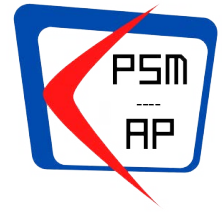# Streaming Public Service Television in the Age of Platforms

Lessons from a comparative analysis of VoD publishing and personalisation in the Belgian market

Catalina Iordache and Tim Raats
imec-SMIT, Vrije Universiteit Brussel

Public service media (PSM) all over the world have consistently been subject to social and technological changes. However, recent years have brought several new challenges. These include radical changes in media use, the advent of streaming services, and the dominance of big tech. The new competitors for the attention of citizens have challenged PSM both as an institution and as organisations. The profound changes in the media landscape have affected the broadcasters themselves, requiring them to transform into fully digital, online-first organisations. 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'. In this brief, we put forward a series of findings and recommendations on PSM publishing and personalisation practices based on analysis of the PSM in-house video-on-demand (VoD) services and main linear channels in the Belgian market, alongside insights from our wider analysis that includes Canada, Denmark, Italy, Poland, and the UK.

Evaluating PSM VoDs

In an on-demand media culture, more PSM organisations are required to fulfil their remits through VoD services, which increasingly operate as 'front doors' to PSM content. It is necessary, therefore, to develop methods for analysing PSMs' VoD publishing practices, particularly in a context where AI-driven personalisation is becoming more common. Currently, the organisations themselves do not publish detailed data on these practices or on VoD user patterns and demographics. Furthermore, there is no consistent access to cultural heritage archives with recordings of VoDs in most countries. To study the publishing and personalisation practices we therefore needed to collect data from the PSM VoD services. We did this by taking a snapshot of the structures and content on the home page of each VoD. The findings in this brief are based on a quantitative content analysis of this data comparing ten public service broadcasters' online VoD portals, both publicly and commercially funded, in six countries: Belgium (RTBF, VRT), Canada (CBC), Denmark (DR, TV 2), Italy (RAI), Poland (TVP) and UK (BBC, Channel 4, ITV). The focus will primarily fall on the findings in the Belgian cases.

First, we did a reverse engineering study of (algorithm-driven) personalisation on the VoDs RTBF Auvio and VRT MAX. We created four accounts for each VoD: three genre-specific accounts (crime fiction, documentary, and game shows) and one neutral. The aim was to identify to what extent personalisation was implemented by the organisations and to examine the relationship between editorial curation and personalisation. Second, we analysed the most important promotional part of the front page of the VoDs: the 'prime space' (see Figure 1). The prime space is visible to the user when opening the VoD service without scrolling and equates to the 'prime time' of a linear channel. We compared the findings to the scheduling of prime time on the main channels VRT1 and RTBF La Une, respectively. The aim was to identify how PSM use their VoDs in terms of genres, origin of the content, and target group when competing with global streaming organisations. Both sets of data were collected between 13 and 19 November 2023.

Figure 1: Key terms in the analysis of VoD services

Key findings from the analysis

The publishing practices identified show that the PSM companies address the competition from global streamers slightly differently, building on broadcasting traditions and the VoD strategies deployed. Editorial curation plays a major role on both PSM VoDs, even in the VRT case, where the degree of algorithmic personalisation is more present. Publishing practices point to stronger emphasis on domestic productions in the VRT MAX case, while RTBF Auvio gave preference to more foreign acquisitions, both French- and English-language content.
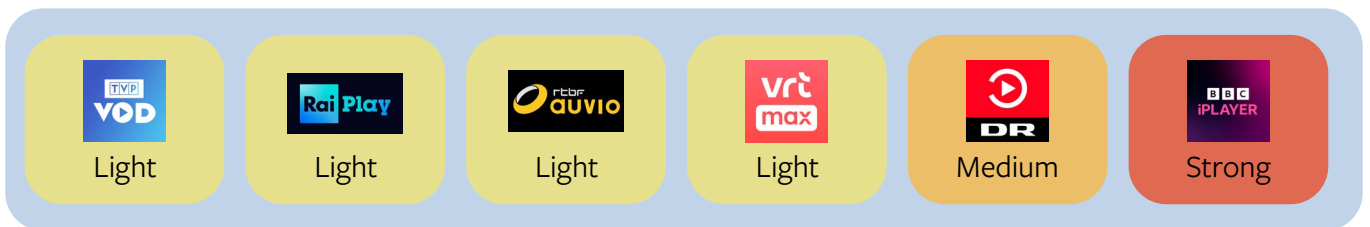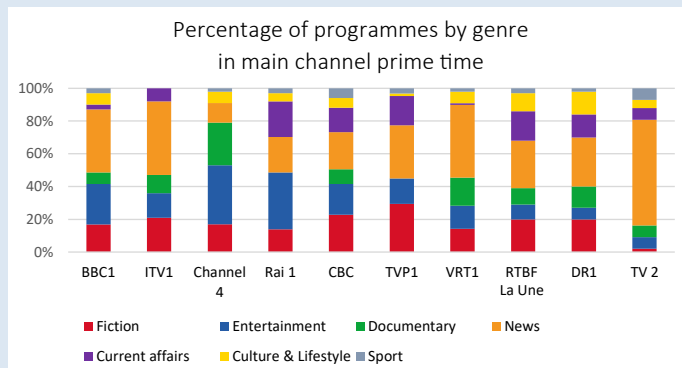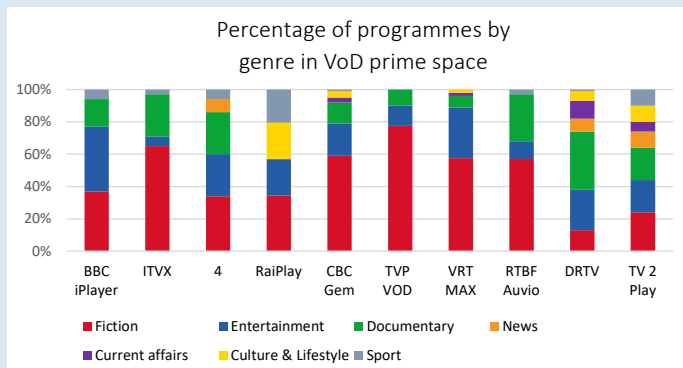

Figure 2: The strength of personalisation on VoD services

The level of personalisation is light on both RTBF Auvio and VRT MAX, based on the differences and similarities between the neutral and the genre-specific accounts. Differences among the cases (see Figure 2) are explained by the cost of personalisation, continued dependence on broadcast television, requirements for metadata and user data, as well as considerations towards public service values and regulatory requirement (as in the case of VRT's 'taste-broadening algorithm'). Even though VRT MAX is rolling out a recommender system, personalisation was far more limited than other studies suggest of global subscription video-on-demand services (SVoDs), as it was combined with editorial insights. RTBF is still in the process of deploying a recommender system on the Auvio service. At the time of data collection, this was limited to widgets for 'Continue watching' and 'My favourite programmes'.

The strength of personalisation on VoD services

In 'prime space' most VoDs try to mimic streaming services like Netflix in terms of genre profile (fiction, entertainment and documentary), a strategy designed to attract and retain a broad and younger audience. However, within these categories, VRT MAX paid considerable attention to human interest programming. Live broadcasting of news and current affairs are largely left to linear channels, although RTBF Auvio occasionally promotes popular live events.

Percentage of programmes by genre in VoD prime space

Percentage of programmes by genre in main channel prime time

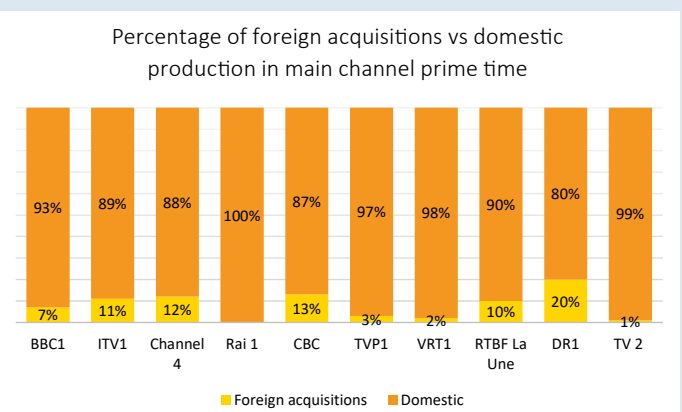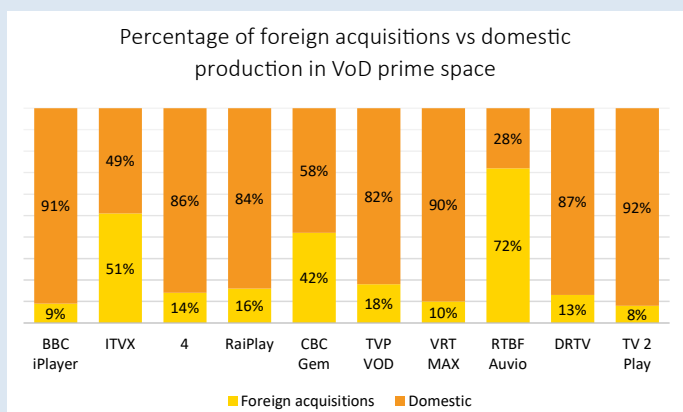Legend: Fiction, Entertainment, Documentary, News, Current affairs, Culture & Lifestyle, Sport

Two practices are at play in terms of whether content on the VoD's prime space comes from the main channel brand or from other channels:

In the VRT case, the VoD replicates content from the main channel and targets a universal audience. In these cases, the limited promotional space of a VoD is a challenge to the obligation to cater to niche audiences. VRT preferences its so-called 'bulls-eye' titles, which are both popular on linear and featured prominently online. RTBF Auvio offers more content from youth or thematic channels, while retaining linguistic proximity through French, Canadian or Swiss (co-)productions and acquisitions. The challenge here is how to meet the obligation to cater to broad audiences no longer using broadcast television.

Percentage of programmes from the main channel vs other channels/brands in VoD prime space

Legend: Main channel, Other channel / VoD
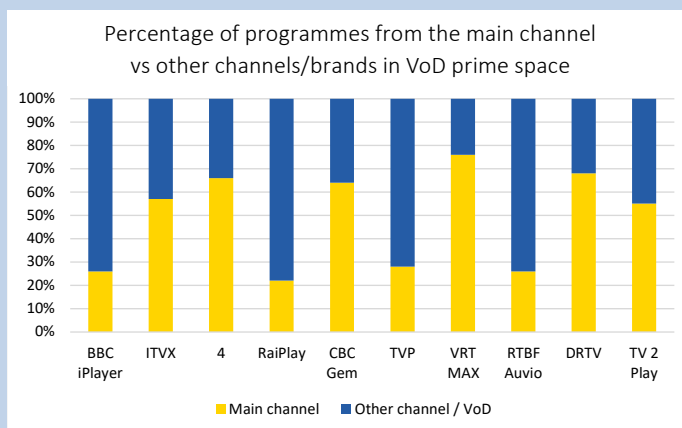
The VoD portals reflect content strategies, but only to some extent. The Belgian cases indicate a clear choice to bring fiction and entertainment to the forefront. This is also part of the growth strategy of both PSM, as they are still in the process of expanding, and trying to attract viewers to their VoD portals and engage them in the longer run as loyal users.

Percentage of foreign acquisitions vs domestic production in VoD prime space

	BBC iPlayer	ITVX	4	RaiPlay	CBC Gem	TVP VOD	VRT MAX	RTBF Auvio	DRTV	TV 2 Play
Domestic	91%	49%	86%	84%	58%	82%	90%	28%	87%	92%
Foreign acquisitions	9%	51%	14%	16%	42%	18%	10%	72%	13%	8%

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

	BBC1	ITV1	Channel 4	Rai 1	CBC	TVP1	VRT1	RTBF La Une	DR1	TV 2
Domestic	93%	89%	88%	100%	87%	97%	98%	90%	80%	99%
Foreign acquisitions	7%	11%	12%		13%	3%	2%	10%	20%	1%

Legend: Foreign acquisitions, Domestic

Incentives to personalise PSM

PSM should be incentivised to implement personalisation to meet public service obligations and user expectations in an on-demand driven media culture. Personalisation should be regarded as part of PSM's basic functionalities and not as a threat to the core values of universality, diversity and quality. PSM should, however, strive to reach a balance between editorial curation and personalisation to reach diverse audience groups in a meaningful way. Algorithmic curation would significantly be improved by the PSM's extensive experience in scheduling and knowledge of the everyday life, taste segments and agendas of its users.

Differentiation strategies on PSM VoDs

PSM need to identify and employ content strategies and publication practices that set them apart from global streamers. Differentiation strategies that have long been deployed by PSM on linear can prove highly beneficial to their on-demand strategies, if adapted in a creative and effective way. The successful establishment of the PSM VoD as an audiovisual destination in its own right can be supported by clear (re-)branding, more diverse content that reaches specific audience groups through strategic curation, and content adapted to digital distribution such as specific formats, (hybrid) genres, or podcasts. The VoD service can also be used as a domestic cultural hub that connects users to ancillary cultural offerings, services, or events in the public domain. This can include cinemas, theatres, libraries, start-ups, and educational institutions.

Evaluation of PSM performance online

In transitioning to an online PSM identity in which the VoD is the 'front door' to the content, PSM require new metrics and measures to document that they are meeting the core values of universality and diversity. Compared to the multi-channel era of television the limited real estate of the VoDs' prime space is a challenge to these values and PSM's ability to serve broad and diverse audiences. Clear metrics and methods are needed to make an evaluation of their compliance with the public service remit transparent and easy to understand. Furthermore, the emerging use of algorithmic personalisation requires transparency and clear rules on the use of data and protection of privacy. These could also be developed through collaborative initiatives, either on a smaller (e.g., at national/regional level) or larger scale (e.g., the European Broadcasting Union). Finally, the PSM VoDs should be recorded and preserved for research by national heritage archives on par with practices used for linear PSM channels.

Regulatory and organisational reforms

The strategic development and effective (re-)positioning of the VoD as a 'front door' to PSM offerings and services should be supported by reforms at regulatory and organisational levels. The former should provide the necessary strategic and financial incentives for PSM to innovate and successfully adapt to the on-demand driven media landscape, in order to meet changing viewer preferences, attract underserved audiences and meet the public remit. The latter should reconsider the existing silo-based organisational structures to support the integration of data analytics, the commissioning and production of content for VoD based on identified audience needs and PSM priorities, distribution and curation fit for these audiences and the channels or services which generate most effective reach and engagement.