

The background of the slide is a photograph of the BBC Broadcasting House at night. The building's iconic curved glass facade is illuminated with a vibrant blue light, and the 'BBC' logo is visible on the glass. The ground in the foreground is wet and reflects the blue and yellow lights from the building and streetlights. A few people are walking in the courtyard area.

**B B C**

## **Deprivation Study**

What is life like without the BBC

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# About this research

The BBC commissioned this study in order to help it understand better the value that it delivers to UK households in return for the licence fee and how this could be improved.

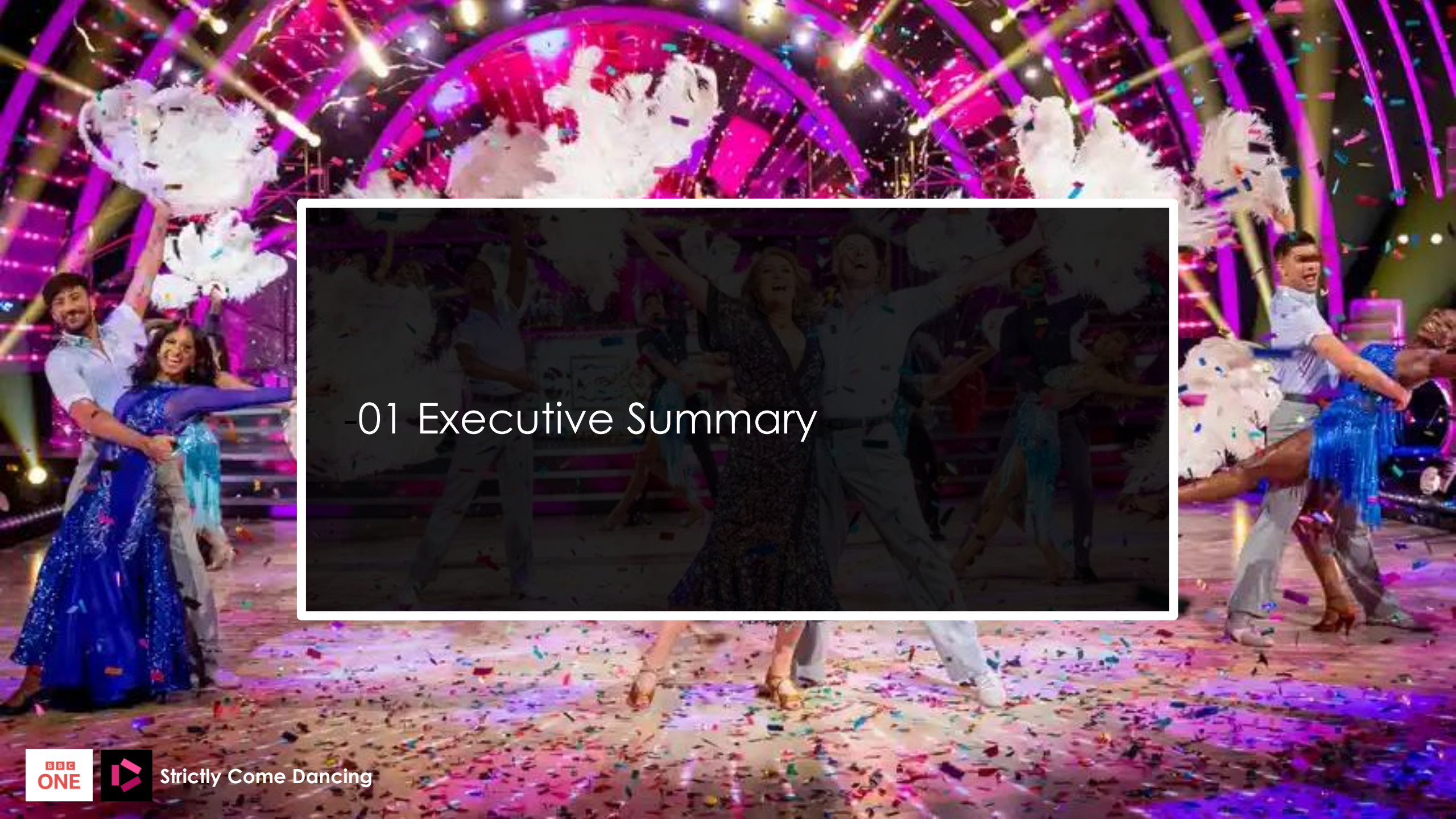
The research is based on a proposal by Professor Patrick Barwise of London Business School.

This study is an update to the work that research and strategy consultancy MTM [designed and conducted around seven years ago](#) (2014/15).

MTM is experienced in deprivation and immersive approaches (e.g. embedding researchers in households/with audiences for a period of time) for clients including Google, Channel 4, Digital UK and Newsworks.

MTM is a winner of multiple awards from the Market Research Society, Media Research Group and Mediatel.





# 01 Executive Summary

# This study sought to uncover the value of the BBC to households in the competitive media environment of 2020/21

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This piece of research by MTM was designed to examine what value the BBC delivers to UK households in return for the licence fee paid. This study was first conducted in 2014/15 ([Life without the BBC](#)) and was undertaken again to test the role, if any, of the BBC in the much more competitive media environment of 2020/21.

To understand this, different kinds of UK households spent nine days without the BBC and were given the equivalent cost of the licence fee for that nine days to see what difference, if any, it made to their views of the value of the licence fee and the BBC.

Deprivation exercises like this are used in research to help to uncover any underlying benefits of the products and services that people use habitually but often without consciously thinking about their value. Because of the long-standing nature and high usage of the BBC – used by 90% of UK adults per week and for c.18 hours weekly per adult on average – it can be difficult for people to assess its role, and the majority of people have never experienced UK life without it. By removing it for the research, it helps people gauge the impact, if any, on their daily lives, and if there is any gap between what they think they get from the BBC and what they actually experience.

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In total, 80 households took part in the research from 16 locations across the UK – almost 200 household members in total. The majority of UK licence fee payers say in surveys that they are prepared to pay the full licence fee in return for BBC content and services. However, to make this a harder test of value, this research focused on the minority of licence-fee paying households that say, if it was down to them, they would rather forego the BBC so they do not have to pay the licence fee and those who say the licence fee is too high.

To this end, the 80 households in the research comprised those that initially said, given the choice, they would:

- Prefer to **pay nothing** and not receive the BBC (x 30)
- Only **pay less** than the full licence fee for the BBC (x 30)
- Be willing to **pay the full licence fee or more** (x 20).

# The deprivation exercise shows that the majority of the households underestimated the value that they get from the BBC

The results of the research showed that after nine days without the BBC:

# 42

out of the 60 households

that initially said they would prefer to **pay nothing** and not receive the BBC or would only **pay less** than the full licence fee became willing to **pay the full licence fee or more**.

# 19

out of the 20 households

that initially said they would **pay the full licence fee or more** were **still willing to pay the full level or more**, with **14 even more positive than previously**. One household became **pay less**.

This means that over two-thirds of the households that had initially said they would **pay nothing** or would only **pay less** than the full licence fee changed their minds and became willing to **pay the full licence fee or more** in order to keep BBC content and services.

The same proportion of these households – 70% – changed their minds in the research in 2020/21 as had done in 2014/15 (69%, 33 out of 48 households), despite the greater range of alternatives available now.

Those changing their minds included a wide range of households: different life stages (single people/house shares, couples, families and retired); those with and without subscription video on-demand (SVOD) services; those with and without pay TV; lower and higher socio-economic groups; across different Nations and regions of the UK.

In addition to the 42 of the 60 **pay nothing** and **pay less** households that changed their minds and became willing to **pay the full licence fee or more**, there were a further four **pay nothing** households that moved from preferring to **pay nothing** to becoming prepared to pay for the licence fee, albeit to **pay less** than the full amount.

# There were a range of reasons why households decided to change their minds or to stick to their original views

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## The reasons why **pay nothing** and **pay less** households changed their minds and became willing to **pay the full licence fee or more**

The majority of households that had initially said they would **pay nothing** or would **pay less** than the full licence fee became willing to pay after having spent time without the BBC (42 of the 60 households). Their reasons for their change of mind were:

- They realised they had been underestimating the amount of BBC consumption in their daily routines.
- They now had more appreciation of the breadth of BBC services across TV, audio and online; an enhanced sense of the quality compared with alternatives; and they had missed the advertising-free nature of the BBC.
- Plus, they had greater recognition and respect for the BBC's cultural and societal role in the fabric of UK life.
- All of these, coupled with the licence fee cost, led to a re-appraisal that the value for money of the licence fee was better than they had originally thought.

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## The reasons why **pay nothing** and **pay less** households did not change their minds

For the minority of these households that did not change their minds (18 of 60), it confirmed their view of the low personal value they received from the BBC plus they felt they had access to viable alternatives and felt frustration at the obligatory nature of the licence fee.

## The reasons why **pay the full licence fee or more** households remained willing to pay

The exercise was especially hard for the sample of **pay the full licence fee or more** homes, who represent the majority of households across the UK overall. Most found it impacted significantly upon their routines. Many found they missed the BBC services they expected to (e.g. TV and high-profile dramas) but also found they relied on a wider range of BBC services than they had realised initially (e.g. the news, sport, weather and food sites/apps). This was reinforced as they found they were disappointed by the alternatives for the BBC and frustrated by those with advertising. This – coupled the cultural and societal benefits that they felt the BBC brings – highlighted their sense that the BBC offers them unique content.

# The results in 2020/21 remain broadly consistent with 2014/15 despite a significantly changed media landscape

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This research study was conducted six years on from the initial [Life without the BBC](#) study in a different media landscape. This time the research took place with a plethora of on-demand services and subscriptions available and with the penetration of SVOD services much higher. There is more choice, and competition, for audiences than ever before.

Six years on, a comparable proportion of households who had initially preferred to **pay nothing** or to **pay less** changed their minds and decided to choose to have BBC content and services at the **full cost of the licence fee or more** (33 out of the 48 in 2014/15; 42 out of the 60 in total in 2020/21).

Though conducted via an adapted methodology in line with the restrictions of the pandemic, there is considerable consistency in the reasons given for why households changed their minds, as well as the elements of the BBC that are uniquely valued and led them to feel the licence fee was worth paying.

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In both 2014/15 and 2020/21 more than two in three of the households in the study who had at first been unwilling to pay the full licence fee, if at all, changed their minds and chose to pay the full amount and keep BBC content and services. And of those households who were initially content to pay, all but one remained willing to pay, with more than two-thirds feeling even more positive after spending time without the BBC.

Both times – with a sample of 150 households across the two waves – would indicate that people's initial view of the value of the licence fee and the BBC is most often likely to be an underestimation. Directionally, this shows that having spent time without the BBC reduces – by about two-thirds – the proportion of households that think the licence fee is poor value for money. When households are without the BBC and assess its role and what they missed, the majority re-evaluated the value of the licence fee and what the BBC brings.



# The deprivation exercise challenged many initial perceptions that **pay nothing** and **pay less** households had about the licence fee

(1/3)

## Before (examples)

SVOD services offer better value for money

The BBC is not needed as there is so much choice now

The licence fee is too expensive for what you get

BBC content is a lesser alternative to other providers/SVOD

Young audiences are not interested in the BBC

The BBC can just be funded by advertising instead

The BBC should become subscription only

## After (examples)

The licence fee covers more than just TV

The BBC plays a unique role in our culture and heritage

Households consume more BBC than they realise

BBC content is high quality across platforms

Households of all ages changed their minds

Continuous/regular advertising can be frustrating

One licence fee covers more than subscriptions

# The deprivation exercise challenged many initial perceptions that **pay nothing** and **pay less** households had about the licence fee

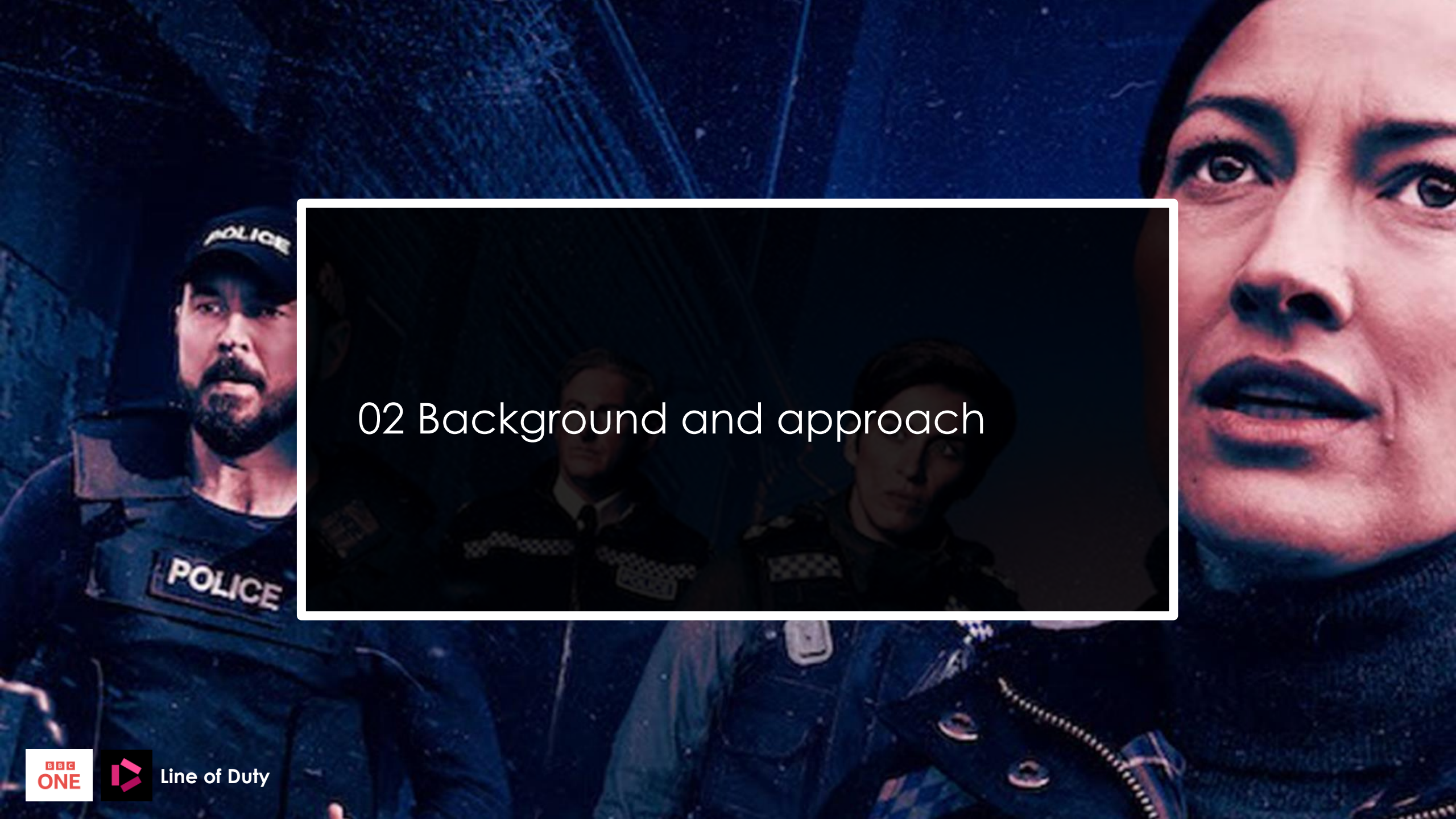
(2/3)

Before	After	Household
<b>SVOD services offer better value for money</b>	<b>The licence fee covers more than just TV</b>	
<b>We know it's excessive vis à vis these other subscription services...</b> <i>If we had an option would we pay £160 a year for that service? The answer is no, if we had an option</i>	<i>(It's been a..) realisation that <b>the content it's not just about the TV</b>, the terrestrial television in the corner, just the sheer amount of content and ready availability of that content that I can get with the BBC <b>that covers the whole spectrum of politics to sport to entertainment, you know, it's all in a one-stop shop.</b> That's the key for me... I realise now that that is a pretty good deal, so I've had a bit of an epiphany there</i>	<b>Pay Nothing</b> , Post Family, ABC1, Freeview, Netflix, BritBox, NOW TV, Prime, Norwich
<b>The BBC is not needed as there is so much choice now</b>	<b>The BBC plays a unique role in our culture and heritage</b>	
<b>Participant 1:</b> <i>I think <b>it's a lot of money for the channels that we would never go to... I would rather not pay it... I wouldn't be sad if they said 'Don't pay it and you can't watch channels one and two'</b></i>	<b>Participant 1:</b> <i>Before we did this I would have said 'Oh no I'll do without. I won't pay the licence fee. I'm fine without it'. <b>Now I've done it I think it's worth the [licence fee]</b></i> <b>Participant 2:</b> <i>...Just <b>as a little bit of a contribution as well...</b> for the services they provide and being a British household... just <b>doing our bit helping pay for a service we do get. It is part of our culture and heritage... Looking at it like that, I think it's worth it. I think it's worth something</b></i>	<b>Pay Nothing</b> , Young family, C2DE, Virgin Media, Apple TV, Blackpool and Preston
<b>The licence fee is too expensive for what you get</b>	<b>Households consume more BBC than they realise</b>	
<i>I'd prefer if there wasn't a licence fee at all - it's <b>outdated...</b> <b>you just don't get value for money from it any more</b></i>	<i>I was surprised how much I rely on the BBC... It's definitely changed the way I see the value of the licence fee... <b>and what it offers me. It's worth paying...</b> I don't think I could feasibly live without the BBC</i>	<b>Pay Nothing</b> Single, ABC1, Freeview, Netflix, Cardiff

# The deprivation exercise challenged many initial perceptions that **pay nothing** and **pay less** households had about the licence fee

(3/3)

Before	After	Household
<b>BBC content is a lesser alternative to other providers/SVOD</b>	<b>BBC content is high quality across platforms</b>	
<i>It [the licence fee] is literally there for nothing. Nowadays there's so many other options</i>	<i>It's kind of like an unnoticed hero... subtly superb isn't it?... it's not flashy... it's just there but it does everything... everything's been optimised well... there's been a lot of thought that's gone into it. I think I would miss it if I'm going to be honest with you</i>	<b>Pay Less</b> , Young Family, C2DE, Sky, Netflix, Prime, Disney+, Blackpool and Preston
<b>Young audiences are not interested in the BBC</b>	<b>Households of all ages changed their minds</b>	
<i>I think because we have a Sky package as well, I'd like to pay less. It does add up to quite a bit of money that is coming out of your account and we don't use it as much (as other services)</i>	<i>If it meant to keep the BBC around I would continue to pay for it like I do now just because I use a lot of the services, whether it be (BBC) News or iPlayer ... I could not live without the BBC</i>	<b>Pay Less</b> , Couple (in their 20s), ABC1, Sky, Netflix, Scotland
<b>The BBC can just be funded by advertising instead</b>	<b>Continuous/regular advertising can be frustrating</b>	
<i>I get frustrated at the amount we're being charged... there should be some element that isn't charged and you get some bits for free</i>	<i>I think I was probably quite naïve thinking it should be no cost. I appreciate actually at no cost would mean it would have to revert to an advert platform and I really value it not being an advert platform</i>	<b>Pay Nothing</b> , Older family, C2DE, Sky, Netflix, Prime, Disney+, York
<b>The BBC should become subscription only</b>	<b>One licence fee covers more than subscriptions</b>	
<i>It feels like it's expensive because I'm not watching BBC TV so what am I paying for? (I'm) comparing it to Netflix because we use Netflix all the time... why can't they do that (be subscription)?</i>	<i>It covers so many different areas. I think all three of us are getting different things from it and paying one fee for all of those different useful things. Podcasts is one thing and then the TV, so that could be another subscription service and then the rest of the apps could be another subscription, whereas this is all in one thing</i>	<b>Pay Less</b> , Shared household, ABC1, Freeview, Netflix, Prime, Disney+, London



## 02 Background and approach

BBC  
ONE



Line of Duty

# This study follows on from an earlier study into the value of the BBC and licence fee in 2014/15

In 2014/15 MTM undertook a piece of research - *Life without the BBC* - designed to examine what value the BBC delivers to UK households in return for the licence fee they pay.

The study took the form of a deprivation exercise where different kinds of households spent nine days without accessing any BBC content and services to see what difference, if any, it made to their views of the value of the BBC and the licence fee. To make it a harder test, the 2014/15 sample was purposely skewed towards those households that said they were unwilling or less willing to pay the full level of the licence fee.

The 2014/15 study showed that households' initial view of their willingness to pay for the BBC and the value for money the licence fee offers is most often an underestimation. The majority of the households that had initially said they would pay nothing or would only pay less than the full licence fee changed their minds having spent time without the BBC and instead choose to have BBC content and services at the full cost of the licence fee. And among the households in the research that had initially been willing to pay the full amount, almost all remained willing to pay this and most were prepared to pay even more.

Since 2014/15, there have, of course, been several fundamental changes in UK life with a global pandemic and significantly, given the media focus of this research, there is a dramatically changed media environment:

- When the previous study began in 2014 7.6m adults used on-demand music services on average per week. Now the figure is 19.4m.
- In 2014 21.5m adults used the internet for news in 2014. Now 39m use news online/social media.
- Most strikingly, in 2014 4.8m UK households had access to SVOD services. Now it is close to 20m. SVOD uptake surged during lockdowns: up from 15m in January-March 2020 to 17m in summer 2020 and then to today's figure close to 20m.

**Given these changes, the BBC asked MTM to undertake a deprivation exercise again – now in the 2020s. With this media choice, what, if anything, is the role of the BBC? What is the impact on the value of the BBC given the SVOD uptake during the pandemic? With all the other options available, how distinctive is the BBC's output and how easily can households find suitable alternatives? As households now pay for a larger number of subscriptions, does the licence fee – sometimes at a higher cost than each individual SVOD or audio subscription – deliver value for money?**

# In research, deprivation exercises are designed to uncover what value products have in people's lives through removing them

As in 2014/15, the study again takes the form of a deprivation exercise because such studies help to understand the role, if any, that products and services play by removing them to explore the impact this has on people's daily lives.

- As explained in the 2014/15 report, this research approach has been described as 'one of the most illuminating in the pantheon of qualitative brand research' because, by taking something away, a unique understanding of its role and value, if any, can emerge.
- Deprivation exercises like this are used in research to help to **uncover underlying benefits of the products and services that people use habitually** but often without consciously thinking about their value.
- Because of the long-standing nature and high usage of the BBC, **it can potentially be difficult for people to assess what, if anything, it brings**, and the majority of people have never experienced UK life without it.
- By removing it for the research, **a deprivation task helps people gauge the impact, if any, on their daily lives**, and if there is any gap between what they think they get from the BBC and what they actually experience.



# The objective was to understand the value of the BBC and licence fee, if any, to households in the media landscape of 2020/21

**The research aimed to understand better the amount and type of value that the BBC delivers to different kinds of UK households in return for the licence fee.** This is particularly important given the habitual nature and different kinds of usage and needs fulfilled by TV, audio and online.

While the majority of UK licence fee payers say in surveys they are prepared to pay the full licence fee in return for BBC content and services, to make this a harder test of value, this research again focused on the minority of licence-fee paying households that say, if it was down to them, they would rather forego the BBC so they do not have to pay the licence fee and those who say the licence fee is too high.

To this end, this research included 80 households in total with a mix of attitudes towards BBC value for money and paying the licence fee.

Using the deprivation approach to determine what, if any, value is delivered, do households who, given the choice, say initially that they would...

Prefer to **pay nothing**  
and not receive the  
BBC

**Pay less** than the full  
licence fee for the  
BBC

Be willing to **pay the  
full licence fee or  
more**

...still hold these views if they are unable to access any BBC content and services for a period of nine days and are given the corresponding licence fee cost for this period?

- For any households that do conclude after this time without the BBC that they would prefer to keep the BBC and pay the full licence fee, what elements of the BBC are valued and lead them to feel that the fee is worth paying?
- And for those households that take the view that the licence fee is not worth the cost, what makes them feel this way?

# The sample was focused towards those who said they were either unwilling or less willing to pay the full licence fee

The research involved a qualitative sample of **80 households**, with just under 200 participants across the households.

Across the UK overall, when asked in surveys, if given the choice, they would continue to pay the full level of the licence fee in order to receive BBC content and services, the majority of licence fee payers – close to seven in ten – say they would **pay the full licence fee or more**. However, around three in ten say they would not, comprising those who say initially they would prefer to **pay nothing** and not receive the BBC and those who say they would pay but would only **pay less** than the full licence fee for the BBC.

The sample of 80 households in this research was more focused towards those who said they were either unwilling or less willing to pay the licence fee than occurs in the population overall and so included:

- 30 households that initially would prefer to **pay nothing** and not receive the BBC
- 30 households that initially would prefer to **pay less** than the full licence fee
- 20 households that would **pay the full licence fee or more**.

The households that initially wanted to **pay nothing** or **pay less** were reflective of three in ten UK TV licence households. The households that were willing to **pay the full licence fee or more** were reflective of seven in ten UK TV licence households.

The overall sample was drawn from **16 locations across the UK:**



**PAY NOTHING = 30 households**

**PAY LESS = 30 households**

**PAY LICENCE FEE OR MORE = 20 households**



# Households were recruited to be reflective of the UK profile for each of the willingness to pay household categories

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All households participating in the study had to be eligible to pay the licence fee at the time of research i.e. they had to watch or record TV programmes at the time of broadcast on any channel, stream programmes live on an online TV service or watch any BBC programmes on iPlayer.

The households were recruited to be reflective of the UK profile of each of the **pay nothing**, **pay less** and **pay the full licence fee or more** households that were eligible to pay the licence fee. A sample framework was constructed to ensure the **pay nothing** and **pay less** households matched the characteristics of these households at a UK level and that the **pay the full licence fee or more** households were in line with the make-up of this household type in the UK.

To this end, quotas were set across a range of criteria per location to ensure that each of these three subsamples of **pay nothing**, **pay less** and **pay the full licence fee or more** households reflected the UK profile for households of that type.

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The quotas that were set per household type covered:

- Household size
- Age range: 16-34 / 35-54 / 55+
- Life stage (singles, couples, shared households, young families, older families, post families (individuals, couples, with and without child/children 18+ in the household))
- Socio-economic group: ABC1 and C2DE
- TV platform ownership: pay TV (e.g. Sky, Virgin Media, BT TV) and free-to-air (Freeview, Freesat)
- Presence of SVOD services in the household: those with and without
- Overall opinion of the BBC: BBC general impression score out of 10 (with a mix of low (1-6) and high (7-10) scores) reflecting the UK profile.

Targets were also set across the sample to ensure a mix of: ethnic backgrounds; financial situation (comfortable/coping/struggling); highest qualification; BBC consumption levels in line with the UK profiles of each group.

# The deprivation fieldwork schedule ran across several waves

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The fieldwork period began in December 2020 and concluded in April 2021.

Fieldwork was staggered over the course of four waves of research in order to mitigate the impact of seasonal differences in schedules.

Owing to the pandemic, this fieldwork period saw varying levels of restrictions over movement with both a UK-wide lockdown and regional tier structures in place at times during this period.

Given the circumstances, the methodology needed to be tailored as follows:

**Conducting fieldwork remotely:** Fieldwork was conducted remotely via Zoom calls rather than face-to-face by visiting participating households' homes. Additional support was available to participants less familiar with or new to the platform.

**Participant engagement:** Given all fieldwork was remote, moderators shared personal contact details to build rapport and checked in with households during the task. Within the Zoom sessions, we showed stimulus via shared screens to make it more interactive than a standard video call.

**Sharing stimulus:** All households were sent a 'Household Pack' before the first interview. This was divided into discrete packs for each stage of the research to ensure the media service they would be deprived of remained shielded. The pack also included a pre-paid and addressed envelope to return their completed materials.

## Wave 1

- **Dates:** Saturday, 12<sup>th</sup> – Sunday, 20<sup>th</sup> December 2020
- **Locations:** Central Belt of Scotland, North East of England, West Midlands, Bristol

## Wave 2

- **Dates:** Saturday, 9<sup>th</sup> – Sunday, 17<sup>th</sup> January 2021
- **Locations:** Cardiff, Liverpool, Leicester, Reading

## Wave 3

- **Dates:** Saturday, 20<sup>th</sup> – Sunday, 28<sup>th</sup> March 2021
- **Locations:** Belfast, Aberdeen, York, Norwich, London, South Coast of England

## Wave 4

- **Dates:** Saturday, 17<sup>th</sup> – Sunday, 25<sup>th</sup> April 2021
- **Locations:** Swansea and surrounding areas, Blackpool and Preston

# There were three strands to the research for the participating households



## INTERVIEW 1

An initial c.90 minute exploratory interview conducted via Zoom with all household members present. This explored the households' media consumption behaviours across TV, audio and online, covering all media providers used. Households did not know until the very end of this interview that it was BBC content and services that they were going to be deprived of during the task.



## DEPRIVATION EXERCISE

Households were unable to access any BBC content and services, across all platforms, for a nine-day period, including two weekends. All household members were sent via the post an individual Media Diary to record all non-BBC products and services used instead and how they felt about these replacements. They were also asked to share their in-the-moment experiences via self-filmed interviews during the deprivation task.



## INTERVIEW 2

A follow-up c.90 minute review interview conducted via Zoom to assess the impact of the deprivation period with all household members. This was conducted in the week immediately after the deprivation task had taken place.

# Interview 1: explored media behaviours and benchmarked feelings before introducing the deprivation task

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At this stage, households did not know that they were going to be tasked to live without the range of BBC content and services for a period of nine days or that the research was on behalf of the BBC. All participants knew at this stage was that they would be asked, as a household, to try living without some media services for the purposes of the study, but did not know what particular services this would involve.

During this first interview, household members were asked about their media consumption habits, including their television, audio and online set-up within the home. The session also explored why they had pay or free-to-air platforms and subscriptions to on-demand services across TV, audio and online. Households were asked about any costs involved in their respective set-ups and how they felt about what they paid. This included the extent to which they felt that they received value for money for what they paid for; which providers they saw as value for money; and also how they felt about the licence fee within this.

Towards the end of the interview, once the full extent of the household's media consumption and content behaviours across TV, audio and online was established, they were then set the deprivation task of living without accessing BBC content and services for a period of nine days.



# The deprivation exercise took place over nine days with the whole household being without any BBC content and services

The deprivation task lasted nine days, beginning on a Saturday and finishing on Sunday a week later, so that it encompassed five weekdays and two full weekends. All members of the household were unable to access any BBC content and services during this time.

This included television, audio and online services, on any devices, both in the home and outside (e.g. when commuting, at work or at other people's houses – when lockdown restrictions permitted). When outside their home, respondents were asked to restrict BBC consumption as much as possible.

As well as 'switching off' from BBC services directly, households were also not permitted to access BBC content via any other on-demand or online providers e.g. Netflix, YouTube or Twitter.

As a further reminder not to access BBC content and services, MTM encouraged households to lock BBC TV channels on TV sets via Parental Controls so they could not be viewed during the tasks.

MTM also instructed households to change pre-set BBC stations on any radio or audio devices, including flash news alerts on home assistants, as well as deleting any BBC apps and website 'favourites' from internet-enabled devices and to unfollow temporarily BBC accounts on social media services.

During the nine days, MTM had intermittent contact with the households via WhatsApp / text message. This was to remind them that the task was about to start, check how they were finding it, to follow up on videos sent through and to confirm when the task had ended, as well as to answer any queries.



THIS MEANS FOR THE NEXT 9 DAYS:

- NO BBC TV CHANNELS
- NO BBC iPLAYER
- NO BBC CONTENT ON YOUTUBE, NETFLIX, BRITBOX, AMAZON PRIME (or any other on-demand provider)
- NO BBC RADIO STATIONS / SOUNDS / PODCASTS
- NO BBC ON SPOTIFY / ITUNES / APPLE PODCASTS (or other audio services)
- NO BBC WEBSITES OR APPS
- NO BBC ON OTHER WEBSITES/APPS (e.g. Apple News / Google / Yahoo etc.)
- NO BBC CONTENT ON SOCIAL MEDIA (e.g. Facebook, Instagram, Twitter)
- NO BBC CONTENT ON SMART SPEAKERS (e.g. Amazon Alexa)



+ do not watch / listen / read any BBC content on any other services, such as:



+ any others that have BBC content on

# All households were sent a Household Pack with various pieces of collateral to assist them during the task



**'No BBC' posters:** To put up around the house, containing a summary of the rules of the tasks and the BBC services (specific to region and nation) across platforms that they were unable to access.



**'No BBC' stickers:** To stick on devices as a reminder not to access any BBC services. Any households with children were also sent 'No CBBC' and 'No CBeebies' stickers as a reminder the task applied to the whole household.

Time	What are you listening to?	Audio service / radio station	Device used	Is this a replacement for what you would normally watch (yes / no)?
8:15am	News - Flash Briefing	News	Voice Assistant	Yes - I had to switch it to Sky from BBC
10:00am	Heart Radio	Radio	DAB radio	No
10:15am	Guardian - Today in Focus	Apple podcast app	iPhone	Yes - I normally listen to updates on BBC Radio 4
11:00am	Happy Place podcast (with Fionn Carter)	Spotify	iPhone	Yes - had been listening to a podcast on BBC Sounds
Midday	Capital FM	Car radio	Radio	No
12:15pm	Kiss FM	Car radio	Radio	No
3:00pm	Viral Hits Playlist	Spotify	Smart Speaker	No
8:30pm	Off Menu with Ed Gamble and Janet Austin	Apple podcast app	iPhone	Yes - had been listening to BBC Friday Night Comedy
10:00pm	Evening - by Michelle Obama (audiobook)	Audiible	Smart Speaker	Yes - I had been listening to an audiobook on Sounds
10:15pm	Apple FM	Radio	DAB radio	No

**Nine-Day Media Diary:** A booklet for each household member to complete daily (adults and, where possible, children). This included pages for participants to detail all TV, audio and online services used and to evaluate any replacements for the BBC content and services (if any) that they would usually access.



**Interviewer sheet:** In order to capture in-the-moment reactions participants were encouraged to film themselves at least three times: once at the start and end to bookmark the process and another when they were missing the BBC or found a suitable replacement – using the questions provided to capture individual responses.

## Interview 2: households considered the impact of the deprivation period and the value they get from the BBC and licence fee

The second interview took place, via Zoom, in the week immediately after the deprivation period. This focused on how the households had found the task, their experiences across the nine-day period and how they had found the time without BBC content and services. The interview was structured around the completed Media Diaries to ensure respondents were recounting their experiences accurately.

Towards the end of the interview, the participants opened an envelope (from their Household Pack) which contained the equivalent licence fee amount for the duration of the task period. For the nine days, this was £3.88 for households taking part up to the end of March 2021 and £3.92 for households taking part in April 2021 as the licence fee increased for the 2021/22 financial year.\*

Households were not informed what the envelope was for or what was in it, only to open it. After spontaneous responses, it was explained how this equated to the licence fee amount for the task period. The household was then asked questions around how they felt about this amount and whether they would rather have had the money, or the BBC content and services they had been without for nine days.



# The research approach was designed with the following considerations in mind to enable accurate and truthful responses

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## A blind test

All households were recruited 'blind' so that they did not know which media service was the focus of the research. It was important that households did not want to take part because they had a particular affection or grievance against one service or another.

This was achieved in the recruitment process whereby licence fee payers in the households were asked about their attitudes regarding 'willingness to pay' and 'preferred main source of funding' for multiple media providers (with the BBC mixed in with ITV, Sky and Netflix). Responses to the question on willingness to pay for the BBC helped to ascertain which of the **pay nothing**, **pay less** or **pay the full licence fee or more** categories each household fitted into.

Households were not informed before the interview that the task was related to BBC content and services. Instead, they were told that they would be asked as a household to live without the content and services (TV, audio and online) of a selected media provider. It was only at the end of Interview 1 that it was revealed they would be asked to forego BBC content and services.

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## Collecting 'in-the-moment' feedback

It was necessary to capture 'in-the-moment' feedback to understand the extent, if any, of feelings or frustration about life without the BBC. This was achieved via the individually completed Media Diaries and self-filmed interviews shared with MTM moderators during the course of the nine-day deprivation task via WhatsApp.

MTM posted Media Diaries to households as part of their 'Household Pack' alongside their stickers, posters, etc. We did consider switching to an online diary approach given the necessary digital fieldwork focus. However, we wanted households to have the diaries to hand, to be able to update them as close to in-the-moment as possible rather than retrospectively filling them in daily. We find that this approach provides a greater richness of detail about behaviours, which would be key to understanding household experiences of the deprivation task. We also wanted participants to be able to reference the diaries in Interview 2, which over Zoom would require flicking between or using multiple screens and could detract from the interview itself.



# Establishing trust and honesty with all households was key to ensure our research reflected their true experiences accurately

Generating 'buy-in' of the households in the research was essential to ensure that they were honest in their assessment of the BBC and licence fee before, during and after the deprivation task.

Although, owing to the pandemic, we were unable to visit households face-to-face, we were able to develop a level of trust between participant and moderator by ensuring a consistent MTM contact e.g. the same moderator at both interviews and sharing personal WhatsApp details as a direct point of contact, responding individually to any queries over the course of the task.

Whilst the importance of trying to adhere to the deprivation process was stressed, it was also explained that it was equally important to be completely honest about whether or not they were successful in doing so. Within the Media Diaries, there was an 'Honesty Box' for each household member to detail each day whether they had broken the task. They were also provided with 'joker' stickers, which they could use if they had been in a situation where they could not avoid the BBC (at work, in public, etc.) In this instance they were encouraged to use a 'joker' sticker as they had not purposefully broken the rules, encouraging greater honesty in the task.

**SATURDAY 20th MARCH: SUMMARY**

**How did you find having no BBC today?**  
Circle a number below which indicates how easy or difficult you found it today?

**DIFFICULT** | 1 2 3 4 5 6 7 8 9 10 | **EASY**

**Why do you say that?**  
Is there anything you missed from the BBC / is there anything that you didn't miss?

**YOUR HONESTY BOX**

 **Did you watch, listen or use anything from the BBC today?**  
(Please tick)

If **YES**, what was it?  YES  NO

mtm 15

Image taken from the Media Diary. There was a separate honesty box for each day of the task.



-03 Life without the BBC: Before and after



### 03.1 Before:

Views before the nine-day deprivation task

# At the start of the research, attitudes towards the perceived value of the licence fee were predominantly driven by views of TV

Before the deprivation task started, attitudes towards the licence fee were mainly driven by how satisfied participating households were with BBC television. If the households were satisfied with what they received from the BBC on TV then they were more likely to say that they were willing to **pay the full licence fee or more**. However, if the household was not satisfied with the BBC on TV, they were more likely to fall into the **pay less** or **pay nothing** categories.

As mentioned before, the sample for this research was purposefully skewed towards those households that were initially either unwilling or less willing to pay the full licence fee.

Among these households, there was mixed awareness and understanding of what the licence fee pays for. Most of these households recognised that the licence fee pays for BBC television, although some suggested that it pays for TV in general, or that it was to pay for all of the 'terrestrial' channels. There was much less awareness, or at least consideration, among these households that the TV licence pays for BBC Radio and BBC Online services as well as the TV.

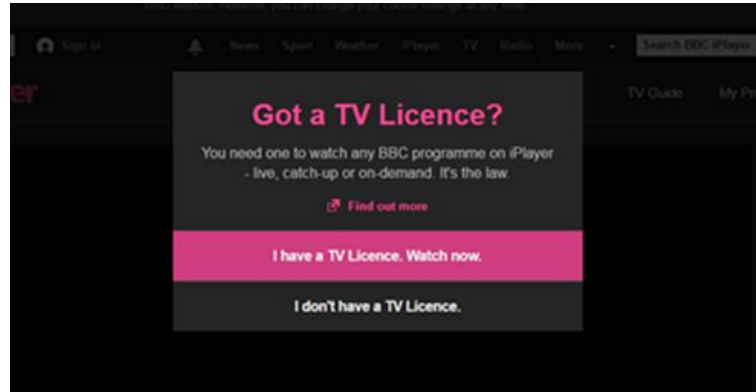


# Broad reasons given by households that initially preferred to **pay nothing** or **pay less** than the full licence fee level



## PERCEIVED PERSONAL VALUE

The amount of perceived personal value derived from the BBC was the main driver of the initial views of the **pay nothing** and **pay less** households towards the licence fee. Initially they felt they did not use the BBC enough to justify the cost and therefore the licence fee felt too expensive.



## AN OUTDATED MODEL OF COLLECTION

There was frustration at the obligatory nature of the licence fee in contrast to the flexibility offered by subscription services. The **pay less** and **pay nothing** households who felt they did not get as much personal value from the BBC felt they would have preferred to opt in and subscribe on-demand, rather than be 'tied in'.



## FAVOURABILITY TOWARDS THE BBC

Initial responses to the licence fee were influenced by how favourable or unfavourable households felt towards the BBC. Issues such as perceived 'wastage' of the licence fee (e.g. salaries) and negativity around the BBC through media and social circles also impacted the **pay nothing** and **pay less** households' willingness to pay.

# The **pay nothing** households initially felt they did not receive enough personal value from the BBC to justify paying the licence fee at all

Overall, the **pay nothing** households had the lowest awareness of the range of BBC services and what the licence fee paid for and felt the BBC did not have much content aimed at them.

Prior to the deprivation exercise, they felt the BBC did not offer content that was particularly distinctive and that they could get similar or better content elsewhere – with a particular focus on their SVOD services.

Given the perceived limited personal value that they initially felt they received from the BBC, the licence fee was often compared unfavourably with their subscription costs – which they saw as offering them considerably more screen time at a lower monthly cost.

In this context, some of the **pay nothing** households felt the BBC was offering them less content for an increasing cost – with confusion, and some frustration, at what the BBC invests this money into if not content for them.

Some of these households also objected to the licence fee on principle and did not favour the obligatory nature of it, suggesting the BBC could generate their own income from advertising rather than using what they described as a television 'tax'.

A minority of the **pay nothing** sample also referenced affordability as a factor for not wanting to pay the licence fee in the first interview. However, this emerged less strongly as a reason in the research this time compared with the 2014/15 study.



*I'd rather not pay for it. I just think there are so many other options out there now...It's really expensive and **I don't think people are using mainstream TV as much now***

**Pay Nothing**, Older family, C2DE, Sky, Netflix, Scotland



*I don't think we should pay it... **there isn't a lot on. It is a lot of same old stuff really for what you get compared to the subscriptions where you can choose what you want to watch.***

*We **hardly watch any of the channels that you pay for** so why should we pay for it when we've got everything else we pay for and watch?*

**Pay Nothing**, Young family, C2DE, Freeview, Netflix, Disney+, Leicester

# The **pay less** households valued the content used from the BBC but initially felt this was a small part of their overall media consumption

Overall, the **pay less** households valued the content that they used from the BBC but also felt they were paying for content that they did not actively use or enjoy, and so while they were willing to pay for the BBC, they felt the full licence fee was too high.

This attitude was often further compounded by the flexible subscription models of video on-demand services. While the **pay less** households were able to identify (typically TV) content they valued from the BBC, initially many felt that the quality and volume of content was not consistent across the year, pinpointing specific shows they valued compared with what they felt were the more consistent examples from SVOD services.

As such, many of the **pay less** households initially felt they would prefer the BBC to offer a subscription model so that they could make the decision to subscribe to watch, say, *Line of Duty* or *Strictly Come Dancing* rather than pay across the whole year.

Moreover, if these households also had pay TV services, they did not want to 'pay twice' to watch BBC as they perceived it initially in addition to paying for Sky or Virgin Media, etc. The **pay less** free-to-air households also believed they had paid to watch TV through purchasing the necessary technology (i.e. TV with in-built Freeview or set-top box) and felt frustrated by ongoing payments in the form of the licence fee, especially if they felt they were not using BBC content or services frequently enough.

For these **pay less** free-to-air households, SVOD services were sometimes used in place of pay TV contracts, offering them a wider choice of content flexibly without being tied into a more expensive contract. In this context, the licence fee model was seen as outdated and there was frustration at the obligatory nature of the payment as well as perceptions of what they saw as 'wastage' with high BBC salaries in contrast to the value they received.



*Having to pay £150 or whatever it is... is quite a lot to do...it's a lot of money... like if it was around the same price point as Netflix, then I would definitely pay for it*

**Pay Less**, Single, C2DE, Freeview, Netflix, Prime, NOW TV, Disney+, South Coast



*I'd like to pay less because I do feel that there's a **lack of consistency** in the content the BBC puts out. There's ... dramas... which are excellent and worth the money...but sometimes **I think there's not the volume of quality content***

**Pay Less**, Older Family, ABC1, Freeview, Netflix, Prime, NOW TV, BritBox, Disney+, Bristol

# The **pay the full licence fee or more** households valued the role that BBC content and services played in their media routines

The **pay the full licence fee or more** households (reflective of the majority of licence fee payers UK wide) were more aware of their BBC consumption, across platforms, and therefore felt the licence fee offered them sufficient personal or household value.

Unlike the other household categories, the **pay the full licence fee or more** households were more likely to identify spontaneously BBC services on radio and online that they used and valued in addition to BBC TV channels and BBC iPlayer.

As well as recognising the amount of content they consumed from across the BBC, the **pay the full licence fee or more** households also saw the BBC as offering them distinctive or unique content that could not be easily replaced via other services.

In line with the personal value that they felt the licence fee offered them, for these households the educational purpose of the BBC was particularly important, especially for children. This was heightened further with BBC Bitesize content supporting home learning during lockdown.

The **pay the full licence fee or more** households were also more comfortable with the concept of the licence fee, citing its longevity, and generally they regarded the BBC as a great British institution that should be protected.

Ultimately, the **pay the full licence fee or more** households felt that the BBC was worth paying for, with some saying they would be prepared to pay more because of the extent that they valued it.



*I think it's a **fair enough amount, obviously when you divide it over the months, for the content that you get** and the programmes that you get, and the variety of choice across the channels. I'd say **the BBC are more friendly**, and more family-friendly programmes. It's value for money for that, and **they're always looking for new and exclusive programmes***

**Pay Licence fee or more**, Older family, C2DE, Freeview, NOW TV, Midlands



*It's an institution... **it's non-commercial which I think is important. I think it's a really valuable service** and I think it **needs to be supported**. It makes **quality stuff** and to be able to continue to do that **it needs money to attract good writers, actors, talent***

**Pay Licence fee or more**, Post family, ABC1, Sky, Netflix, Prime, South Coast



# Once introduced to the deprivation task, initial reactions were very revealing of how households felt the task would impact them

Initially, the **pay nothing** households thought that being without BBC content and services for nine days would be an easy task and there was relief that they did not have to live without another media service

““ *That's not a problem by the way! Yeah, no problem. I can on my phone stop all notifications. **Apart from that, it's easy***  
**Pay Nothing**, Single, C2DE, Sky, Scotland

The **pay less** households were more mixed in their initial responses about being without the BBC for nine days, with some feeling it would be achievable, but others raising some concerns

““ *I think I will be fine, but... I think I'll go to use it **and then realise***  
**Pay Less**, Couple, ABC1, Sky, Netflix, Wales

““ *I'm **actually** going to find that really hard*  
**Pay Less**, Shared household, ABC1, Freeview, Netflix, London

The **pay the full licence fee or more** households were the most shocked, as they realised that the deprivation task would have a big impact on their daily routines owing to their higher levels of BBC consumption

““ *Oh no! **Oh no, no I can't!** I'm not doing it. Oh dear!*  
**Pay Licence fee or more**, Post family, ABC1, Freesat, Netflix, York

### 03.2 After:

Views after the nine-day deprivation task



# Households were interviewed in the week after the deprivation exercise about how they felt about the BBC and licence fee now

Overall, the majority of the households underestimated initially the value that they got from the BBC and licence fee.

# 42

out of the 60 households

that initially said they would prefer to **pay nothing** and not receive the BBC or would only **pay less** were now willing to **pay the full amount or more**.

Of the households that initially said that they would **pay nothing** or **pay less**, those that changed their mind regarding willingness to pay were as follows:

**Pay nothing** households

- 20 out of the 30 were now willing to **pay the full licence fee or more**
- 4 out of the 30 were now prepared to pay something but wanted to **pay less** than the full amount
- 6 out of the 30 were still **unwilling** to pay the full licence fee.

**Pay less** households

- 22 out of the 30 were now willing to pay the full licence fee
- 8 out of the 30 still wanted to pay less than the full amount.

# 19

out of the 20 households

that initially said they would **pay the full licence fee or more** were **still willing to pay the full amount or more**, with **14 even more positive than previously**.

The breakdown of **pay the full licence fee or more** households was:

- 19 out of the 20 households were still willing to **pay the full licence fee or more**
- One out of the 20 households was no longer willing to pay the licence fee in full, though was willing to **pay less** than the full amount.

# The households before and after the deprivation exercise

Before

30  
= Pay nothing

30  
= Pay less

20  
= Pay LF or more

After

20  
out of the 30 now willing to pay the full licence fee or more

22  
out of the 30 now willing to pay the full licence fee or more

19  
out of the 20 still willing to pay the full licence fee or more, with 14 willing to pay even more

4  
out of the 30 were now willing to pay but less than the full amount

8  
out of the 30 still wanted to pay less than the full amount

1  
out of the 20 now wanted to pay less than the full amount

6  
out of the 30 still unwilling to pay at all

# The **pay nothing** and **pay less** households that became willing to **pay the full licence fee** included a range of household types



**All lifestages:** singles / house shares, couples, young families, older families and post family

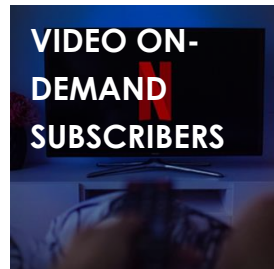


**ABC1** and **C2DE** households

Including those describing themselves as 'comfortable', 'coping' or 'struggling'



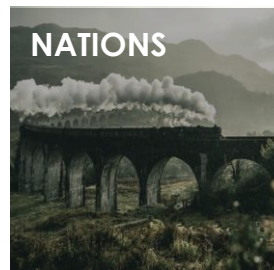
A mix of **pay TV** and **free-to-air** households



Both **with SVOD services** and **without**



A mix of ethnically diverse households



Households converted across all four Nations



I. Households that changed their minds:

**Pay nothing** and **pay less** households now willing to  
**pay the full licence fee or more**

# 42 of the 60 **pay nothing** and **pay less** households changed their minds and became willing to **pay the full licence fee or more**

These included a wide range of household types, as follows:

- **A mix of lifestages:** including the full spectrum of single-person households / house shares (6 out of 11), couples (4 out of 4), young families (7 out of 14), older families (8 out of 10) and post-family households (17 out of 21)
- Both **ABC1** (21 of 25) and **C2DE** (21 of 35) socio-economic groups
- A mix of **pay TV** (25 out of 35) and **free-to-air** households (17 out of 25)
- Households both **with SVOD** (35 out of 49) and **without SVOD** (7 out of 11)
- A mix of both **higher** and **lower general impressions of the BBC beforehand** (29 out of 39 who scored the BBC 1-6 out of 10 at recruitment stage changed their minds, versus 13 out of 21 who scored the BBC between 7-10)\*
- **Ethnically diverse:** 8 out of the 10 households with people belonging to ethnic minorities
- **Locations:** Scotland (4 out of 8), Wales (6 out of 9) and N. Ireland (3 out of 5) plus England (13 out of 14 North, 5 out of 9 Midlands, 11 out of 15 South)
- **A mix of household income types:** including those describing themselves as 'comfortable' (16 out of 23) and 'coping or struggling' (26 out of 37).

BEFORE



*I only probably watch a handful of shows on the channels so I think it's an absolute con*



AFTER



*I use it a lot more than I thought I actually would... so I do think what you're paying is a fair amount compared to the likes of Netflix and your Amazons and everything else like that, so yeah.. I'm happy to pay*

**Pay Nothing**, Couple, ABC1, Sky, Netflix, Prime, Disney+, North East

BEFORE



*We are not happy with the licence fee like it's a bit too much – £150 if it's like £80 or £70 then it would be reasonable*



AFTER

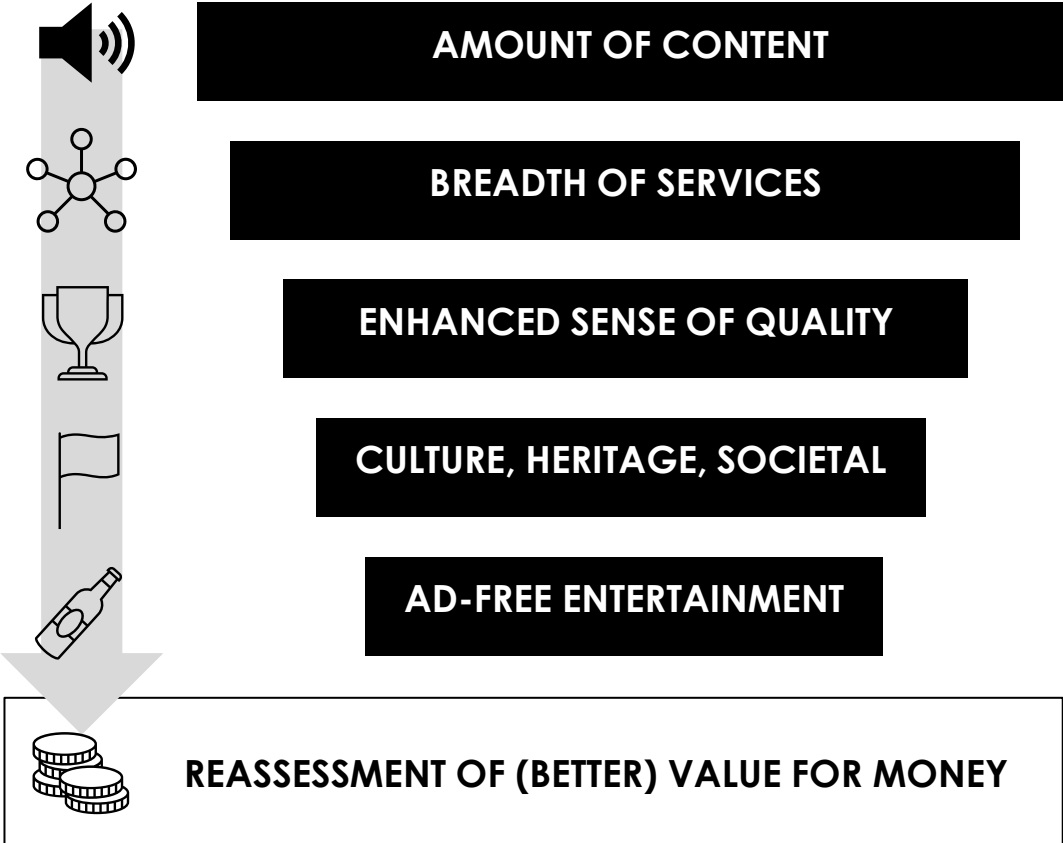


*I miss not being able to just ... log on to the BBC iPlayer app. On top of that, it was not being able to watch the news on BBC, documentaries... the morning programmes... I feel like I have missed out on quite a lot of content and so for that reason I feel to be able to watch those kind of programmes I think it's only fair for me to pay the asking price.*

**Pay Less**, Young family, C2DE, Virgin Media, Leicester

# In a changing world, the reasons households changed their minds about the licence fee were the same as in the 2014/15 research

Despite the far greater media choice available and a pandemic, the range of reasons that households gave for changing their minds and becoming willing to pay the full licence fee or more were consistent with the earlier wave of research in 2014/15.



Households had underestimated the volume of BBC consumption in their daily routines and became more aware of the BBC content and services not available elsewhere.

Increased understanding of where the licence fee goes, in terms of the variety of services that the BBC offers – which many had not recognised fully,

A realisation that the BBC provides a high level of quality in its content, which had not always been appreciated previously.

A feeling that, as a public service broadcaster, the BBC is a trusted source that people turn to in times of national crisis or for events of major significance.

Found the constant levels of advertising frustrating and missed being able to consume content across the BBC without advertising.

All of which, coupled with the licence fee amount, led to a re-appraisal of the value for money for what the licence fee pays for in terms of the content and services available, driven by better understanding the value the BBC offers in day-to-day lives.





# Amount: the task challenged households' preconceptions about how much **BBC TV** they watched



## Realisation among households that they relied upon regular programming as part of their day / week

For example, *BBC Breakfast*, *BBC News* bulletins, regional news and programmes, quiz shows such as *Pointless*, factual entertainment like *MasterChef*, *Graham Norton*, *TOTP* Friday nights on BBC Four.



## Missed 'event' TV and live sport on the BBC that brings the nation together

For example, *Strictly Come Dancing*, football on the BBC, Six Nations tournament.



## Families struggled to find suitable alternatives to CBeebies/CBBC

They felt alternatives did not have the equivalent standard of educational or 'safe' content for their children. It also disrupted some established routines (e.g. bedtimes).



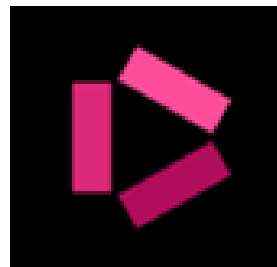
## Inability to watch or continue watching high-profile dramas:

For example, *The Serpent*, *Line of Duty*, *His Dark Materials*, *Bloodlands*) that friends and family were talking about, or that there was a buzz about on social media platforms.



## Frustration at being unable to view archive BBC content on other services and channels

This fulfilled a nostalgia or wind-down need state (e.g. BBC content on UKTV channels such as Dave and Gold, Netflix, BritBox and YouTube).



## Missed the convenience and flexibility of BBC iPlayer for the BBC TV content they enjoyed

They realised they had overlooked the role of BBC iPlayer before the task and had underestimated how often they used it and breadth of content on there.



# Amount: the task challenged households' preconceptions about how much **BBC TV** they watched



“ We've tried Sky and GMTV on ITV, neither of which is in any way **approaching the level of BBC News**

**Pay Less**, Older family, ABC1, Freeview, Netflix, Prime, NOW TV, BritBox, Disney+, Bristol

“ The BBC does **a lot of shows that relate to our country**, and it probably **does more for Northern Ireland than we would actually ever know**

**Pay Nothing**, Older family, C2DE, Freeview, Disney+, Northern Ireland



“ At the start of the week it was fine, just because it was the start and I could live without it for a couple of days. Then it got to mid-week and **I realised I missed the football highlights and the substitutes weren't as good as the BBC. By the end of the week, I'd given in to watch the football!**

**Pay Less**, Couple, ABC1, Sky, Netflix, Scotland



“ (I have missed) there being **no ads and the shows being really good!** Every show pretty much – **Art Ninja, Dengineers...Operation Ouch!, Deadly 60, Hey Duggee...**I've been playing the Nintendo Wii instead (child, aged 10)

**Pay Less**, Young family, C2DE, Freeview + Netflix, North



“ The biggest thing was **not watching Line of Duty**, because you know that **the whole world talks about it** as well... You still end up getting little snippets from people and social media

**Pay Nothing**, Post family, ABC1, Sky, Blackpool and Preston

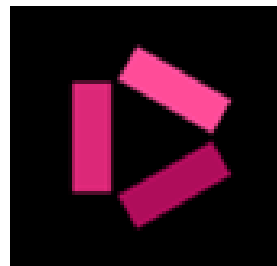
“ They are giving me dramas and TV programmes that **I want to watch. That did surprise me**

**Pay Nothing**, Post family, ABC1, Virgin Media, Netflix, Swansea



“ When you go to the likes of Amazon and Netflix it's easy to **forget what's BBC content...** I remember watching the likes of Come Fly With Me which is a BBC show from years ago...but you kind of forget it's a BBC show...**We've realised how much is available and how much we do actually use it**

**Pay Nothing** Couple, ABC1, Sky, Netflix, Prime, Disney+, North



“ I forget about things like **iPlayer** and the huge breadth that's on there, including films... I think that the wealth of the offer has definitely hit home. **£12 a month is incredible for that breadth, the archive, I love the BBC dramas and soaps so I can see where the investment is going**

**Pay Nothing**, Older family, C2DE, Sky, Netflix, Prime, Disney+, York



# Amount: the task also made households re-assess the role of **BBC Online services** in their daily lives

**An underestimated area of the BBC's offer, households often missed their access to the suite of BBC apps and websites that they used daily.**

**BBC News and Sport:** The tone and style of content was felt to be hard to replace with alternatives. These households also realised how reliant they were on push notifications from these apps (headlines and scores), which would normally keep them abreast of updates passively.

**BBC Weather:** Despite trying alternatives, these were felt to not be as accurate, detailed or localised as the BBC's meteorological information.

**BBC Food website:** The inability to be able to access the 'reliable recipes' was a frequent frustration amongst those who cooked meals for themselves or their families, with alternatives sometimes seen as having unclear measurements, obscure ingredients or lacking a 'Britishness' about them.

**Social media:** Households were also sometimes surprised at the number of BBC accounts / programmes that they followed via social platforms and missed being able to get updates from these e.g. BBC News or *The Graham Norton Show* clips on Twitter.

**Third-party platforms:** Completely avoiding BBC on services such as YouTube or on voice assistants when looking for content of interest proved difficult. It made many realise how much the BBC permeates the media they use and how these little things add up to greater value than initially thought.

“ I'd only thought about the TV side of BBC initially, but I've had to use the Sky News app which I really didn't like. It doesn't have the same content and just doesn't seem to have as much **Pay Nothing**, Young family, ABC1, Virgin Media, Netflix, Prime, Disney+, Apple TV, York

“ The **BBC Weather app** just seems to be a bit more accurate for me, and it also picks up where you are locally **Pay Nothing**, Post family, C2DE, Freeview, Liverpool

“ The first thing I did when I was allowed was to go on to BBC Sport. There was just so many adverts on Sky so think I'll be going back to BBC Sport for the future **Pay Nothing**, Older family, C2DE, Sky, Netflix, Prime, Disney+, York

“ I've been using the Tesco recipe app which is OK, it's not as good...I'm missing [BBC food website] because I use it most of the time and I like to save the recipes I like. It's easy to use **Pay Less**, Shared household, ABC1, Freeview, Netflix, Prime, Disney+, London



# Amount: households cited the range of the BBC's audio offer among the reasons for changing their minds

As with BBC Online services, households had often under-appreciated how much of the BBC's audio offer they consumed in a typical day or week. This varied relative to personal preferences (typically skewing by target age of the station or by location in terms of BBC local and nations radio). This was particularly felt by those with radio routines: for example, times of day (breakfast, commutes, mid-morning breaks) or those with BBC Radio on in the background while they were working.

The volume of adverts on commercial stations proved a frequent annoyance when trying alternatives to the extent that radio was sometimes switched for music playlists instead.

Some – typically older – household members missed their BBC local station for news, weather and traffic updates, plus local sports coverage. They turned to online (e.g. local news brands or social media) but with mixed success.

BBC Sounds was missed by regular users as a quick way to get to BBC radio and audio. The range of BBC podcasts were missed on walks or as accompaniments during personal downtime as escapism from what was going on in the world.

“ I have missed listening to Radio 2 because that has always been my go-to station. **It has such a wide variety of programmes** and things to listen to. Popmaster is a favourite of mine and I enjoy listening to that... so that's been difficult. I listened to Absolute Radio instead...the downside was **the amount of adverts, every two of three songs you get adverts for things you just don't want**

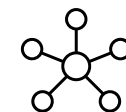
Pay Less, Young family, C2DE, Freeview, Netflix, North

“ In the evenings before I go to bed, **normally I'd listen to a podcast and they tend to be BBC ones** [Radio 4 and Radio 5 live]

Pay Less, Shared household, ABC1, Freeview, Netflix, Prime, Disney+, London

“ I didn't think I would miss the radio or the news as much because it's there elsewhere, but it just doesn't come up to scratch. Like [name of local commercial alternative] is my local radio station and I should be listening to that but it's just absolute garbage. It's not as independent. It's not as informative... I was quite surprised at how much I missed it [BBC Radio Scotland]... **You're going to get everything you need from that station**

Pay Nothing, Older family, C2DE, Sky, Netflix, Scotland



# Breadth: the task enhanced households' understanding of the range of services that the BBC provides for the licence fee

Households that initially wanted to **pay nothing** or **pay less** than the licence fee often cited the lack of content they consume from BBC TV as a reason – that it only has "a couple of channels" that they rarely watch.

After been without the BBC for nine days, households became aware the BBC's offer was more extensive than they had realised and that the licence fee also goes into the provision of services across audio, online and iPlayer. In this context – and upon greater awareness of their usage across this portfolio – households felt that their licence fee 'went further' than originally thought. This was often instrumental in their decision to change their minds in terms of their willingness to pay. No longer were comparisons being made in a like-for-like way on just TV (e.g. the licence fee versus a Netflix subscription), but in the knowledge of what else the licence fee went towards, which enhanced their value perceptions.

“ **I probably didn't appreciate what we were missing until we'd missed it!** ... When I'm accessing the services, whether it be radio, TV or on my phone, **you almost do those things subconsciously without necessarily registering that actually what you are doing is accessing BBC content ... and it's part of our DNA**

**Pay Nothing**, Post family, ABC1, Virgin Media, Netflix, NOW TV, Prime, Bristol

“ You go to that **one central node**, if you like, and from there you can just reel in all this information and find something almost instantaneously in one place for £3.02 a week... It's also made me realise that you don't know what you've got until it's gone

**Pay Nothing**, Post Family, ABC1, Freeview, Netflix, BritBox, NOW TV, Prime, Norwich

“ I think, for me, **I hadn't realised the number of different platforms that are accessed by us and by the children... after the nine days we've just been through... it's of such an incalculable value**

**Pay Nothing**, Older family, C2DE, Sky, Netflix, Prime, Disney+, York

“ When you look at it, it offers more than what you think. **You tend to just think the BBC channels and a bit of Radio but like... there's a lot more to it. There's all your websites, and obviously all the learning stuff for the kids...** And I didn't realise how much I check on the weather and the news, and when you break it down to £3 it's not that much really

**Pay Nothing**, Young family, C2DE, Freeview, Netflix, Disney+, Leicester



# Quality: the absence of BBC services and forced exposure to others created a new appreciation of the BBC's quality of output

Whilst households recognised that the BBC produced some high-quality output in the initial interviews – typically big budget dramas – the experience of being without the full range of the BBC's services often created a greater appreciation of the production values in other areas, too.

This was particularly the case for educational content for children amongst family households, as well as BBC News and current affairs at both a UK, Nations and local level.

Audiences across household types and ages missed the presentational style, sense of trustworthiness and reliability from the BBC across the news offer. There was also greater appreciation for the quality of audio output across radio and podcasts in terms of production values, features and presenters, as well as for BBC Online's layout, push notifications and depth of detail.

“ Now I've had to binge watch other channels, I do **feel happier paying the licence fee because I feel you get quality programmes** on the BBC. There might not always be as much choice... but the quality is worth the licence fee

**Pay Less**, Post family, C2DE, Sky, Netflix, Prime, London

“ This has **made me realise why we do pay it** because there isn't a replacement, and hand on heart that is something we've said several times over the years **'Oh there's absolutely nothing on' but the reality is there is and without the news we are lost**

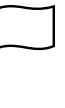
**Pay Less**, Older family, ABC1, Freeview, Netflix, Prime, NOW TV, BritBox, Disney+, Bristol

“ **It has a bit more integrity I think in the BBC programmes**, whereas other channels do sort of throw things together just for the entertainment value. **The BBC do think about the quality of those shows they're putting on**

**Pay Less**, Young Family, C2DE, Freeview, Netflix, North East

“ **I know that anything I put on the BBC [CBeebies] all of it would be ok.** I could leave it on in the room and it would be fine. I maybe couldn't do that on YouTube, the internet, Netflix. **It's safe for the kids!**

**Pay Less**, Young Family, C2DE, Sky, Netflix, Prime, Disney+, Blackpool and Preston



# Cultural, heritage and societal benefits: households also realised and respected more the role of the BBC in UK life

This emerged as an area of greater importance compared with the research in 2014/15, owing to the pandemic and national / regional lockdowns. There was frustration at not being able to turn to the national broadcaster at a time of need. However, this was not the key driver of why these households changed their minds. The amount, breadth and quality remained the most significant themes regardless of the pandemic.

“ We take the BBC for granted a lot and have done for years and years. **It just wouldn't be good if we didn't have the BBC option because they are a trusted institution...** It's just part of your life. You don't realise how much is there

Pay Less, Older Family, ABC1, Freeview, Netflix, Scotland

“ I appreciate now how well the BBC summarise all the stuff going on, because there is so much going on! I think they're actually doing a **pretty incredible job of keeping the nation up-to-date**, keeping them entertained and lifting their spirits. I think that's **worth its weight in gold right now**

Pay Less, Older family, ABC1, Freeview, Netflix, Prime, NOW TV, BritBox, Disney+, Bristol

**Coronavirus updates and briefings:** There was a sense of loss of not being able to turn to the BBC when there were major government announcements about the pandemic. Although available on other networks and services, for many – especially those who grew up with the BBC in their households – the BBC was seen as the 'go-to' for important news such as this.

**Provision of educational content:** Being unable to access the new educational resources that the BBC put on for primary and secondary school children was frustrating for parents. It also generated a feeling of increased warmth to the BBC and a recognition of the public value it can deliver that other broadcasters are unable to.

**National 'moments':** The inability to access the BBC during moments of national significance made audiences realise how important the BBC can be in such times in terms of striking the right tone and representing British culture to the rest of the world. It reminded households of how embedded the BBC is within the fabric of UK life.

“ It's such a big part of everyday life... **that sense of all being connected... we would all miss it a lot, I think, if we didn't have it**

Pay Less, Single, C2DE, Freeview, Netflix, Prime, NOW TV, Disney+, South Coast



# Advert free: households became tired of advertising and missed having some exposure to ad-free entertainment

Across household types, ages and lifestyles, those who changed their minds often cited the volume of advertising as a source of frustration during the deprivation experience. Adverts now 'interrupted' news, sport and children's content where previously they had not. This was on linear channels but also radio stations, YouTube and broadcast video on-demand services such as ITV Hub and All4 (for those who were using those services more as alternatives to iPlayer).

With some households suggesting that they would not mind advertising on the BBC as an alternative funding model originally, this disruption and exposure to an advertising-filled world challenged that view.

“ I think **a platform that isn't riddled with adverts is a big thing that I've missed**. I realise not just how irritating they are but how repetitive... **an advert-free platform is actually really welcome**

**Pay Nothing**, Older family, C2DE, Sky, Netflix, Prime, Disney+, York

“ They have some very nice programmes on the BBC, and they bring the family together and **they have no adverts as well, I really don't like adverts**

**Pay Less**, Young family, C2DE, Virgin Media, Leicester

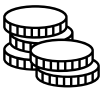
“ If you compare that [BBC] to **the likes of Sky, you have to pay a subscription fee and you have to watch the adverts as well**. [The licence fee] is excellent value... The BBC is very, very good value for money

**Pay Nothing**, Post family, ABC1, Freeview, Netflix, Prime, Swansea

“ **Where the BBC wins with me is purely because of the adverts**. If you watched Minder on TV for an hour, 15 minutes of that hour you're watching adverts, that's why I record everything... If you watch a programme on the BBC for an hour, it is an actual hour you're watching

**Pay Less**, Post family, C2DE, Sky, Bristol





# Reassessing value for money: all of this, plus seeing the licence fee cost, made households reconsider the value they received

When households opened the envelope that contained the equivalent licence fee amount for the nine days they had been without the BBC, this was often a pivotal moment in their decision to change their minds. By holding this amount in their hands, they began to consider everything they had missed during this period across platforms from the BBC. Many came to the opinion that they felt that they would have paid this amount of money to have had access to the BBC services – and would also now be willing to pay this amount in future, in contrast to their beliefs at the first interview.

Households made this judgement call based on the areas identified in the preceding slides, whilst also making comparisons to other everyday items such as the price of a cup of coffee, a meal deal or a pint of beer and how much they get from the BBC compared with those.

Some also compared the amount favourably to one-off payments they might make for an on-demand film on Sky or Amazon Prime Video. It also led households to re-consider the value that they get from pay TV and SVOD subscriptions that they may have access to, with many suggesting that those services were not as good value in comparison, which was often in contrast to views at the first interview.

Before the exercise, most of these households had preferred advertising or subscription as the means of funding the BBC but after the nine days, changed their opinion to the licence fee.

“ I’m thinking [my son] **spends more than that on sweets in two days** and you think that’s absolutely nothing - you don’t get a lot for £3.88

**Pay Less**, Older Family, ABC1, Freeview, Netflix, Scotland

“ I’d prefer to pay it... I don’t make big bucks in my job but **it’s not a lot of money**... It’s not a lot

**Pay Nothing**, Post family, C2DE, Freeview, North East

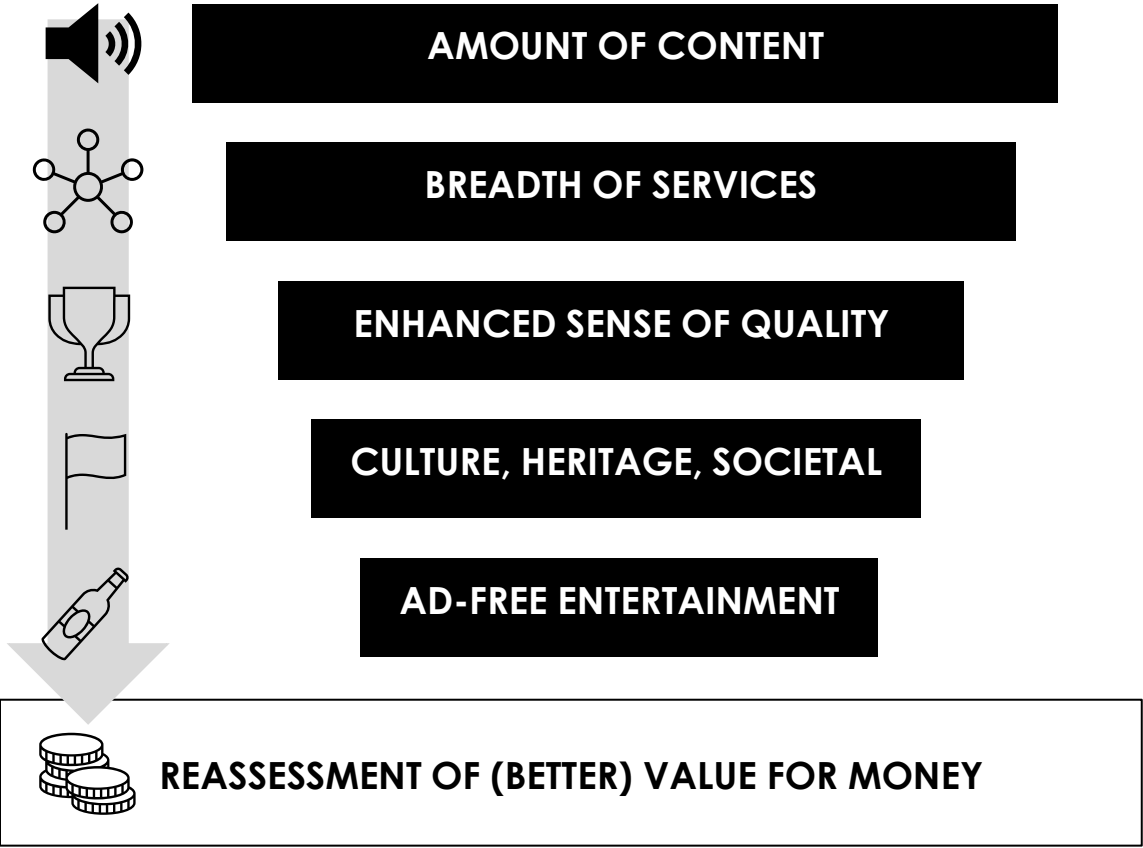
“ **What other form of relaxation or entertainment could I do for £3.88 in just over a week? You can’t even get a coffee for that.** You wouldn’t be able to get a special Christmas one, you’d have to forego the cream on top or caramel sauce or something!

**Pay Nothing**, Single, C2DE, Freeview, Netflix, Prime, Midlands

“ You **can’t get a subscription service that covers all that for that kind of money** – not anywhere

**Pay Less**, Post family, C2DE, Freeview, BT Sport, NOW TV, Prime, Apple TV, Norwich

# Identifying with one or a combination of these reasons led to a reappraisal for those households that changed their minds



Driven by better understanding the value the BBC offers in day-to-day lives



### BEFORE

“ I think it's money that we're paying out that we shouldn't have to. **It's an extra payment that you have to worry about. I don't think it's value for money... I'd rather not pay for it.** I just think there are so many other options out there now... It's really expensive



### AFTER

“ I did not realise or think for one minute that it would bother me as **much as it has.** And now I'm more than happy with the services I access on a daily basis

**It's worth every penny and more...** I've realised the value of what I'm paying for, **so I have absolutely no problem paying for it**

**Pay Nothing**, Older family, C2DE, Sky, Netflix, Scotland



## II. Households that did not change their minds:

**Pay nothing** and **pay less** households that stayed unwilling to pay the full licence fee

# 18 of the 60 **pay nothing** / **pay less** households did not change their minds, though 4 of these **pay nothing** households became **pay less**

These included a range of household types, as follows:

- **A mix of lifestyles:** including single person / house shares (5 out of 11), young families (7 out of 14), older families (2 out of 10) and post-family households (4 out of 21)
- Both **ABC1** (4) and **C2DE** (14) socio-economic groups. (The C2DE figure is higher because reflecting the national profile, there was a higher proportion of C2DE households in the pay nothing and pay less samples (overall sample = 35 C2DE households and 25 ABC1 households))
- **A mix of pay TV** (10 out of 35) and **free-to-air** (8 out of 25) households
- Households both **with SVOD** (14 out of 49) and **without SVOD** (4 out of 11)
- A mix of **higher** and **lower general impressions of the BBC** beforehand (10 out of 39 who scored the BBC 1-6 out of 10 at recruitment stage did not change their mind, versus 8 out of 21 who scored the BBC between 7-10)
- **Ethnically diverse:** 2 out of 10 households with people belonging to ethnic minorities did not change their minds
- **Locations:** Scotland (4 out of 8), Wales (3 out of 9) and Northern Ireland (2 out of 5) plus England (1 out of 14 North, 4 out of 9 Midlands, 4 out of 15 South)
- **A mix of household income types:** including those describing themselves as 'comfortable' (7 out of 23) and 'coping or struggling' financially (11 out of 37).

**BEFORE**

“ I could go without the BBC quite easily.



I don't really watch it or live TV

**AFTER**

“ I didn't miss it at all...BBC is not part of my normal routine, so it didn't affect it... I don't use any of their services at all

**Pay Nothing**, Single, ABC1, Freeview, Netflix, Scotland

**BEFORE**

“ I just think **there's so much out there now, we shouldn't have to pay that to BBC** when it's not used as much as it used to be

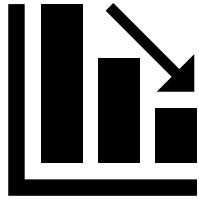


**AFTER**

“ When put in perspective how much I pay for it, **realistically I'm paying £3 a week for EastEnders because everything else can be easily substituted...that's a lot for one programme!**

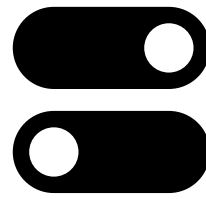
**Pay Less**, Young Family, ABC1, Freeview, Netflix, Disney+, Prime, Reading

These 18 **pay nothing** and **pay less** households did not change their minds as they had not sufficiently missed the BBC



### PERCEIVED LOW PERSONAL VALUE

Following the deprivation task, these households **still felt they received low personal value** from the BBC



### ACCESSIBLE REPLACEMENTS FOR THE BBC

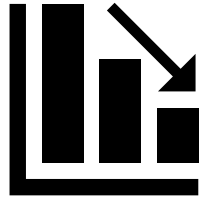
There were **alternatives that were equally good, if not better**, so paying the licence fee felt unnecessary to these households



### OBLIGATORY NATURE OF THE LICENCE FEE

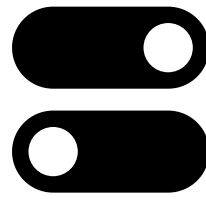
Some households **begrudged paying for a service that is seen to be forced upon them** and others

# For the minority of households, the deprivation task reinforced their initial views about the BBC



## PERCEIVED LOW PERSONAL VALUE

Households that did not change their minds mainly attributed this to the fact that they received low personal value from the BBC. For some of these **pay nothing** households, this enhanced a sense that this was something they felt they could not afford, although affordability did not emerge as strongly overall as in 2014/15. The **pay less households** still felt that while it was fair to pay for services they did use (and missed), they should not be paying as much because they did not use all BBC services.



## ACCESSIBLE REPLACEMENTS FOR THE BBC

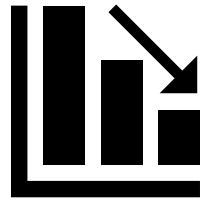
These households felt there were alternative services available that were equally good, if not better, than BBC equivalents and so paying the full licence fee felt unnecessary. The pay TV and SVOD households that did not change their minds talked about the variety of content available there, meaning there was always something for them to watch. For more practical information, like weather, they had been able to find free online replacements.



## OBLIGATORY NATURE OF THE LICENCE FEE

Another reason these households did not change their point of view was the obligatory nature of the licence fee instead of advertising or subscription. These households begrudged paying for a service that was seen to be forced upon them and others to pay. Others voiced frustration that they are obligated to pay for a service they felt they do not use enough of. Some compared the licence fee cost to their SVOD subscriptions, and wanted to pay a reduced price, if anything, that felt more in line with their use of the BBC.

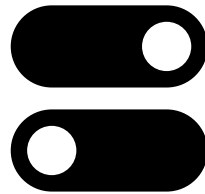
# For the minority of households, the deprivation task reinforced their initial views about the BBC



## PERCEIVED LOW PERSONAL VALUE

“ I just **watch the television to watch what I want to watch, and the BBC is not what I want to watch** so I don't see why I should pay £3.02 a week. No, I **don't think it's good value** for me  
**Pay Nothing**, Post family, C2DE, Sky, Netflix, Reading

“ We don't really use it... **They need to mix up the age groups and make it not just for the young and slightly older ones** but everyone, something for every age group to watch  
**Pay Nothing**, Older family, C2DE, Sky, Netflix, Prime, London



## ACCESSIBLE REPLACEMENTS FOR THE BBC

“ I still don't use anything. I didn't miss anything throughout the week...I don't watch anything that's on the BBC. **Anything I use from the BBC is free, like the apps, and I just don't want to pay for anything I don't use**  
**Pay Nothing**, Shared household, C2DE, Sky, Netflix, Prime, Disney+, Norwich

“ At first, I missed it, but then I realised **they're not the only ones that can entertain me**  
**Pay Less**, Post family, C2DE, Freeview, Scotland



## OBLIGATORY NATURE OF THE LICENCE FEE

“ My views haven't changed. **I still don't like the fact that it's a given that you have to pay and that everyone has to pay the same set amount** regardless if you use BBC content ... I think it should be modernised and maybe introduce some advertising to reduce the licence fee  
**Pay Less**, Single, ABC1, Sky, Netflix, Disney+, Leicester

“ I understand the BBC is 'The' British broadcaster and I respect that, but it **shouldn't be forced**  
**Pay Less**, Young family, C2DE, Virgin Media, Prime, Swansea

# However, while not willing to pay the full amount, four **pay nothing** households became willing to pay, though **less than** the full cost

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Of the ten **pay nothing** households that did not change their minds about paying the full cost of the licence fee, there were four that moved from **pay nothing** to becoming prepared to pay for the licence fee, albeit to **pay less** than the full amount.

The four households that shifted their opinion from **pay nothing** to **pay less** were families (2 young; 1 older family) or shared households (1 household).

While they continued to feel that they were not receiving sufficient value personally, they recognised that BBC services and / or content collectively across the household was offering them better overall value than they had initially thought.

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For the families, this tended to be prompted by children's content which was often a part of the daily routine not initially considered, and was missed by the children themselves. Similarly, the parents missed the educational content from BBC Bitesize.

Some of these households were also consuming BBC content via other platforms (Netflix and YouTube) and so were more inclined to pay so that they did not 'lose' this content.

While they were now willing to pay to contribute to the BBC, they did not feel the full amount was in line with the level of value they received at the moment and so wanted to **pay less** than the full amount.

## BEFORE

“ We do pay for it, but if I'm honest I'd rather not because **we don't really use BBC very much**...every now and then we'll flick through Freeview and maybe watch something but **I'd rather not pay for it because we use everything else more**



## AFTER

“ We use more than I thought we did, the CBeebies and the seasonal stuff like *Strictly* and *Line of Duty*. Maybe I didn't register as we don't watch BBC very often but **we do watch the dramas on Netflix so we're watching it at some point**, so in that respect **I'd rather pay less than nothing**

**Pay Nothing**, Young family, ABC1, Freeview, NOW TV, Netflix, Prime, Reading





III. Pay the full licence fee or more households

BBC  
ONE



His Dark Materials

# For almost all **pay the full licence fee or more** households, the task reinforced the higher personal value they get from the BBC

**19**  
out of the 20 households  
stayed willing to **pay the full  
licence fee or more**

The deprivation task was difficult for nearly all of the **pay the full licence fee or more** homes.

Of the 20 households involved in the research, 19 were still willing to **pay the full licence fee or more** after living without the BBC for nine days.

Of these households, 14 were even more positive than they had been previously as they had missed the BBC and the role it plays in their lives so much.

**14**  
out of these 19 households  
became **willing to pay even  
more** than they had been  
previously

**BEFORE**

“ It's such a little amount each month... **Most of the programmes we watch are BBC...we trust the BBC for news as well** ”



**AFTER**

“ It's been a nightmare. I **wouldn't have done it** [deprivation exercise] **if I had known it was going to be that bad.** I didn't realise how much we used BBC... I **absolutely now would be more than happy to pay more** ”

**Pay Licence fee or more**, Post Family, ABC1, Freesat, Netflix, York

**BEFORE**

“ BBC gives you **an awful amount of entertainment for not a huge amount of money.** So, thinking about all the other things you pay for, we are perfectly happy to pay as you get so much ”

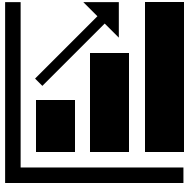


**AFTER**

“ Compared to Netflix, yes, it's more money but you can't really compare the two because **Netflix is just the TV** whereas with BBC you've got your listening, your news, iPlayer, so it's totally different...for **£3.02 a week, that's not even a pound per person** [in this house] ”

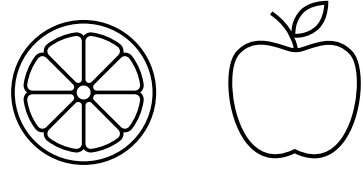
**Pay Licence fee or more**, Young family, ABC1, Freeview, Netflix, <sup>58</sup> Prime, Bristol

# These households already valued the BBC but the task amplified their perceptions of value for money from the licence fee



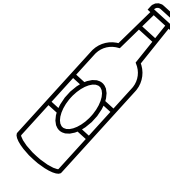
## HIGH PERSONAL & HOUSEHOLD VALUE

These households that were still willing to pay, or pay more, found that being without the BBC had dramatically impacted their routines because they consume a high volume of BBC content across platforms. These households missed the BBC services and content they had expected to, but also found they relied on the BBC even more than they initially realised.



## DISAPPOINTING ALTERNATIVES FOR THE BBC

The task strengthened these households' quality perceptions of the BBC, with many struggling to find adequate substitutes for their BBC equivalents – reinforcing their sense that the BBC offered them unique and distinctive content. While TV and big dramas were missed, for many households it was also the practical information and support services (e.g. BBC News, Sports and Weather apps) they used throughout the day that impacted them the most.



## FRUSTRATION WITH VOLUME OF ADVERTISING

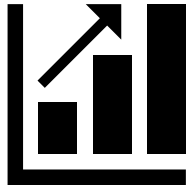
Among these households who have heavier BBC consumption habits, using commercial alternatives with adverts was a real frustration. This spanned TV, radio and online replacements with households commenting on adverts interrupting TV dramas; causing them to station hop on the radio frequently; or feeling bombarded by pop-ups on alternative recipe or sport sites and children's games.



## CULTURE, HERITAGE & SOCIETAL BENEFITS

There was a strong sense among these households that in contributing to the BBC, there were wider societal benefits. These households felt that their licence fee was helping to go towards the greater good of the UK (e.g. Bitesize) and enabled the BBC to deliver many different things for different audiences. They also valued having the BBC as something that represents the UK as a recognised institution across the world.

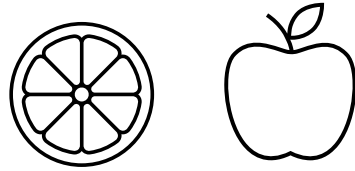
# These households already valued the BBC but the task amplified their perceptions of value for money from the licence fee



## HIGH PERSONAL AND HOUSEHOLD VALUE

“ *If you weren't to pay your TV licence, you would have to go and pay for Sky or the various subscription charges which probably work out more and you wouldn't get the likes of radio stations, the news channels... The service available for kids alone would be worth the money*

**Pay Licence fee or more**, Young family, C2DE, Freeview, Blackpool and Preston



## DISAPPOINTING ALTERNATIVES FOR THE BBC

“ *I couldn't live without the BBC permanently because the lack of alternatives giving the same local coverage is not great...I value certain things in life and... the BBC is probably for the greater good of everything and it's important to support these things*

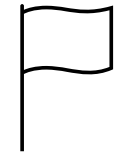
**Pay Licence fee or more**, Post family, ABC1, Freeview, Netflix, Scotland



## FRUSTRATION WITH THE VOLUME OF ADVERTISING

“ *The adverts, they're just so frustrating. It's so repetitive... So, I think you get to appreciate, 'OK, this is what we actually pay for. We pay for the luxury of having no adverts'*

**Pay Licence fee or more**, Older family, C2DE, Freeview, NOW TV, Leicester



## CULTURE, HERITAGE & SOCIETAL BENEFITS

“ *I would happily pay £3.88 plus for what we get...I'd rather pay more knowing that people can use it, not necessarily just us. A Sky subscription you pay for it and it's just for you but this is something that everyone can access and when you think how much can be accessed for 43p a day, it's stupid what you get!*

**Pay Licence fee or more**, Young family, ABC1, BT TV, Netflix, NOW TV, Prime, Reading

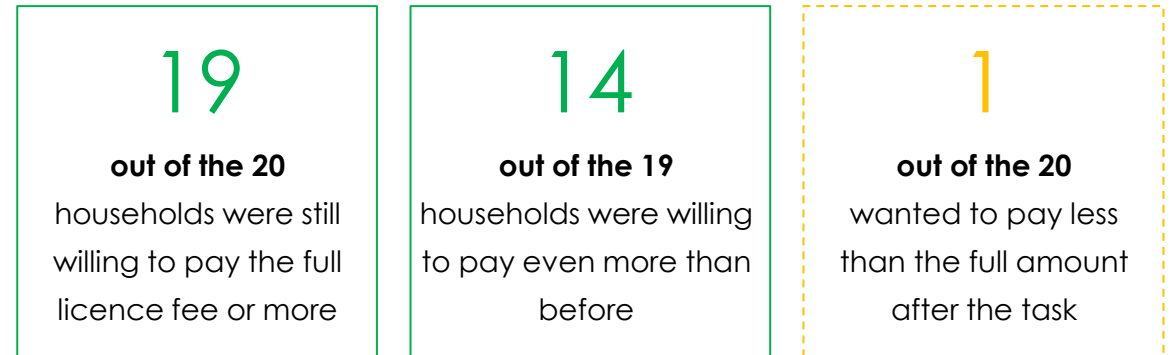
# One **pay the full licence fee or more** household changed their mind and decided they wanted to **pay less** than the licence fee

There was one household in the research that, following the deprivation task, decided they wanted to **pay less** rather than **pay the full licence fee or more**.

This post-family household had initially been willing to **pay the full licence fee** as they felt the amount of BBC content they consumed was comparative with the other services they used and pay for. In addition, while having always paid the licence fee, they admitted it was not something they had given much further consideration regarding the amount it costs in relation to other services.

However, during the deprivation task they found they did not miss the BBC as much as they had expected, and so began to question the value they got from the licence fee, comparing it with their SVOD subscription which they came to see as offering them better value for money. Given this, they felt that they were not receiving the full value from the current level of the licence fee.

They did, however, relay that had *Strictly Come Dancing* or a 'big' drama such as *Line of Duty* been on during their deprivation period, their opinion could have been different.



## BEFORE



*It's **something we've always had to pay** so we haven't really thought about it much before. We just pay it!*

## AFTER



*I think we both feel that we're paying the licence fee for not a lot of value or content. **Paying for a service you don't use that much isn't ideal.** We would pay the licence fee but pay less*

**Pay Licence fee or more**, Post family, ABC1, Sky, Netflix, Wales



04 Life without the BBC: Summing up

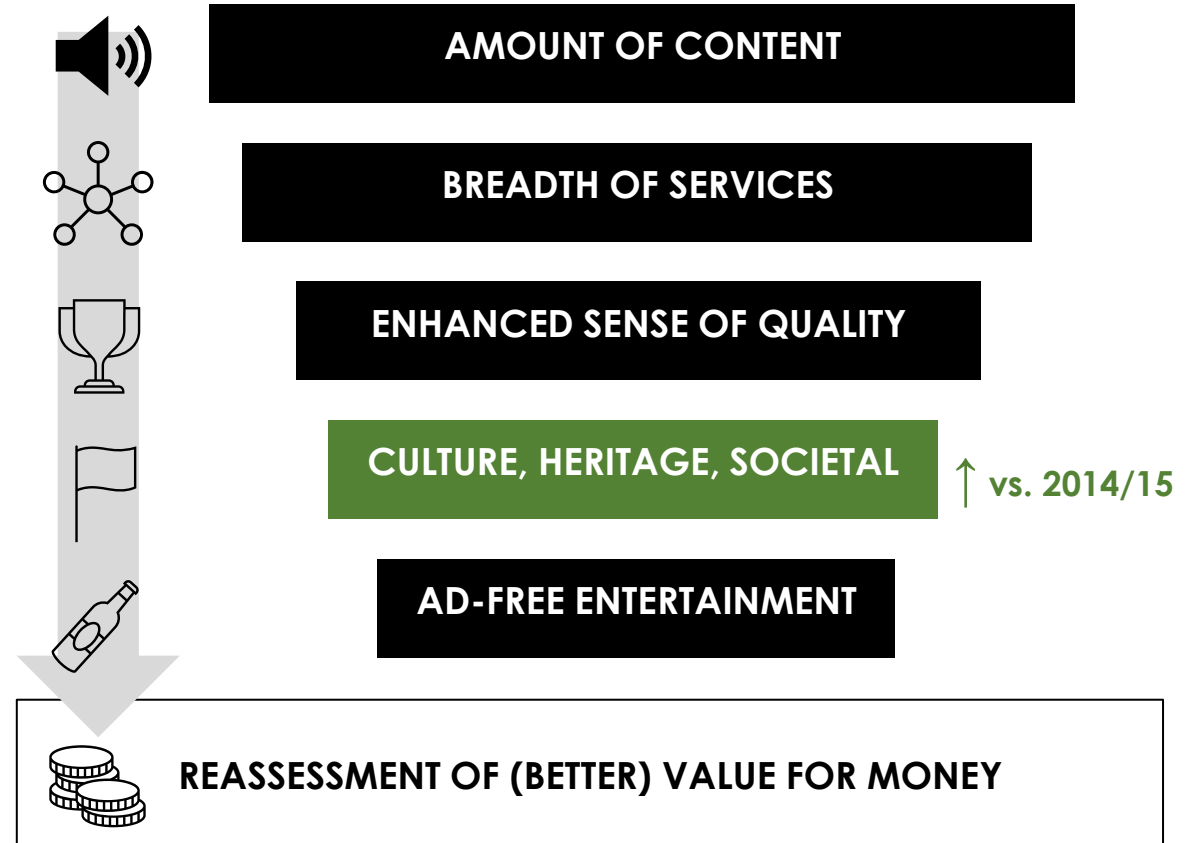
The deprivation exercise shows that the majority of the households under-estimated the value that they get from the BBC

42

out of the 60 **pay nothing** and **pay less** households changed their minds and became willing to **pay the full licence fee or more (70%)**


19

out of the 20 **pay the full licence fee or more** households were **still willing to pay**, with **14 even more positive than before**




*Driven by better understanding the value the BBC offers in day-to-day lives*

# For the majority of the **pay nothing** and **pay less** households, the task made them realise how much BBC content they used



## BBC Television

- Realisation they **relied upon regular programming** as part of their day / week
- **Missed 'event' TV and live sport** that brings the nation together
- Families **struggled to find suitable alternatives** to CBBC and CBeebies
- Inability to watch or continue watching **high-profile dramas**
- Frustrated at **being unable to view archive BBC content on other services and channels**
- Missed **the breadth, convenience and flexibility of BBC iPlayer**. Many realised they had overlooked the role of BBC iPlayer before.



## BBC Online & social

- **Tone and style hard to replace** by alternatives
- Enhanced realisation of **reliance on BBC push notifications**
- Alternatives tried seen as **not as accurate, detailed or localised**
- Households also missed being able to get updates from **BBC social accounts**
- **Avoiding the BBC on third-party platforms proved** difficult. Many realised how much the BBC permeates the media they use and that this adds up to greater value than initially thought.

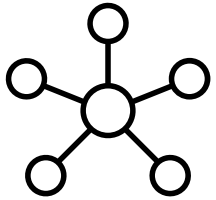


## BBC Radio & audio

- **Under-estimated how much BBC audio they used** in a typical day or week
- **Volume of adverts on commercial stations proved a frequent annoyance**; radio was sometimes switched for playlists instead
- **BBC Sounds was missed by regular users** as a quick way to get to BBC radio and audio
- **Range of BBC podcasts missed** during exercise and/or as accompaniments during personal downtime for moments of escapism.



These **pay nothing** and **pay less** households also changed their minds owing to a combination of these additional reasons



**APPRECIATION FOR THE BREADTH OF BBC SERVICES**

Enhanced understanding of **the three-dimensional breadth of the BBC**



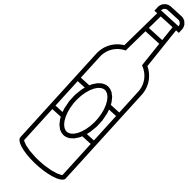
**ENHANCED SENSE OF QUALITY OF BBC CONTENT**

Created **a new appreciation of the BBC's quality** of output, across genres and platforms



**CULTURE, HERITAGE & SOCIETAL BENEFITS**

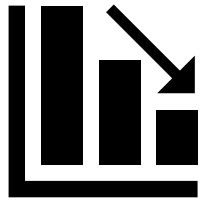
Frustration at not being able to **turn to the national broadcaster**. Realisation of how embedded the BBC is within UK life and the public value delivered.



**MISSING ADVERT-FREE ENTERTAINMENT AND SERVICES**

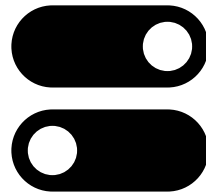
Became tired of constant advertising and **missed ad-free entertainment**

A minority of **pay nothing** and **pay less** households did not change their minds as they had not sufficiently missed the BBC



### PERCEIVED LOW PERSONAL VALUE

Following the deprivation task, these households **still felt they received low personal value** from the BBC



### ACCESSIBLE REPLACEMENTS FOR THE BBC

There were **alternatives that were equally good, if not better**, so paying the licence fee felt unnecessary

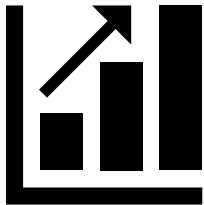


### OBLIGATORY NATURE OF THE LICENCE FEE

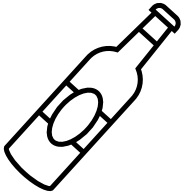
Some households **begrudged paying for a service that was seen to be forced upon them** and others

For almost all of **pay the full licence fee or more** households, the task reinforced the higher personal value they get from the BBC

**19**  
out of the 20 households  
stayed willing to **pay the full  
licence fee or more**

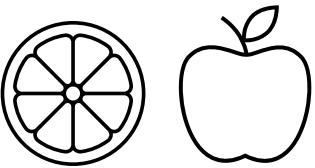


**HIGH PERSONAL AND  
HOUSEHOLD VALUE**

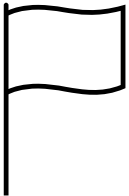


**FRUSTRATION WITH  
THE VOLUME OF  
ADVERTISING**

**14**  
out of these 19 households  
became **willing to pay even  
more** than they had been  
previously



**DISAPPOINTING  
ALTERNATIVES  
FOR THE BBC**



**CULTURE, HERITAGE  
& SOCIETAL  
BENEFITS**

# The deprivation exercise challenged many initial perceptions that **pay nothing** and **pay less** households had about the licence fee

## Before (examples)

SVOD services offer better value for money

The BBC is not needed as there is so much choice now

The licence fee is too expensive for what you get

BBC content is a lesser alternative to other providers/SVOD

Young audiences are not interested in the BBC

The BBC can just be funded by advertising instead

The BBC should become subscription only

## After (examples)

The licence fee covers more than just TV

The BBC plays a unique role in our culture and heritage

Households consume more BBC than they realise

BBC content is high quality across platforms

Households of all ages changed their minds

Continuous/regular advertising can be frustrating

One licence fee covers more than subscriptions

THANK YOU  
FOR READING\_



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# Appendix: image source library

The following images are not owned by MTM, we use sources that are free of charge but do not own the IP on these images. The image sources are as follows:

Title: <https://www.bbc.co.uk/programmes/b02w0kvr>

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Slide 16: [England Vector Map on FAVPNG](#)

Slide 19: Image 1 [Brooke Cagle on Unsplash](#)

Slide 19: Image 2 [Afif Kusuma on Unsplash](#)

Slide 20: [Brooke Cagle on Unsplash](#)

Slide 22: [Mukul Joshi on Unsplash](#)

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