



THE HEART OF THE NATION:
THE ENDURING POWER OF
THE NATIONAL BROADCASTERS

I'm A Celebrity... Get Me Out Of Here! (ITV)

Oliver & Ohlbaum Associates
Commissioned by Everyone TV

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The Chase (ITV)





Introduction

Gladiators (BBC)

©BBC/Nick Eagle/© Hungry Bear Media Ltd

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INTRODUCTION

About this report

This independent report has been commissioned from Oliver & Ohlbaum (O&O) by Everyone TV.

Everyone TV is a joint venture owned and supported by the national broadcasters – the BBC, ITV, Channel 4 and 5.

The organisation runs free-to-air TV platforms in the UK, including Freely, Freeview and Freesat.

Everyone TV 'believes everyone should be able to access great quality TV, regardless of location or income' and for this reason it is 'leading free TV's evolution for the digital age'.

Everyone TV, about us:
everyonetv.co.uk/about-us

All Creatures Great and Small (5)



About this report

The TV set remains at the heart of our viewing

Ofcom figures show that we spend around **4 and a half hours a day** watching TV and videos, and **84%** of that is on the TV set – even with the different screens that many of us have today, the TV set remains at the heart of our viewing.*

**Ofcom Media Nations 2025*

Women's Football Euros
(BBC/ITV)

But what and how we watch is changing

From their introduction a decade ago, today subscription video on-demand services (SVODs) are in **68%** of UK homes.*

And now we are also seeing more viewing on social platforms, which in this report we call 'video-sharing platforms' (VSPs) – like YouTube and TikTok.

At the same time, viewing to broadcaster content accounts for 57% of all time spent watching the TV.**

***Ofcom Media Nations 2025*

National broadcasters are still at the heart of the nation

In this report, we aim to look at how each of these different types of service and platform are cutting through with the British public. We have reviewed market trends and carried out a survey of 1,500 nationally representative respondents.

Our study reveals that it is our national broadcasters – the BBC, ITV, Channel 4 and 5 – that unify us, connect us and best represent us, as well as providing the most memorable, lasting moments that drive national conversation. Despite some commentary that 'YouTube is the new TV', national broadcasters remain the most watched overall.



Our findings show national broadcasters cut through

The national broadcasters are the most watched

Following Ofcom's Media Nations 2025 report, there has been discussion of YouTube 'taking over' the TV set. While YouTube and other streaming services contribute to the variety of content that audiences enjoy, it is worth placing this in context:

- The national broadcasters, the BBC, ITV, Channel 4 and 5, make up **41%** of total viewing. YouTube is **14%** and Netflix is **8%**.*
- 'Streaming' is not only about YouTube – BBC iPlayer was the UK's fastest-growing long-form video on-demand service in 2024/25* while **18%** of Channel 4 viewing is from streaming, with a goal to reach **30%** by 2030.**
- There is a definitional point. YouTube is different – it is a horizontal platform aggregating user-generated, archive, originated and licensed content from across the world. The national broadcasters focus on producing and commissioning their own TV programmes for UK audiences.
- The national broadcasters continue to top 'most watched' programmes: 'Gavin & Stacey' (BBC), 'Wallace & Gromit: Vengeance Most Fowl' (BBC) and 'Mr Bates vs The Post Office' (ITV) were the most-watched TV programmes/films of 2024 – and two were from Christmas Day.*** Meanwhile, England's Women's Euro final is the most watched television moment of 2025, across the BBC and ITV.****

*BBC Annual Report 2024/25 **Channel 4 Annual Report 2024 ***Ofcom Media Nations 2025 ****BBC Media Centre

Throughout this report we use the term 'national broadcasters'. This refers to the UK's public service broadcasters, the BBC, ITV, Channel 4 and 5. The content we refer to from these broadcasters has been delivered via a variety of distribution methods including streaming (BVOD), linear streaming, terrestrial and satellite. Data includes any form of accessing national broadcaster content. A glossary of terms can be found in the Appendix.



Key Findings

Mr Bates vs The Post Office (ITV)

KEY FINDINGS

The national broadcasters are not only the most watched, they also come out top for...



Watching together

From 'I'm a Celebrity...' on ITV to 'The Traitors' on the BBC, the national broadcasters provided the shows that audiences most enjoy watching with others. This holds true for all ages and specifically for younger generations.



Delivering the most memorable moments

'Mr Bates vs The Post Office' (ITV) was chosen unprompted. Other stand-out moments were 'Gavin & Stacey: The Finale' on the BBC on Christmas Day and the 2025 Women's Football Euros across the BBC and ITV.



Driving the national conversation

Audiences commented how ITV's 'Mr Bates vs The Post Office' led to change. And said they turn to the national broadcasters for accurate news, the detail behind the headlines, and 'what is really happening'.



Reflecting our lives

The national broadcasters make the shows that best reflect our families, communities and towns – a view that is held even more strongly by those living outside London and by households on lower incomes.



Making us feel connected across the UK

They make us feel connected to people up and down the country, and across all four Nations.



Watching together

Gogglebox (Channel 4)

WATCHING TOGETHER

National broadcaster shows are best for bringing people together

As part of our survey we showed people a list of programmes from different broadcasters, SVOD services and YouTube, and asked which they were aware of (see Appendix). We then asked which ones are best for watching with other people. The national broadcasters were top for TV programmes that are best for watching together and made up 8 of the top 10.*

Our results support Ofcom's view that:



PSB content brings UK audiences together through services that are universally and freely available."

Ofcom Review of PSM, 2024

The Traitors (BBC)

©BBC/Studio Lambert
/Cody Burridge

8 out of 10 of the top programmes for watching together are from the national broadcasters

Which programmes are best for watching along with other people? (prompted)

% of those selecting a programme, out of those of which they are aware, top 10.*

- 1 I'm A Celebrity... Get Me Out Of Here!** (ITV)
- 2 The Traitors** (BBC)
- 3 Gavin & Stacey: The Finale** (BBC)
- 4 Race Across the World** (BBC)
- 5 The Great British Bake Off** (Channel 4)
- 6 Clarkson's Farm** (Amazon Prime Video)
- 7 Love Island** (ITV)
- 8 Gladiators** (BBC)
- 9 Squid Game** (Netflix)
- 10 Married at First Sight** (Channel 4)

Among 18-24 year olds, similar to the national average, top choices were 'I'm a Celebrity... Get Me Out of Here!' (ITV), 'The Traitors' (BBC) and 'Gavin & Stacey: The Finale' (BBC) showing their role in bringing generations together.

* Excluding sport

WATCHING TOGETHER

National broadcasters deliver the most memorable moments, driving the national conversation

Next, we wanted to test which programme people found the most memorable. We didn't give any suggestions – people could make a spontaneous choice.



'Mr Bates vs The Post Office' was both memorable and widely watched – the third most watched programme of 2024, averaging 14.7 million across ITV/STV (including online).

Ofcom Meda Nations, UK 2025

What's the most memorable TV programme or online video you've seen in the past few years – one you couldn't stop thinking about? (unprompted)

'Mr Bates vs The Post Office' (ITV) was the single most referenced show (unprompted), 18 months after it was first shown – showing its enduring impact. It was mentioned twice more than **'Adolescence'**, which was released in March 2025. Coverage of the **Queen's funeral** was the second most referenced TV programme (unprompted), showing the importance of state events being broadcast as part of our shared history and the value audiences attach to these moments.

Comments about Mr Bates vs The Post Office included...



Mr Bates and the post office; that was hard hitting and interesting."

55-64 woman from London, living with her partner and adult child



The most memorable TV programme I've seen in the past few years, one that resonated deeply and sparked significant national discussion, is Mr Bates vs The Post Office."

25-34 man from London, living with his partner and child



One of the most memorable programmes I've seen in recent years is Mr Bates vs The Post Office. It was powerful, emotional, and deeply unsettling ... The storytelling was compelling, and it sparked a national conversation that led to real political and legal action. It stayed with me long after watching because of its impact and the strength of those who stood up for justice."

45-54 man from SE England, living with his teenage child

WATCHING TOGETHER

National broadcasters deliver the most memorable moments, driving the national conversation

We then showed people our list of programmes again (see Appendix) and asked which one had the most memorable moment. This time, 'Gavin & Stacey: The Finale' came out top – more than six months after it aired.

Gavin & Stacey: The Finale (BBC)

©BBC/Toffee International Ltd./Tom Jackson



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Overall, shows from the national broadcasters were chosen nearly twice more than SVOD shows

Gavin & Stacey was both memorable and the most viewed programme of 2024 – driving impact.

1 Gavin & Stacey: The Finale (BBC)

2 Women's Football Euros (BBC/ITV)

3 Premier League Football (Sky)

4 Mr Bates vs The Post Office (ITV)



Gavin & Stacey really does belong to the audience."

Ruth Jones & James Corden

WATCHING TOGETHER

Live sport coverage brings the nation together, with the 2025 Women's Euros top of mind

The England Women's Final is the most watched so far in 2025.

England's historic back-to-back Women's Euros final is the most watched television moment of 2025 across the BBC and ITV.

Women's Football Euros (BBC/ITV)



Women's Football Euros (BBC/ITV)



Second place for 'most memorable moment' (prompted) went to the England Women's Football Euros. The final took place the weekend of our research and it turned out that England were playing.

People explained their choice:



Just watched the Lionesses win the Euros tonight: for sheer entertainment and national pride, this takes some beating."

Man aged 55-64 from NW England who lives with other family



Strangely enough, it was the Lionesses winning the Euros yesterday evening on ITV. It felt lovely."

Woman aged 70+, living in London with her partner



Recently it'll be the women's Euros this year because it has been an amazing tournament."

Woman aged 25-34 from North West England who lives with her parents

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Our lives on screen

Married at First Sight
(Channel 4)

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OUR LIVES ON SCREEN

The national broadcasters make the shows that best connect us with our communities

We asked people which TV and video providers are best at showing our lives on screen (prompted, see Appendix).

x2

More people agreed that a **national broadcaster** was the best at showing people like their family, community or town compared to SVODs.

This finding reflects how the national broadcasters are required to



Provide a breadth of UK content that reflects the whole of the UK and appeals to a wide range of audiences."

Ofcom, The Future of Public Service Media, 2025

Other services are complementary, contributing to the variety of content that UK audiences enjoy.



Dr Who (BBC)

©Doctor Who is: BBC/Danny Kasky

Which of the following are best at showing people like your family, your community, or your town?

% of all TV viewers ranking each service as their top service.

Any National Broadcaster

55%

Any SVOD

27%

Any VSP

13%

Note: 'Any National Broadcaster', 'Any SVOD', and 'Any VSP' is the maximum for any single service, not the combined rankings of all national broadcaster, SVOD, or VSP services. Only including viewers who watch at least three services (90% of all viewers).

Source: FlyResearch (n=1,344), Oliver & Ohlbaum analysis.

OUR LIVES ON SCREEN

Audiences outside London or from low-income households feel best represented by national broadcasters

When we examined the data further, we found that audiences outside London were even more likely to choose a national broadcaster as best at showing people like their family, community or town, and were less likely to choose an SVOD or a VSP.

Low-income households also favoured a national broadcaster over any SVOD or any VSP.

National broadcasters are committed to reflecting the diversity of communities across the Nations and Regions and across socio-economic groups, including by commissioning new programmes from and set in different places, supporting schemes for diverse talent on- and off-screen, and investing in screen industry hubs across the UK

Policy makers have encouraged the broadcasters to better serve audiences from lower socio-economic backgrounds. Our results are positive and indicative of the work underway.

All Creatures Great and Small (5)

Which of the following are best at showing people like your family, your community, or your town?

% of all TV viewers ranking each service as their top service.



Low income

% of **outside of London** TV viewers ranking each service as their most representative.

Any National Broadcaster

60%

Any SVOD

22%

Any VSP

14%

Outside London

% of **outside of London** TV viewers ranking each service as their most representative.

Any National Broadcaster

59%

Any SVOD

24%

Any VSP

12%

Note: 'Any National Broadcaster', 'Any SVOD', and 'Any VSP' is the maximum for any single service, not the combined rankings of all national broadcaster, SVOD, or VSP services. Only including viewers who watch at least three services (90% of all viewers).

Source: FlyResearch (n=1,344), Oliver & Ohlbaum analysis.

OUR LIVES ON SCREEN

National broadcasters make us feel more connected to other people, up and down the country

We also asked which TV and video providers are best at connecting us to the rest of the country.

x4

More people agreed that a **UK broadcaster** was the best at making them feel connected to people up and down the country and across all four Nations compared to VSPs.

Initiatives by the national broadcasters to connect us as a country include:

- National broadcasters collectively commissioned over **350 shows** outside London in 2024.*
- In the last three years, the BBC has made over 100 dramas and comedies set outside London: *Blue Lights*, *Sherwood*, *Responder*, *This City is Ours*...
- ITV provides 17 different regions and nations news services.
- Channel 4 has doubled its 4Skills training and career development programme to £10 million per year, boosting opportunities outside London.
- 5 aims to 'super-serve' regional audiences when commissioning, from documentaries to drama.

*O&O Programme Database; Ofcom Made Outside London Programme Titles Register, 2024



Race Across the World (BBC)

©BBC/Studio Lambert/Gary Moyes

Which of the following make you feel connected to people up and down the country and across all four nations (England, Northern Ireland, Scotland, and Wales)?

% of all TV viewers ranking each service as their top service.

Any National Broadcaster

63%

Any SVOD

18%

Any VSP

14%

Note: 'Any National Broadcaster', 'Any SVOD', and 'Any VSP' is the maximum for any single service, not the combined rankings of all national broadcaster, SVOD, or VSP services. Only including viewers who watch at least three services (90% of all viewers).

Source: FlyResearch (n=1,344), Oliver & Ohlbaum analysis.

5



When it matters

Channel 4 News (Channel 4)

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WHEN IT MATTERS

National broadcasters deliver the most accurate news and information

Our findings echo those of Ofcom Media Nations 2025 and the Ofcom News Consumption report 2024, with higher trust in national broadcasters, and in wider TV news, compared to individuals posting on social media – with the national broadcasters receiving even higher scores in our survey.

The results reflect the fact that national broadcasters have a distinctive role; they are required to deliver trusted news, including local news. This is vital for keeping us all well-informed.



This critical content supports participation in democratic society through holding government and institutions to account and keeping people informed.”

Ofcom, The Future of Public Service Media, 2025

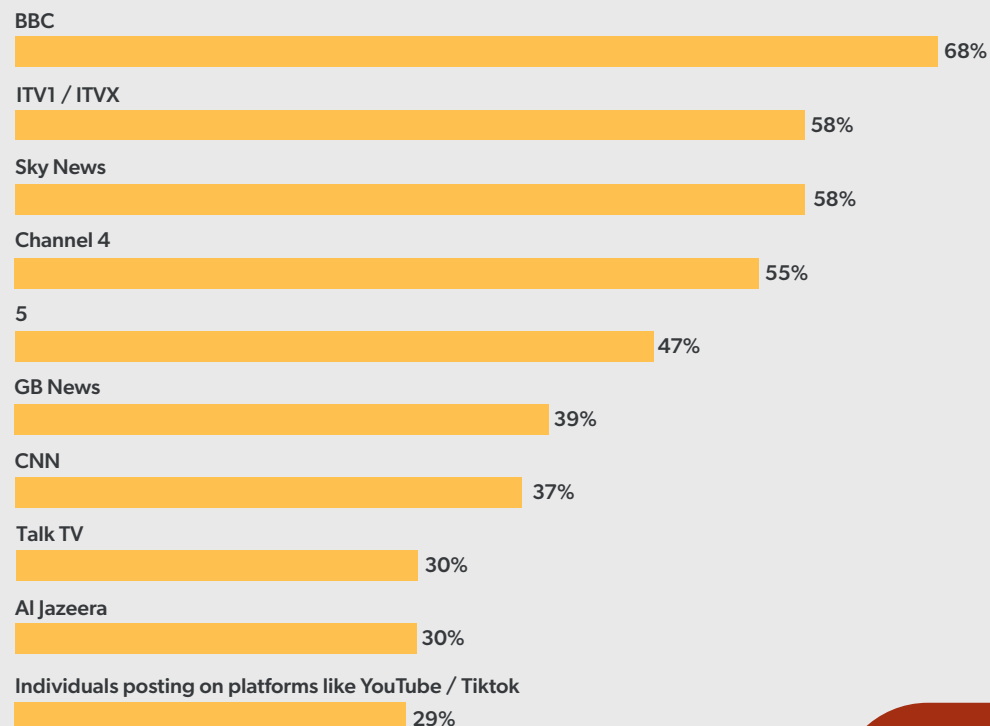
The Reuters Institute Digital News Report 2025 includes the question ‘How trustworthy would you say news from the following brands is?’, with 6 and above out of 10 coded as ‘trust’. In that study, the BBC was trusted by 60%, Channel 4 by 56%, ITV by 56% and Sky News by 51% (5 was not included).



Morning Conversation (5)

How much do you trust each TV / video news source to provide accurate information?

% all TV viewers accessing news via TV or other online video platforms, ranking each news source as 4 or 5 (5 is complete trust).



Source: FlyResearch (n=1,500), Oliver & Ohlbaum analysis.

WHEN IT MATTERS

Britain still backs national broadcasters

We also asked questions about which TV or video news source is best for providing the details, they 'need to know', and helping you to understand what is really going on.

Again, major UK broadcaster news comes out top with over 60% for each question.

The free to air news channel Sky News was also a popular choice.



Sunday with
Laura Kuenssberg (BBC)

Which TV/ video news source is best for...

% all TV viewers accessing news via TV or other online services.

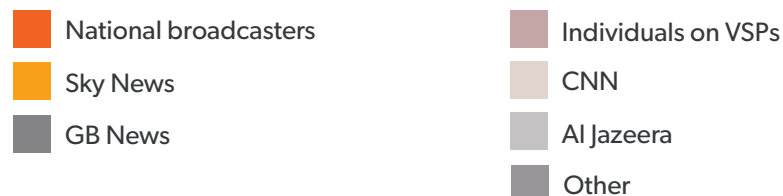
Best for providing the detail



Best for telling you what you 'need to know'



Best for understanding what's really happening



Source: FlyResearch (n=1,238), Oliver & Ohlbaum analysis

Conclusions

Paris 2024 Paralympic Games
(Channel 4)

CONCLUSIONS

Britain still backs national broadcasters

- Looking at developments in the UK TV landscape more broadly, government is reviewing how we will be getting our TV in the future – as audiences increasingly watch live and on-demand programmes delivered to their TV sets over the Internet. This brings lots of advantages in terms of choice and flexibility, and it is important that everyone can benefit.
- As Ofcom noted in its 2025 PSM Review, the national broadcasters provide “an unmatched breadth of high-quality UK programmes that meet the needs and interests of UK audiences”, and which is universally and freely available. Other services play a distinct and complementary role, contributing to the variety of content that UK audiences enjoy.
- This report has shown the importance that the British public places on the national broadcasters and their impact on society. Given these findings, connected TV platforms like Freely that ensure easy and free access to content from the national broadcasters have an important role to play.



Emmerdale (ITV)



British audiences of all ages still favour the long-loved national broadcasters. Our research shows that, by some way, they continue to best represent audiences’ real lives, right across the UK, unite and connect us, and produce the most memorable TV moments, some with lasting impact on our society.

Perhaps that is why the most watched programming still comes from our public service broadcasters and why audiences are making a choice to continue to connect over these shows in the streaming age.”

Mark Oliver, Chairman & Senior Advisor,
Oliver & Ohlbaum Associates

Appendix

Our objectives for this report

In this report, we wanted to build on existing research and test three things – comparing the services and shows from the major national broadcasters with other TV and video.



Strictly Come Dancing (BBC)

Report objectives

- 1** What brings us together, at home and across the country?
- 2** What do we remember long after watching; what drives change?
- 3** Where do we turn for accurate news and information?

Our approach

In addition to reviewing recent industry and Ofcom data and reports to provide context, we carried out a consumer survey to test our three areas:

- 20 minutes
- Online survey
- 1,500 respondents from a nationally representative sample

We asked about channels, players and shows from the BBC, ITV, Channel 4, 5, which we refer to as the 'national broadcasters' in this report.

We also asked about subscription video on-demand services (SVOD) like Amazon Prime Video and Disney+; advertising-funded video on-demand services (AVOD) and Free ad-supported streaming television (FAST) – Tubi and Pluto; pay TV sports channels and other pay-tv channels like TNT Sports, Comedy Central; and other free-to air channels like U&Dave and GREAT!tv.

Further definitions are provided in the Glossary.

AVOD

Advertising-supported video on-demand services like Tubi (distinct from the national broadcasters' VOD services, which may also carry advertising).

National broadcasters

In this report, used to refer to the BBC, ITV, Channel 4 and 5, across all of their TV channels and their video on-demand services such as BBC iPlayer and ITVX.

Public Service Broadcasters (PSBs)

All the BBC channels and BBC iPlayer, plus the main channels of ITV/STV, Channel 4 and 5.

Public Service Media (PSM)

Content that is 'of high quality, reflects the whole of the UK, and brings audiences together. It includes high-quality, trusted, accurate news' (Ofcom, 'Transmission Critical, The future of Public Service Media', 2025).

FAST

Free Ad-supported Streaming Television like Pluto TV.

SVOD

Subscription video on-demand. On-demand/streaming services that are only available on a paid-subscription basis, for example Netflix, Amazon Prime Video and Disney+.

VOD

Video on-demand.

Video Sharing Platforms (VSPs)

Online video platforms that allow users to upload and share videos with the public; may be funded by subscriptions or advertising. The examples used in our survey are YouTube and TikTok.

Channels and services

In our survey, we asked questions about a list of different TV and online video services. These are:

National Broadcasters

- BBC (channels + BBC iPlayer)
- ITV (channels + ITVX)
- Channel 4 (channels + online service)
- 5 (channels + online service)

Other UK Broadcasters

- Other free to air channels on the channel guide
- Pay TV sports channels
- Other pay TV channels

SVODs

- Netflix
- Amazon Prime Video
- NOW
- Disney +
- Apple TV +
- Paramount +
- Discovery +

AVODs

- Tubi
- Pluto TV

VSPs

- YouTube
- TikTok
- Other platforms

TV programmes
and online
videos

We also asked questions about a randomised list of TV programmes and online videos. We selected these with a view to balancing different criteria across viewing (live and on-demand), cultural resonance, genre. These are:

National Broadcasters

- The Traitors (BBC)
- Gavin & Stacey: The Finale (BBC)
- Gladiators (BBC)
- Race Across the World (BBC)
- 2024 Men's football Euros (BBC/ITV)
- 2025 Women's football Euros (BBC/ITV)
- 2024 Olympics (BBC/TNT Sport)
- I'm A Celebrity...Get Me Out of Here! (ITV)
- Mr Bates vs The Post Office (ITV)
- Love Island (ITV)
- The Great British Bake off (C4)
- 2024 Paralympics (C4)
- Married at First Sight (UK / Australia / other) (C4/E4)
- The Yorkshire Vet (C5)
- All Creatures Great and Small (C5)

Other UK broadcasters

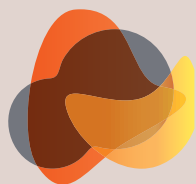
- The Last of Us (Sky)
- Premier League Football (Sky)

AVODs

- Squid Game (Netflix)
- Adolescence (Netflix)
- Baby Reindeer (Netflix)
- Clarkson's Farm (Amazon Prime Video)
- Fallout (Amazon Prime Video)
- Andor (Disney+)
- Rivals (Disney+)

VSPs

- Mr Beast (YouTube channel)
- KSI / Sidemen (YouTube channel)
- Chicken Shop Date (YouTube)



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