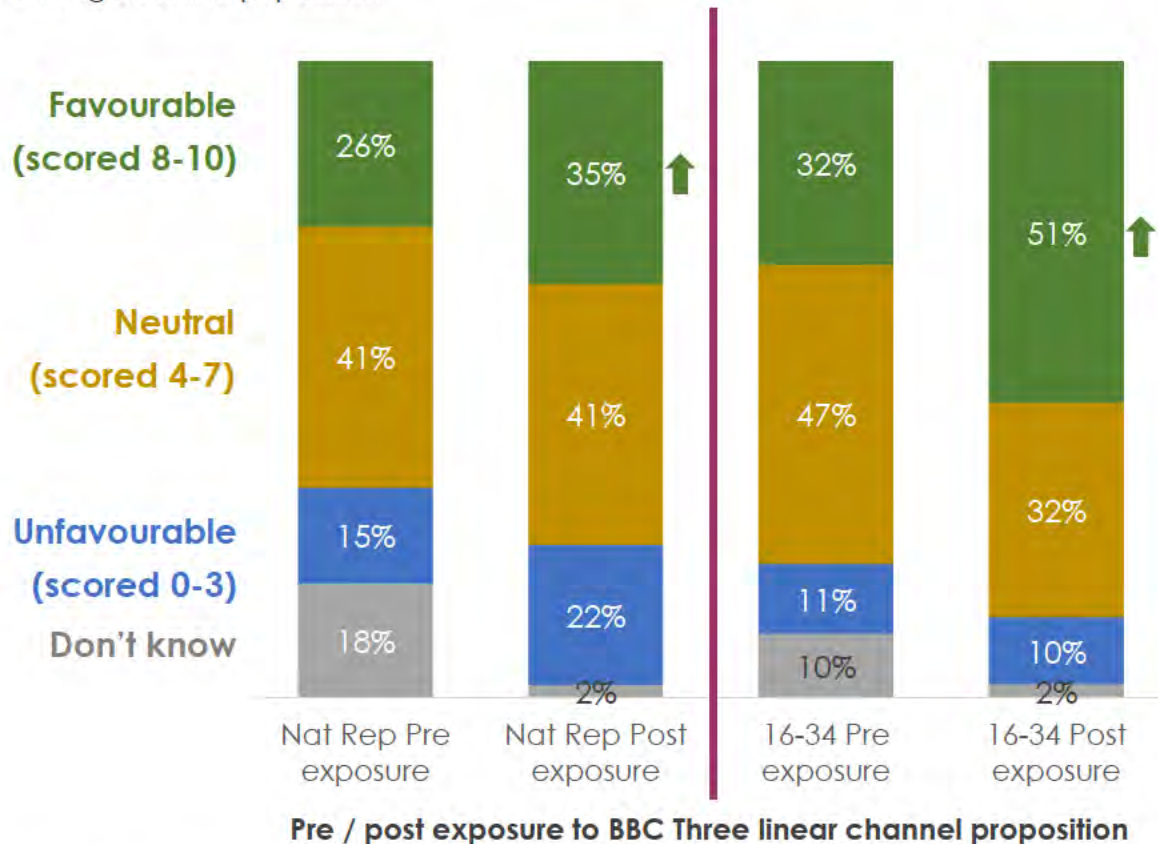


Overall appeal of launching BBC Three as a linear channel

Once audiences were shown stimulus about the linear channel, they became more favourable towards the BBC Three brand

Favourability towards BBC Three

Among UK online population



There was an **uplift in favourability once audiences had explored iPlayer** and created a Watch List, challenging the idea that the BBC isn't 'for them' and further highlighting a lack of awareness of BBC Three content

There was an **additional boost to favourability once audiences learned about BBC Three becoming a linear channel***, with the perceived benefits of encouraging greater awareness and offering more convenient access

The showreel helped BBC Three **feel more like a 'complete' channel**, with content there to suit a variety of moods and needs. It **also challenged historical BBC Three TV viewers' associations** of the channel just being about passive late-night comedy (though these do still hold appeal)

While for **older audiences**, despite recognising it was not aimed at them, there was **appeal for the live sport and music**, not available elsewhere



*I rated it 1! I said I hardly used it and then I realised that's where I watch most of my shows. **If I had known all those shows we're BBC Three I would never have rated it like I did***

18-24, Heavy/mid-BBC, North



Younger audiences demonstrate a shift in favourability towards BBC Three, when learning of it becoming a TV channel

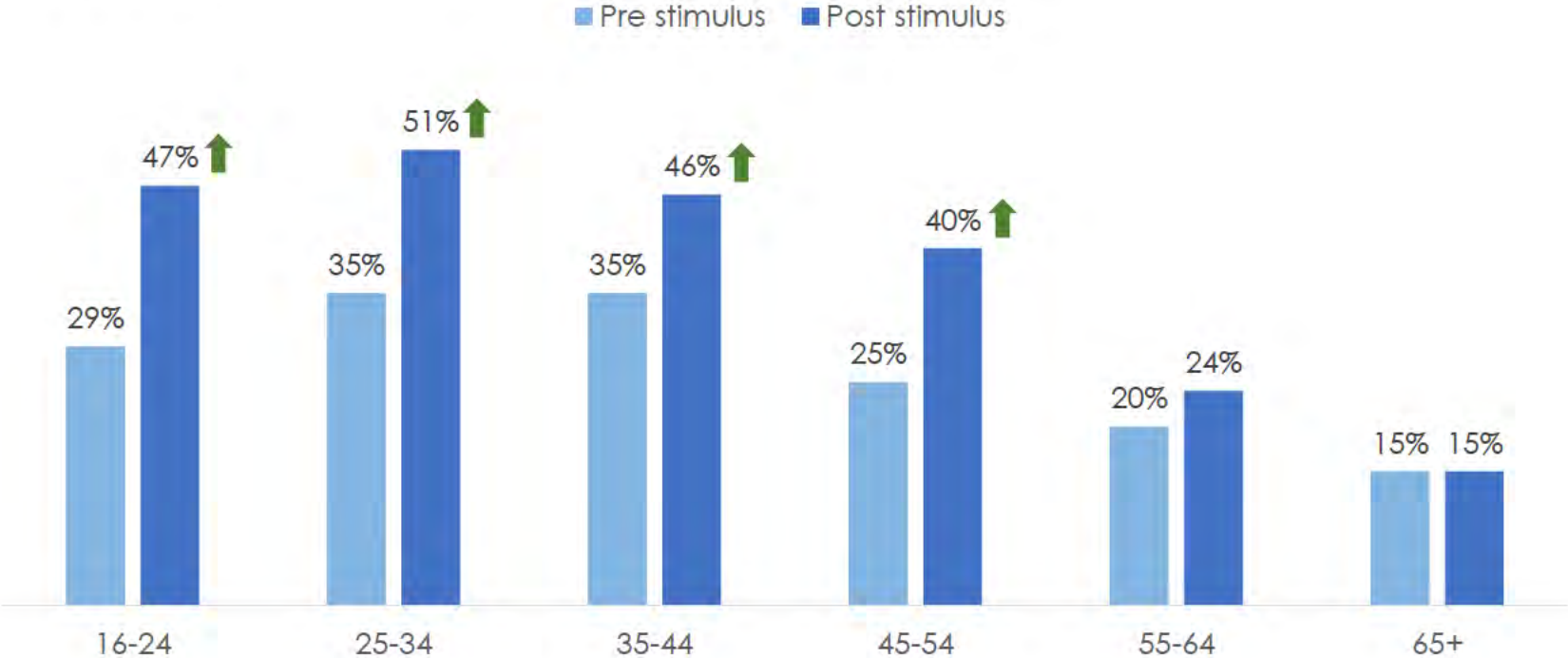
Ages 16-24 sees the biggest increase in favourability towards BBC Three after learning of the proposed changes. Before exposure, they are only slightly more favourable towards BBC Three than 45-54s, but the showreel leads to a sizeable increase.

This highlights that exposure to the channel and content available works in driving favourability towards BBC Three, particularly among younger audiences who may be unaware of the type of content available currently on BBC Three.

Favourability towards BBC Three does not shift among the oldest audience group.

Favourability towards BBC Three

Among age groups in UK online population (% scoring 8-10)



Base: All respondents aged 16-24 (1,070), 25-34 (1,115), 35-44 (257), 45-54 (285), 55-64 (224), 65+ (330)
Source: C6 and D1 – BBC Three Favourability

↑ Denotes figure is statistically significant higher 21 for post stimulus compared to pre stimulus

Audiences become warmer to BBC Three following increased exposure to the variety of content available

16-17

“

It feels **like it's for the younger and older generations**, so covers both departments. The film we saw was quite bold and **definitely interested me**

16-17, Heavy/mid-BBC, South

18-24

“

It's nice to see something targeting a younger audience from the BBC, **I was surprised by how much good-looking content there was on there**

18-24, Heavy/mid-BBC, North

25-34

“

There's a lot more on there than I thought there was... there's **a lot of shows that I wouldn't have seen until looking through now**

25-34, Light/non-BBC, South

35-54

“

This has highlighted to me some of the original content from BBC3...**it's made me think I should spend more time checking what's on BBC Three** on iPlayer to see what's available

35-54, Heavy/mid-BBC, South

55+

“

I could see BBC Three being a channel that's part of my hierarchy but **it certainly wouldn't fit in the top section at the moment**

55-74, Heavy/mid-BBC, North

With favourability rising further once audiences are aware of the proposed changes, building excitement for a BBC Three channel

16-17

“

I've seen the BBC as traditional and for the older generation. **Bringing this channel back shows that it can be modern as well**

18-24, Heavy/mid-BBC, North

18-24

“

This will help the BBC image, in my head BBC was an aging entity and getting older, **this would help bring it in to the modern era**

18-24, Heavy/mid-BBC, North

25-34

“

It makes me think the BBC are **making an effort to be relevant to young people and offer something more on trend** outside of BBC One and BBC Two

25-34, Heavy/mid-BBC, Scotland

35-54

“

You have to make a conscious effort to go and look for these shows on iPlayer... **A tv channel would help showcase some of these shows to people**

35-54, Light/non-BBC, North

55+

“

The age groups they're targeting are already on their iPads and phones, **so I don't think it matters to them whether it's on the TV or not**

55-74, Heavy/mid-BBC, North

Over half of younger audiences claim they would be likely to watch the new BBC Three channel should it launch

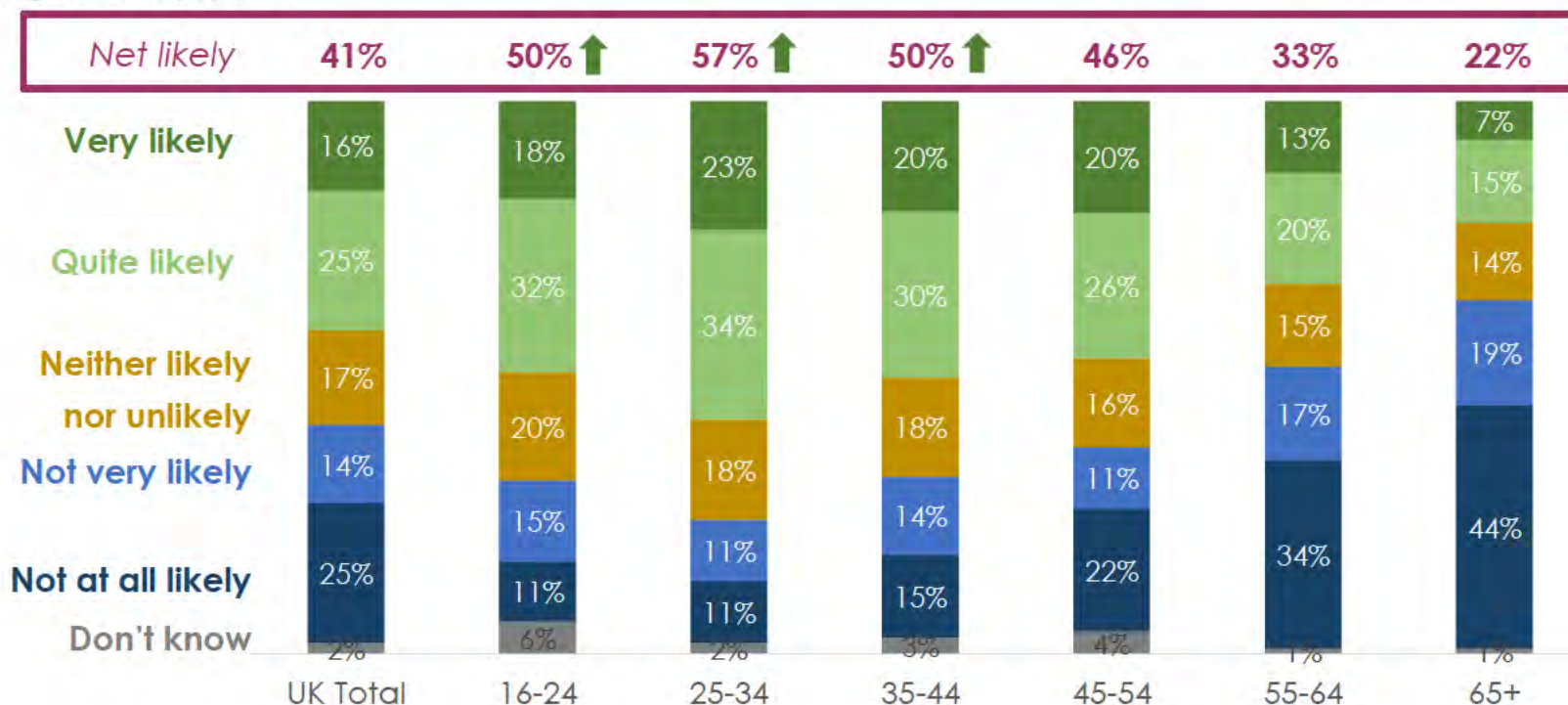
Half of those aged 16-24 state they are likely to watch the BBC Three TV channel should it launch, although only 18% state that they would be very likely to do so.

Appeal is highest amongst 25-34s, with 57% likely to watch, with appeal declining as age increases.

That is not to say that the service will not appeal to some older audiences. Whilst outright rejection is high, **over a fifth of over 65s state they would still be likely to watch the channel at some point.**

Likelihood of watching BBC Three TV channel

Among UK online population



Note – this is assessing broad appeal of the channel, and would not map to total reach of the linear channel



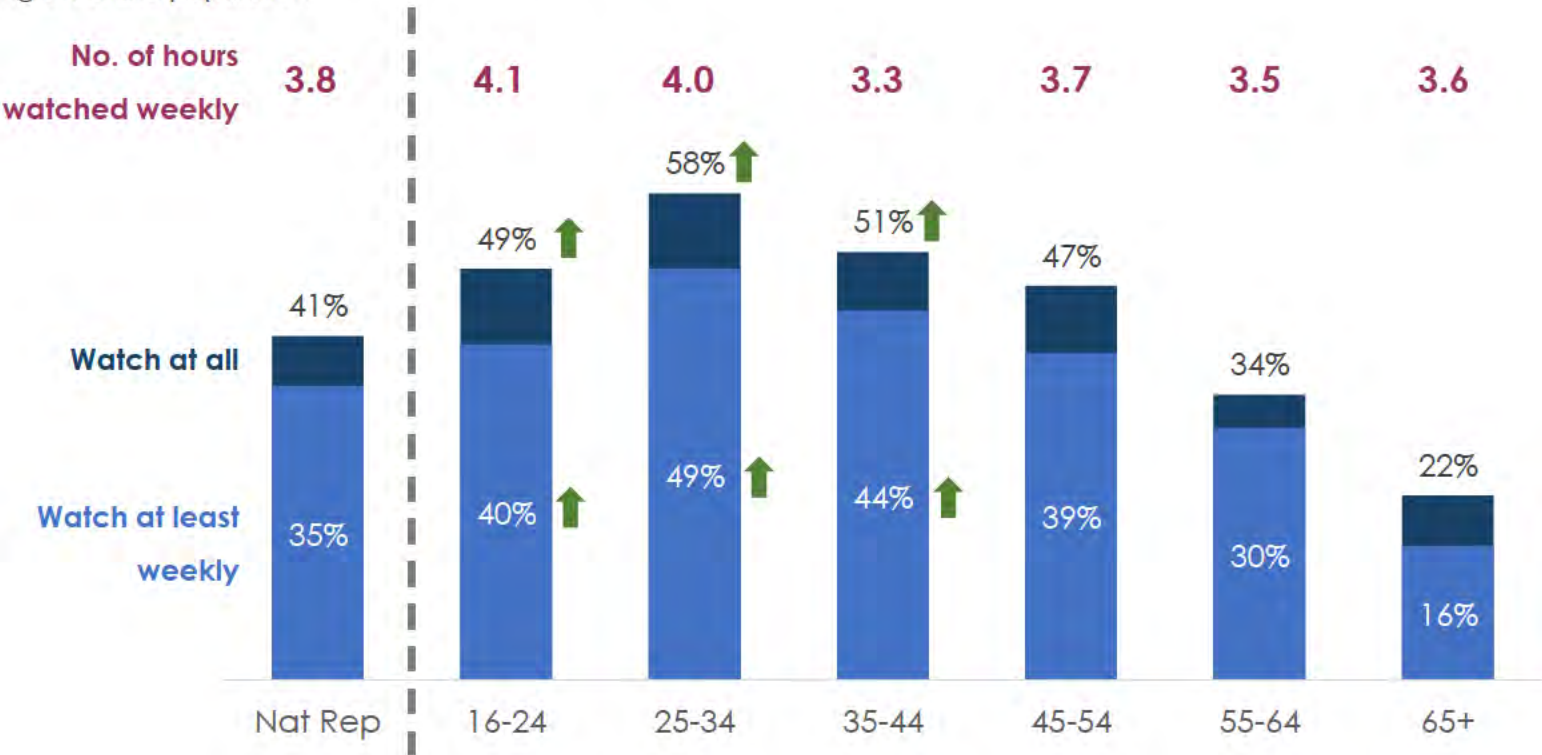
Base: All respondents in nat rep sample (1,568), all respondents in boost sample (2,185), all aged 16-24 (1,070), 25-34 (1,115), 35-44 (257), 45-54 (285), 55-64 (224), 65+ (330)
Source: D3 – Likelihood to watch new BBC Three TV channel

↑ Denotes figure is statistically significant higher than UK online population total

Around 4 in 10 of those aged 16-24 would watch the new channel weekly, and claim they will watch for 4 hours a week

Frequency of watching BBC Three TV channel

Among UK online population



A note on interpreting hours to watch BBC Three

Getting respondents to accurately state how many hours they will use a new service is difficult in a survey environment, and therefore are not likely to be a true reflection on how much time they will spend with the service at launch.

Instead, we'd recommend looking at the patterns we are seeing between subgroups, and the relative differences between each. The hours spent using the service data is among those who would use from each age group, and so from this we can see that younger audiences claim that they will spend more time with the service than older users, likely a reflection on the service having more for them.



Base: All respondents in nat rep sample (1,568), all respondents in boost sample (2,185), all aged 16-24 (1,070), 25-34 (1,115), 35-44 (257), 45-54 (285), 55-64 (224), 65+ (330)
 Source: D5 – Frequency of watching new BBC Three TV channel, D6 – Number of hours spent watching new BBC Three TV channel weekly

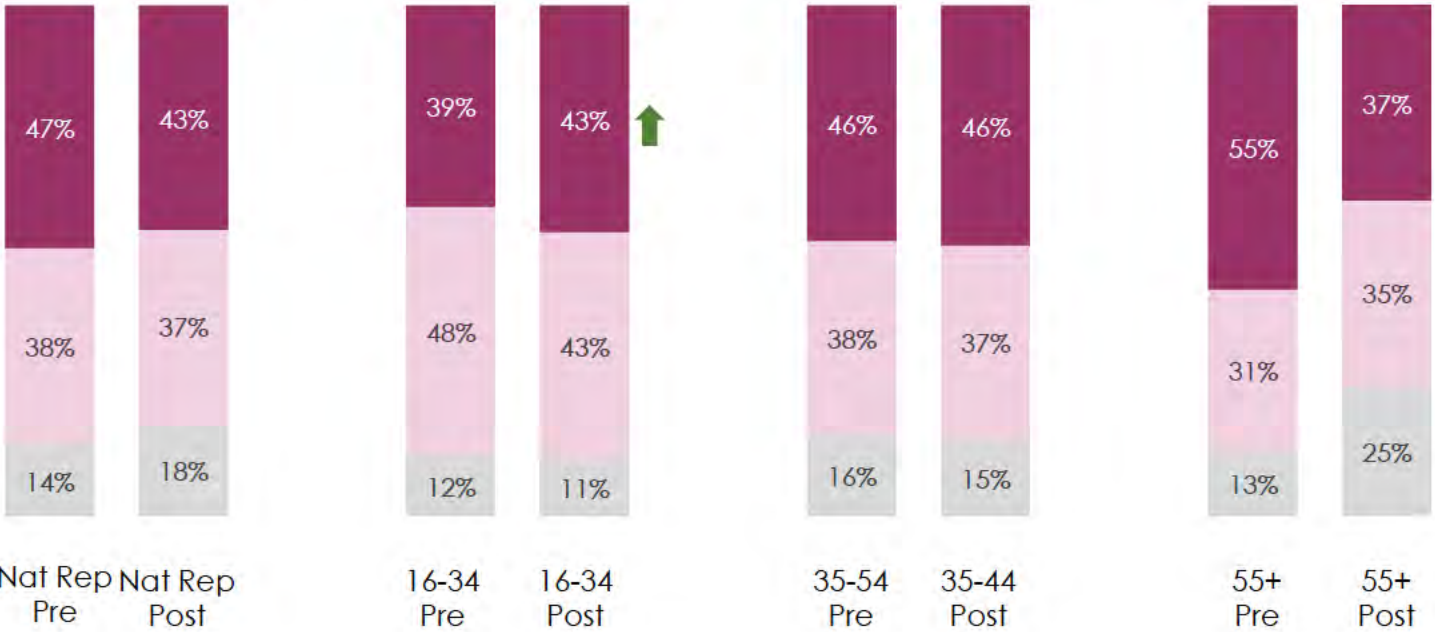
↑ Denotes figure is statistically significant higher than the nat rep figure

Overall, the new channel also has a positive impact on younger audiences favourability towards the BBC as a whole

BBC favourability

Impact of the proposed BBC Three TV channel

■ Unfavourable ■ Neutral ■ Favourable



*I was surprised by how much there was on there and how much there was for people our age. **I didn't really think the BBC did that kind of thing***

16-17, Light/non-BBC, North



*It's been a really positive surprise and change finding out about this, my perception has definitely changed and **I'll give BBC more of a try and give it a look, rather than judging from the outside***

16-17, Heavy/mid-BBC, Midlands



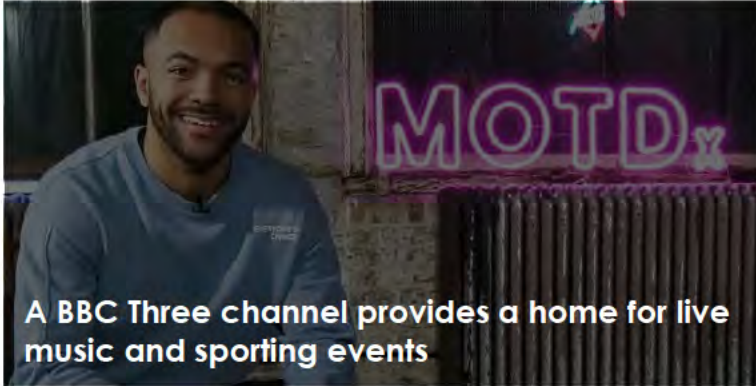
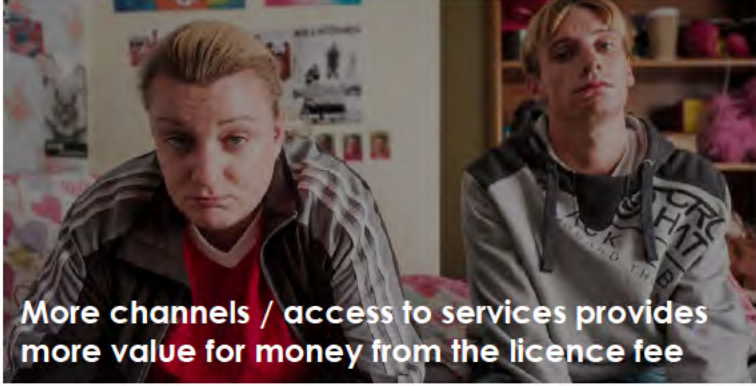
Base: All respondents (1568), 16-34 (2185 from boost sample), 35-54 (542), 55+ (554) Source: A7 / D17 BBC favourability pre and post new channel introduction

↑ Denotes figure is statistically significant higher for post scores compared to pre scores



Audience benefits of
launching BBC Three as a
TV channel

We see six main audience benefits to BBC Three launching as a linear TV channel



A BBC Three linear TV channel would enable discovery of BBC Three programmes by acting as a 'shop window'

A BBC Three shop window fuels discoverability

Limited browsing of BBC iPlayer meant BBC Three was often 'out of sight, out of mind' - a channel was seen to **encourage greater awareness and attribution** to content (something BBC Three struggled with across audiences)

“ You **want to be in the shop window** and unfortunately, I think they've missed a few years of that by taking it off TV... being on **TV is going to get a wider audience** and that can only be a good thing!

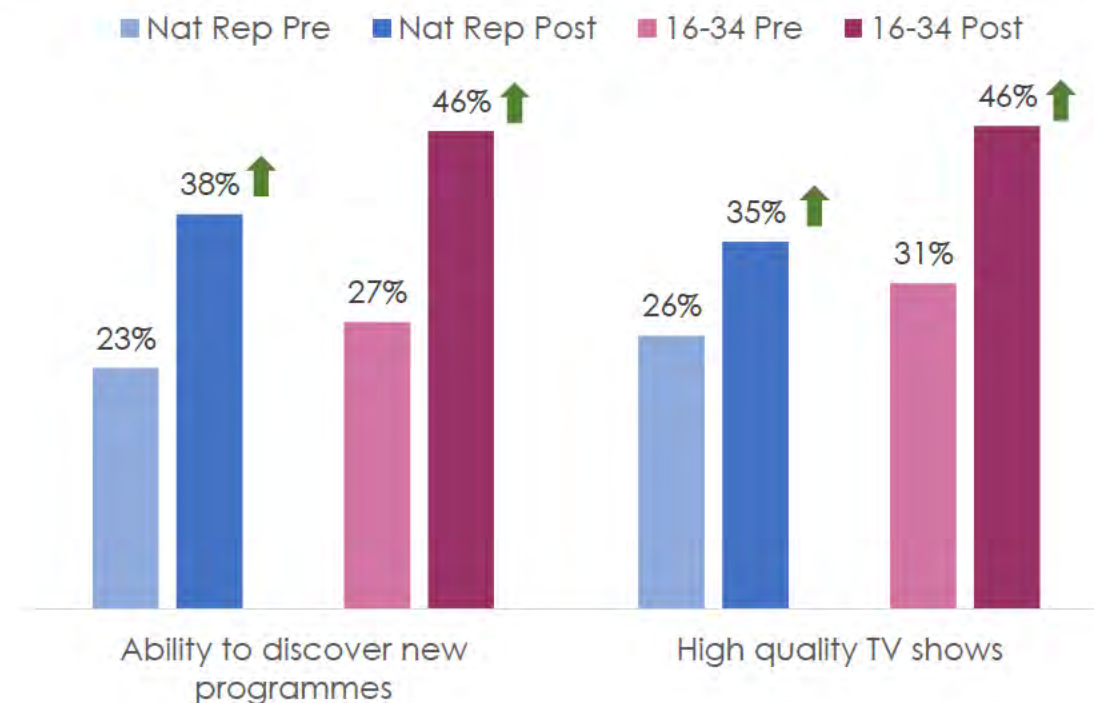
35-54, heavy/mid-BBC, London

“ I think it will **encourage people to find new shows** by putting it on a TV channel, **things people wouldn't necessarily search for on iPlayer**. It's more inclusive to have access to both on demand and a TV channel

18-24, heavy/mid-BBC, Wales

Perceptions of BBC Three

Among UK online population and 16-34 boost sample (% scoring 8-10 on a 0-10 scale)



↑ Denotes figure is statistically significant higher 29 for the post score compared to the pre score

A linear channel also helps younger audiences feel like the BBC has TV shows for people like them

It makes the BBC feel more like it's 'for me'

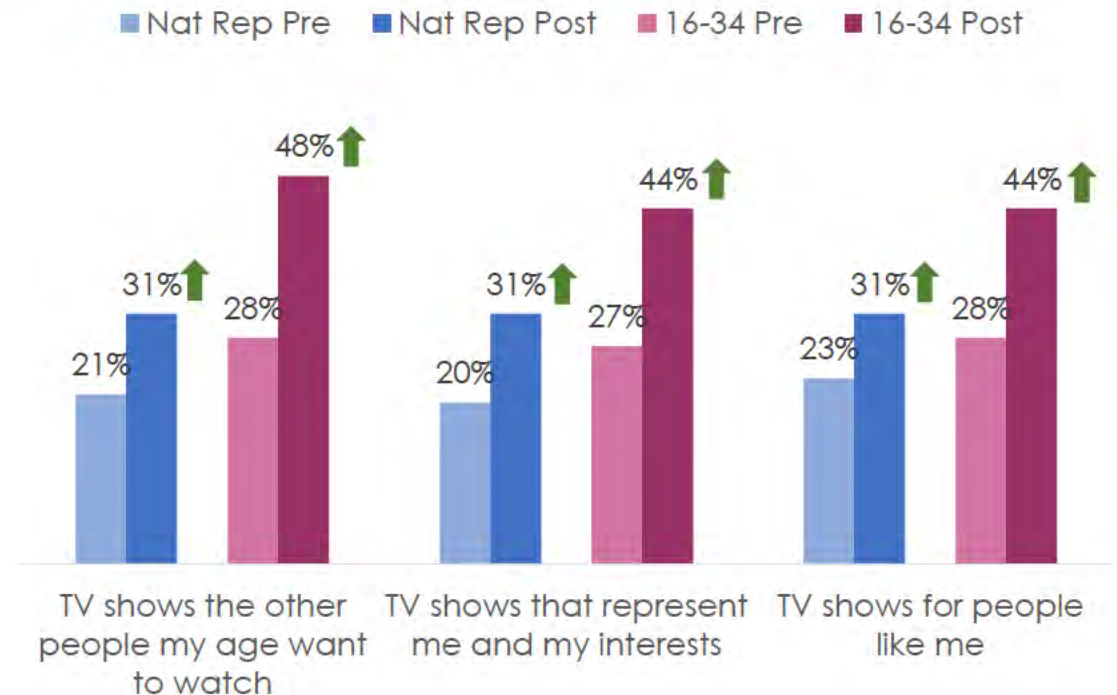
Younger and underrepresented audiences (BAME, LGBTQ+) feel like there is **content on BBC Three that better represents and caters to them**, challenging their more 'traditional' perceptions of BBC (it's not all costume dramas!)

“ I've **seen the BBC as traditional** and for the older generation. So, bringing this channel **shows that the BBC can be modern as well**
25-34, Heavy/mid-BBC, North

“ I quite like those documentaries [Reggie Yates, Stacey Dooley]; they're pitched more at my level. **They've got more of a younger voice** than what I usually associate with the BBC
25-34, Light/non-BBC, Wales

Perceptions of BBC Three

Among UK online population and 16-34 boost sample (% scoring 8-10 on a 0-10 scale)



Audiences recognise a linear channel would provide them with an easy route to BBC content, with minimal effort required

It provides a more convenient, additional access point to watch

A linear channel offers a **low effort route to content**. Audiences can just put the channel on, and the content is chosen for them, opposed to iPlayer where they need to make more active viewing choices.

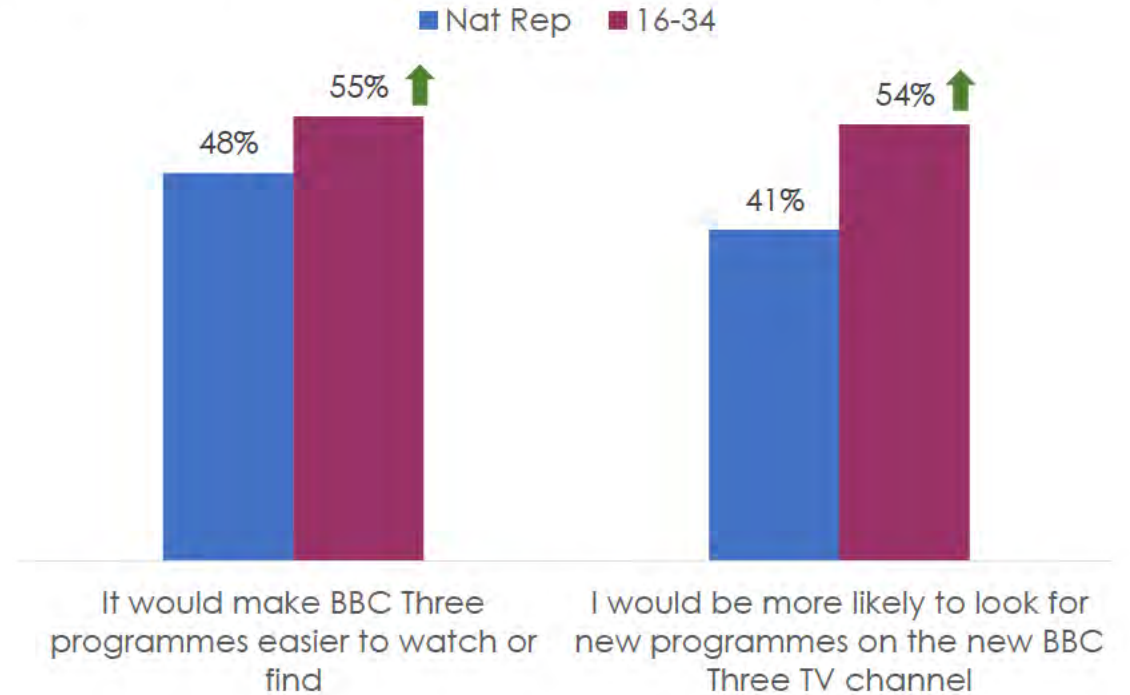
While older viewers and those with poor internet connections in particular **valued the convenience of a live channel**, with the option to watch and / or record direct from the TV rather than solely accessing online seen as a benefit.

“ It's right **at the end of your fingertips** isn't it...to just **flick on your TV that's the easiest way to find what you're looking for**. The only reason I don't watch it is because its not on the TV...out of sight out of mind!

35-44, Heavy/mid-BBC, London

Personal impact of BBC Three launching as a TV channel

Among UK online population and 16-34 boost sample (% strongly / slightly agree)



↑ Denotes figure is statistically significant higher than the nat rep figure

There is also an appreciation that a new linear channel would provide additional value for money to licence fee payers

More channels / access to services provides more VFM from the LF

For some licence fee payers, making BBC Three more of a 'destination' meant they were **getting more for their money**. This related both to the extra channel but also in encouraging more use of iPlayer for BBC Three content

“ Having it more of a destination again makes me think there's more that appeals to me **so I might be getting more value out of my TV licence fee**

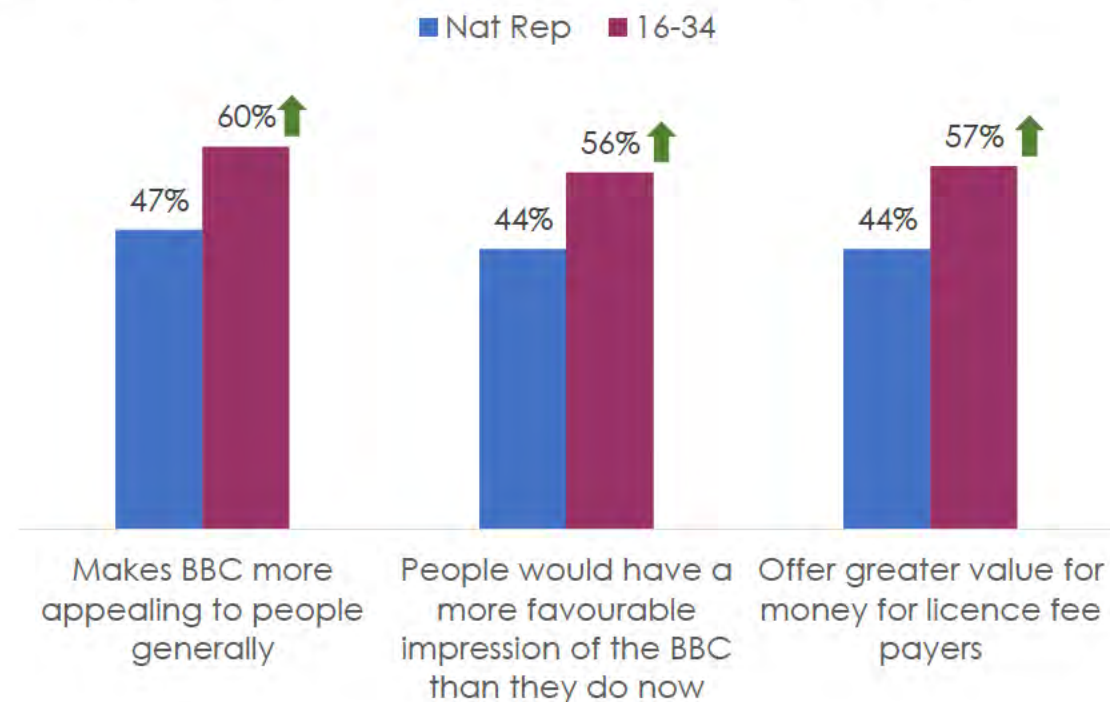
35-44, Heavy/mid-BBC, London

“ **I get a bit miffed paying the licence fee** because there's not a lot of new content for me, you get more bang for your buck with Netflix. But **with BBC Three coming back to TV it justifies the licence fee much more for me now**

18-24, Heavy/mid-BBC, North

Societal impact of BBC Three launching as a TV channel

Among UK online population and 16-34 boost sample (% strongly / slightly agree)



↑ Denotes figure is statistically significant higher than the nat rep figure

Audiences valued a BBC Three linear channel providing sport and music content that may not be available elsewhere

A BBC Three channel provides a home for live music and sporting events that may not otherwise be on the BBC

A BBC Three channel would be a place to surface content that otherwise might not have a home on the BBC. Sports or music content which might be unlikely to be shown on BBC One or Two (and audiences wouldn't necessarily think to seek out on iPlayer) will have a more accessible home on the BBC Three channel

“ It struck me that it felt like **there was something for everybody on it, like the sport**, the extended Match of the Day, my husband would like that. **The music and events I think the whole family would be interested in**

35-44, Light/non-BBC, Scotland

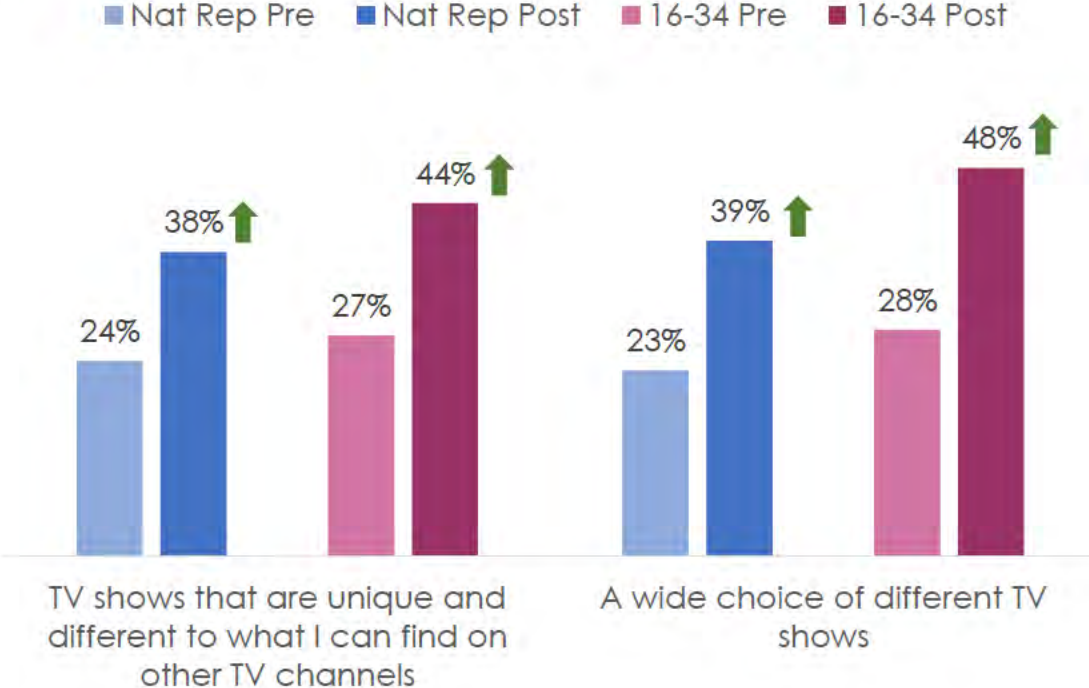
“ That **MMA coverage is interesting**, didn't really think the BBC would do that kind of thing

18-24, Light/non-BBC, South



Perceptions of BBC Three

Among UK online population and 16-34 boost sample (% scoring 8-10 on a 0-10 scale)



↑ Denotes figure is statistically significant higher 33 for the post score compared to the pre score

As a linear TV channel, BBC Three will benefit from occasion TV and big properties that reflect the reasons they turn to live TV first

BBC Three could benefit from a 'hook' e.g. content audiences feel reflect the occasions they tune into linear TV vs. an on-demand service

Within the proposed BBC Three schedule, there is content that has the **potential to hook interest and demonstrate the breadth of content:**

- **Sporting events** are appealing as audiences want to watch sport live, rather than go to BBC iPlayer and catch up later
- **Music events like Glastonbury**, where audiences want to watch in-the-moment to feel like they're there
- **Exclusive content they can't get elsewhere** e.g. big properties like RuPaul shown first on BBC Three with a weekly appointment to view
- **Saturday / Sunday film nights** with channel blockbuster premiers or themes e.g. seasonal, awards, actor takeovers etc. are different to what they expect from a BBC channel and BBC iPlayer



Live sport and coverage of popular music events create occasion TV moments that have wide appeal among audiences

Live sport and highlights

Audiences want to watch sport live, rather than catch up, providing a hook for a linear TV

There's **appeal for live sport on BBC Three**, particularly sports not televised elsewhere, like women's football, or MMA that you might not get elsewhere

Sport could **sync further with BBC Three's strength in documentaries** e.g. rise of MMA fighters, rise to football stardom etc.

However, there are **some queries over how this will work with the channel starting at 7pm** – will it be highlights rather than full matches etc.

Music concerts and events

Unlike reality TV or 'younger' documentary topics, coverage of **music events hold more universal appeal** – with **both older and younger audiences interested**

Coverage of music events like Glastonbury or BBC Live Lounge is **appealing as content** that audiences will **not be able to get on other channels and services**

The **in-the-moment event aspect** adds to the **appeal of BBC Three as a live channel** – with the possibility for added extras to explore on iPlayer e.g. behind the scenes, acoustic sets, more interviews etc.



By making the brand more mentally available, it becomes more of a destination - particularly for younger audiences

Makes the brand more 'mentally available'

Given some audiences struggled to understand what BBC Three is (*is it 'just' a part of iPlayer? Does it have a destination of its own?*) in becoming a linear channel there's potential for the brand to become more mentally available. With audiences better able to understand what BBC Three offers them, a channel will encourage deeper engagement

“ I was surprised by how much there was on BBC Three and how much there was for people of our age...**If I was struggling to find something to watch on TV then I might find something on there**

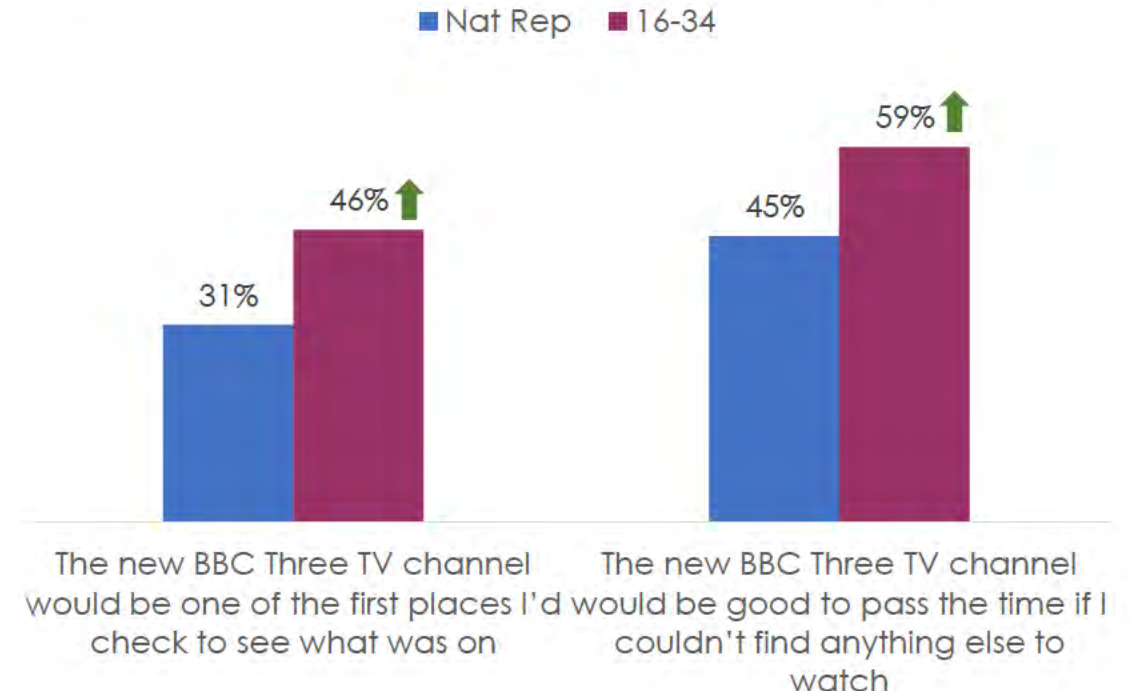
16-17, Light/non-BBC, North

“ It's definitely the kind of channel I would keep an eye out for when scrolling through the guide, **feels like a mix of E4, ITV2 and Channel 4 which are all channels that I like watching**

18-24, Light/non-BBC, Midlands

Personal impact of BBC Three launching as a TV channel

Among UK online population and 16-34 boost sample (% strongly / slightly agree)



↑ Denotes figure is statistically significant higher than the nat rep figure

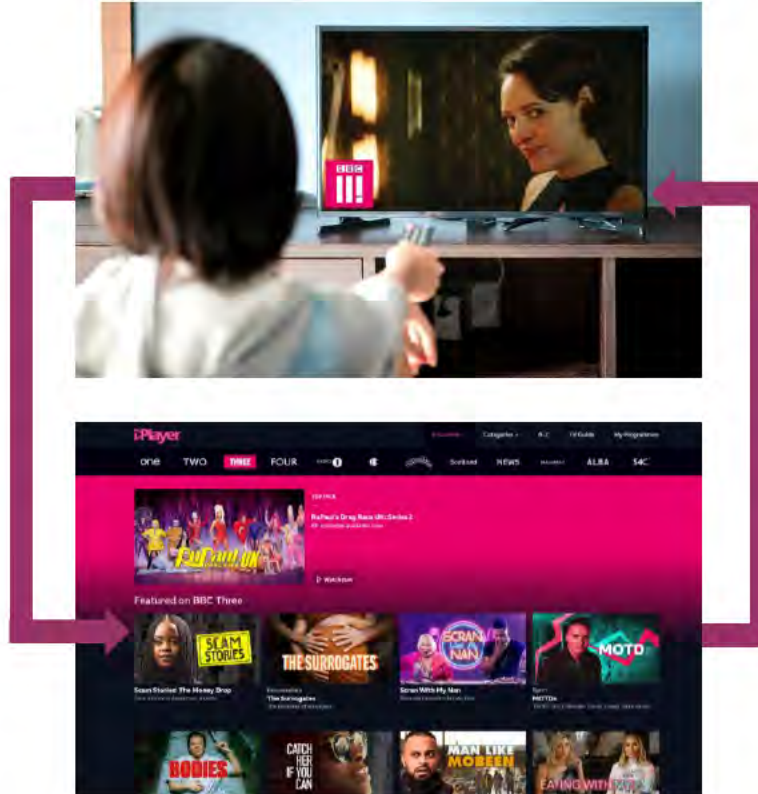
A BBC Three channel and iPlayer would also work well together, fuelling more in-depth discovery and engagement of content

Preconceptions of the BBC masterbrand and BBC One / Two content often **creates barriers to exploring iPlayer**

As such, audiences feel a channel will create **greater visibility**, promoting BBC Three content rather than it feeling 'hidden' on iPlayer

Similarly, a BBC Three 'shop window' can **better convey the channels 'vibe'** and **encourage greater discovery** via iPlayer

Many feel that while they might not watch in-the-moment, knowing the content is there will **prompt them to go to iPlayer** to catch up or to watch future episodes



“ [iPlayer] will **become more of a hub** for the channel

18-24, Heavy/mid-BBC, Wales

“ It'll **open BBC Three up to more people**. I think lots of people don't go to BBC iPlayer so **if they see it as a channel again they might go and visit the app**

18-24, Light/non-BBC, London

“ I think I'll use it more, if I went on it and saw a programme I like or something I used to watch, **I'd go on iPlayer and watch it from the start**, like from series 1

18-24, Light / non-BBC, Midlands

4 in 10 aged 16-34 would go to BBC iPlayer for some reason as a result of BBC Three launching as a linear TV channel

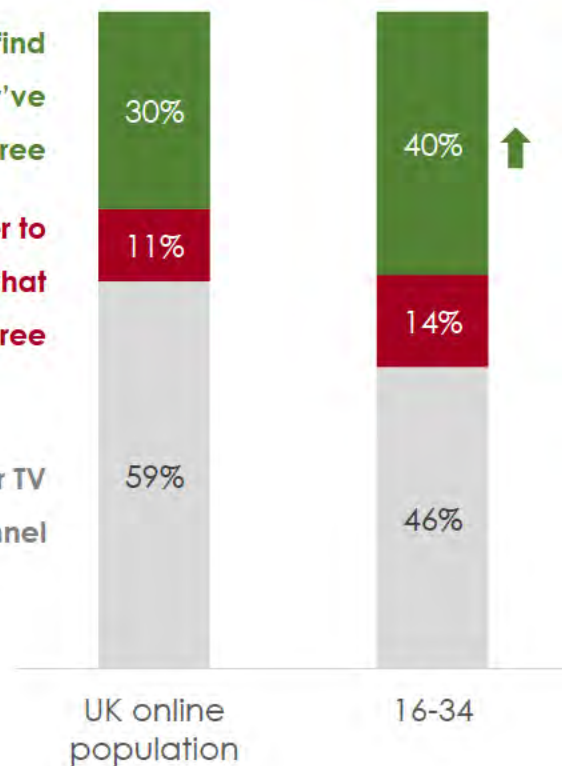
Impact on BBC iPlayer

Among total UK online population and 16-34's (% very or quite likely)

Would watch BBC Three and would use iPlayer to find new TV programmes that are similar to what they've watched on BBC Three

Would watch BBC Three but wouldn't use iPlayer to find new TV programmes that are similar to what they've watched on BBC Three

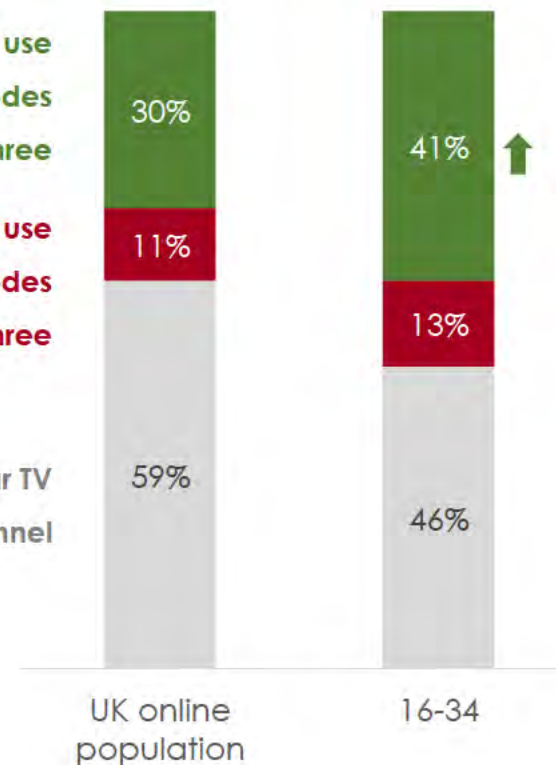
Wouldn't watch BBC Three as a linear TV channel



Would watch BBC Three and would use iPlayer to catch up/watch future episodes of a show they've watched on BBC Three

Would watch BBC Three but wouldn't use iPlayer to catch up/watch future episodes of a show they've watched on BBC Three

Wouldn't watch BBC Three as a linear TV channel





Under-served audiences

BBC Three becoming a TV channel would also increase its appeal with under-served audiences, and those with access issues



One of the **biggest rises in favourability to BBC Three is among BAME audiences**. After learning of the changes, half (50%) have a favourable impression of the service, which is much higher than for white audiences (32%).

“ There's Asian people and black people, **I feel it's very varied** and I think that's a positive and **not something you tend to see on telly**
35-54, Light/non-BBC, Scotland (BAME)



C2DE audiences also see a rise in their favourability towards BBC Three after exposure to the stimulus, rising from 25% to 34%. This is similar to what we see for ABC1 audiences, who rise from 26% to 35%.

“ You **get a bit miffed paying the licence fee** because you think there's no new content for me...but with **BBC Three coming back to TV it justifies the LF much more** to me now
18-24, Heavy/mid-BBC, North (C2DE)



Among those who have a weaker internet connection*, favourability to BBC Three **rises from 30% to 40% after learning about it becoming a TV channel**. **struggle to stream or download video content on their broadband connection*

“ **It's more inclusive**, to have access to both on-demand and TV has a lot of benefits
18-24, Heavy/mid-BBC, Wales

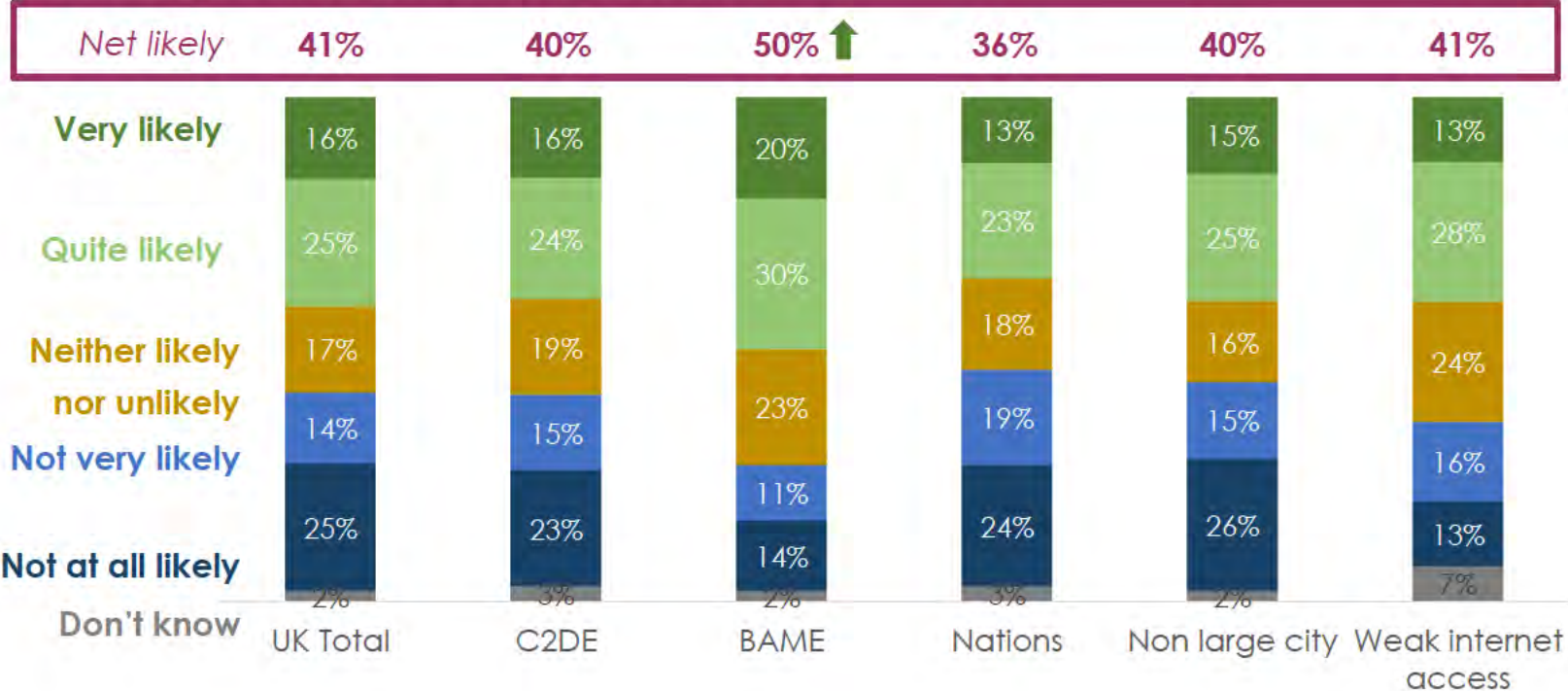
BAME audiences especially find the idea of BBC Three becoming a TV channel appealing, with half saying they will watch

When looking at traditionally under-served audiences, **BAME audiences show the strongest appeal**, with half likely to watch, significantly higher than all other audience groups.

Appeal is similar among the others audience groups outlined here (C2DE, those outside of large cities, and those with weaker internet access), with around **40% of each group likely to watch the channel**.

Likelihood of watching BBC Three TV channel

Among UK online population and BBC under-served audiences



Base: All respondents in nat rep sample (1,568), C2DE (673), BAME (178), Nations (258), Non large city (1,156), Weak internet access (xxx)
 Source: D3 – Likelihood to watch new BBC Three TV channel

↑ Denotes figure is statistically significant higher than the nat rep figure

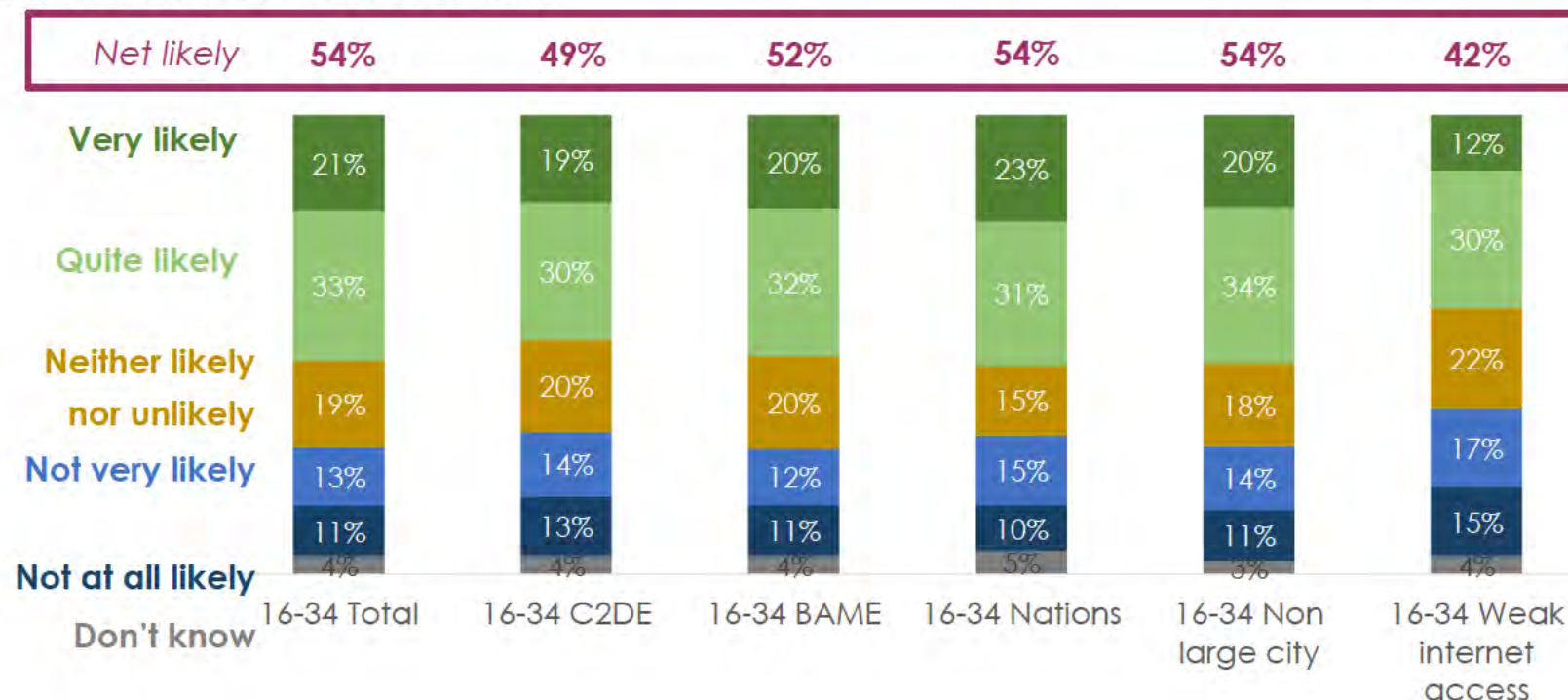
Additionally, over half of 16-34s in the Nations would be likely to watch the new BBC Three TV channel

When looking specifically at the under-served audiences among 16-34s, again appeal is consistent to the total figure.

Compared to the under-served audience groups in the total population, we see **the biggest rises in appeal for those outside of large cities and in the nations**, indicating the service will be good at attracting these specific types of young audiences.

Likelihood of watching BBC Three TV channel

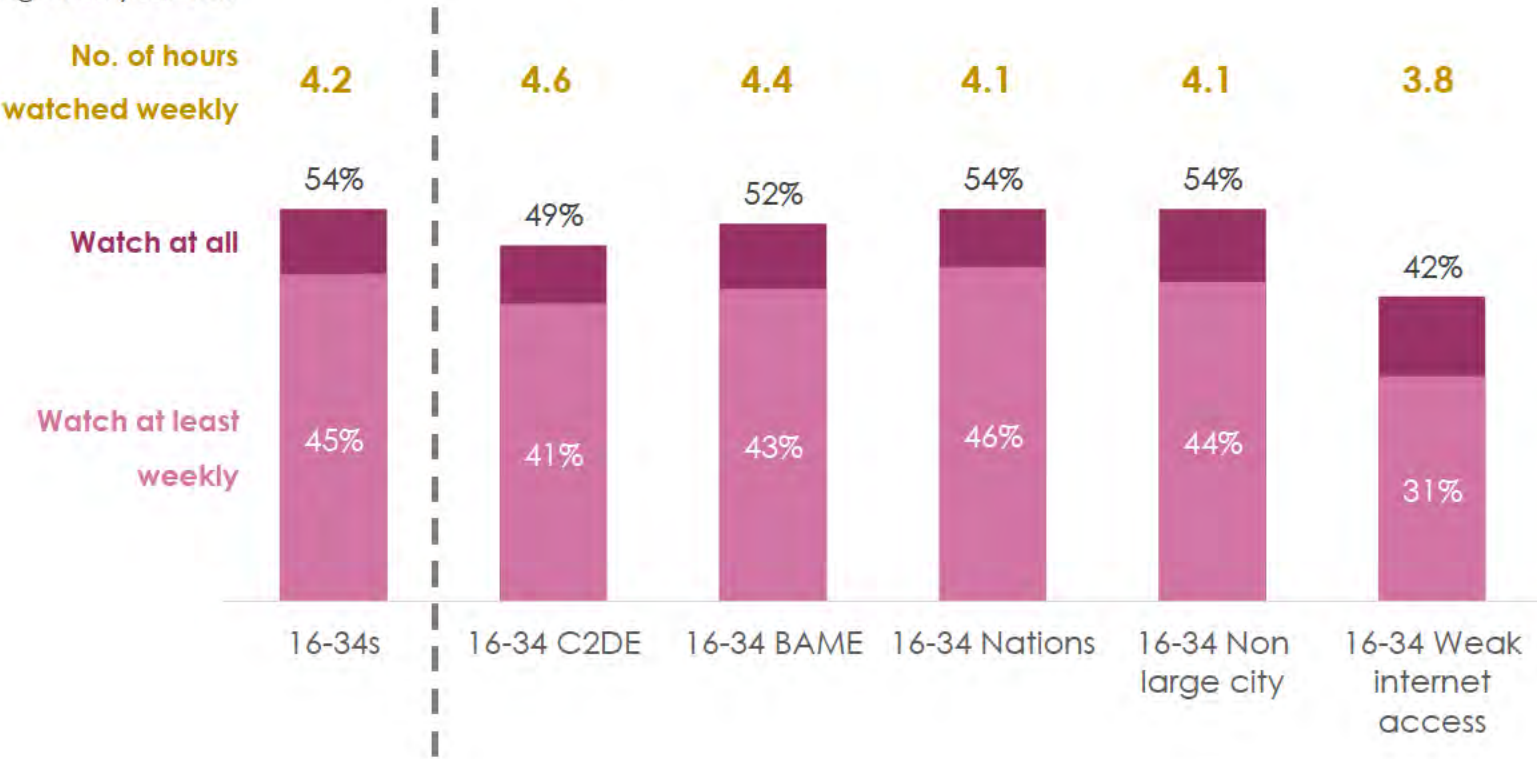
Among 16-34s and BBC under-served audiences



Among younger audiences specifically, average viewing time for under-served audiences is higher

Frequency of watching BBC Three TV channel

Among 16-34 year olds



“ I surprised myself on just how much I consumed without knowing it was BBC 3

25-34, Heavy/mid-BBC, Scotland

“ It's made me realise where I can go to find the shows I've been watching!

18-24, Heavy/mid-BBC, North

“ I was quite shocked really with how many programmes are on there that I would watch. I didn't realise how many programmes were on there that I like

25-34, Light/non-BBC, Wales



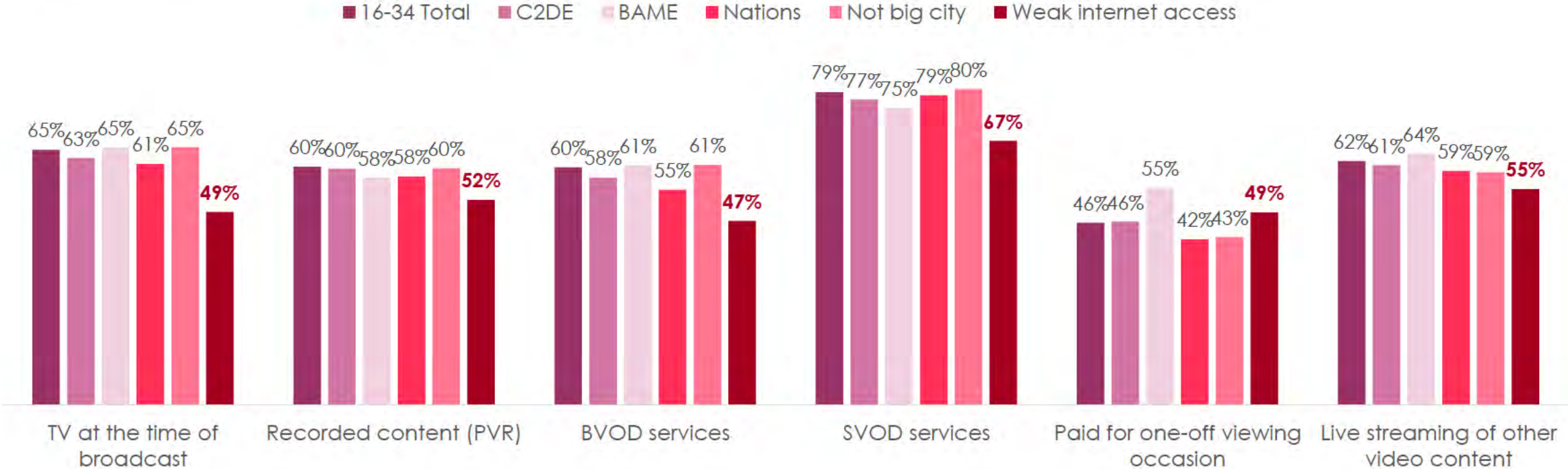
Base: All respondents in boost sample (2,185), C2DE (978), BAME (438), Nations (310), Non large city (1,376), Weak internet access (434)
 Source: D5 – Frequency of watching new BBC Three TV channel, D6 – Number of hours spent watching new BBC Three TV channel weekly

↑ Denotes figure is statistically significant higher than the total 16-34 figure

16-34s with weak internet access are less likely to watch any sort of TV content compared to other under served audiences

TV content watched on TV set on at least a weekly basis

Among 16-34 year olds

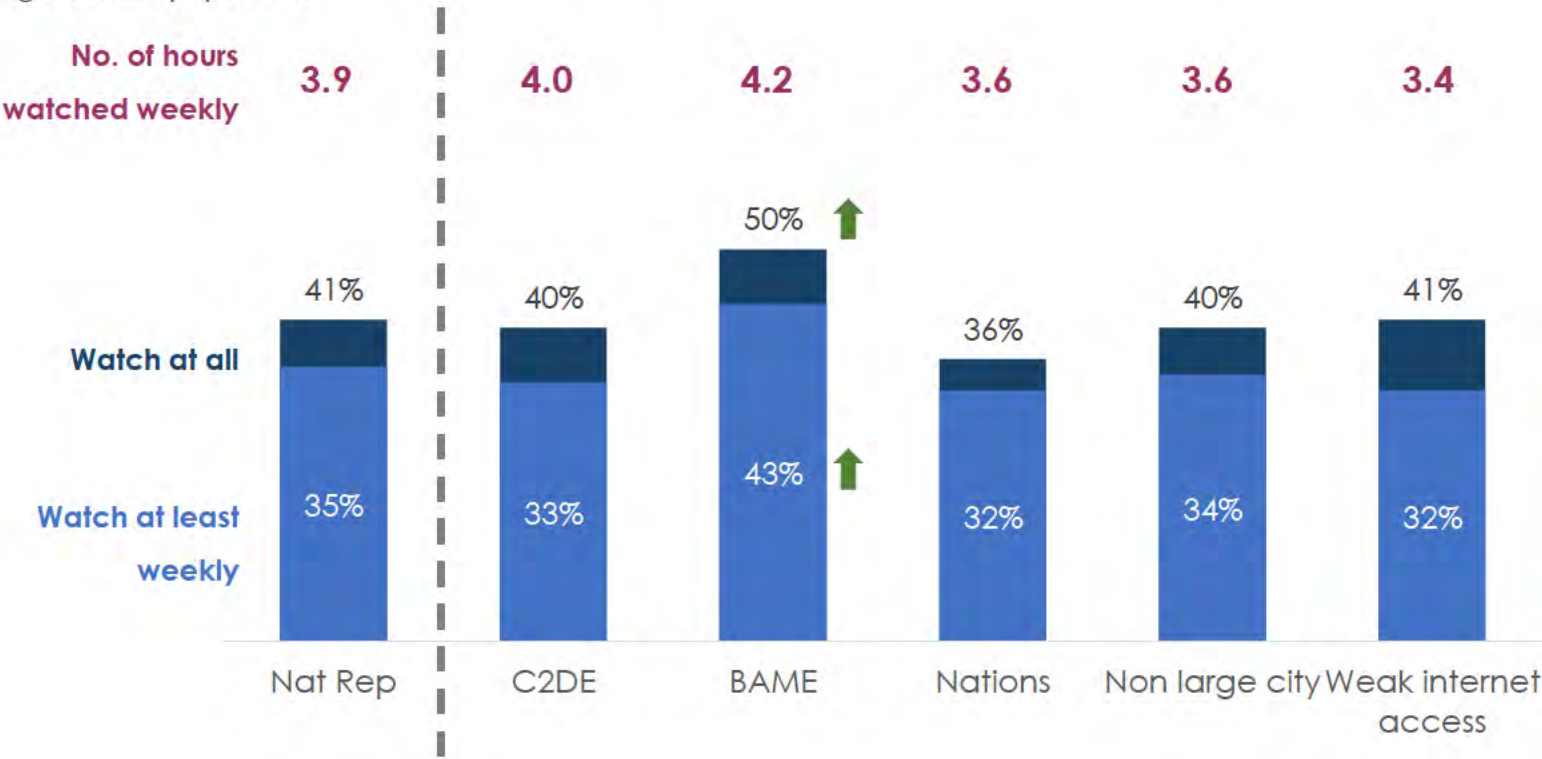


Base: All respondents in boost sample (2,185), C2DE (978), BAME (438), Nations (310), Non large city (1,376), Weak internet access (434)
 Source: B2 – Frequency of watching types of TV content on a TV set

Over 4 in 10 BAME respondents claim that they will watch the new service on at least a weekly basis

Frequency of watching BBC Three TV channel

Among UK online population



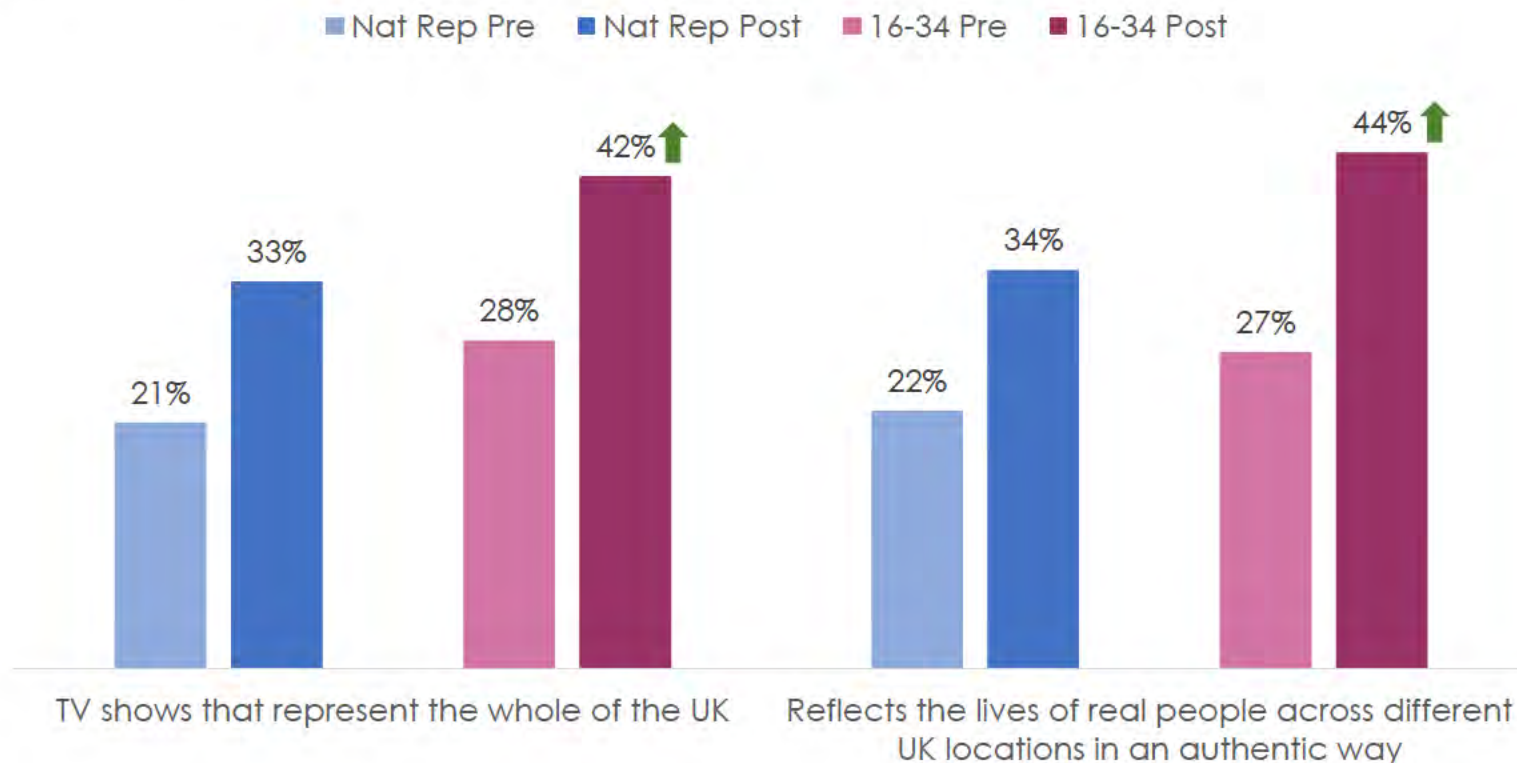
Base: All respondents in nat rep sample (1,568), C2DE (673), BAME (178), Nations (258), Non large city (1,156), Weak internet access (176)
 Source: D5 – Frequency of watching new BBC Three TV channel, D6 – Number of hours spent watching new BBC Three TV channel weekly

↑ Denotes figure is statistically significant higher than the nat rep figure

The BBC Three TV channel is also thought to be representative of all in the UK

Change in BBC Three perceptions

Among UK online population (% scoring 8-10)



“ It’s based in different areas of the UK, like ‘Angles of the North’ for example – **it’s representing different areas**

16-17, Heavy/mid-BBC, Midlands

“ The **BBC have felt behind in terms of representing different types of people** in comparison to ITV and Channel 4. I think they’ve needed to do it for a long time

18-24, Heavy/mid-BBC, North



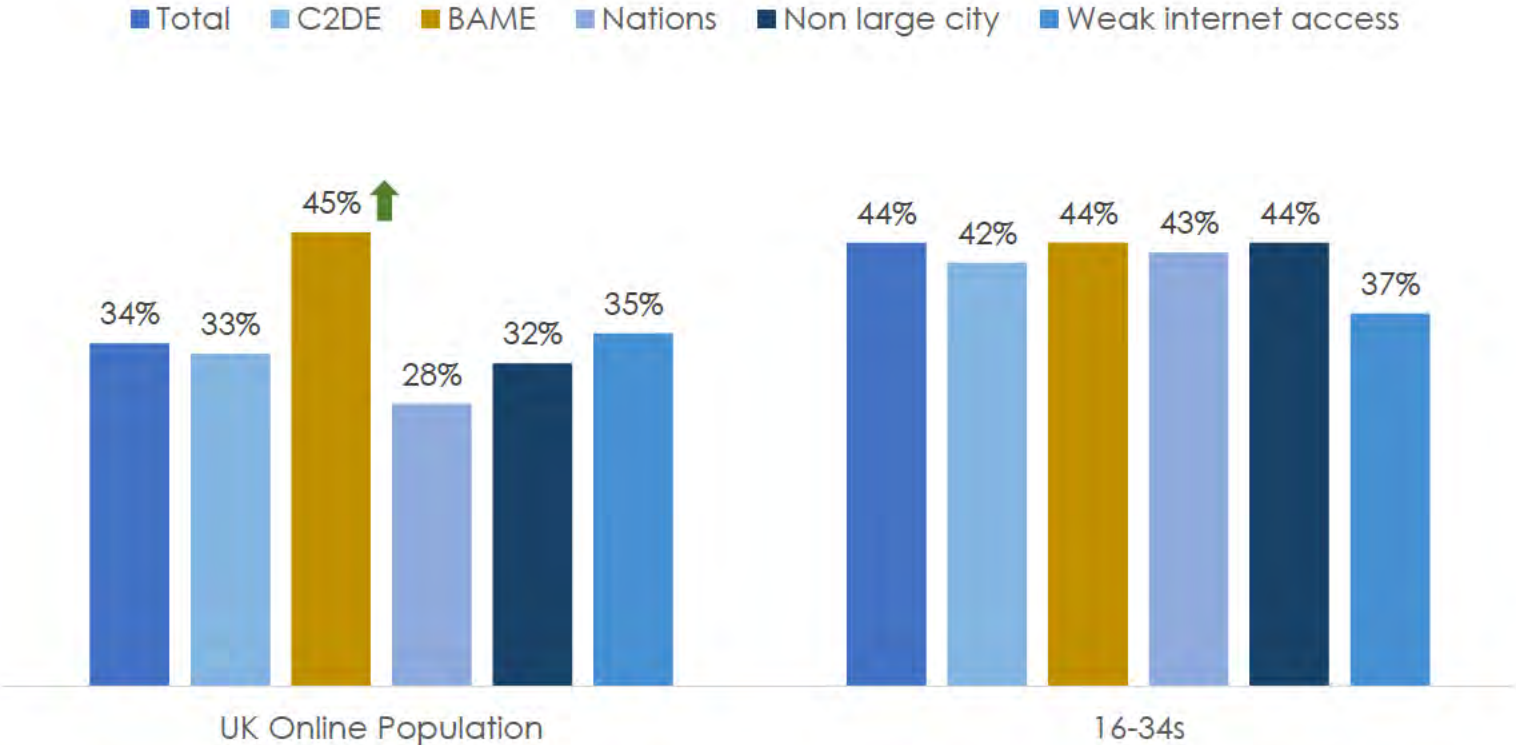
Base: All respondents in nat rep sample (1,568) boost sample (2,185)
Source: C5 / D2 – Perceptions of BBC Three

↑ Denotes figure is statistically significant higher 46 for 16-34 post compared to nat rep post

BAME audiences have the best perceptions of the BBC Three TV channel compared to other underserved audiences

Perceptions of BBC Three (post exposure)

Among UK online population and 16-34 boost sample (average 'delivers well'* score across 13 statements)



BBC Three perceptions tested:

- High quality TV shows
- A wide choice of different TV shows
- TV shows that I want to watch personally
- TV shows that other people my age want to watch
- TV shows that the general population want to watch
- TV shows that represent me and my interests
- TV shows for people like me
- TV shows that represent the whole of the UK
- TV shows that are unique and different to what I can find on other TV channels
- New TV shows (i.e. first shown within the last few months)
- TV shows from the past (i.e. that were originally shown years ago)
- The ability to discover new TV programmes to watch
- Reflects the lives of real people across different UK locations in an authentic way

Base: All respondents in nat rep sample (1,568), C2DE (673), BAME (178), Nations (258), Non large city (1,156), Weak internet access (176), All respondents in boost sample (2,185), C2DE (978), BAME (438), Nations (310), Non large city (1,376), Weak internet access (434)
 Source: D2 – Perceptions of BBC Three
 *Note: Delivers well is calculated as those who score BBC Three an 8-10 on a 1-10 point scale for delivering each perception tested

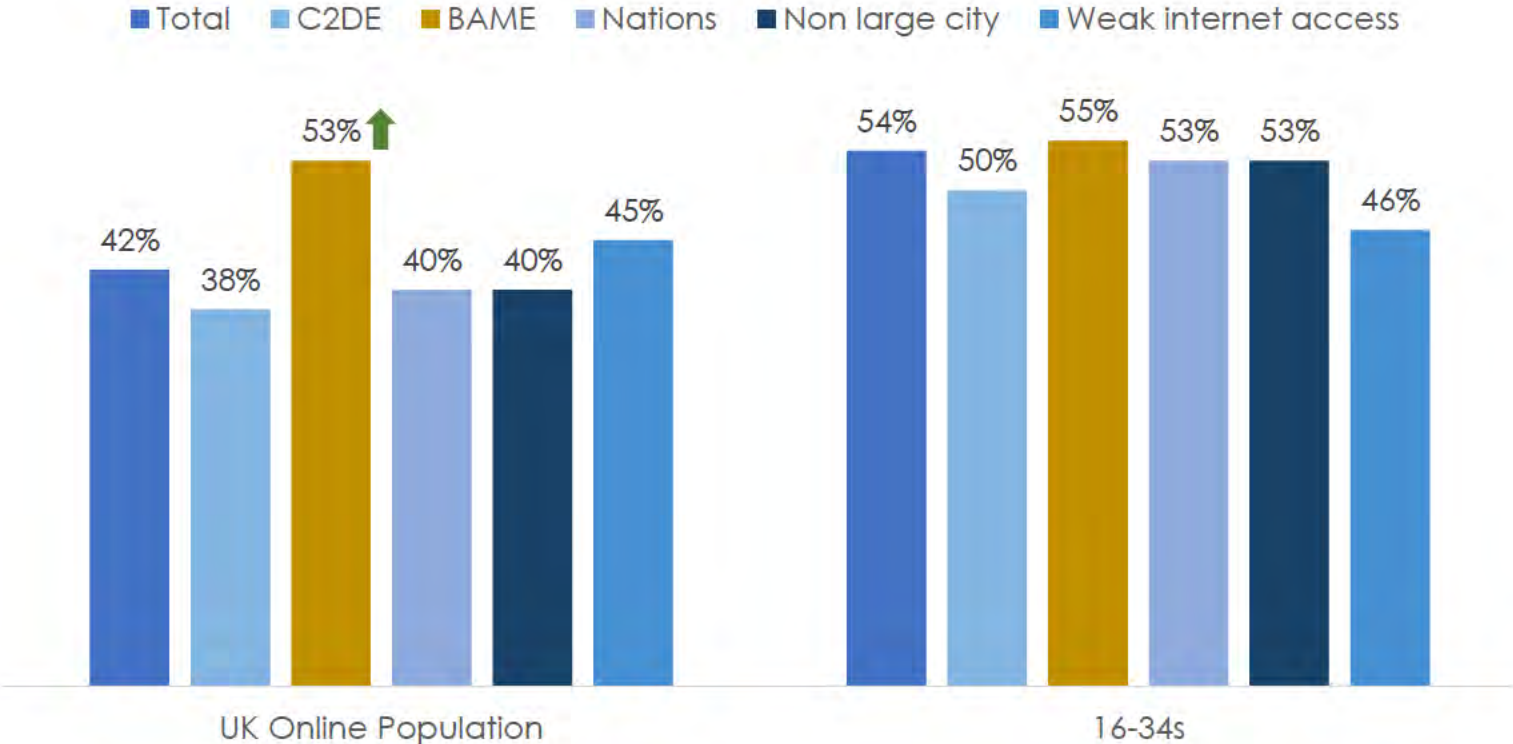


↑ Denotes figure is statistically significant higher than the nat rep figure

BAME audiences have seen the biggest uplift in perceptions of BBC Three after learning of it launching as a TV channel

Personal impact of BBC Three (post exposure)

Among UK online population and 16-34 boost sample (average agreement score across 10 statements)



BBC Three personal impact statements tested

- The new BBC Three TV channel would have great quality TV programmes
- The new BBC Three TV channel would be unique – no other TV channel is like this
- The new BBC Three TV channel would be for people like me
- The new BBC Three TV channel would have TV shows that represent me and my interests
- The new BBC Three TV channel would be one of the first places I'd check to see what was on
- I would be more likely to look for new programmes on the new BBC Three TV channel
- It would make BBC Three programmes easier to watch or find
- The new BBC Three TV channel would be good to pass the time if I couldn't find anything else to watch
- The new BBC Three TV channel would have a wide range of genres I enjoy
- The new BBC Three TV channel would feature a diverse range of programmes



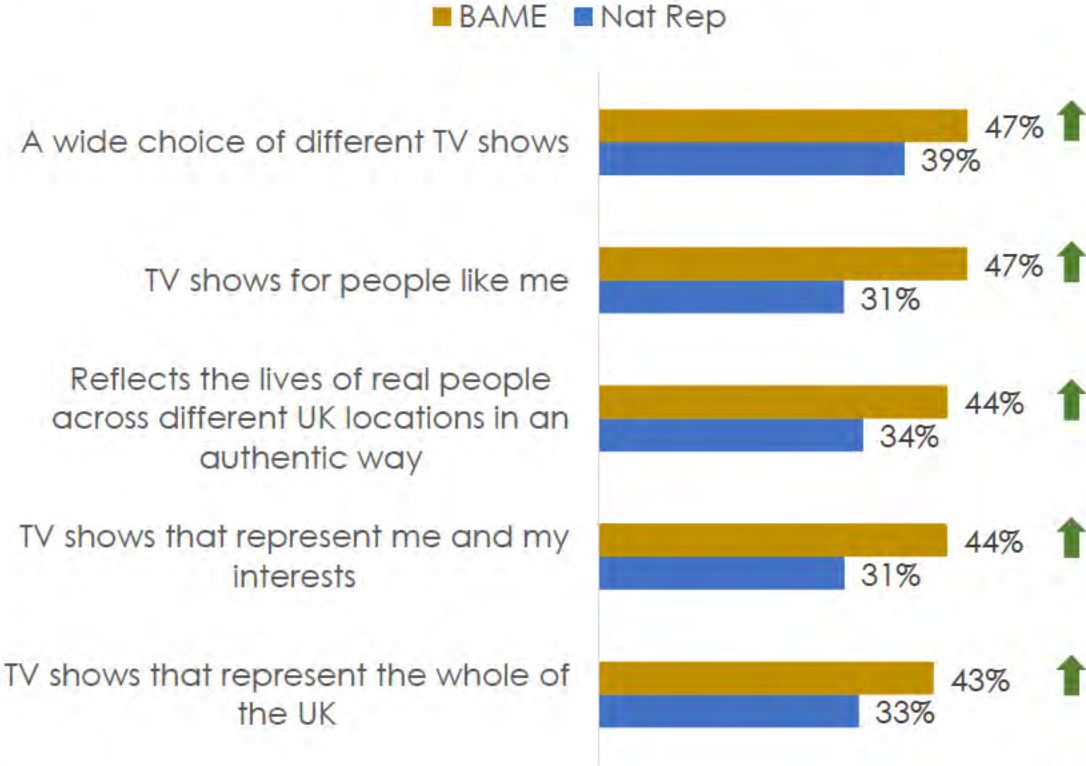
Base: All respondents in nat rep sample (1,568), C2DE (673), BAME (178), Nations (258), Non large city (1,156), Weak internet access (176), All respondents in boost sample (2,185), C2DE (978), BAME (438), Nations (310), Non large city (1,376), Weak internet access (434)
 Source: D14 – Personal impact of BBC Three

↑ Denotes figure is statistically significant higher than the nat rep figure

BAME audiences react particularly well to the diverse, wide range of shows that represent them and their interests

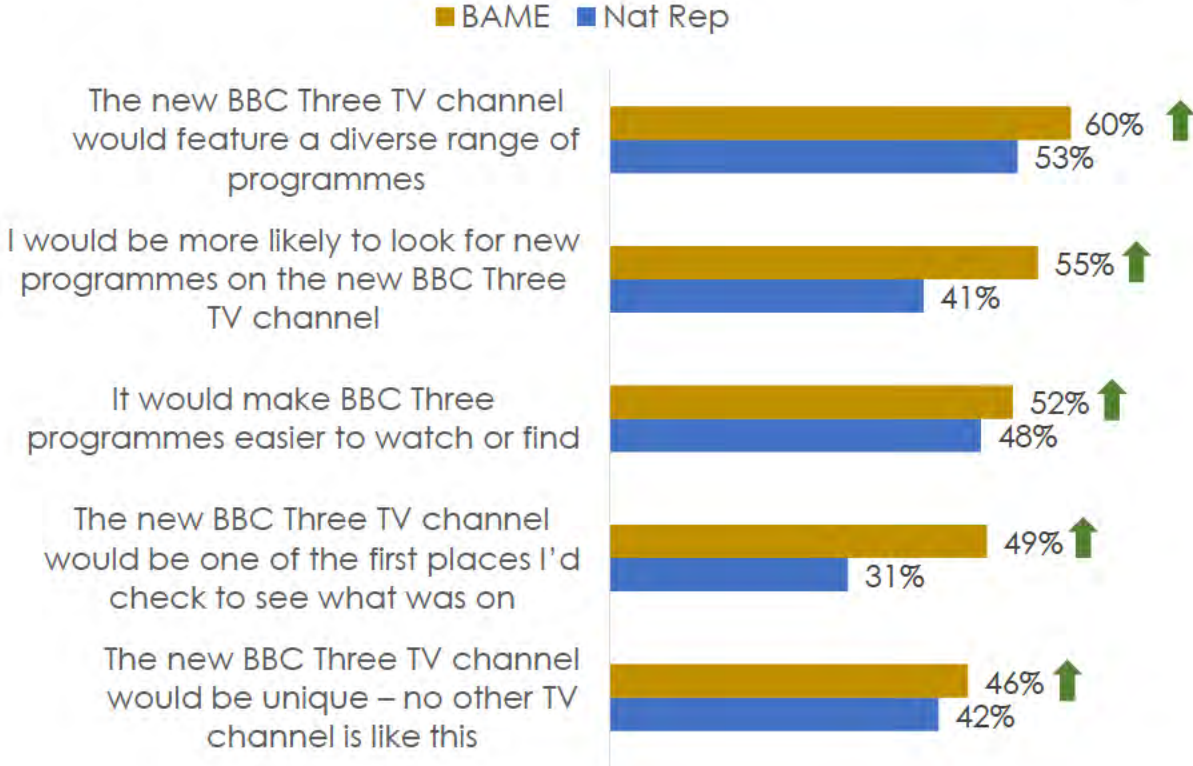
Perceptions of BBC Three

Among UK online population and BAME respondents (% scoring 8-10)



Personal impact of BBC Three

Among UK online population and BAME respondents (% strongly agree or slightly agree)



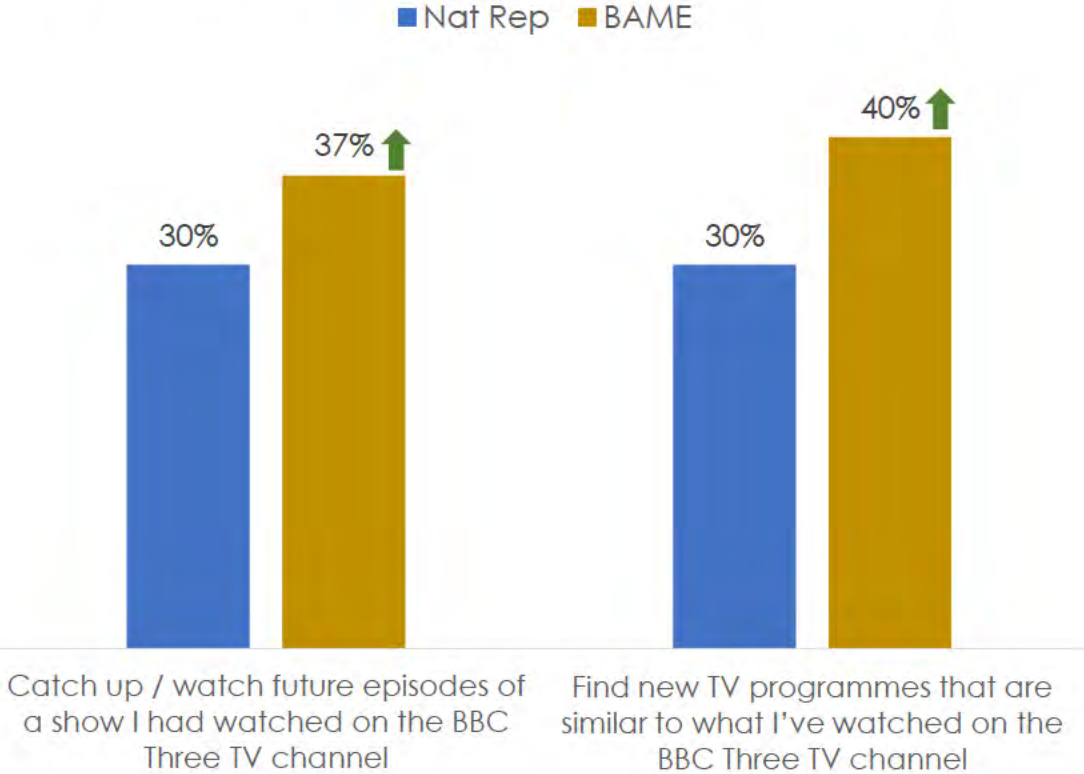
Base: All respondents in nat rep sample (1,568), BAME (178)
 Source: D2 – Perceptions of BBC Three, D14 – Personal impact of BBC Three

↑ Denotes figure is statistically significant higher than the nat rep figure

The majority of BAME respondents also believe they will use iPlayer more as a result of BBC Three launching as a TV channel

Impact on BBC iPlayer

Among UK online population and BAME audiences



Base: All respondents in UK online population sample (1568), BAME, (211)
Source: D16 Societal Impact

↑ Denotes figure is statistically significant higher 50 than the nat rep figure

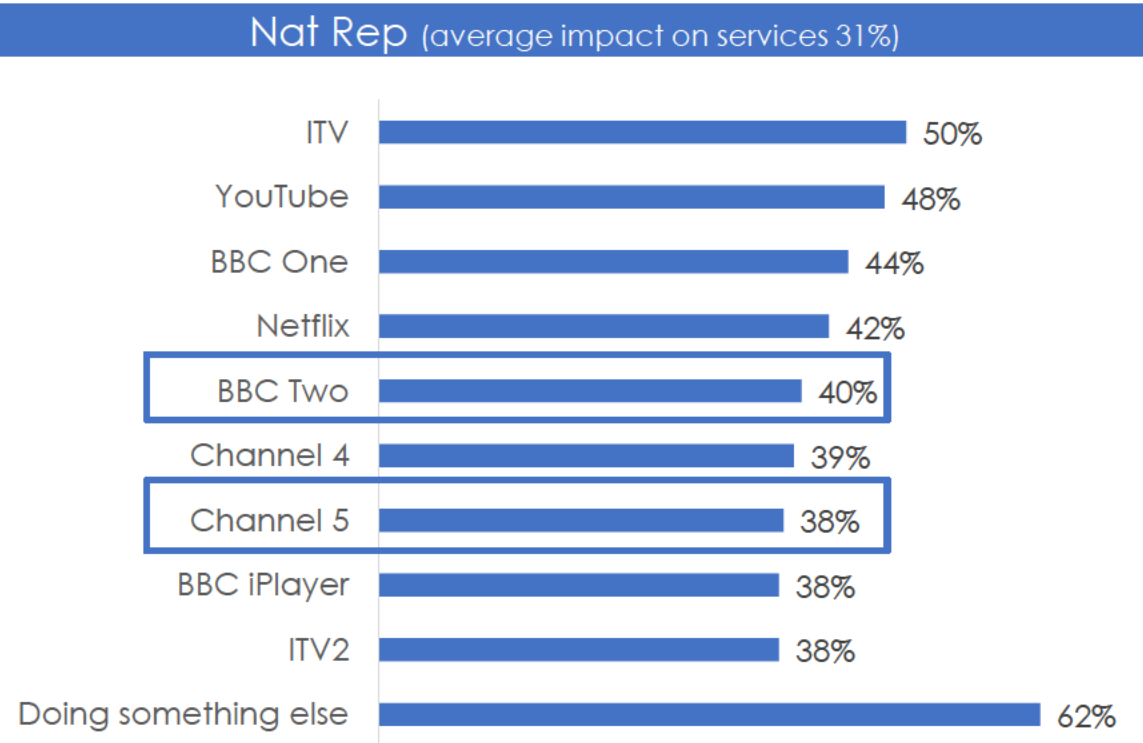


Wider impact

Younger audiences are more likely to take time away from online video and streaming services to make room for BBC Three

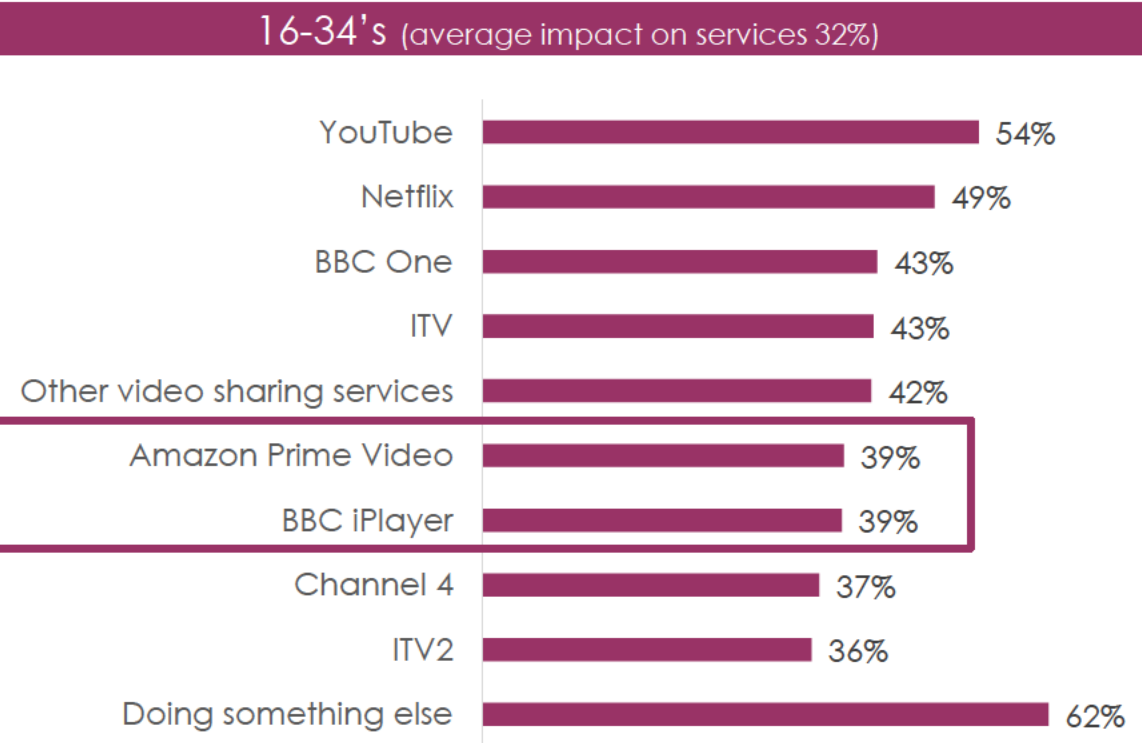
Top 10 services to take time away from to watch BBC Three

Among all in UK online population who would watch the new BBC Three channel weekly



Top 10 services to take time away from to watch BBC Three

Among all 16-34's who would watch the new BBC Three channel weekly



Boxes indicate that service is unique to the top 10 for that group

How to interpret average scores: Across all services asked about, the average score for very or quite likely to take some time away from it as a result of BBC Three launching was 31%



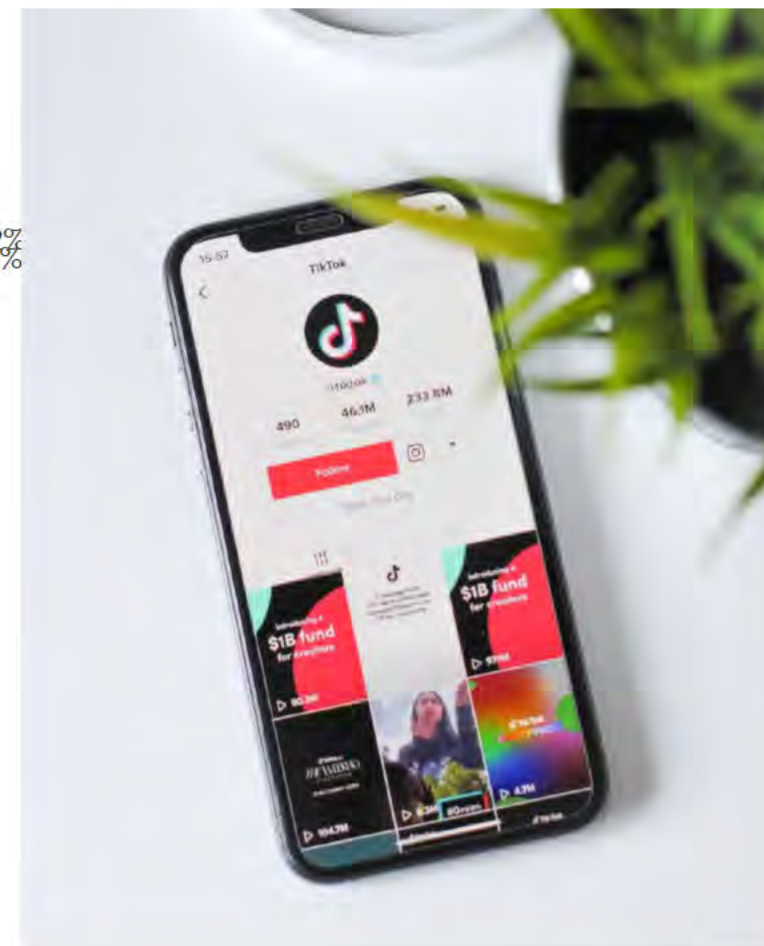
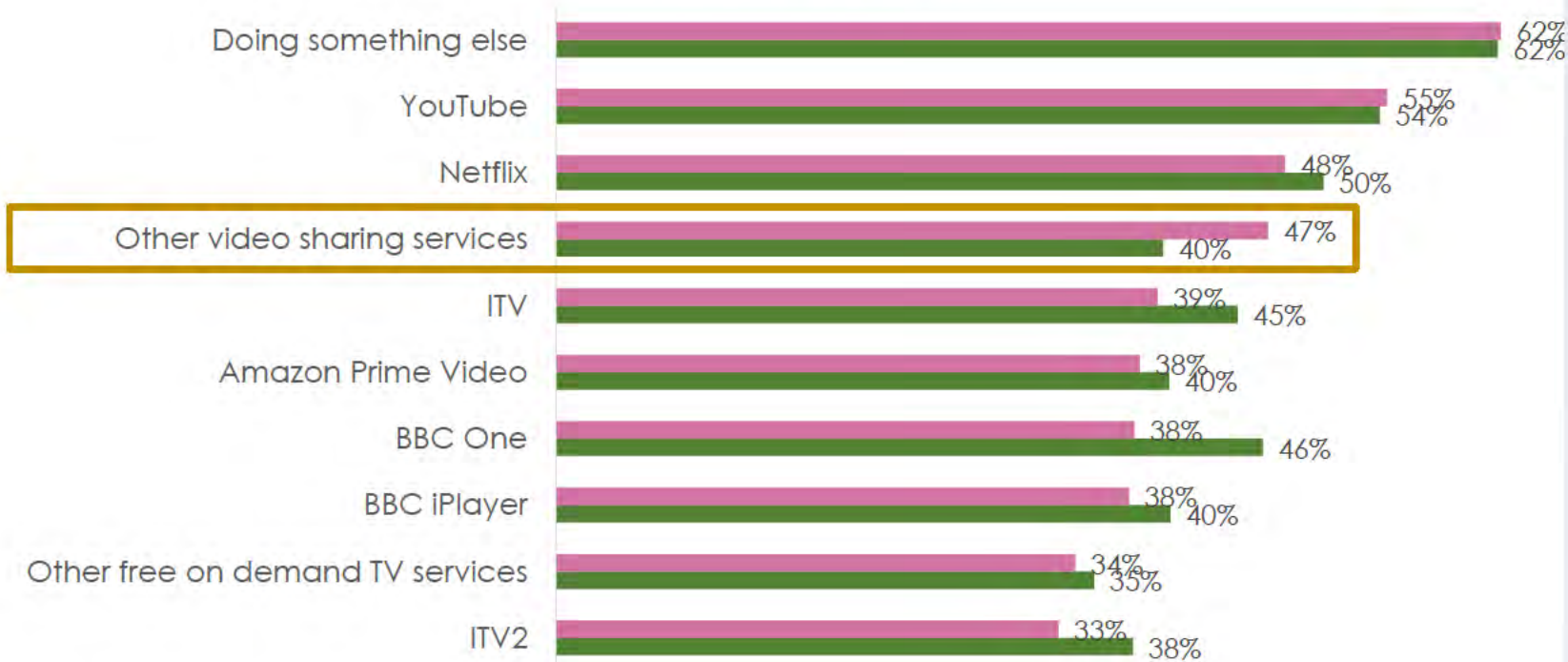
Base: All in nat rep sample likely to watch the service on a weekly basis (556), All 16-34's likely to watch the service on a weekly basis (964)
Source: D9 – Services taken time away from

The youngest audiences are more likely to take time from other video sharing services like TikTok, and less from linear channels

Top 10 services to take time away from

Among all 16-34's who would watch BBC Three channel weekly

■ 16-24 ■ 25-34



The online population that would watch BBC Three weekly will take time away from other services fairly evenly

TV Channel	% likely	No. of hours
BBC One	44%	0.35
BBC Two	40%	0.26
BBC Four	26%	0.12
Other BBC	32%	0.17
ITV	50%	0.26
ITV2	38%	0.15
ITV3	26%	0.09
ITV4	22%	0.07
Other ITV	24%	0.10
Channel4	39%	0.12
E4	32%	0.10
Other C4	34%	0.12
Channel 5	38%	0.12
Other C5	27%	0.07
Sky One	31%	0.09
Other Sky	29%	0.09
Other TV channel	31%	0.10

Service	% likely	No. of hours
BBC iPlayer	38%	0.15
ITV Hub	32%	0.07
All4	27%	0.04
My5	19%	0.03
Other free catch up	26%	0.07

Service	% likely	No. of hours
Netflix	42%	0.22
Amazon Prime Video	34%	0.16
Disney+	28%	0.07
NOW TV	22%	0.04
BritBox	15%	0.03
Other paid video service	24%	0.05

Service	% likely	No. of hours
YouTube	48%	0.21
Other video sharing	27%	0.09
Doing something else	62%	0.30

Notes: The average 'likely' score for services having taken time away from them among weekly BBC Three viewers is 31%.

*Hours shown on this slide total the average of **3.90** hours each weekly viewer would watch BBC Three channel in a typical week.*

Younger audiences are more likely to create time for BBC Three by reducing the time they watch online video services

TV Channel	% likely	No. of hours
BBC One	43%	0.36
BBC Two	32%	0.20
BBC Four	24%	0.13
Other BBC	30%	0.18
ITV	43%	0.22
ITV2	36%	0.16
ITV3	24%	0.08
ITV4	23%	0.06
Other ITV	25%	0.08
Channel4	37%	0.13
E4	32%	0.11
Other C4	29%	0.09
Channel 5	28%	0.08
Other C5	24%	0.06
Sky One	26%	0.08
Other Sky	28%	0.08
Other TV channel	32%	0.09

Service	% likely	No. of hours
BBC iPlayer	39%	0.16
ITV Hub	29%	0.07
All4	29%	0.05
My5	19%	0.04
Other free catch up	35%	0.11

TV Channel	% likely	No. of hours
Netflix	49%	0.34
Amazon Prime Video	39%	0.19
Disney+	32%	0.14
NOW TV	22%	0.06
BritBox	15%	0.03
Other paid video service	29%	0.09

TV Channel	% likely	No. of hours
YouTube	54%	0.29
Other video sharing	42%	0.19

Doing something else	62%	0.29
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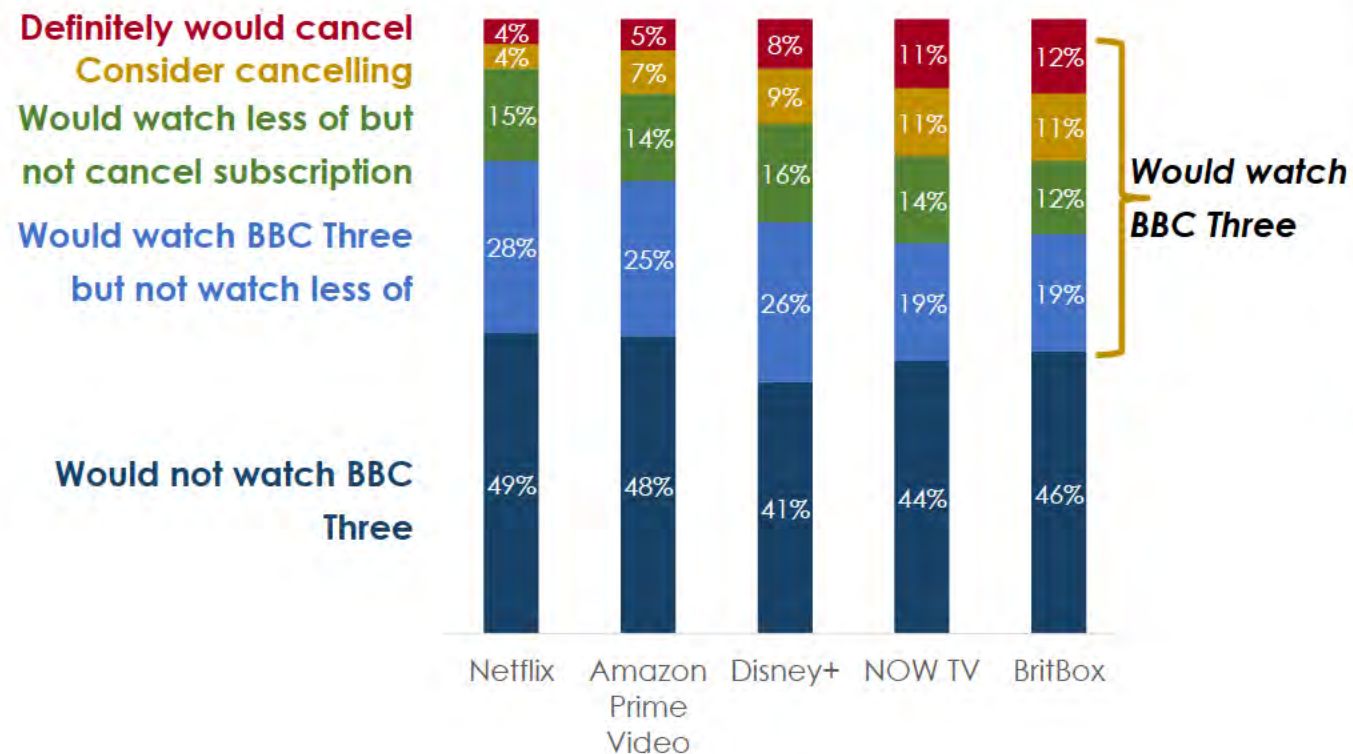
Notes: The average 'likely' score for services having taken time away from them among weekly BBC Three viewers is 32%.

*Hours shown on this slide total the average of **4.24** hours each weekly viewer would watch BBC Three channel in a typical week.*

The launch of a BBC Three TV channel will not have much impact on subscription rates for major SVOD services

Impact on SVOD services

Among users of each SVOD service in the nat rep sample



A note on interpretation

As we did not ask intention to churn from services before showing BBC Three stimulus, we'd imagine the figures for consider / definitely cancel are also likely to be impacted by external forces, as in previous research we have seen claimed intention to churn always higher for smaller services like NOW TV and BritBox, compared to the likes of Netflix and Amazon Prime Video.

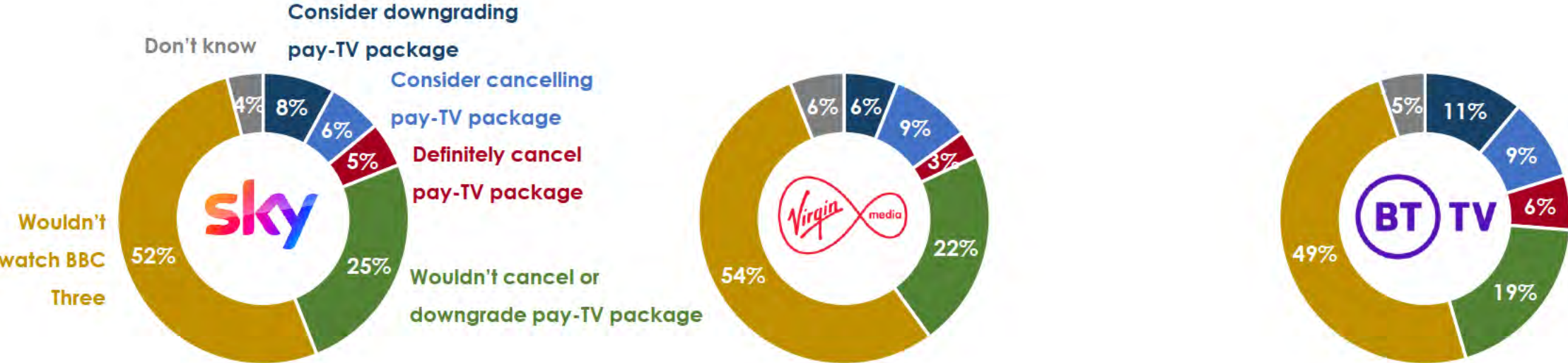
“It's **not going to change how much I use Netflix or Amazon [Prime], they're like my go-to's, I'm not going to get rid of them just because BBC Three has a TV channel**


18-24, Light / non-BBC, London

Less than 1 in 10 claim that they will cancel their pay-TV subscription as a result of the new BBC Three channel

Impact on pay-TV services

Among users of each pay-TV service who would watch the new BBC Three TV channel on a weekly basis



The background of the slide is a complex marbled paper pattern. It features swirling, organic shapes in various shades of blue, from light sky blue to deep navy blue, set against a white or light grey base. The patterns resemble natural textures like marbled paper or perhaps microscopic biological structures. In the center of the slide, there is a solid black rectangular box with a thin white border. Inside this box, the text is written in a clean, white, sans-serif font.

04 Audience reactions to the
linear channel proposition from
a societal perspective

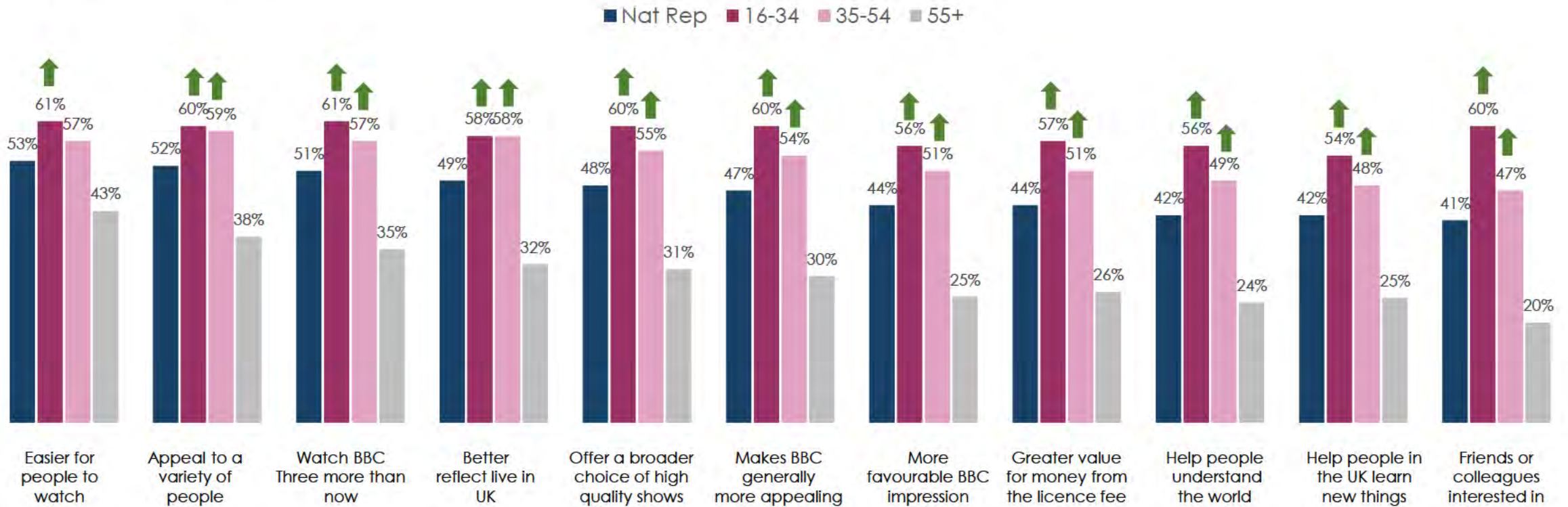


Overall expected impact

Expected societal impact is widely positive, particularly amongst 16-34s, although this does drop significantly for those aged 55+

Societal Impact on the BBC

% who agree with statements



Base: All respondents (1568), 16-34 (2185 from boost sample), 35-54 (542), 55+ (554) Source: D16 Societal Impact

↑ Denotes figure is statistically significant higher than the nat rep figure

In particular, the public can identify several consistent societal benefits to BBC Three becoming a TV channel once again



It will appeal more to those 'younger than me'

Older (esp. 55+) recognised a channel has **benefits for younger generations**, particularly those interested in the **themes / people like them** that will feature in BBC Three programmes



It provides extra content for Freeview households

Given the more limited range of channel options (vs. Pay TV) many felt that a BBC Three linear channel would **provide value to free-to-air only homes**, by delivering **more content at no extra cost**



It's a new platform for under-represented groups

Seen as **beneficial for those who don't typically get as much terrestrial screen time**, e.g. LGBTQ, BAME, regions and nations, young people more generally, who can now be represented via a more mainstream platform



It's helpful for less digitally savvy / digital issues

For those with traditional linear habits, or **unable to access BBC Three via BBC iPlayer**, this now allows them to do so via a more familiar gateway, meaning they are **not hindered by a lack of tech sophistication / access**



It can appeal to the young at heart

It has content that will resonate with **older audiences who are interested in topical issues** and opens up opportunities for them to **see how younger generations think / act / feel / speak etc.**

The public can identify several consistent societal benefits to BBC Three becoming a TV channel once again

It will appeal more to those 'younger than me'



To a degree, there's a few things that would appeal to me like the dramas but **generally I'd say it's more for 18-35 year olds**

55-74, Heavy/mid-BBC, Scotland

It provides extra content for Freeview households



For **anyone who just has Freeview it's a huge benefit**, it's a whole other channel to watch

-35-54, Light/non-BBC, North

It's a new platform for under-represented groups



It's keeping up with the times... the **content involving the LGBTQ community, race, different parts of the UK**, a lot of places and different genres that people can hone into

35-54, Heavy/mid-BBC, London

It's helpful for those less digitally savvy / with digital issues



The fact that it's moving to the TV, older people use the TV more than apps so they'll probably come across it and it will **be more accessible**

16-17, Heavy/mid-BBC, Midlands

It can appeal to the young at heart



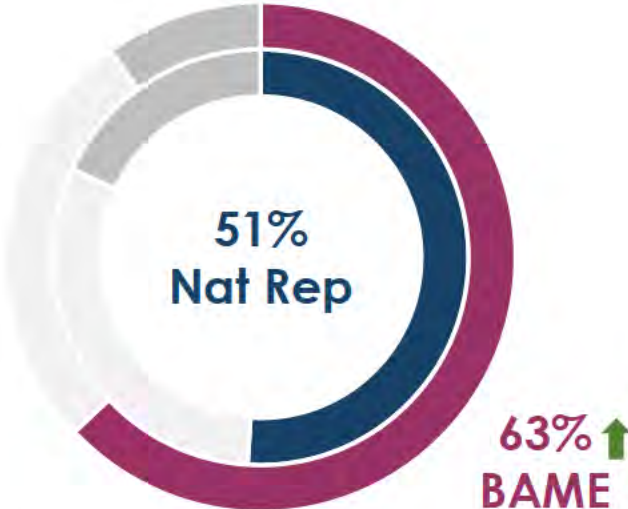
It's not the age that actually matters - **it's the mindset. Older people in this society would be open to watching this content.** It's a young mindset so there's a market for older people too

18-24, Heavy/mid-BBC, North

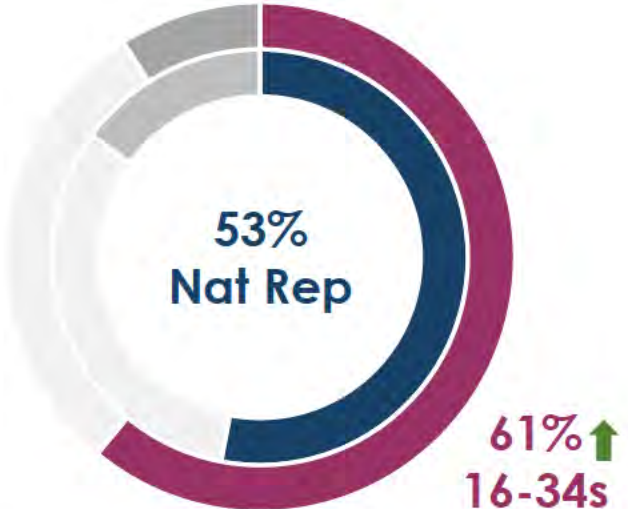
Half of all respondents feel the new channel will make programmes easier to find, and more people will watch

Societal Impact

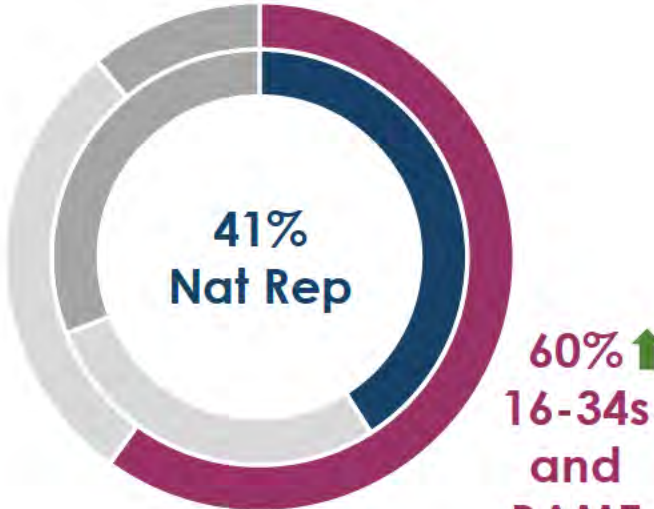
Impact of the proposed BBC Three TV channel



More people will watch BBC Three than do so now if these changes are made



The new channel will make BBC Three **programmes easier** for people to **watch or find**



The new channel will show stuff my **friends or colleagues** will be **interested in**



Base: All respondents (1568), 16-34 (2185 from boost sample), C2DE (673), BAME, (178), Nations (258), Non-large city (1156), Weak internet access (176)
Source: D16 Societal Impact

↑ Denotes figure is statistically significant higher than the nat rep figure

Half of all respondents feel the new channel will make programmes easier to find, and more people will watch

Societal Impact

Impact of the proposed BBC Three TV channel

% AGREE	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet access
More people would watch BBC Three than do so now if these changes were made	51%	45%	63% ↑	48%	48%	60% ↑
The new channel would make BBC Three programmes easier for people to watch or find	53%	47%	60% ↑	51%	52%	52%
The new channel would show stuff my friends or colleagues would be interested in	41%	36%	60% ↑	37%	38%	53% ↑

% AGREE	16-34	16-34 CD2E	16-34 BAME	16-34 Nations	16-34 Non large cities	16-34 Weak internet
More people would watch BBC Three than do so now if these changes were made	61%	59%	66% ↑	57%	59%	58%
The new channel would make BBC Three programmes easier for people to watch or find	61%	58%	63%	63%	62%	57%
The new channel would show stuff my friends or colleagues would be interested in	60%	56%	62%	63%	60%	52%



Base: All respondents (1568), 16-34 (2185 from boost sample), C2DE (673), BAME, (178), Nations (258), Non-large city (1156), Weak internet access (176)
 16-34 from boost sample C2DE (978), BAME (438), Nations (310), Non-large city (1376), Weak internet (434), Source: D16 Societal Impact

↑ Denotes figure is statistically significant higher than the nat rep figure

Although not a widely held view, there is a minority who feel unsure about the value of BBC Three becoming a TV channel

There is some confusion over why the BBC would bring BBC Three back, as it **feels counter intuitive to the (perceived) way young people watch TV**

Some younger (16-24s) and / or lighter BBC consumers **sometimes struggle to relate to the concept of a linear channel and schedules** for other people like them

Some suggest BBC could **promote BBC Three on iPlayer more** and push audiences there instead

However, while some have a perception that younger audiences will not use it, actually many young viewers **feel they would get value from a linear BBC Three channel**, as outlined and further supported by the quantitative results



“ I think **younger generations are very much online based** so I don't know how many would sit and flick through that. **My sister or brother would go on iPlayer, they wouldn't sit downstairs.** A lot of the time they're in their rooms as well, on their own watching what they want rather than agreeing on something to watch

25-34, Light/non-BBC, London

“ I'd like to watch it live on TV if I was at home, if I had that option which I don't have at my student house. I **don't know if I'd go out of my way to go on BBC iPlayer and search for BBC Three if I can get it on my TV**

18-24, Heavy/mid-BBC, Wales

While some older audiences are concerned with the volume of reality shows and promoting the cult of celebrity to young viewers

Some older audiences (typically 55+) feel that there appears to be a **high volume of 'reality' and celebrity-based content on the linear channel**

For them this feels 'less BBC' and not as closely aligned with the content mix of BBC One and BBC Two that they are more familiar with

Whilst recognising that it is not designed for them, there is **some concern for younger generations about promoting the cult of celebrity** e.g. presenting celebrity as being aspirational vs. focusing on vocational careers



“ It does worry me that the younger generation are watching this sort of thing **because it's creating a generation of people who just want to be famous.** Somebody from 'Love Island' can earn a 100x what a nurse earns. They just want to be famous and **it's not good for a younger generation to actually be fed this**

55-74, Heavy/mid-BBC, North

“ **I must be getting too old for this.** It's just mind-boggling, some of it. The way I've been brought up and how I've lived my life to see this now is **beyond comprehension**

55-74, Heavy/mid-BBC, Scotland



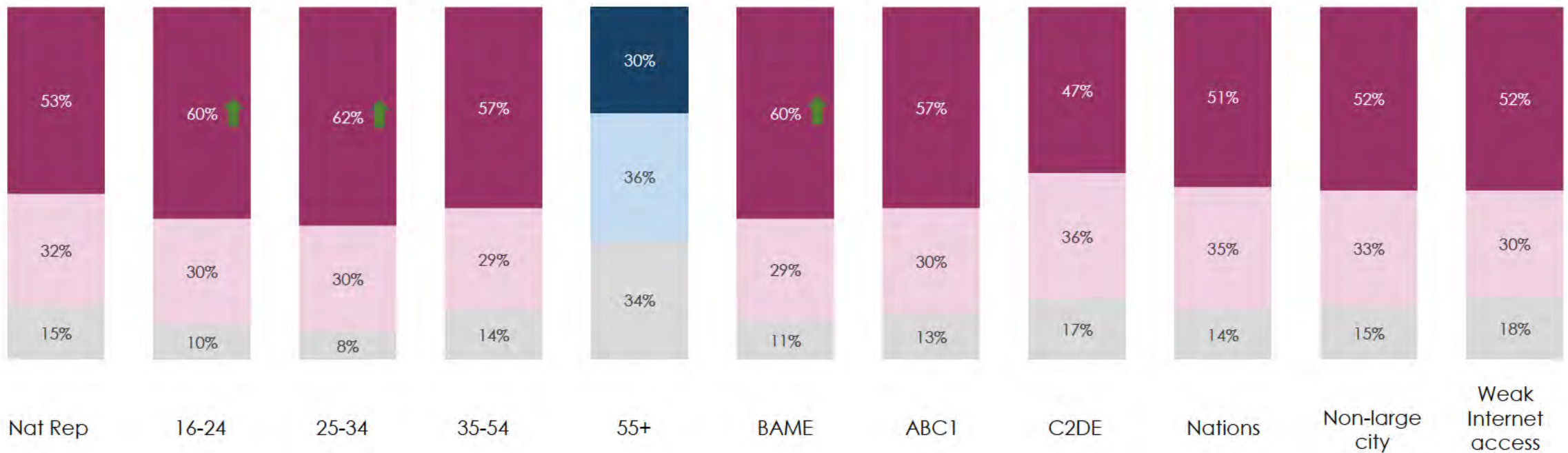
Under-served audiences

There is positive expected levels of societal impact across 16-54 year olds and the BBC's typically under-served audiences

Societal Impact on the BBC

Average Societal Impact score

Disagree Neutral Agree



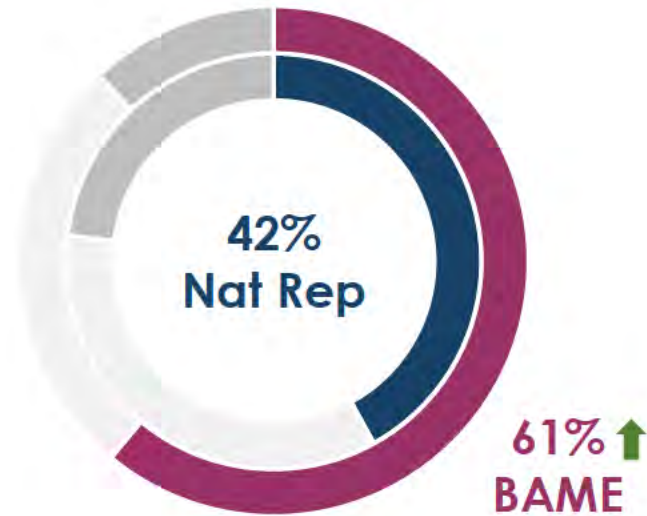
Base: All respondents (1568), all sub-groups higher than 100 Source: D16 Societal Impact – average of score all statements

↑ Denotes figure is statistically significant higher than the nat rep figure

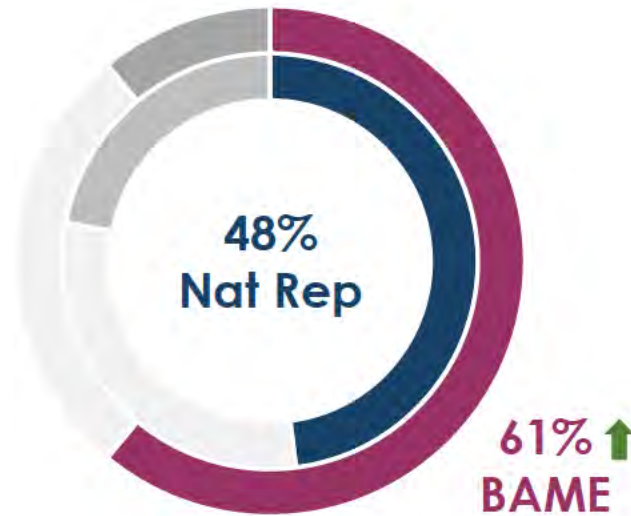
Two thirds of BAME audiences feel the changes will help people in the UK understand more about the world around them

Societal Impact

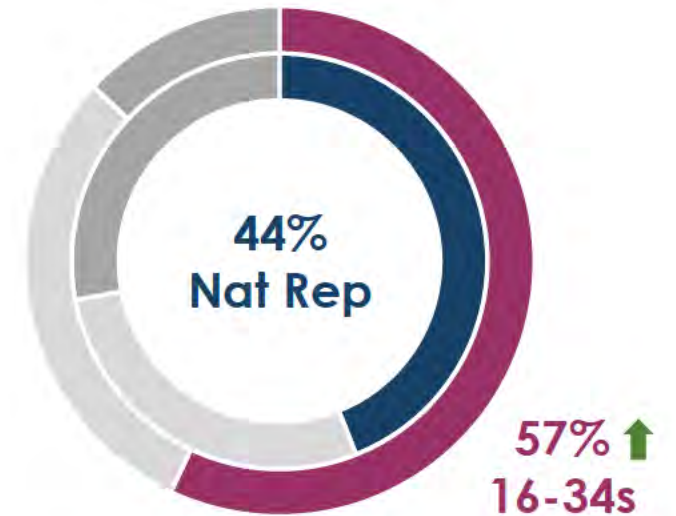
Impact of the proposed BBC Three TV channel



The changes will **help people** in the UK **understand and engage** more in the **world around them**



The changes will offer a broader **choice of high quality content**



The new BBC Three TV channel would offer **greater value for money for licence fee payers**

Two thirds of BAME audiences feel the changes will help people in the UK understand more about the world around them

Societal Impact

Impact of the proposed BBC Three TV channel

% AGREE	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet access
The changes will help people in the UK understand and engage more in the world around them	42%	38%	61% ↑	42%	39%	42%
The changes will offer a broader choice of high quality content	48%	44%	61% ↑	45%	45%	54%
The new BBC Three TV channel would offer greater value for money for licence fee payers	44%	40%	56% ↑	38%	42%	48%

% AGREE	16-34	16-34 CD2E	16-34 BAME	16-34 Nations	16-34 Non large cities	16-34 Weak internet
The changes will help people in the UK understand and engage more in the world around them	54%	52%	58%	51%	53%	49%
The changes will offer a broader choice of high quality content	60%	57%	64%	59%	60%	53%
The new BBC Three TV channel would offer greater value for money for licence fee payers	57%	55%	57%	56%	56%	52%



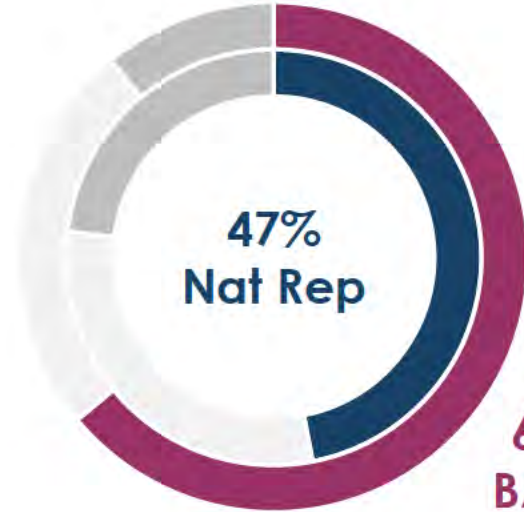
Base: All respondents (1568), 16-34 (2185 from boost sample), C2DE (673), BAME, (178), Nations (258), Non-large city (1156), Weak internet access (176)
 16-34 from boost sample C2DE (978), BAME (438), Nations (310), Non-large city (1376), Weak internet (434), Source: D16 Societal Impact

↑ Denotes figure is statistically significant higher 70 than the nat rep figure

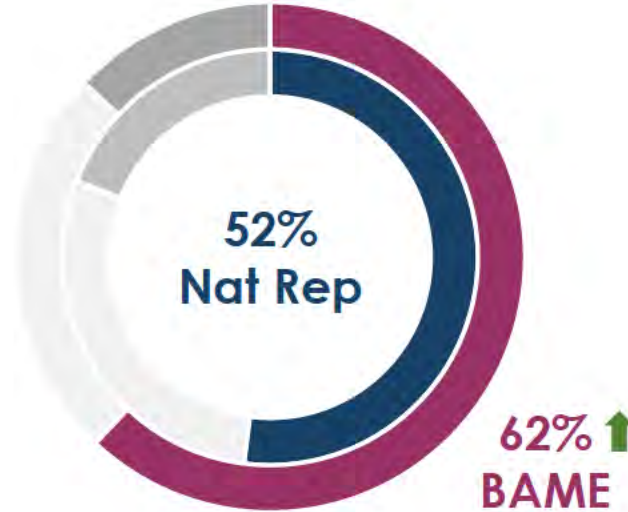
Subsequently the new channel improves perceptions of the BBC for most, but particularly among BAME and younger audiences

Societal Impact

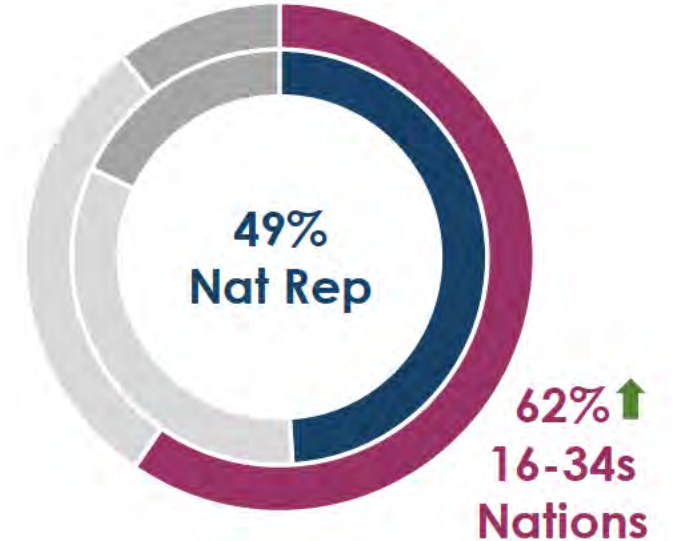
Impact of the proposed BBC Three TV channel



The changes would make BBC **more appealing** to people generally



The BBC would appeal to a wider variety of **different people** than it does now



The BBC would **better reflect life in different parts of the UK**

Subsequently the new channel improves perceptions of the BBC for most, but particularly among BAME and younger audiences

Societal Impact

Impact of the proposed BBC Three TV channel

% AGREE	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet access
The changes would make BBC more appealing to people generally	47%	43%	64% ↑	45%	45%	51%
The BBC would appeal to a wider variety of different people than it does now	52%	47%	62% ↑	48%	50%	52%
The BBC would better reflect life in different parts of the UK	49%	45%	61% ↑	50%	46%	56%

% AGREE	16-34	16-34 CD2E	16-34 BAME	16-34 Nations	16-34 Non large cities	16-34 Weak internet
The changes would make BBC more appealing to people generally	60%	58%	63%	59%	59%	53%
The BBC would appeal to a wider variety of different people than it does now	60%	58%	61%	61%	60%	53%
The BBC would better reflect life in different parts of the UK	58%	56%	61%	62%	58%	51%



Base: All respondents (1568), 16-34 (2185 from boost sample), C2DE (673), BAME, (178), Nations (258), Non-large city (1156), Weak internet access (176)
 16-34 from boost sample C2DE (978), BAME (438), Nations (310), Non-large city (1376), Weak internet (434), Source: D16 Societal Impact

↑ Denotes figure is statistically significant higher than the nat rep figure

And the channel will have a positive impact for the BBC in some under-served audiences (especially for 16-34 year olds)

BBC favourability

Impact of the proposed BBC Three TV channel

% Favourable	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet access
Pre exposure to new BBC TV channel	47%	44%	45%	45%	47%	33%
Post exposure to new BBC TV channel	43%	39%	48%	38%	41%	37%
Difference	-4%	-5%	+3%	-7%	-6%	+4%

% Favourable	16-34	16-34 CD2E	16-34 BAME	16-34 Nations	16-34 Non large cities	16-34 Weak internet
Pre exposure to new BBC TV channel	39%	37%	42%	33%	38%	30%
Post exposure to new BBC TV channel	43% ↑	36%	46%	41% ↑	42%	35%
Difference	+4%	-1%	+4%	+8%	+4%	+5%

Base: All respondents (1568), 16-34 (2185 from boost sample), C2DE (673), BAME, (178), Nations (258), Non-large city (1156), Weak internet access (176)

16-34 from boost sample C2DE (1021), BAME (410), Nations (328), Non-large city (1376), Weak internet (431), Source: A7 / D17 BBC favourability pre and post new channel introduction



↑ Denotes figure is statistically significant higher 73 for the pre score compared to post score



The BBC's public purposes

The majority feel BBC Three becoming a channel will help with 3 and 4, as well as to some extent with 2 – but less so with 1

Audiences were introduced to four of the five purposes (in simplified language to increase clarity and accessibility) and asked to pick out words in these which they felt BBC Three becoming a TV channel might help the BBC deliver on

The BBC is a public service organisation

It has public purposes to help it achieve its core mission to inform, educate and entertain. These include:

1. To provide impartial news and information

2. To support **learning** for everyone

3. To be **creative** and distinctive, whilst delivering **high quality TV programmes**, **TV channels** and services

4. To **reflect, represent** and serve **everyone in the UK**

The possible BBC Three linear channel is felt to be creative and representative, providing learning via documentaries

1. To provide impartial news and information

2. To support **learning** for everyone

3. To be **creative** and distinctive, whilst delivering **high quality TV programmes, TV channels** and services

4. To **reflect, represent** and serve **everyone in the UK**

It doesn't really strike me as being a news channel, it's more cultural learning through the programmes themselves

*Looking at the documentaries, covering different cultures, mental health, **teaching people about these important subjects***

*It would definitely contribute towards that one **that could almost be the mission statement for BBC Three***

*Realistic character portrayals, and the stories that are shown **would do more to highlight groups you don't often see on TV***

35-54, Light/non-BBC, North

25-34, Light/non-BBC, Wales

25-34, Heavy/mid-BBC, Midlands

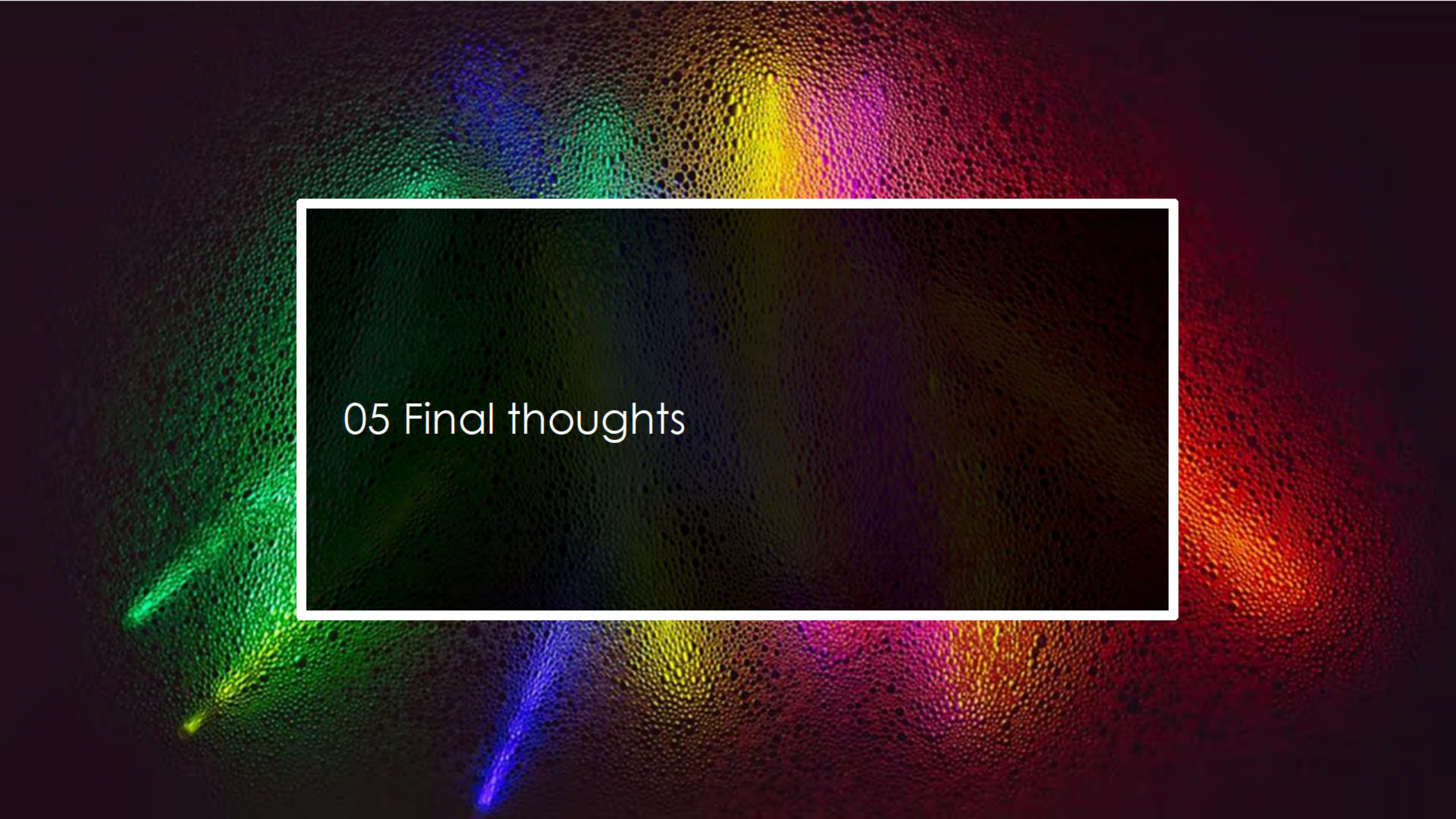
16-17, Heavy/mid-BBC, Midlands

A lack of overt news content in the showreel and from current BBC Three output means that **audiences do not feel this purpose will be delivered on by the new channel**

Audiences feel that BBC Three will **provide learning via the range of documentaries and the handling of topical issues** like mental health and gender identity

The new channel is felt to be **creative in terms of style, tone and output**, delivering (in the main) **high quality content** – particularly dramas and documentaries

The **mix of regions, nations and people from different walks of life** in the content examples was **felt to be a strength of BBC Three as a TV channel**, providing under-represented groups more national airtime



05 Final thoughts

This research has shown that the BBC's proposal to reinstate BBC Three as a linear TV channel is in the public's interest

We tested this hypotheses: bringing BBC Three back as a linear channel increases the public value of the service



OUR VERDICT



Personal Impact

- ✓ **41% of the online population would watch a BBC Three TV channel**, this is higher among younger audiences with 54% of 16-34s claiming they would watch
- ✓ This intended **viewing is fairly consistent amongst traditionally under-served BBC audiences**, but is particularly appealing to BAME audiences
- ✓ Audiences feel **a linear channel will help to provide a shop window to BBC Three content on iPlayer**, increasing discoverability and helping with identified issues regarding awareness and understanding of the brand
- ✓ Exposure to **BBC Three content helps to challenge BBC masterbrand perceptions**, or that there isn't anything 'for me' amongst younger audiences
- ✓ **Favourability towards BBC Three increases particularly amongst younger audience (16-34s)** – almost half have a favourable impression of the BBC following greater exposure to the content available 'for them'
- ✓ **No one service is dramatically impacted by the change** compared to others; time would be taken fairly evenly across people's wider TV and video repertoires
- ✓ BBC Three becoming a linear TV channel once again would **be more convenient and increase accessibility of BBC Three programming**, with younger audiences suggesting it would become more of a viewing destination

More widely, reinstating BBC Three is seen to be beneficial for other people and will help the BBC to deliver its core mission

We tested this hypotheses: bringing BBC Three back as a linear channel increases the public value of the service



OUR VERDICT



Societal Impact

- ✓ We see **positive levels of societal impact** across all 16-54 year olds
- ✓ Becoming a linear channel is thought to **help improve perceptions of quality, convenience and access for different audiences**
- ✓ BBC Three returning as a TV channel will help to provide **a greater platform for underrepresented audiences**, e.g. BAME, LGBTQ+ and nations
- ✗ Older audiences (55+) are **worried that BBC Three might overpromote the cult of celebrity to younger audiences** who are likely to be attracted to the channel
- ✓ The changes to BBC Three are felt to **help the BBC deliver on the majority of the targeted public purposes** and in particular deliver on creativity, representation and quality of output

THANK YOU
FOR LISTENING



ROSS TAYLOR

DIRECTOR

E: ross.taylor@wearemtm.com

FAYE CATEN

ASSOCIATE DIRECTOR

E: faye.caten@wearemtm.com

CHRIS HURRY

RESEARCH DIRECTOR

E: chris.hurry@wearemtm.com

SAM GILBERT

RESEARCH MANAGER

E: sam.gilbert@wearemtm.com

ARCHIE BOOTH

SENIOR RESEARCH EXECUTIVE

E: archie.booth@wearemtm.com

KATE ISAACS

SENIOR RESEARCH EXECUTIVE

E: kate.isaacs@wearemtm.com

Appendix

mtm

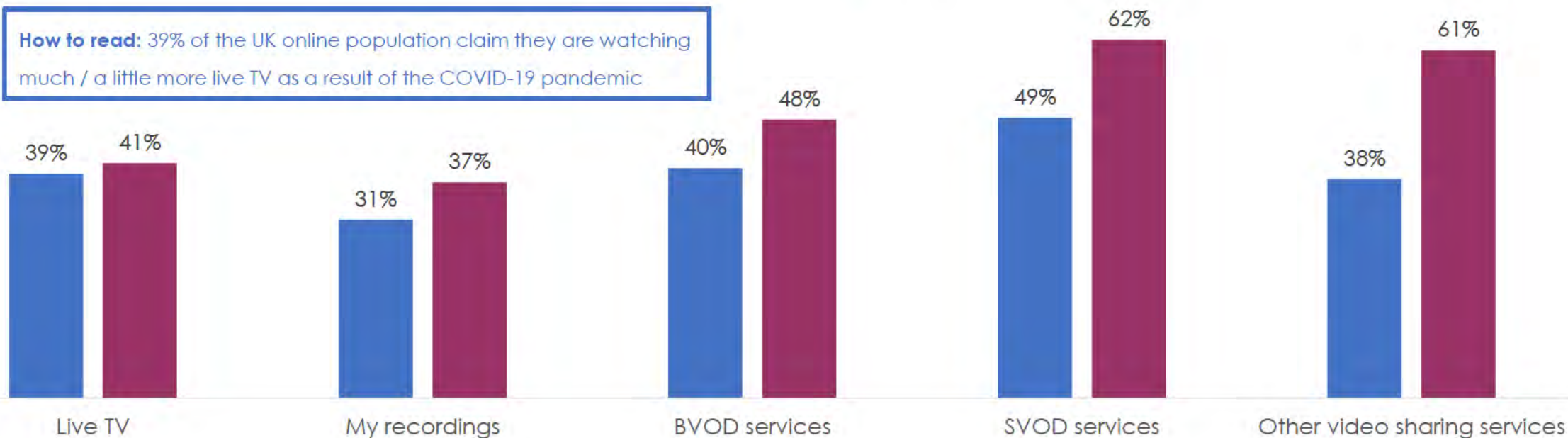
CONTEXT: Audiences are watching a lot more TV content due to the pandemic

Media types watched more of due to the COVID-19 pandemic

Among UK online population and those aged 16-34 (% who stated they are watching each much / a little more)

■ UK Online Population ■ 16-34s

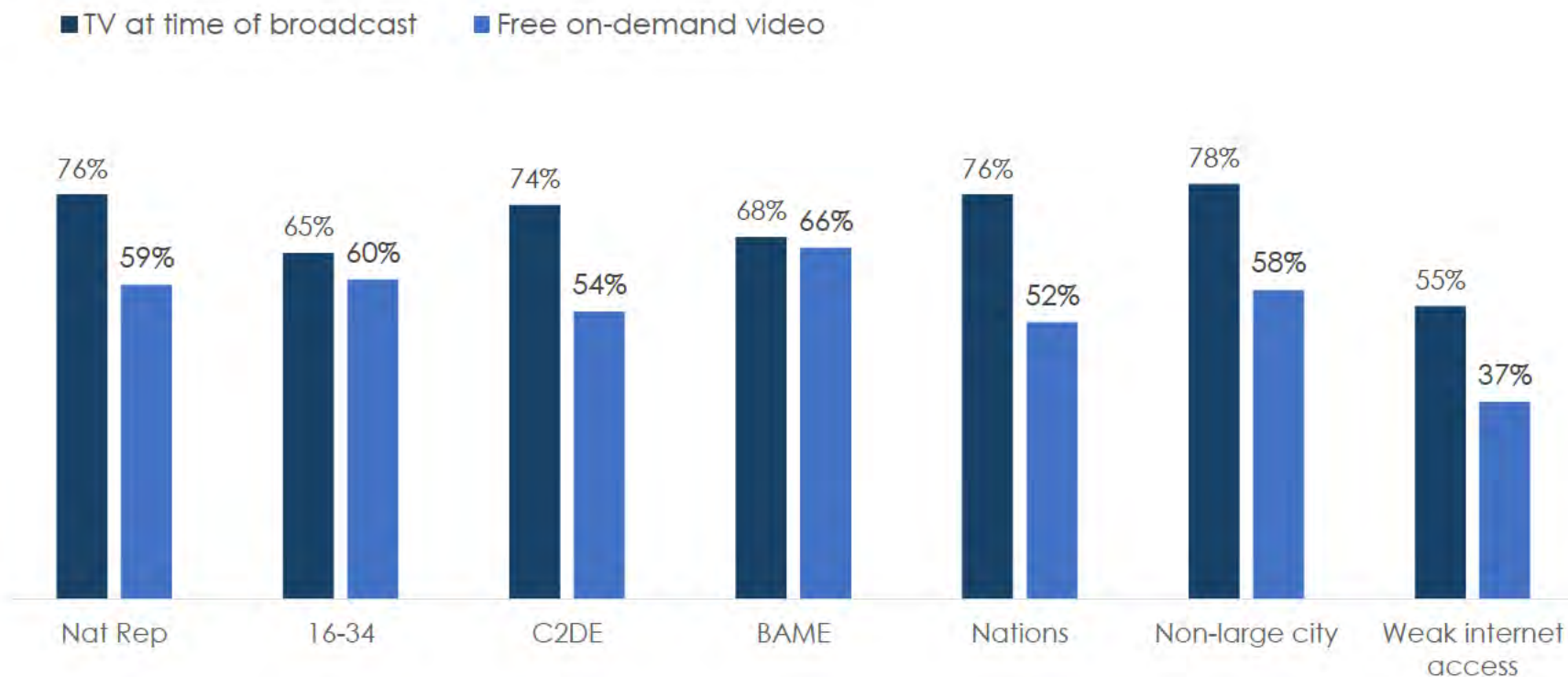
How to read: 39% of the UK online population claim they are watching much / a little more live TV as a result of the COVID-19 pandemic



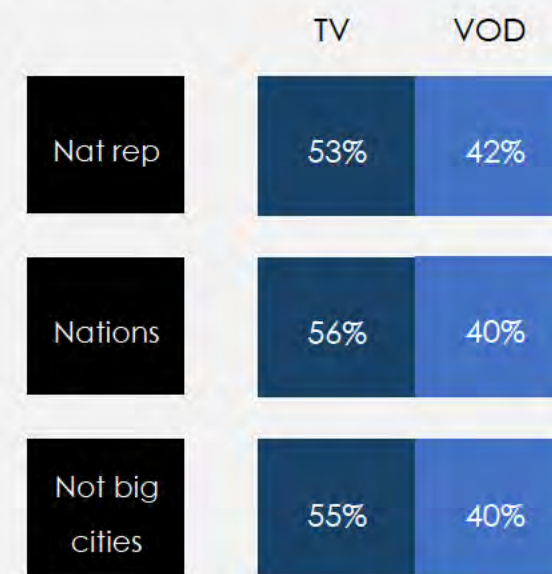
And despite popular belief, almost two thirds of 16-34 year olds still watch television at time of broadcast on a TV set each week

Viewers of TV at time of broadcast on a TV set

Weekly viewing vs. free on demand video on a TV set



And for some TV broadcasts are still tuned to first

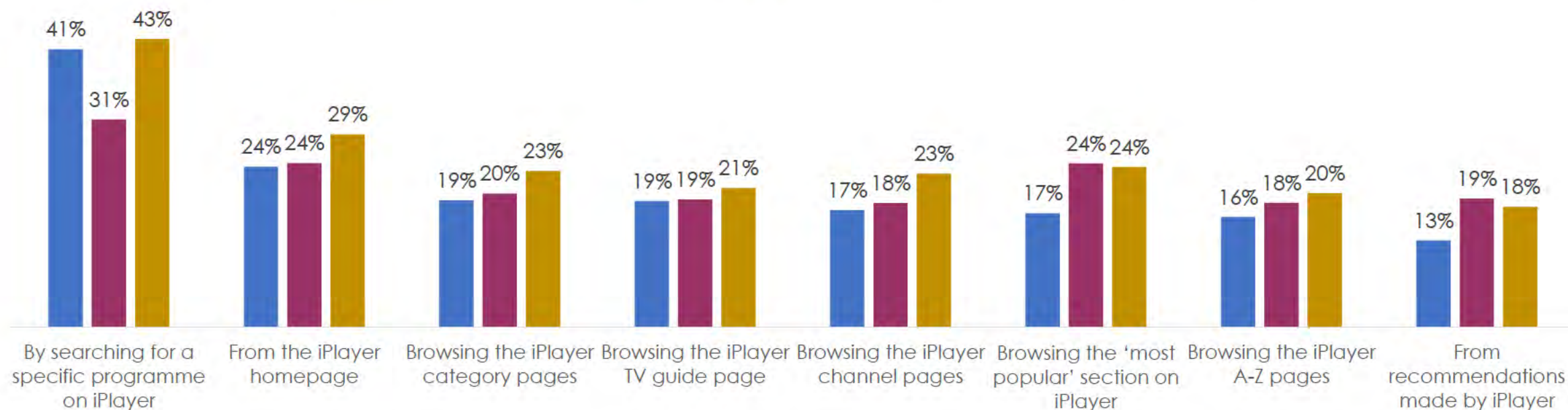


Currently, iPlayer users are searching for a specific programme when using the services, rather than using all features available

Discovering programmes to watch on BBC iPlayer

Among BBC iPlayer users

■ UK Online Population ■ 16-34s ■ Weekly viewers of new BBC Three TV channel



BAME audiences are statistically significantly more likely to agree with a range of perceptions about BBC Three

BBC Three perceptions as a result of BBC Three becoming a TV channel

Among under served audiences in the online population

% AGREE	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet
High quality TV shows	35%	36%	46%	27%	33%	36%
A wide choice of different TV shows	39%	38%	47%	33%	37%	38%
TV shows that I want to watch personally	31%	31%	40%	24%	29%	32%
TV shows that other people my age want to watch	31%	30%	43%	26%	28%	32%
TV shows that the general population want to watch	33%	34%	45%	29%	31%	38%
TV shows that represent me and my interests	31%	32%	44%	24%	29%	36%
TV shows for people like me	31%	32%	47%	23%	29%	34%
TV shows that represent the whole of the UK	33%	33%	43%	29%	31%	37%
TV shows that are unique and different to what I can find on other TV channels	38%	34%	42%	32%	36%	38%
New TV shows (i.e. first shown within the last few months)	36%	33%	45%	31%	35%	37%
TV shows from the past (i.e. that were originally shown years ago)	29%	29%	40%	27%	26%	31%
The ability to discover new TV programmes to watch	38%	37%	52%	34%	35%	38%
Reflects the lives of real people across different UK locations in an authentic way	34%	35%	44%	26%	31%	32%

Younger audiences are more likely in general to agree with a wide range of statements about BBC Three

BBC Three perceptions as a result of BBC Three becoming a TV channel

Among under served audiences aged 16-34

% AGREE	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet
High quality TV shows	46%	44%	48%	41%	46%	39%
A wide choice of different TV shows	48%	45%	48%	47%	47%	39%
TV shows that I want to watch personally	45%	42%	45%	47%	45%	37%
TV shows that other people my age want to watch	48%	45%	47%	48%	47%	39%
TV shows that the general population want to watch	44%	42%	43%	43%	43%	40%
TV shows that represent me and my interests	44%	42%	42%	43%	44%	39%
TV shows for people like me	44%	43%	44%	43%	44%	39%
TV shows that represent the whole of the UK	42%	40%	40%	39%	41%	36%
TV shows that are unique and different to what I can find on other TV channels	44%	39%	43%	41%	43%	36%
New TV shows (i.e. first shown within the last few months)	44%	41%	47%	43%	42%	38%
TV shows from the past (i.e. that were originally shown years ago)	37%	35%	38%	38%	36%	30%
The ability to discover new TV programmes to watch	46%	43%	43%	45%	45%	39%
Reflects the lives of real people across different UK locations in an authentic way	44%	43%	44%	42%	42%	36%

BBC Three launching as a TV channel would have the biggest personal impact on BAME audiences

Personal impact of BBC Three becoming a TV channel

Among under served audiences in the online population

% AGREE	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet
The new BBC Three TV channel would have great quality TV programmes	43%	39%	54%	43%	41%	48%
The new BBC Three TV channel would be unique – no other TV channel is like this	42%	36%	46%	39%	41%	40%
The new BBC Three TV channel would be for people like me	37%	36%	52%	33%	34%	42%
The new BBC Three TV channel would have TV shows that represent me and my interests	38%	36%	49%	35%	35%	47%
The new BBC Three TV channel would be one of the first places I'd check to see what was on	31%	29%	49%	26%	27%	39%
I would be more likely to look for new programmes on the new BBC Three TV channel	41%	38%	55%	36%	38%	47%
It would make BBC Three programmes easier to watch or find	48%	44%	52%	52%	47%	47%
The new BBC Three TV channel would be good to pass the time if I couldn't find anything else to watch	45%	41%	57%	45%	43%	42%
The new BBC Three TV channel would have a wide range of genres I enjoy	40%	38%	52%	36%	38%	46%
The new BBC Three TV channel would feature a diverse range of programmes	53%	47%	60%	53%	51%	52%

Again, younger audiences would feel a bigger personal impact from BBC Three launching as a TV channel

Personal impact of BBC Three becoming a TV channel

Among under served audiences aged 16-34

% AGREE	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet
The new BBC Three TV channel would have great quality TV programmes	55%	51%	60%	55%	55%	47%
The new BBC Three TV channel would be unique – no other TV channel is like this	50%	47%	51%	46%	47%	43%
The new BBC Three TV channel would be for people like me	52%	50%	55%	53%	52%	43%
The new BBC Three TV channel would have TV shows that represent me and my interests	53%	50%	53%	54%	52%	45%
The new BBC Three TV channel would be one of the first places I'd check to see what was on	46%	44%	47%	45%	44%	42%
I would be more likely to look for new programmes on the new BBC Three TV channel	54%	50%	55%	51%	54%	49%
It would make BBC Three programmes easier to watch or find	55%	50%	56%	57%	55%	48%
The new BBC Three TV channel would be good to pass the time if I couldn't find anything else to watch	59%	56%	59%	59%	58%	49%
The new BBC Three TV channel would have a wide range of genres I enjoy	54%	50%	53%	51%	53%	47%
The new BBC Three TV channel would feature a diverse range of programmes	58%	54%	62%	59%	58%	49%

The BBC Three TV channel will also encourage more under-served audiences to go to iPlayer

BBC iPlayer Impact

Impact of the proposed BBC Three TV channel

% LIKELY	Nat Rep	CD2E	BAME	Nations	Non large cities	Weak internet
Catch up / watch future episodes of a show I had watched on the BBC Three TV channel	42%	40%	57% ↑	39%	39%	46% ↑
Find new TV programmes that are similar to what I've watched on the BBC Three TV channel	43%	40%	59% ↑	39%	39%	52% ↑

% LIKELY	16-34	16-34 CD2E	16-34 BAME	16-34 Nations	16-34 Non large cities	16-34 Weak internet
Catch up / watch future episodes of a show I had watched on the BBC Three TV channel	56%	54%	57%	53%	55%	45%
Find new TV programmes that are similar to what I've watched on the BBC Three TV channel	56%	53%	59%	53%	55%	47%



Base: All respondents (1568), 16-34 (2185 from boost sample), C2DE (652), BAME, (211), Nations (262), Non-large city (1147), Weak internet (175)
 16-34 from boost sample C2DE (1021), BAME (410), Nations (328), Non-large city (1376), Weak internet (431), Source: D16 Societal Impact

↑ Denotes figure is statistically significant higher than the total figure

WHAT IS BBC THREE?

BBC Three produces Dramas, Comedies, Entertainment shows and Documentaries that **tell real stories** featuring **young people from across the UK**.

It currently makes shows to release on BBC iPlayer, but **does not have its own television channel currently**, having moved BBC Three online in 2016.

The BBC is exploring **re-launching BBC Three as a TV channel** that would be available on **all major television services**, such as Freeview, Sky and Virgin – in the same way that BBC One, BBC Two and BBC Four are.

The channel would air from **7pm in the evening until 4am in the morning, 7 nights a week**.

BBC Three shows will still be released on BBC iPlayer, as currently – but the TV channel gives **another option to discover and watch programmes in a convenient way**.



A TV CHANNEL WILL PROVIDE A CONVENIENT PLACE TO DISCOVER ALL OF BBC THREE'S PROGRAMMES...

Competition shows



Real & unfiltered entertainment shows



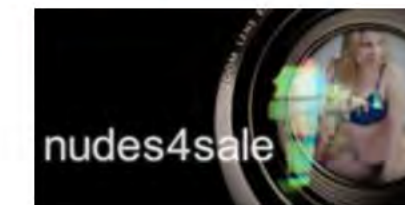
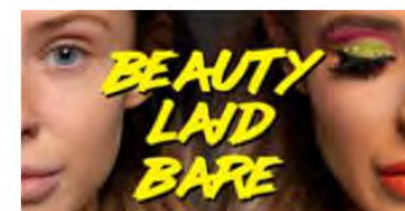
Big drama boxsets



Fresh and exciting comedy from the UK



Documentaries and factual series



...AS WELL AS A PLACE FOR BBC THREE TO BRING NEW SHOWS TO TV

Spin offs of popular shows (EXAMPLES ONLY)



Live Sport and highlights shows (EXAMPLES ONLY)



Music concerts and events (EXAMPLES ONLY)



HOW A CHANNEL SCHEDULE MIGHT LOOK

WEEKDAY

7PM-8PM

REPEATS



8PM-11PM

NEW ENTERTAINMENT, DRAMA,
DOCUMENTARIES



11PM-12AM

CLASSIC BBC
THREE



12AM-4AM

LATE NIGHT
REPEATS

Big shows from
8-11pm will be
shown again

WEEKEND

LIVE SPORT NIGHT



FILM NIGHT



EVENT NIGHT STACK



HOW WILL THE NEW BBC THREE TV CHANNEL WORK WITH BBC IPLAYER?

All BBC Three shows that are shown on the BBC Three TV channel **will be available to watch on BBC iPlayer.**

Most BBC Three shows **will be available to watch in their entirety, as boxsets.** For others, it could be at the same day as the first episode is shown on the BBC Three channel.

Some shows will continue to be released weekly, but **in future would be available on both the BBC Three TV channel and BBC iPlayer at the same time.**

BBC iPlayer will continue to be the place where audiences can go to **watch the back catalogue of BBC Three content across all genres.**

