



# HD Ready TV sets

Mystery shopping survey

A report written by Continental  
Research for Ofcom



Research report

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## Section 1

# Executive Summary

- 1.1 Ofcom commissioned Continental Research to conduct a mystery shopping exercise amongst retailers of HD Ready TV sets.
- 1.2 We wanted to test what advice retailers give consumers about how to get HDTV services.

### **In the majority of cases information given was accurate**

- 1.3 The information provided to shoppers about HD Ready TV sets was accurate in the majority of cases. But there was significant confusion amongst some retail staff over the current and future availability of HD services on Freeview, and - to a lesser extent - terrestrial TV.

### **Where information was not accurate the mystery shoppers felt that this was down to a lack of knowledge rather than deception.**

- 1.4 Mystery shoppers felt that when inaccurate information was provided, it was largely as a result of poorly trained (or poorly informed) sales staff, rather than an attempt to deliberately mislead consumers.
- 1.5 The level and accuracy of information sales staff gave varied considerably from outlet to outlet. Some provided detailed and accurate information, but for a minority there was definite confusion about the need for extra equipment, and HD's availability via Freeview.
- 1.6 The type of information provided did not differ significantly between the three types of store (chain, department, and independent). When assessed by the mystery shoppers, the overall **accuracy** of all the information provided did differ, with independent stores adjudged to be significantly more accurate than department stores.

### **A minority were given the impression that high definition pictures are already being broadcast on terrestrial TV**

- 1.7 12% of in-store mystery shoppers (and 4% of phone shoppers) were given the impression that an HD Ready TV set would show high definition pictures from analogue terrestrial TV broadcast.
- 1.8 And 14% of in-store shoppers (and 21% of phone shoppers) were given the impression that an HD Ready TV set would enable them to receive HD pictures via Freeview (DTT).

### **In many cases mystery shoppers had to prompt for key information**

- 1.9 Retailers did not always make it clear that it was necessary to buy extra equipment (in addition to the HD Ready set) to receive HD services. Seven per cent of in-store shoppers were incorrectly told that no extra equipment was required and nearly one in five (18%) of in-store shoppers were only told about this requirement when they asked.

- 1.10 A quarter of in-store shoppers were only told that additional fees were required to get HDTV services when they asked.

**In-store advice was better than advice given over the phone**

- 1.11 Shoppers generally received slightly better advice in-store than over the telephone. Websites were less likely to offer any additional advice on HD service (just 44% of websites did so). This had the effect that they were less likely to provide any inaccurate information at all.

## Section 2

# Objectives

2.1 The research sought to test:

- What (if anything) retailers tell consumers about receiving HDTV service when purchasing HD Ready TV sets.
- What retailers tell consumers about which platforms HDTV is currently available on
- What retailers tell consumers about which platforms the service will be available on in the future
- What retailers tell consumers about the prospects of HDTV service being made available on the Freeview platform
- Whether retailers tell consumers that there a subscription fee for HDTV

## Section 3

# Methodology

- 3.1 A total of 174 mystery shops were conducted between the 3 and 14 August 2007. These broke down as follows:
  - 122 in-store conducted face-to-face
  - 52 with mail order/internet retailers via phone
- 3.2 The 122 stores were further broken down into 3 types:
  - 47 in electrical chain stores
  - 31 in department stores
  - 44 with independent stores (that had only one outlet)
- 3.3 We also reviewed 25 websites that sell HD Ready TV sets directly to the consumer.
- 3.4 Before the fieldwork started, all the mystery shoppers had a personal briefing from the project executive. This detailed the background to the project, the information they had to gather and explanation of the data collection form they had to fill in.
- 3.5 Each mystery shopper was assigned one of three scenarios to be used when speaking with the retailers. The main variation between each scenario was the level of knowledge about HDTV they were allowed to show. The full scenarios are detailed in the annex.
- 3.6 For the face-to-face mystery shops conducted in-store, each shopper went in to the store and waited to be approached by a member of staff, or if necessary approached one. They then asked the sales staff about HDTV sets, starting off with general questions, and then asking more specific questions where necessary. Once they had collected all the necessary information, they left the store and immediately filled in the data collection form (a copy of which can be found in the annex).
- 3.7 For the mail order mystery shops each shopper phoned the main customer enquiry line. They then explained their query, and either spoke to the first person available or in some cases they were transferred to a specialist or a different department. A similar approach was then used to the in-store surveys, and once the call was over they filled in a feedback form (see annex).
- 3.8 For each website, the mystery shopper spent up to a maximum of 15 minutes exploring it to see what, if any, information was available on HD Ready TV sets and HD services in general. They also filled in a data collection form (see annex).
- 3.9 To ensure a spread of retailer types were researched, we set minimum quotas by type of store and region. Figure 3.1 shows the total number of each type surveyed.

**Figure 3.1: In-store mystery shops by region and type of store.**

	<b>Chain stores</b>	<b>Department stores</b>	<b>Independents</b>	<b>TOTAL</b>
<b>South</b>	9	8	11	28
<b>Midlands/East Anglia</b>	13	7	9	29
<b>North</b>	11	6	10	27
<b>Wales</b>	6	4	6	16
<b>Scotland</b>	8	6	8	22
<b>TOTAL</b>	47	31	44	122

3.10 We set minimum quotas for the type of scenario used for the phone and in-store mystery shops, producing the following number for each scenario:

- Scenario A – 72 mystery shops
- Scenario B – 58 mystery shops
- Scenario C – 44 mystery shops

3.11 All data is unweighted.

3.12 After all the in-store mystery shops were completed, we conducted two group discussions with three mystery shoppers in each. These allowed us to explore some of the issues in further depth, and enabled shoppers to provide further details on their experiences. The quotes from mystery shoppers that appear in the report were taken from these group discussions.

## Section 4

# Information provided to consumers by retailers

### Over half of stores had a TV specialist giving advice

- 4.1 Just over half (55%) of stores has a TV specialist on hand to offer advice. There were no significant differences between the type of store (independent, chain or department). In telephone mystery shops, 38% were dealt with by what the mystery shopper thought was a TV specialist.
- 4.2 Under half of the websites surveyed had any additional information on TVs, other than models and prices. Where a website did have additional information on TVs, it invariably featured at least some advice on high definition.

### Most explanations of “HD Ready” were broadly accurate

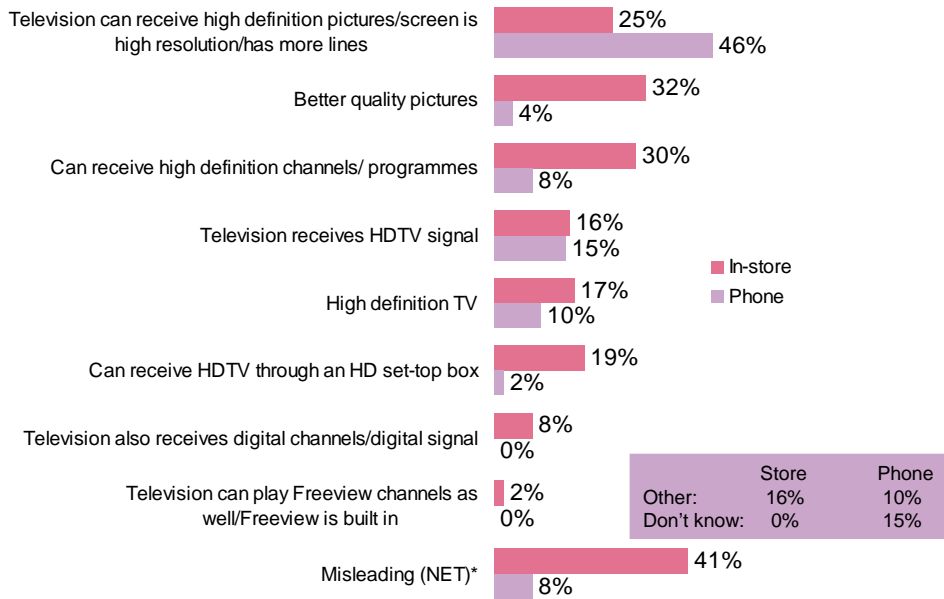
- 4.3 There was no consistent description amongst retail staff of exactly what “HD Ready” meant. Just under nine in ten retailers provided (at least some) accurate information (89% in-store, and 83% via phone), such as *“the screen is high resolution/has more lines”* (mentioned by 25% of in-store staff). Most comments were quite general as this one from a sales assistant at a chain store illustrates *“95% of new TVs are HD Ready, meaning in the future, when all signals are broadcast in HD, you’ll get improved picture quality”*

### But the correct advice was often mixed with *potentially misleading or incomplete information*

- 4.4 41% of those visiting shops were given potentially misleading responses such as *“It can receive high definition programmes”* (mentioned by 30%). Whilst this is technically correct, it is not possible without an additional HDTV set-top box.

### Figure 4.1. What shoppers were told “HD Ready” means

Q. When you asked “What does HD Ready mean?” what did they say?



\*This is the net figure for “Better quality pictures”, “Television also receives digital channels/digital signal”, “Can receive high definition channels” and “Television can play Freeview channels as well/Freeview is built in”

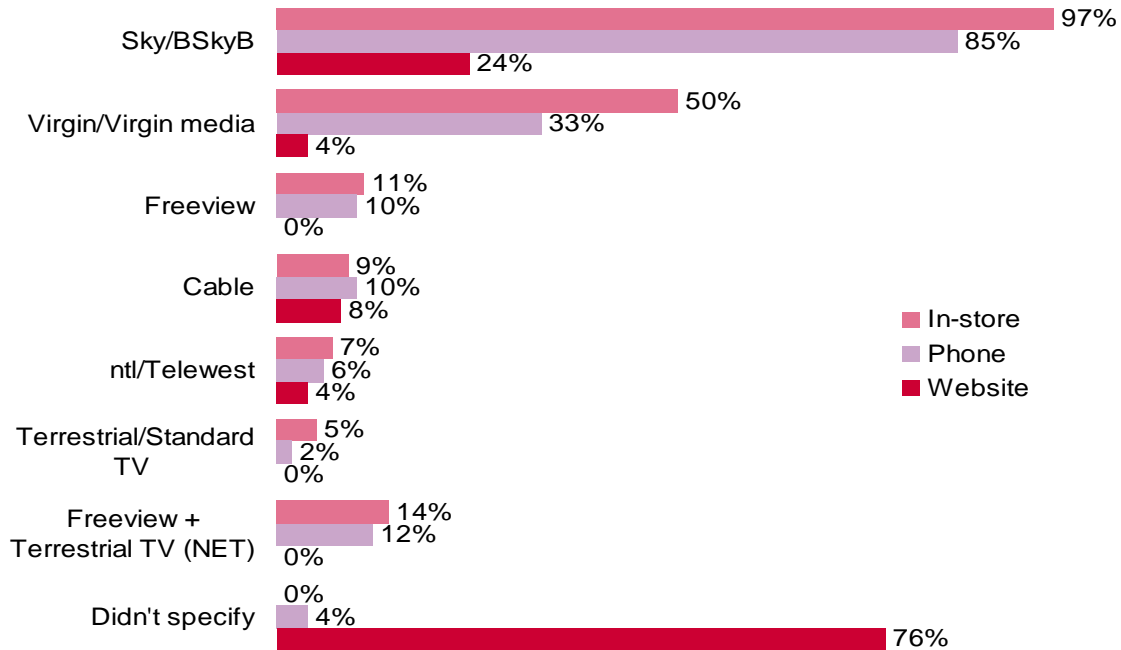
Base : All respondents 122 in-store /54 by phone

### The majority of information on HDTV platforms was correct

- 4.5 The information provided about which platforms HDTV is available on was generally accurate. Nearly all shoppers were informed that they were available on Sky, with half of in-store shoppers and a third via phone told they were available on Virgin Media (see Figure 4.2).
- 4.6 In-store shoppers were significantly more likely to be told about the two platforms that HD is available on. Three-quarters of the retailer websites studied didn't make any mention of which platforms HDTV programmes were available on. Of those that did, all mentioned Sky, and one mentioned Virgin. No websites incorrectly mentioned the platforms that HD was available on.
- 4.7 One in ten shoppers were incorrectly told HDTV services were available on Freeview. One in-store shopper said “*When I asked if there were any HD channels on Freeview, he said ‘there are a couple of BBC ones, and I think National Geographic’*”. There was also a small proportion of shoppers who were incorrectly told that HDTV services were available via terrestrial TV.

**Figure 4.2 Which platforms shoppers were told HD services are available on**

Q . What platforms did they say HD services were available on?

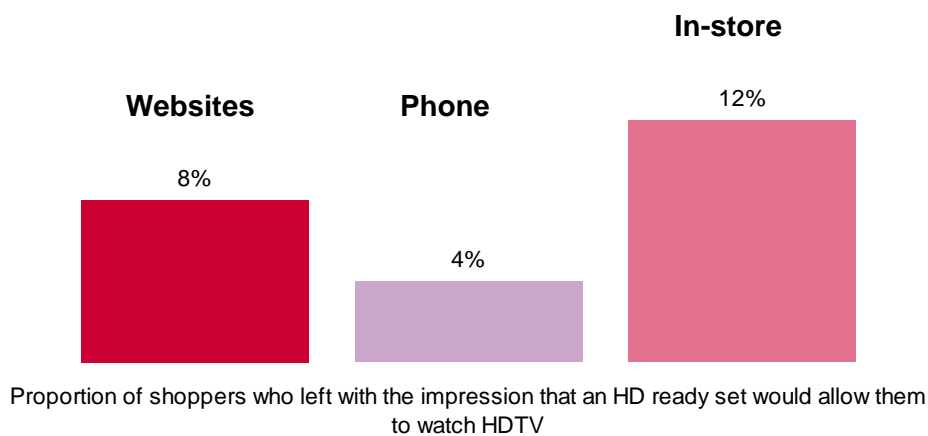


Base : All respondents 122 in-store /54 by phone /25 websites

4.8 A quarter of in-store shoppers, and a third of phone shoppers had to ask the retailer what platforms HDTV services were available on, with the rest being told spontaneously by sales staff.

4.9 Taking into account everything they had been told, after the mystery shop was over, one in eight in-store shoppers (12%) were left with the *impression* that an HDTV set would allow them to view the basic (i.e. analogue) terrestrial channels in high definition. The figure was lower for phone shoppers (4%).

**Figure 4.3 Perception of whether an HD Ready set gives access to HDTV pictures – after the shop was completed.**



Base : All respondents 122 in-store /54 by phone /25 websites

4.10 Again, once the mystery shop was over and after taking into account everything they had been told, a similar proportion (14%) of in-store shoppers were left with the impression that they would be able to receive HD via Freeview. This figure was 21% amongst phone shoppers. A typical comment from a one of these shoppers was “I was told that because it was a digital signal with Freeview everything was high definition”.

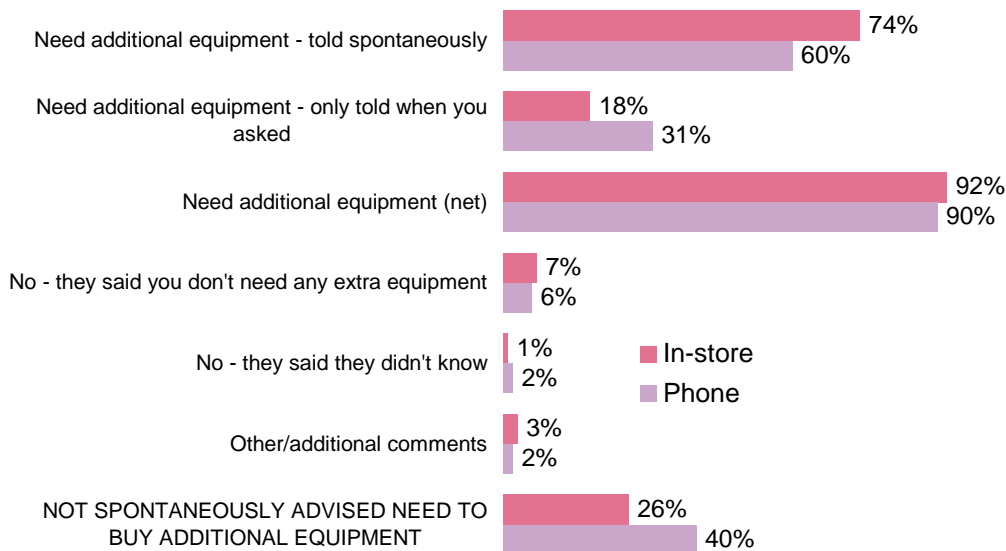
**The need for additional equipment to get HDTV was not always made clear**

4.11 Retailers did not always make it clear that it was necessary to buy extra equipment (in addition to the HD Ready TV set) to receive HD services. Nearly one in five (18%) of in-store shoppers were only told when they were asked, and 7% were actually told they didn't need to buy any extra equipment.

4.12 Just 60% of phone staff spontaneously told shoppers that they would need to buy additional equipment, and 6% said they didn't need to buy any at all (see Figure 4.4).

**Figure 4.4 Advice about the necessity of additional equipment**

Q . Did they tell you that you needed additional equipment (other than an HD Ready TV set) to receive HDTV services?



Base : All respondents 122 in-store /54 by phone

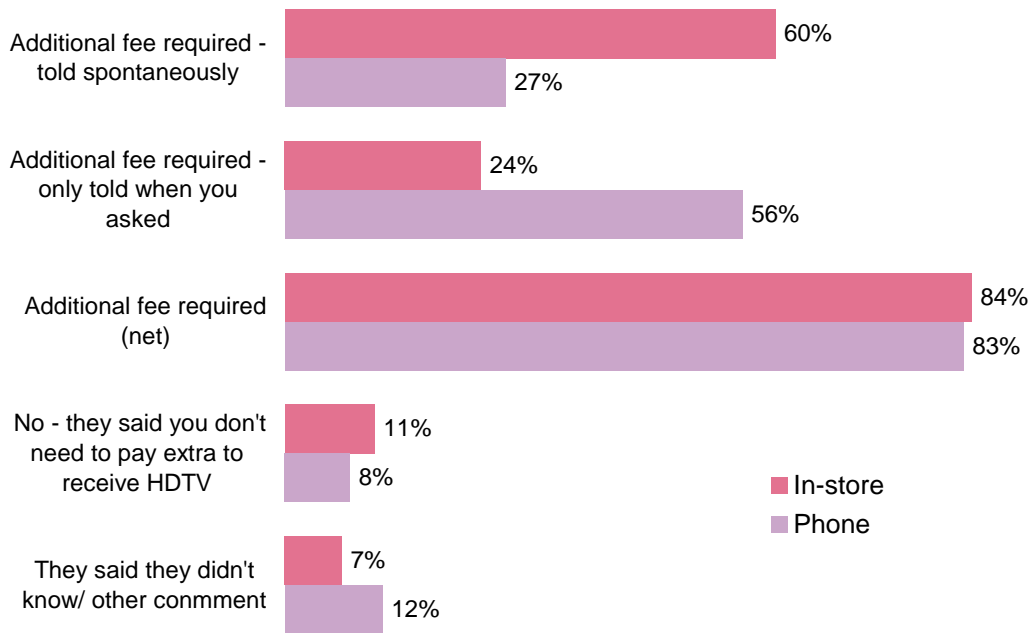
4.13 Of the 25 websites studied, three gave some information that could have been misinterpreted to infer that no additional equipment was necessary.

**One in ten were told that no additional fee was required to view HD services**

4.14 Around one in ten were told there was no additional fee required to view HD services (See Figure 4.5). A quarter of in-store shoppers, and over half of phone shoppers were only told that there were additional fees when they asked.

**Figure 4.5: Proportion told additional fees were necessary to receive HDTV services**

Q. Did they tell you if you had to pay a fee to receive/subscribe to current HDTV services?

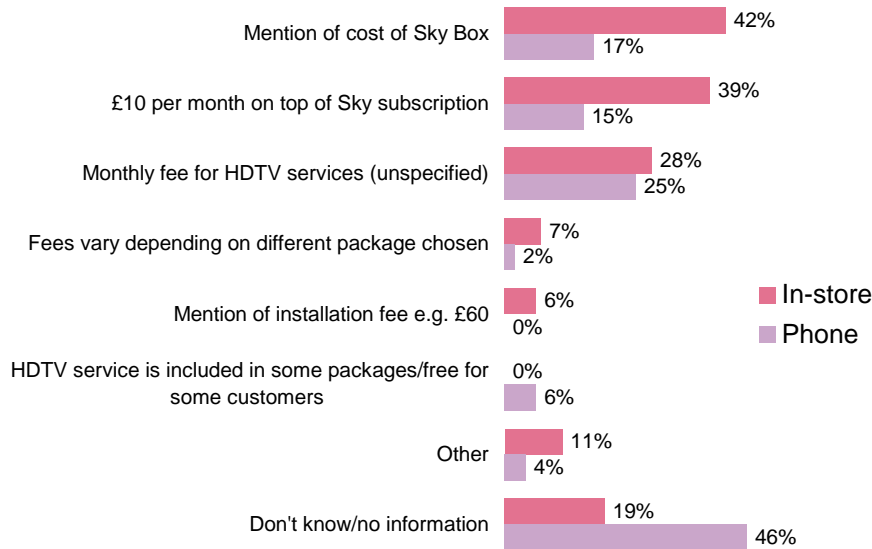


Base : All respondents 122 in-store /54 by phone

4.15 In-store staff were more likely to be aware of the costs involved to receive HDTV services (both the equipment and subscription costs). 42% of store staff mentioned the cost of purchasing a Sky set-top box (compared to 17% of phone staff), and 39% mentioned a £10 a month subscription charge to receive the service from Sky (15% amongst phone staff). Around a quarter of both groups (28% and 25% respectively) were aware that a monthly fee needed to be paid, but could not state how much.

**Figure 4.6: What costs involved in receiving HDTV services shoppers were told about**

Q. Write in details of what they told you you'd have to pay to receive HDTV services.



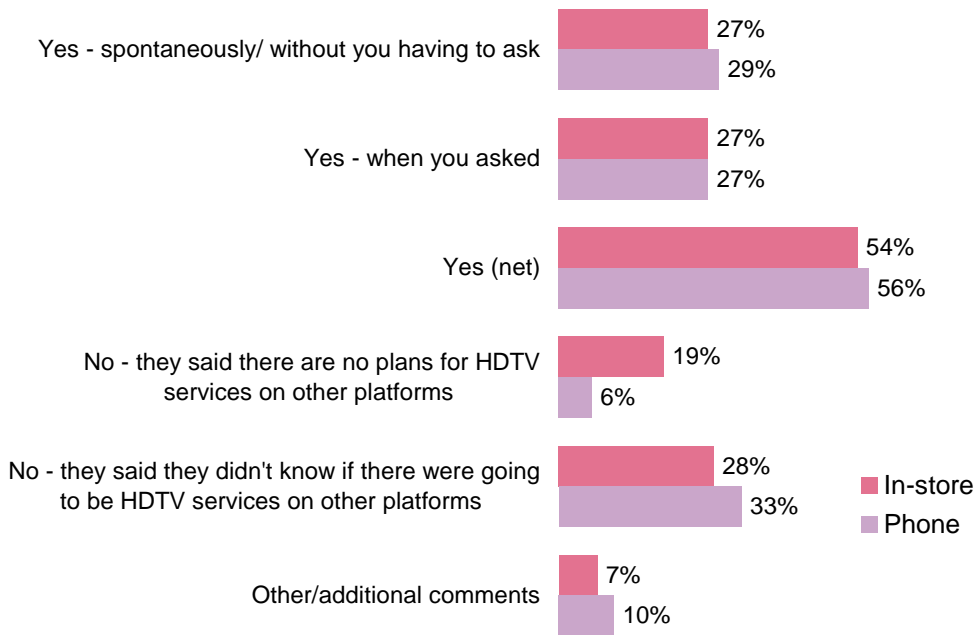
Base : All respondents 122 in-store /54 by phone

**Information given on future platform availability of HDTV was varied**

- 4.16 When seeking information on the **future** availability of HDTV services (specifically with regard to other platforms it's not currently available on, and if there will be free services) there was no consistent message provided.
- 4.17 Over half of shoppers were told there would be HDTV services on other platforms in the future (see Figure 4.7). Around half of the shoppers were told this spontaneously, and around half had to ask. A significant minority of the staff didn't know if there were going to be any HD services on other platforms in the future.

**Figure 4.7. Future availability of HDTV services on other platforms**

Q. Did they tell you that HDTV services would be available on other platforms in the future?



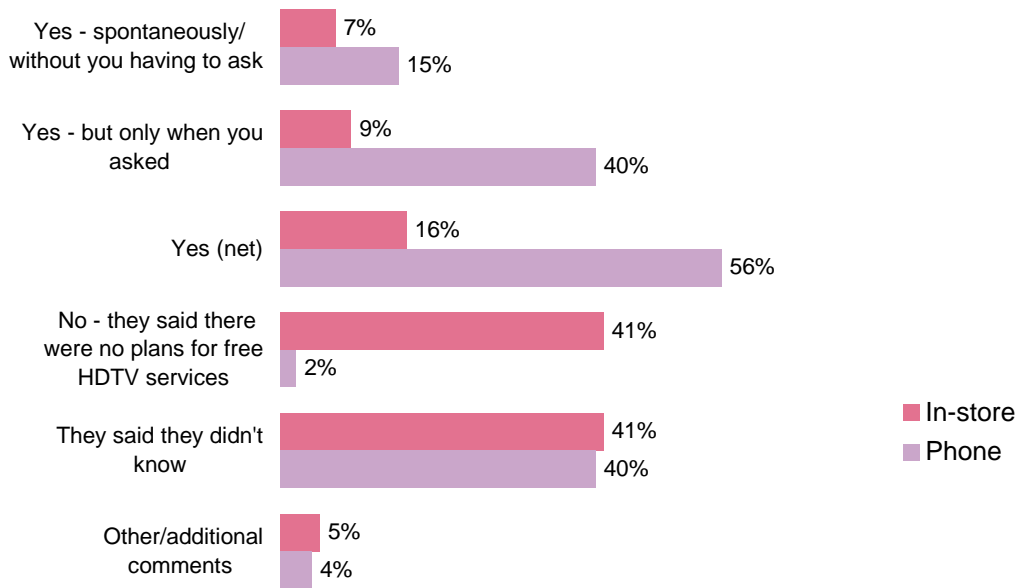
Base : All respondents 122 in-store /54 by phone

**A minority were told that free HDTV services would be available in the future**

- 4.18 There was a lack of clear knowledge as to whether there were firm plans to launch free HD services, as illustrated by the shoppers who said “*They [the sales staff] were very vague – they ‘thought’ it would be available on Freeview next year*”
- 4.19 Four in ten staff said they didn’t know when free services would be launched. Phone staff were significantly more likely to state that free HD services would be available in the future, with 56% doing so (compared to 16% of in-store staff). Figure 4.8 shows the differences between what phone shoppers and in-store shoppers were told.

**Figure 4.8: Availability of free HDTV services in the future**

Q. Did they tell you if there were going to be any free HDTV services in the future?



Base : All respondents 122 in-store /54 by phone

**Some retailers referred to the next generation of high definition sets**

- 4.20 Some new TV sets are being marketed as “True HD”, “Real HD”, or “Full HD”. These TV sets are capable of showing images of 1080p quality, which means the picture is of even better quality.
- 4.21 There was low awareness of these new types of set. Full HD was the most frequently mentioned, with 13% of in-store staff spontaneously mentioning it. Just 3% of store-staff mentioned True HD sets, and 2% mentioned Real HD sets. In total, 16% of in-store shoppers were told about at least one of these three types.
- 4.22 Unlike the in-store mystery shoppers who waited for the staff to mention either Full, True or Real HD TV sets, the mystery shoppers that contacted mail order retailers via phone were told to specifically ask about them. There was therefore higher repeated awareness (52% of phone staff had heard of Full HD, 40% True HD and a third had heard of Real HD). Sixty per cent mentioned at least one. However, other than a general awareness of the names, little was known.. Most comments regarding Full HD related to it being a better picture than ‘standard’ HD TV sets. The following comments from a department store’s salesman was typical “*Full HD is the latest and highest spec – it has 1,080 vertical lines compared to 720 for other types of HD*”.

## Section 5

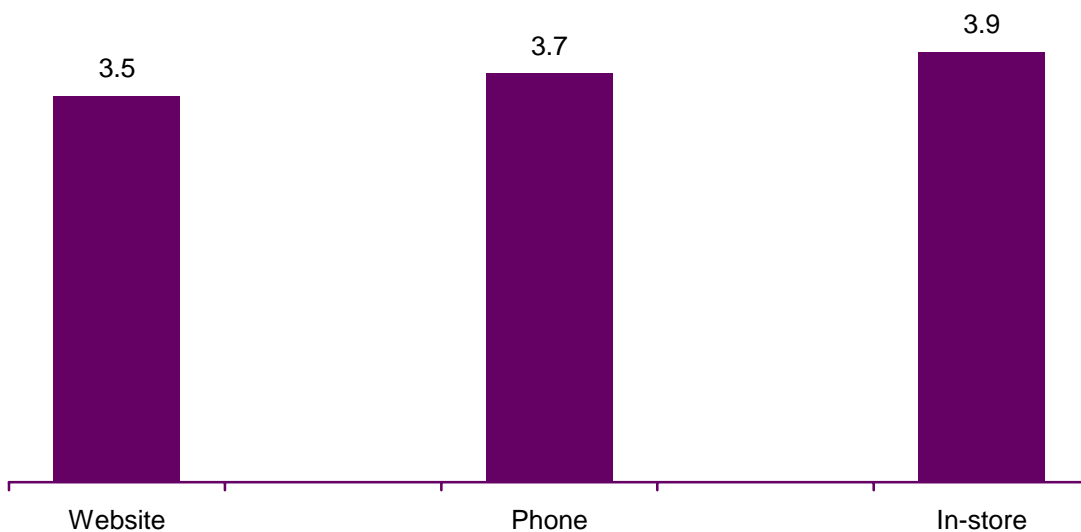
# Assessment of the information provided

### In general mystery shoppers felt that the information they received was fairly accurate

- 5.1 This section looks at the accuracy of the information provided by the sales staff to the mystery shopper, based on the mystery shoppers' own assessments.
- 5.2 Each mystery shopper rated the sales staff they spoke to out of five, with 1 being the lowest score (for "completely inaccurate"), and 5 the highest score (representing "completely accurate"). The websites studied were also rated using the same scale.
- 5.3 Shoppers felt the information given to them was fairly accurate. There were no significant differences in the mean scores between the accuracy of advice given via website, in store or via phone as seen in Figure 5.1. However, independent stores had a significantly higher average score (4.0) than department stores (3.5).

**Figure 5.1. Average score for accuracy of information**

Q. On a scale of 1-5 where 1 is "not at all" and 5 is "completely", how accurate do think the information given to you by the sales assistant/website was?



Base : All respondents 122 in-store /54 by phone/ 25 websites

- 5.4 This is a typical comment made by a mystery shopper regarding the salesman at an independent retailer: "*He seemed to have a real passion for TVs and was more than happy to talk about them and explain things clearly, even to a real technophobe like me*".

**Where information was inaccurate mystery shoppers felt this was down to a lack of training rather than deception.**

- 5.5 Every shopper that gave a sales person a medium or low score for accuracy (i.e. 3 or below) then made an assessment as to whether this was due to a lack of training, or in an attempt to deliberately mislead the customer to secure a sale. Staff were rated between 1 and 5, where 1 meant the inaccuracy was solely due to a lack of training, and 5 meant it was purely due to an attempt to mislead. No sales staff received a score of 5, meaning that no one felt they were completely deliberately misled. *“I don’t think he was trying to pull a fast one – he just didn’t seem to know very much”* was a comment made regarding a department store salesman given a score of 1.
- 5.6 In-store staff were significantly more likely to be seen as misleading than phone staff, with a score of 2.1 compared to 1.5. This may be as a result of the differing types of staff – in-store staff were typically sales staff, whereas those who gave advice over the phone tended to be customer services staff, whose main role was to provide information rather than secure a sale.
- 5.7 The fact that both scores were under 3 does indicate that overall inaccuracies for both types of outlet were felt to be predominantly due to a lack of training.

## Annex 1

# Mystery shopping scenarios

The following were the scenarios and associated instructions provided to the mystery shoppers.

The scenario is a guide for you to use as a basis for talking to the sales assistants. Please feel free to add in your own experiences and details (where appropriate). Please use the same scenarios for all your mystery shops. You will be assigned your scenario during the telephone briefing from the project exec.

In many cases it may not be necessary to tell the sales assistant your scenario in detail, but is useful to have it in your head when conducting the mystery shop.

### Scenario A – Not knowledgeable

You want to buy a new TV for your son/nephew (this could be as a birthday present or - as they are quite expensive - as a graduation present from University. You're willing to spend about £750-£1,000).

You don't know much about TVs at all. You may have heard of the phrase "HDTV" or high definition but don't know anything about it.

Ask the sales assistant to explain to you what HDTV is, and what is needed to watch High Definition TV. Ask why the TV sets have "HD Ready" on them – what does that mean?

IF SKY OR CABLE MENTIONED: Your son lives in rented accommodation and you do know that he isn't allowed a satellite dish. (If the assistant asks if he has or can get cable TV say that "you don't think so").

NB If the sales assistant mentions Freeview, make sure you find out (either spontaneously or prompt them if necessary) if that would allow your son to get HDTV services.

### Scenario B – Some knowledge

You are looking to buy a new TV for your home. Your husband has told you some details about what to get and you are looking at TVs to buy whilst out shopping today. It should be a screen of at least 37" (possibly 42") and you want an HDTV so you can watch television shows in High Definition. You have a budget of about £1,000.

Your husband has told you it must be "HD Ready"– ask the assistant to tell you what that means. You want more information on what is required to watch HDTV at home.

You don't want a satellite dish on your home and can't get cable yet. You don't have Freeview yet but have been considering getting it. If the sales assistant mentions Freeview, make sure you find out (either spontaneously or prompt if necessary) if that would allow you to get HDTV services.

### Scenario C – Fairly knowledgeable

You are looking to buy an HDTV yourself, for use at home, so that you can watch TV channels in High Definition. You are quite knowledgeable about the HDTV services. It is fine to use your existing knowledge and what you have learnt from the project briefing (as appropriate). Try to get as much information from the assistant as possible without prompting, but do ask specific questions at the end if necessary to obtain the required information. If the assistant tells you anything that you know to be wrong, (e.g, they tell you that you can get HDTV pictures via Freeview) please check with them and ask them if that is definitely correct.

**Annex 2**

# The in-store data collection form

Serial No: \_\_\_\_\_ (1-5)  
Card: 01 (6-7)

---

Q1 Job number: J8956

FEEDBACK FORM IN-STORE - FINAL  
=====

J8956 \_\_\_\_\_ (8-12)

---

**Interviewer name:** \_\_\_\_\_

**Interviewer no:** \_\_\_\_\_

---

**ACCOMPANIED BY: (PLEASE PRINT)**

\_\_\_\_\_

**SIGNATURE OF SUPERVISOR:** \_\_\_\_\_

**SIGNATURE OF INTERVIEWER:** \_\_\_\_\_

---

**FOR OFFICE USE: EDITOR:** \_\_\_\_\_ **CODER:** \_\_\_\_\_

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Q2 WRITE IN THE FOLLOWING DETAILS OF THE STORE

NAME OF STORE ..... 1  
..... (13)  
..... (14-15)

TOWN/AREA ..... 1  
..... (16)  
..... (17-18)

STREET/LOCAL AREA/SHOPPING CENTRE ..... 1  
..... (19)  
..... (20-21)

---

Q3	Which day of the week did you visit?	(22)
	Monday .....	1
	Tuesday .....	2
	Wednesday .....	3
	Thursday .....	4
	Friday .....	5
	Saturday .....	6
	Sunday .....	7

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Q4	At what time of day did you visit?	(23)
	Before 10am.....	1
	10am-12pm .....	2
	12.01-2pm .....	3
	2.01-4pm .....	4
	4.01-6pm .....	5
	After 6pm.....	6

---

Q5	Did the first person you spoke to answer all your questions, or did they get another member of staff?	(24)
	Only spoke to 1 person .....	1
	Spoke to more than 1 .....	2

Other/additional comments WRITE IN ..... 3  
(25-26)

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Q6	From your impressions, how specialised would you say the member of staff that you (mainly) spoke to was? Were they...	(27)
	A TV specialist .....	1
	A general salesperson/ member of staff .....	2

Other/additional comments WRITE IN..... 3  
(28-29)

---

Q7	IF KNOWN: Write in the job title of the main person you spoke to (if possible - don't ask)	(30-32)
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Q8 Were they a Digital Advisor (i.e. did they have the Ask Digital logo on their badge/shirt - see instructions)?

(33)  
Yes ..... 1  
No..... 2  
Don't know..... 3

---

Q9 And did you see the Ask Digital logo anywhere else - e.g. on a sign on the counter?

(34)  
Yes ..... 1  
No..... 2

---

Q10 What were you initially told about receiving HDTV services in general? WRITE IN FULL DETAILS

(35-37)

---

Q11 When you asked "How can I watch HDTV?" what did they say?

(38-39)

---

Q12 When you asked "What does 'HD Ready' mean?" what did they say?

(40-41)

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Q13	What platforms did they say HD services were available on?	(42)
	Terrestrial/Standard TV.....	1
	Freeview.....	2
	Sky/BSkyB.....	3
	Virgin/ Virgin media.....	4
	ntl/Telewest.....	5
	Cable.....	6
	Other/additional comments WRITE IN.....	7 (43-44)

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Q14	And did you need to ask them what platforms it was available on, or did they tell you spontaneously (without you having to ask about platform)?	(45)
	I had to ask.....	1
	They told me spontaneously.....	2
	Other WRITE IN.....	3 (46-47)

---

Q15	Did they tell you that HDTV services would be available on other platforms in the future?	(48)
	Yes - spontaneously/without you having to ask.....	1
	Yes - when you asked.....	2
	No - they said there are no plans for HDTV services on other platforms.....	3
	No - they said they didn't know if there were going to be HDTV services on other platforms.....	4
	Other/additional comments WRITE IN.....	5 (49-50)

**Q16 FILL IN IF 1 OR 2 CODED AT Q15**

When did they say it would be available on other platforms (that it's not currently available on)?

WRITE IN FOR EACH PLATFORM MENTIONED

Terrestrial TV .....	1
.....	(51)
Freeview.....	1
.....	(52)
Other platform(s) SPECIFY PLATFORMS AND WHEN AVAILABLE .....	1
.....	(53)
	(54-56)
Other/additional comments WRITE IN.....	1
.....	(57)
	(58-59)

**Q17 Did they tell you that you needed additional equipment (other than an HD Ready TV set) to receive HDTV services?**

	(60)
Yes - spontaneously/without you having to ask.....	1
Yes - but only when you asked .....	2
No - they said you DON'T need any extra equipment .....	3
No - they said they didn't know .....	4

Other/additional comments WRITE IN.....	5
	(61-62)

**Q18 FILL IN IF 1 OR 2 CODED AT Q17**

What additional equipment did they tell you that you needed?

CODE ALL THAT APPLY

	(63)
Sky TV HD box.....	1
Virgin Media HD Box.....	2
Freeview box.....	3
Satellite dish.....	4

Other/additional comments WRITE IN.....	5
	(64-65)

None - didn't mention needing any additional equipment.....	1
	(66)

---

Q19	Did they tell you if you had to pay a fee to receive /subscribe to current HDTV services?	(67)
	Yes - spontaneously/without you having to ask .....	1
	Yes - but only when you asked .....	2
	No - they said you don't need to pay extra to receive HDTV .....	3
	No - they said they didn't know .....	4
	Other/additional comments WRITE IN.....	5 (68-70)

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Q20	ASK IF 1 OR 2 CODED AT Q19	
	Write in details of what they told you you'd have to pay to receive HDTV services.	(71-72)

---

Q21	ONLY ASK IF THEY DIDN'T SAY THERE WERE ALREADY FREE SERVICES IN EXISTENCE AT Q19	
	Did they tell you if there were going to be any free HDTV services in the future?	
	Yes - spontaneously/without you having to ask .....	(73) 1
	Yes - but only when you asked .....	2
	No - they said there were no plans for free HDTV services.....	3
	No - they said they didn't know .....	4
	Other/additional comments WRITE IN.....	5 (74-76)

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Q22	ASK IF 1 OR 2 CODED AT Q21	
	Write in details of what free HDTV services you were told would be available in the future	(77-78)

Q23 Did the sales assistant give you the impression that if you bought an HDTV you could receive HDTV services from normal terrestrial TV (the 5 basic channels)? (79)

Yes ..... 1

No ..... 2

Q24 And did the sales assistant give you the impression that if you bought an HDTV you could receive HDTV services via Freeview? (80)

Yes ..... 1

..... Goto Q25

No ..... 2

..... Goto Q26

Q25 What (else) did they tell you about the possibility of receiving HDTV via Freeview?

card: 02 (6-7)

(8-11)

WRITE IN FULLY

Q26 Did the sales assistant mention any of the following: (12)

True HD ..... 1

Real HD ..... 2

Full HD ..... 3

NONE ..... 4

Q27 What did they say about them? Write in which type of HD (Real/True/Full) you are referring to. (13-14)

**Q28 FILL IN IF 1 OR 2 CODED AT Q26**

If True HD TV sets or Real HD TV sets were mentioned did they say that they will show HD pictures with existing set-top boxes? MAKE SURE YOU ASK IF THEY ARE MENTIONED.

- (15)
- True HD sets will show HD pictures..... 1  
 Real HD sets will show HD pictures..... 2  
 Did not state that either of these will show HD pictures..... 3

**Q29 On a scale of 1-5 where 1 is "not at all" and 5 is "completely", how accurate do think the information given to you by the sales assistant was?**

- (16)
- 1 - Not at all accurate ..... 1  
 ..... Goto Q30  
 2 ..... 2  
 ..... Goto Q30  
 3 ..... 3  
 ..... Goto Q30  
 4 ..... 4  
 ..... Goto Q31  
 5 - Completely accurate ..... 5  
 ..... Goto Q31

**Q30 FILL IN IF SCORE OF 1-3 GIVEN AT Q29.**

And how much do you think this was down to a lack of training or knowledge, and how much down to them trying to deliberately mislead you?

Please give a score of 1-5, where 1 is it was completely down to poor training and not at all due to deliberately misleading you, and 5 is it was completely down to them trying to mislead you. A score of 3 would be an equal mix of the two aspects.

- (17)
- 1 - Lack of training..... 1  
 2 ..... 2  
 3 - Equal mix of the two..... 3  
 4 ..... 4  
 5 - Deliberately misleading..... 5  
 Don't know..... 6

**Q31 Please write in any other comments about the sales person.**

(18-20)

---

Q32	CODE TYPE OF STORE	(21)
	Chain .....	1
	Department store/ Supermarket.....	2
	Independent .....	3

---

Q33	CODE REGION	(22)
	Scotland .....	1
	Wales .....	2
	North of England .....	3
	Midlands/ East Anglia.....	4
	South of England.....	5

---

Q34	CODE SCENARIO	(23)
	A - Not knowledgeable .....	1
	B - Some knowledge .....	2
	C - Fairly knowledge .....	3

---

**I declare that this is a true record of a mystery shopping visit which was carried out within the Market Research Society Code of Conduct in accordance with instructions in the Interviewers' Manual**

**SIGNED:** \_\_\_\_\_ **DATE:** \_\_\_/\_\_\_/\_\_\_

**Annex 3**

# The telephone data collection form

Serial No: \_\_\_\_\_ (1-5)  
Card: 01 (6-7)

Q1 Job number: J8956

**FEEDBACK FORM - TELEPHONE/EMAIL**  
=====

J8956 \_\_\_\_\_ (8-12)

**Interviewer name:** \_\_\_\_\_

**Interviewer no:** \_\_\_\_\_

**ACCOMPANIED BY: (PLEASE PRINT)**

\_\_\_\_\_

**SIGNATURE OF SUPERVISOR:** \_\_\_\_\_

**SIGNATURE OF INTERVIEWER:** \_\_\_\_\_

**FOR OFFICE USE: EDITOR:** \_\_\_\_\_ **CODER:** \_\_\_\_\_

Q2 WRITE IN THE FOLLOWING DETAILS OF THE STORE

NAME OF STORE ..... 1  
..... (13)  
..... (14-15)

URL ..... 1  
..... (16)  
..... (17-18)

TELEPHONE NUMBER..... 1  
..... (19)  
..... (20-21)

---

Q3	Which day of the week did you call/email?	(22)
	Monday .....	1
	Tuesday .....	2
	Wednesday .....	3
	Thursday .....	4
	Friday .....	5
	Saturday .....	6
	Sunday .....	7

---

Q4	At what time of day did you call/visit?	(23)
	Before 10am.....	1
	10am-12pm .....	2
	12.01-2pm .....	3
	2.01-4pm .....	4
	4.01-6pm .....	5
	After 6pm.....	6

---

Q5	Did the first person you spoke to answer all your questions, or did they transfer you to another member of staff?	(24)
	Only spoke to 1 person .....	1
	Spoke to more than 1 .....	2

Other/additional comments WRITE IN ..... 3  
(25-26)

---

Q6	From your impressions, how specialised would you say the member of staff that you (mainly) spoke to was? Were they...	(27)
	A TV specialist .....	1
	A general salesperson/ member of customer services.....	2

Other/additional comments WRITE IN..... 3  
(28-29)

---

Q7	IF KNOWN: Write in the job title of the main person you spoke to (if possible - don't ask)	(30-32)
----	--	---------

---

Q8 \*\*\*IGNORE\*\*\*

.....

---

Q9 \*\*\*IGNORE\*\*\*

---

Q10 What were you initially told about receiving HDTV services in general? WRITE IN FULL DETAILS

(35-37)

---

Q11 When you asked "How can I watch HDTV?" what did they say?

(38-39)

Q12 When you asked "I've seen an 'HD Ready' logo - what does that mean?" what did they say? (40-41)

Q13 What platforms did they say HD services were available on? (42)

Terrestrial/Standard TV.....	1
Freeview.....	2
Sky/BSkyB.....	3
Virgin/ Virgin media.....	4
ntl/Telewest.....	5
Cable.....	6

Other/additional comments WRITE IN..... 7  
(43-44)

Q14 And did you need to ask them what platforms it was available on, or did they tell you spontaneously (without you having to ask about platform)? (45)

I had to ask.....	1
They told me spontaneously.....	2

Other WRITE IN..... 3  
(46-47)

---

Q15	Did they tell you that HDTV services would be available on other platforms in the future?	(48)
	Yes - spontaneously/without you having to ask.....	1
	Yes - when you asked.....	2
	No - they said there are no plans for HDTV services on other platforms .....	3
	No - they said they didn't know if there were going to be HDTV services on other platforms	4
	Other/additional comments WRITE IN.....	5 (49-50)

---

Q16	FILL IN IF 1 OR 2 CODED AT Q15	
	When did they say it would be available on other platforms (that it's not currently available on)?	
	WRITE IN FOR EACH PLATFORM MENTIONED	
	Terrestrial TV .....	1
	.....	(51)
	Freeview.....	1
	.....	(52)
	Other platform(s) SPECIFY PLATFORMS AND WHEN AVAILABLE .....	1
	.....	(53) (54-56)
	Other/additional comments WRITE IN.....	1
	.....	(57) (58-59)

---

Q17	Did they tell you that you needed additional equipment (other than an HD Ready TV set) to receive HDTV services?	(60)
	Yes - spontaneously/without you having to ask.....	1
	Yes - but only when you asked .....	2
	No - they said you DON'T need any extra equipment .....	3
	No - they said they didn't know .....	4
	Other/additional comments WRITE IN.....	5 (61-62)

---

Q18 FILL IN IF 1 OR 2 CODED AT Q17

What additional equipment did they tell you that you needed?

CODE ALL THAT APPLY

	(63)
Sky TV HD box.....	1
Virgin Media HD Box.....	2
Freeview box.....	3
Satellite dish.....	4
Other/additional comments WRITE IN.....	5
.....	(64-65)
	(66)
None - didn't mention needing any additional equipment.....	1

---

Q19 Did they tell you if you had to pay a fee to receive /subscribe to current HDTV services?

	(67)
Yes - spontaneously/without you having to ask .....	1
Yes - but only when you asked .....	2
No - they said you don't need to pay extra to receive HDTV.....	3
No - they said they didn't know .....	4

Other/additional comments WRITE IN..... 5  
(68-70)

---

Q20 ASK IF 1 OR 2 CODED AT Q19

Write in details of what they told you you'd have to pay to receive HDTV services.

(71-72)

Q21 ONLY ASK IF THEY DIDN'T SAY THERE WERE ALREADY FREE SERVICES IN EXISTENCE AT Q19

Did they tell you if there were going to be any free HDTV services in the future?

	(73)
Yes - spontaneously/without you having to ask .....	1
Yes - but only when you asked .....	2
No - they said there were no plans for free HDTV services.....	3
No - they said they didn't know .....	4

Other/additional comments WRITE IN .....	5
	(74-76)

Q22 ASK IF 1 OR 2 CODED AT Q21

Write in details of what free HDTV services you were told would be available in the future (77-78)

Q23 Did the customer services/sales assistant give you the impression that if you bought an HDTV you could receive HDTV services from normal terrestrial TV (the 5 basic channels)?

	(79)
Yes .....	1
No.....	2

Q24 And did the customer services/sales assistant give you the impression that if you bought an HDTV you could receive HDTV services via Freeview?

	(80)
Yes .....	1
.....	Goto Q25
No.....	2
.....	Goto Q26

Q25 What (else) did they tell you about the possibility of receiving HDTV via Freeview?

	card: 02	(6-7)
WRITE IN FULLY		(8-11)

Q26 Do you know what is meant by.....READ OUT?

- |               |      |
|---------------|------|
|               | (12) |
| True HD.....  | 1    |
| Real HD.....  | 2    |
| Full HD ..... | 3    |
| NONE.....     | 4    |

Q27 What did they say about them? Write in which type of HD (Real/True/Full) you are referring to.

(13-14)

Q28 FILL IN IF 1 OR 2 CODED AT Q26

If True HD TV sets or Real HD TV sets were mentioned did they say that they will show HD pictures with existing set-top boxes? MAKE SURE YOU ASK IF THEY ARE MENTIONED.

(15)

- |   |   |
|---|---|
| True HD sets will show HD pictures.....                       | 1 |
| Real HD sets will show HD pictures.....                       | 2 |
| Did not state that either of these will show HD pictures..... | 3 |

Q29 On a scale of 1-5 where 1 is "not at all" and 5 is "completely", how accurate do think the information given to you by the person/people you spoke to was?

(16)

- |                               |   |          |
|-------------------------------|---|----------|
| 1 - Not at all accurate ..... | 1 |          |
| .....                         |   | Goto Q30 |
| 2 .....                       | 2 |          |
| .....                         |   | Goto Q30 |
| 3 .....                       | 3 |          |
| .....                         |   | Goto Q30 |
| 4 .....                       | 4 |          |
| .....                         |   | Goto Q31 |
| 5 - Completely accurate ..... | 5 |          |
| .....                         |   | Goto Q31 |

---

Q30 FILL IN IF SCORE OF 1-3 GIVEN AT Q29.

And how much do you think this was down to a lack of training or knowledge, and how much down to them trying to deliberately mislead you?

Please give a score of 1-5, where 1 is it was completely down to poor training and not at all due to deliberately misleading you, and 5 is it was completely down to them trying to mislead you. A score of 3 would be an equal mix of the two aspects.

	(17)
1 - Lack of training.....	1
2 .....	2
3 - Equal mix of the two.....	3
4 .....	4
5 - Deliberately misleading.....	5
Don't know.....	6

---

Q31 Please write in any other comments about customer services / the sales person.

(18-20)

---

Q32 CODE TYPE OF STORE

	(21)
Chain.....	1
Department store/ Supermarket.....	2
Independent .....	3

---

Q33 IGNORE

---

Q34 CODE SCENARIO

	(23)
A - Not knowledgeable.....	1
B - Some knowledge .....	2
C - Fairly knowledge .....	3

---

Q35 CODE TYPE OF SHOP

	(24)
In store .....	1
Mail order - via telephone.....	2
Mail order - via email.....	3
Website .....	4

---

**I declare that this is a true record of a mystery shopping visit which was carried out within the Market Research Society Code of Conduct in accordance with instructions in the Interviewers' Manual**

**SIGNED:** \_\_\_\_\_ **DATE:** \_\_\_/\_\_\_/\_\_\_

Annex 4

# The website data collection form

Serial No: \_\_\_\_\_ (1-5)  
Card: 01 (6-7)

---

Q1 Job number: J8956web

FEEDBACK FORM - WEBSITE  
=====

J8956 \_\_\_\_\_ (8-12)

---

Interviewer name: \_\_\_\_\_

Interviewer no: \_\_\_\_\_

---

ACCOMPANIED BY: (PLEASE PRINT)

\_\_\_\_\_

SIGNATURE OF SUPERVISOR: \_\_\_\_\_

SIGNATURE OF INTERVIEWER: \_\_\_\_\_

---

FOR OFFICE USE: EDITOR: \_\_\_\_\_ CODER: \_\_\_\_\_

---

Q2 WRITE IN THE FOLLOWING DETAILS OF THE STORE

NAME OF STORE ..... 1  
..... (13)  
..... (14-15)

URL ..... 1  
..... (16)  
..... (17-18)

\*\*\*IGNORE\*\*\* ..... 1  
..... (19)  
..... (20-21)

---

Q3	Did you see the Ask Digital logo anywhere on the website?	(22)
	Yes .....	1
	No.....	2

---

Q4	Other than lists of models and prices, was there any additional information on TVs?	(23)
	Yes .....	1
	.....	Goto Q5
	No.....	2
	.....	Goto Q18

---

Q5	And was there specific information on HD Ready TVs?	(24)
	Yes .....	1
	.....	Goto Q6
	No.....	2
	.....	Goto Q18

**COLLECT SCREEN SHOT WHEN APPLICABLE**

---

Q6	Did it state any of the following?	(25)
	That you need additional equipment (as well as the HD Ready TV set) to receive HDTV pictures.....	1
	That you need to subscribe to HDTV services to receive HDTV pictures .....	2
	That you can get HD pictures from an HD DVD or Blu Ray player .....	3
	That you can get HD pictures from a games console like a Playstation 3 or X Box 360.....	4
	That you CAN get HD pictures via Freeview .....	5
	That you CAN'T get HD pictures via Freeview .....	6
	NONE.....	7

---

Q7	What equipment, if any, did it tell you that you needed to get HD pictures?	(26)
	Sky TV HD box.....	1
	Virgin Media HD Box.....	2
	Freeview box.....	3
	Satellite dish.....	4
	Other/additional comments WRITE IN.....	5
		(27-28)
	Didn't mention needing any other equipment .....	(29)
		1

---

Q8	Did it imply anywhere that you DON'T need any additional equipment (other than an HD Ready TV) to receive HD pictures/TV channels	
	Yes WRITE IN DETAILS.....	1
	.....	(30)
		(31-32)
	No .....	(33)
		1

---

Q9	What platforms, if any, did it say HD services were available on?	(34)
	Terrestrial/Standard TV.....	1
	Freeview.....	2
	Sky/BSkyB .....	3
	Virgin/ Virgin media .....	4
	ntl/Telewest .....	5
	Cable.....	6
	Other/additional comments WRITE IN.....	7
		(35-36)
	DIDN'T SPECIFY .....	(37)
		1

---

Q10	Did it tell you that you had to pay a fee to receive /subscribe to current HDTV services?	
	Yes - WRITE IN DETAILS .....	1
	.....	(38)
		(39-40)
	No.....	(41)
		1

---

Q11	Did the information on the website give you the impression that if you bought an HDTV you could receive HDTV services from normal terrestrial TV (the 5 basic channels)?	(42)
	Yes .....	1
	No.....	2

---

Q12	And did the information on the website give you the impression that if you bought an HDTV you could receive HDTV services via Freeview?	(43)
	Yes .....	1
	.....	Goto Q13
	No.....	2
	.....	Goto Q14

Q13 What (else) did they tell you about the possibility of receiving HDTV via Freeview?

(44-47)

WRITE IN FULLY

Q14 Did information on the website mention any of the following:

(48)

True HD..... 1  
 Real HD..... 2  
 Full HD ..... 3  
 NONE..... 4

Q15 What did they say about them? Write in which type of HD (Real/True/Full) you are referring to.

(49-50)

Q16 FILL IN IF 1 OR 2 CODED AT Q14

If True HD TV sets or Real HD TV sets were mentioned did they say that they will show HD pictures with existing set-top boxes? MAKE SURE YOU ASK IF THEY ARE MENTIONED.

(51)

True HD sets will show HD pictures..... 1  
 Real HD sets will show HD pictures..... 2  
 Did not state that either of these will show HD pictures..... 3

Q17 On a scale of 1-5 where 1 is "not at all" and 5 is "completely", how accurate do think the information given by the website was?

(52)

1 - Not at all accurate ..... 1  
 2 ..... 2  
 3 ..... 3  
 4 ..... 4  
 5 - Completely accurate ..... 5

---

Q18 How long did you spend on the website?

ENTER MINUTES

\_\_\_\_\_ (53-54)

---

Q19 CODE TYPE OF STORE

(55)

- Chain ..... 1
- Department store/ Supermarket..... 2
- Independent ..... 3

---

Q20 CODE TYPE OF SHOP

(56)

- In store ..... 1
- Mail order - via telephone..... 2
- Mail order - via email..... 3
- Website ..... 4

---

**I declare that this is a true record of a mystery shopping visit which was carried out within the Market Research Society Code of Conduct in accordance with instructions in the Interviewers' Manual**

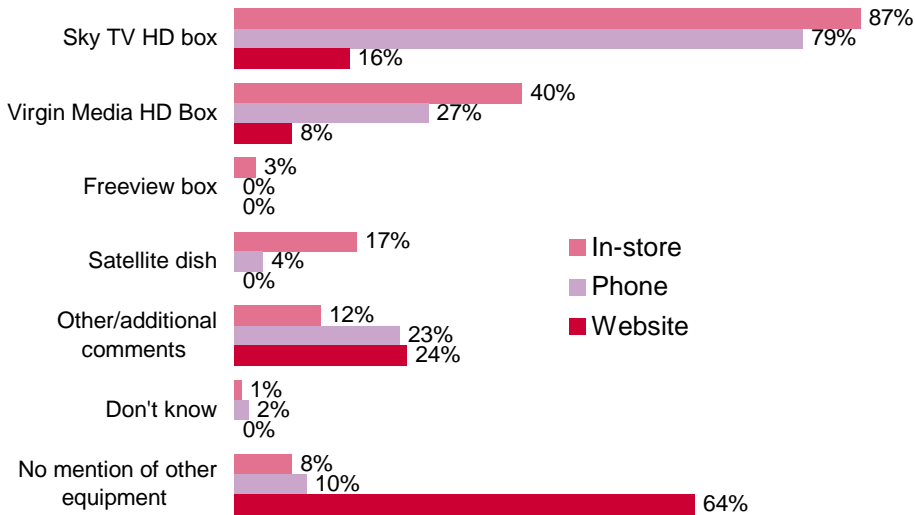
**SIGNED:** \_\_\_\_\_ **DATE:** \_\_\_/\_\_\_/\_\_\_

Annex 5

# Additional charts

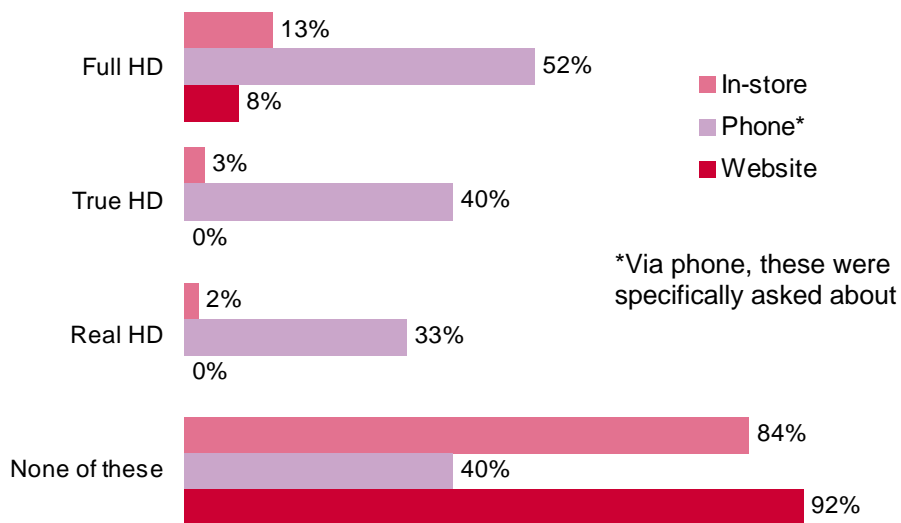
**Figure A1. What additional equipment shoppers were told was required to receive HD services**

Q. What additional equipment did they tell you that you needed?



Base : All respondents 122 in-store /54 by phone /25 websites

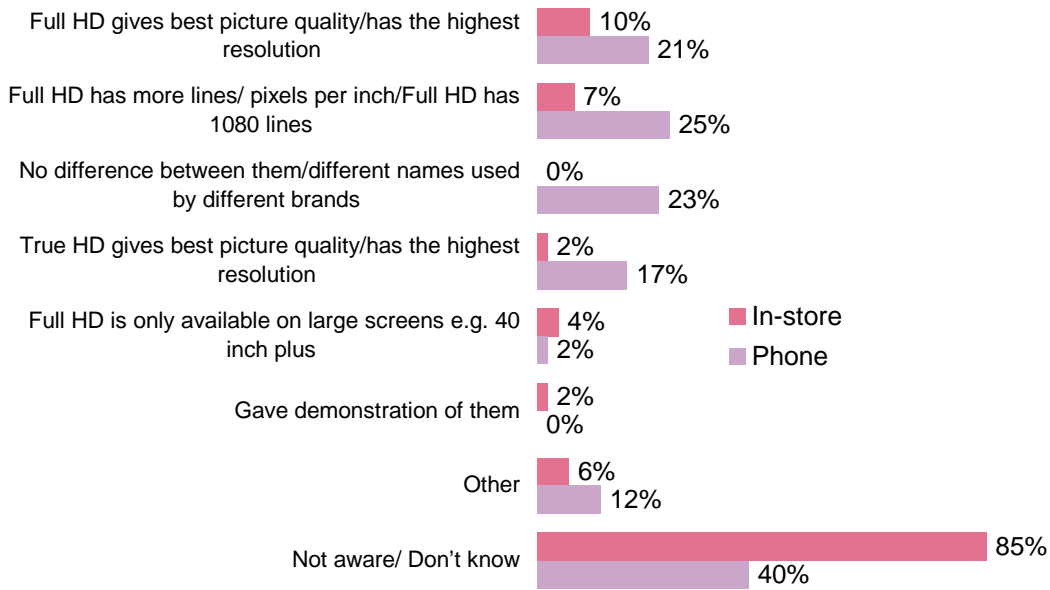
**Figure A2. Mentions of next generation HD sets.**



Base : All respondents 122 in-store /54 by phone /25 websites

**Figure A3. What was said about Full/Real/True HD**

Q. What did they say about Full/Real/True HD?



Base : All respondents 122 in-store /54 by phone