Streaming Public Service Television in the Age of Platforms

Lessons for the UK from a comparative analysis of VoD publishing and personalisation in seven markets

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Recent years have brought a number of new challenges for public service media (PSM) all over the world. These include radical changes in media use, the emergence of streaming services and the dominance of big tech. These new competitors for the attention of audiences have challenged PSM as an institution and project, requiring public service broadcasters to transform into fully digital, online-first organisations.

In this context, the UK's three largest public service broadcasters (BBC, ITV and Channel 4) have made their video-on-demand (VoD) services central to their content and distribution strategies and, in turn, media regulation has been required to keep pace. The passing of the Media Act 2024 brings all the UK broadcaster VoD services under the public service remit for the first time. It also introduces prominence legislation, requiring appropriate prominence of PSM content and services in connected devices and requiring public service remit content to be readily discoverable within the PSM's VoD.

In this context, we present results from research conducted during the second year of PSM-AP, a large-scale comparative research project analysing 'Public Service Media in the Age of Platforms'. For this research we compared the user interfaces of PSM VoD services in seven markets: Belgium (Flanders and Wallonia), Canada, Denmark, Italy, Poland and the UK. Our analysis focused on the publishing and personalisation practices evident in these services. This brief presents core findings from the UK analysis of VoDs. It also proposes recommendations to aid with the future health of PSM, so that PSMs might best navigate the challenges associated with the platform age and public service values might be extended into the digital-first era.

Evaluating PSM VoDs

Because of a lack of publicly accessible comparative data from PSM on the user behaviours and metrics underpinning their personalisation and publishing practices, our analysis used reverse engineering of the algorithm and a common comparative definition of 'prime space' (Figure 1) to analyse key features of personalisation and publishing practices of PSM VoD services in each market. First, we conducted a reverse engineering study of AI driven personalisation on the VoDs in remit in 2023, which in the UK was only BBC iPlayer. We created four accounts – three genre accounts and one neutral – on each of the VoDs. The aim was to identify to what extent personalisation was implemented, as well as the relationship between editorial curation and algorithmic recommendation. Second, we analysed the publishing priorities on the landing page of the largest PSM VoDs in each market which, in the UK, was BBC iPlayer, ITVX and 4. We focused on the most important promotional space of the front page: the 'prime space' (the hero board and/or first deck), which is visible to the user when opening the VoD service without scrolling. We compared this to the scheduling of prime-time on the main linear channels of each organisation during

the same week. The goal was to identify how PSM companies curate the priority space of their VoDs in terms of frequency of genre and origin of the content in the competition with global streaming companies. Both sets of data were collected between 13-20 November 2023 and represent a snapshot of the PSM publishing practices.

Figure 1: Key terms in the analysis of VoD services

Key Findings

The level of personalisation varies from light to relatively strong across our case study VoDs (Figure 2). BBC iPlayer displayed the strongest level of personalisation: algorithmically generated recommendations were evident quickly from cold start and most of the prime space of the landing page was personalised.

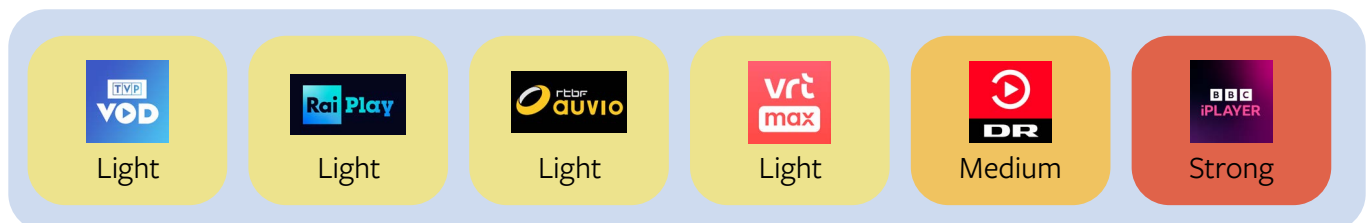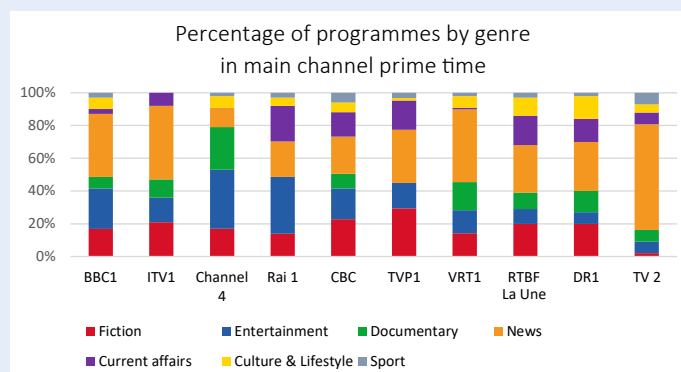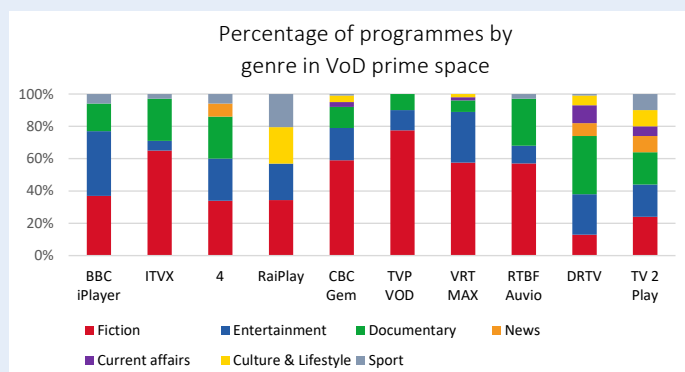| TVP VOD	Rai Play	rtbf auvio	vrt max	DR	BBC iPLAYER
Light	Light	Light	Light	Medium	Strong

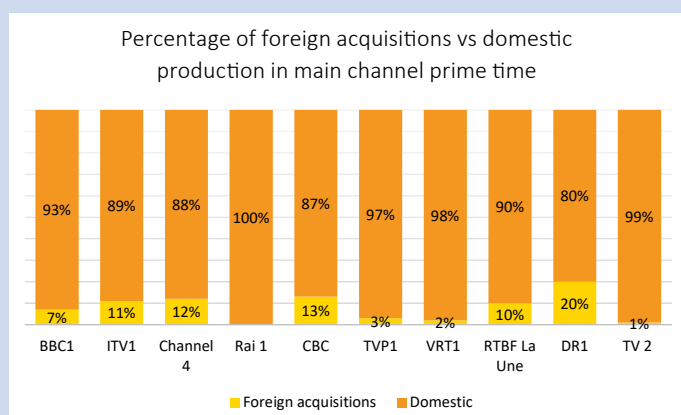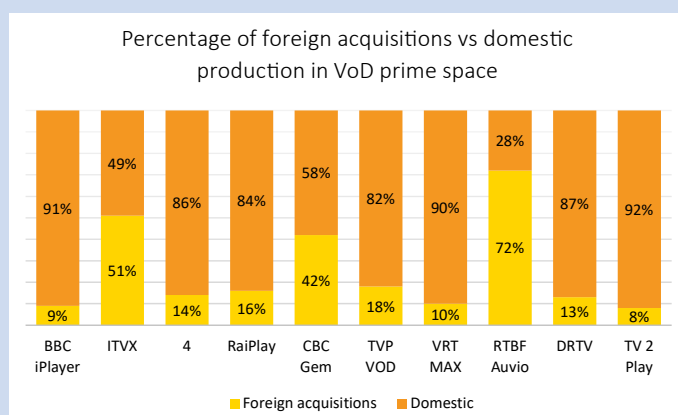Figure 2: The strength of personalisation on VoD services

However, personalisation on iPlayer was far more limited than similar studies suggest of Netflix. iPlayer uses a combination of algorithmic recommendation and editorial curation to organise the range of content that users see within the interface, with some decks wholly determined by algorithms, but most still suggesting content that has been editorially selected. This includes 'personalised sort' in some decks, in which an algorithm is used to rank content that has been selected by the editorial team. By designing personalisation around editorial intelligence, iPlayer navigates between imperatives of reach – by recommending viewers more of what they have already watched – and values of diversity, impartiality, safety and pluralism in viewing.

Across the services we analysed, publishing priorities differ between broadcast and on-demand services. Prime space has noticeably less genre diversity than the prime-time schedule. With exceptions of some live programmes suggested throughout the week (such as Channel 4 News at 7pm), the provision of news and current affairs was not evident in prime space, and it appears that such programming is being left to linear channels.

Percentage of programmes by genre in VoD prime space

Legend: Fiction, Entertainment, Documentary, News, Current affairs, Culture & Lifestyle, Sport

Percentage of programmes by genre in main channel prime time

Legend: Fiction, Entertainment, Documentary, News, Current affairs, Culture & Lifestyle, Sport

The programmes prioritised on BBC iPlayer, ITVX and 4 in prime space mimic that of global streamers in terms of genre profile (fiction, entertainment and documentary), a strategy designed to reach and retain a broad and a younger audience. Even in the context of the personalisation observed in iPlayer, there was a clear tendency towards more popular genres and expensive 'quality' programming in the spaces where editorial curation had some influence on selection. Personalised sort still favours fiction, entertainment and high-end documentary.

PSM VoD catalogues also tend to prioritise domestic content over foreign acquisitions. ITVX is an outlier among our UK cases due to the prevalence of Hollywood films and US box-sets in prime space, in line with a wider a strategy to retain viewers within the VoD with longer-form and bingeable content.

Percentage of foreign acquisitions vs domestic production in VoD prime space

Legend: Foreign acquisitions, Domestic

Percentage of foreign acquisitions vs domestic production in main channel prime time

Legend: Foreign acquisitions, Domestic

These findings accord with Ofcom's analysis of the composition of the catalogues of PSM VoDs in the UK.[1] This data shows that the VoD catalogues of the UK's PSMs contain a far smaller percentage of news and current affairs content and a far greater amount of drama compared to the linear schedules of the main channels, and that PSM VoDs contain a far higher percentage of UK content than the major subscription video-on-demand services (SVoDs) available in the UK.

The relative homogeneity of the content most prominent in the VoDs within our sample raises concerns about how PSM organisations are balancing the promotion of popular content types with ensuring the prominence of a diverse range of programming on their VoD services. Pressingly, challenges remain about how to track and measure this diversity, particularly given the lack of transparent data offered by UK PSM in relation to the curation of their VoDs.

[1] Ofcom, *Review of Public Service Media (2019-23): Challenges and opportunities for Public Service Media,* 17 December 2024.

A common industry framework for evaluating PSM provision on VoD

The Media Act's changes to prominence legislation require public service remit content to be readily discoverable within the VoD of PSM, but there is no common industry framework for what areas of the VoD are considered most discoverable to users. Clear and transparent metrics and methods for evaluating compliance with the public service remit within VoD are now urgently required and these need to take into account the role of personalisation.

Transparent viewing data for greater accountability

Policymakers need to require PSM organisations to be accountable to the public in how they manage their obligations on their VoDs as the transition to digital-first delivery develops. This begins with PSM being more transparent about how they use data and algorithms to make scheduling decisions within the VoD interface. This should include providing publicly accessible top-level aggregated user data to enable independent analysis of programming strategies in high-traffic areas on the VoD.

Retain a public service identity on PSM VoDs

PSM need to identify and employ content strategies and publication practices that set them apart from global streamers by promoting a broader mix of genres in the prime space. The shift from prime time to prime space threatens the universal appeal of PSM content, trading the mixed-diet of the linear schedule for the comparatively limited real estate of the VoD prime space dominated by drama, entertainment and documentary. A less varied genre profile could potentially exclude a range of existing broadcast-only viewers with the looming reality of Internet Protocol Television (IPTV). What works when the VoD is the front door might not work for all if it becomes the only entry to PSM content. While the move to a digital-first requires new ways of delivering content, PSM should not overlook the values underpinning differentiation strategies deployed in the era of broadcast television.

Optimise for diversity

Content diversity, serendipity and pluralism need to remain the primary priorities for PSM curation on VoD as well as linear. PSM should use both editorial curation and algorithmic personalisation to offer a measurable level of generic diversity across the catalogue and prominently within the interface to all users. Where rails are partly algorithmic, partly editorial in their curation, the datasets which algorithms recommend from should include the full range of content required for PSMs to hit their remit.

About our study