



Digital Television – Consumers’ Use and Perceptions

A Report on a Research Study

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Oftel is a non-ministerial Government organisation. Its role is as a regulator of the UK telecoms market, and its goal is to obtain the best possible deal for customers from telecoms services, and it seeks to do this principally through effective competition in telecoms networks and services. Oftel's broadcasting team's main objective is to develop and apply a clear and consistent policy framework for the promotion of competition in broadcasting markets. In addition, it will continue to promote greater understanding of Oftel's regulatory role in broadcasting.

In June 2001, as part of the measurement of Oftel's effectiveness in achieving its goal, Oftel commissioned Counterpoint to carry out research into consumers' use of digital television services. The purpose of this research was to gain a greater understanding of how and which services residential customers are making use of, and how useful they perceive them to be.

This report outlines the findings of that research.

2. Research Objectives

In overall terms, the aim of the research was to provide Oftel with a greater understanding of how and which services residential consumers are making use of, and how useful they perceive them to be.

The list of topics for research were as follows:

1. *Digital Television Services*

Why do they have digital television (pay and non-pay)?

Did they have analogue pay TV before?

What expectations did they have before and has it lived up to them – why/why not?

What do they like/dislike about digital TV?

Are they likely to keep/get rid of digital? Why?

If subscribing to digital pay TV

Who is their supplier?

How did they decide which company to use?

What do they see to be the main differences between companies?

2. *Digital Interactive Services*

What do the respondents think about the following services? How often do they use them? How easy are they to use? How useful are they? Are they reliable/ secure (eg. on-line banking/home shopping) – why/why not? What problems have they faced and how have they overcome them?

- Interactive services such as playercam for football matches/Wimbledon, interactive news
- Home shopping for holidays/tickets/weekly food shopping etc
- On-line banking through television
- Internet or email services
- Downloading/playing games

3. *Electronic Programme Guides*

What do the respondents think about following features available through the Electronic Programme Guide (EPG)? How often do they use it? How easy is it to use? How useful do they find it? What problems have they faced and how have they overcome them?

- On screen listings which you select to access digital television services.
- Favourite channel function – available through EPG which produces customised listing of your favourite channels

How do digital TV viewers use the EPG?

- Is it the main means by which users access digital television services?
- Does listing position on the EPG affect how frequently viewers access digital television services? If so, how? ie. Those listed closer to the top are used more frequently.

4. *Digital text*

- Are the respondents using digital text - why/why not?
- Are they aware of the differences between analogue and digital text?
Digital text allows you to scroll through pages, pictures.

5. *Integrated Digital Television sets*

These are digital television sets, which have no need for a separate set top box and receive various free to air channels. They are currently retailing at around £400-500.

- Are the respondents aware of these types of digital television sets?
- Which, if any of the free to air channels that can be received are they aware of? Would they watch any of those channels? Why, why not?
- If unaware of IDTV's what is their reaction to learning about them?
- What would persuade them to purchase one in the future ie. more free channels, cheaper equipment etc.?
- Those who already own one – why did they decide to buy one? What do they like/dislike about it? Did they subscribe to digital pay TV before?

6. *Additional features*

How likely would they be to use these future functions? How useful do they think they would be?

- Video on demand,– this would enable you to select and watch a film of your choice at any time of the day
- Facility where you could click on screen to select more information about a certain programme, or advert?
- What additional features would they like to see in the future?
- What else would they like to be able to do – ie. A recording functionality that learns viewing preferences and automatically records programmes that are likely to be of interest.”

3. Research Method and Sample

The research was carried out in three stages : a series of telephone depth interviews, then a series of household depths, and finally, a series of peer group discussions.

The details of the depths and groups are as follows:

3.1. Telephone Depth Interviews

Date	Area	Specification
	Leeds	Telephone Depth 1 Pre-family C1C2, Male
7/7/01	London	Telephone Depth 2 Pre-family C1C2, Female
	Leeds	Telephone Depth 3 Young family BC1, Male
9/7/01	London	Telephone Depth 4 Young family BC1, Female
	Essex	Telephone Depth 5 Young family C2D Male
	Essex	Telephone Depth 6 Young family C2D Female
	Essex	Telephone Depth 7 Older family BC1 Male
11/7/01	London	Telephone Depth 8 Older family BC1 Female
	Leeds	Telephone Depth 9 Older family C2D Male
8/7/01	London	Telephone Depth 10 Older family C2D Female
	Essex	Telephone Depth 11 Empty Nesters C1C2 Male
	Leeds	Telephone Depth 12 Empty Nesters C1C2 Female

3.2. Household Depths

Date	Area	Specification
9/7/01	London	Household Depth 1 BC1 pre-family
		Household Depth 8 C2D empty nesters
10/7/01	London	Household Depth 6 C2D family with eldest child over 8
		Household Depth 3 BC1 Family with eldest child under 8
11/7/01	Birmingham	Household Depth 4 C2D family with eldest child under 8
		Household Depth 5 BC1 family with eldest child over 8
18/7/01	Newcastle	Household Depth 2 C2D pre-family
		Household Depth 7 BC1 empty nesters

3.3. Peer Groups

Date	Area	Specification
17/7/01	Leeds	Peer Group 2 C2D Teenagers, 16-19, female
		Peer Group 4 C1C2(D) 25-40, mixed gender, with eldest child under 8
16/7/01	Surrey	Peer Group 1 Teenagers 16-19, male, BC1
		Peer Group 5 Older family, 35-50, mixed gender, (B)C1C2
18/7/01	North London	Peer Group 3 Pre-family, 20-30, mixed gender, (B)C1C2
		Peer Group 6 Empty Nesters/ young retired, 50+, C1C2(D)

4. Discussion Guide and Stimulus Material

Three separate discussions guides were developed for each of the stages of the research. All three are contained in Appendix 1.

5. Summary of Research Findings

5.1. Characteristics of the Sample

The lack of common ground observed in the sample provided clear evidence of a fragmented audience. As viewers, they expected to have a much more active role in scanning the whole range of what was available to view, and in making their choice on a programme-by-programme basis. Traditional schedules were no longer so relevant. Because decisions were made on an almost instant basis, labelling and branding of both channels and programmes was crucial.

When making their initial overview of available programmes, schedules tended to have been replaced by genre interests: respondents 'cruised' within genre interests, rather than within a schedule.

That the only television in the household with digital decoder tended to be the 'main' television in the communal living room, had also changed behaviour and attitudes towards television. Children were showing parents how to use the remote control, or what other services were part of the digital package, and parents felt more confident of knowing what their children were watching.

Attitudes towards service providers were very relaxed and tolerant, partly because there were so few 'players' in the marketplace and partly because of the newness of the technology and service. Further, because of the relatively high number of viewers who had previously been analogue subscribers within the sample, there was a strong feeling that all "decent" television would imply a subscription, therefore there was an expectation that organisations involved in television nowadays would have a commercial prerogative. Finally, unlike analogue subscription, digital subscribers noticed constant change, and 'upgrade' in their service, leading to a feeling of a service in development, with constant upgrades being delivered as and when they were available.

Most declared themselves very happy with their subscription, because their main motivation to subscribe was for "more channels", and that was essentially what they felt had been delivered to them.

The EPG was a major breakthrough for viewers, although they did not see it as a 'product' or service, but rather as simply the new way of finding programmes to watch.

The interactive services, although usually noticed, were defined as very peripheral to the service, essentially they were a 'nice extra'. However digital television had led to a significantly reduced use of their video, and had obviated the need for a DVD player or videos for many.

Whilst generally very happy indeed with the 'service' – i.e. 'more channels', most reported significant problems with the technology which delivered their service.

Age was a significant variable in terms of attitudes to television. Children were much more confident and explorative users, often teaching their elders the rudiments of the service. Children also tended to flick much more, whilst older respondents tended to watch programmes right through.

Those who were new to subscription television tended to be much more critical of the service, and indeed of the idea of having to pay for television per se.

Men tended to be much more interested in the technical side of the service than women, and reported having to learn the extent and logic of the system and then explaining it to their partner. Women reported learning much of the 'extras' of the system via their children and friends.

5.2. The Appeal of Digital Television

For many within the sample, upgrading to digital television was not a big decision, or a significant decision at all: they were used to paying for television, this was just a small upgrade.

Improved picture quality was another justification for upgrading to digital, although for many who had not been analogue subscribers the attraction of digital had been its significantly improved reception quality.

Children were also a significant factor in the decision to obtain digital television, and all amongst the sample who had a genre interest (cinema, entertainment, sports, news and current affairs), felt that the digital option was the only choice for the depth and range within their interest that was desired.

Interactive and internet services were never used in the justification of digital argument, they were invariably seen as, at best, an interesting extra.

Cable viewers tended to have had a relationship with their cable provider already, and were simply upgrading via an offer.

A key concern amongst viewers was the aggressiveness of their service providers' marketing to them. They were irritated by what they saw as strategies to secure higher revenue per household. These included changing the configuration of packages, deleting key channels from certain packages, the movement of best quality programmes (particularly sport and film) to pay per view channels, and a general propensity to demand fees on top of the monthly subscription. There was a concern that as individual consumers, they could do nothing to check this activity. Their only hope, they felt, lay in competition, and they tended to be worried that there would be healthy competition within the marketplace.

5.3. Learning to Use Services

Most respondents learned to use their service by trial and error, starting with what they found most useful, i.e. changing channel/ the electronic programme guide (EPG), and then moving on to explore other services. Younger respondents tended to be more inquisitive, finding new elements such as interactivity and then showing them to their parents.

Generally respondents judged the system to be extremely intuitive and user-friendly, to the extent they felt that it represented a breakthrough in terms of finding programmes, and had led to a fundamental change in the way they watched television. The workings of the EPG were central to that change.

5.4 The Electronic Programme Guide

Respondents tended to use three different ways of navigating through the channels: what they variously called 'the big list', the 'TV Guide', and 'the menu'; scrolling; and finally 'jumping' from one section of the EPG to another (i.e. between genres) by inputting the channel number.

The TV Guide gave them access to the complete range of programmes in a quick, digestible, visual form. They tended to browse the 'all programmes' menu most often, arguing that it took them such a short time to browse through that it was worth seeing the whole range of what they were paying for.

They had a clear picture of the order of channels in their minds, which they then used when switching via another method (i.e. scrolling, or when making the decision whether it was worth it to input the number direct, c.f. just scrolling). Again channel identity and branding was crucial to their decision making, however any new channels encountered in this context were sampled and judged quickly on the basis of this 'dip'. Respondents also felt it was easy to miss new channels when browsing the big list, and asked that they be highlighted for an initial period.

It was an advantage to be near the top of the TV Guide, as viewers tended to make their choice before getting to the end of the list. They argued that they would check their favourite genres (from the 'all channels' option) and tended to have made their choice before reaching the end of the list. Respondents were very reluctant indeed to move out of the EPG, so all Sky Digital viewers reported a marked decrease in their ITV viewing. Indeed a significant number claimed they no longer watched the channel simply because of its absence from the EPG.

Scrolling was the second method used, and was preferred by some because it didn't interfere with the programme they were watching. The genre organisation was particularly helpful within this context since it allowed them to 'browse around' their local area to check whether there was a better programme on, without leaving their current programme, or having to scroll through a significant number of channels. Whilst some family members would complain when the person controlling the remote went to the TV Guide because of the loss of the current channel, others complained when the viewer controlling the remote started scrolling, because of the different rates at which the household read. Adults and women also complained about children and men's propensity to browse, interfering with their current viewing.

Finally, because of the need to switch between genres, many respondents had learned the channel numbers of one or two channels per genre. This allowed them to skip directly from, for instance news, to entertainment channels. They argued they only needed to know one or two per genre because once within the genre, they would browse around via the scrolling function in any case.

There was little interest in personalisation and customisation amongst these subscribers, since they felt the EPG was so efficient, quick and logical that they had no need to edit down the list of channels. There was a feeling that if interactive or on-line services offered more and were therefore used more often, then personalisation might be more valuable (e.g. different 'users'), however at the point of the research there was very little value placed on this function.

The 'i' button was used almost ubiquitously, and was judged to be extremely useful. It allowed viewers the overview and speedy browse they wanted, but gave them instant access to the depth they wanted before making their viewing decision.

Likewise, respondents praised the design, layout, and clarity of their remote control. Cable subscribers however complained bitterly about the need for two remote controls to adjust their volume.

5.5. Interactive Services

There were mixed to lukewarm reactions to interactive services, with some subscribers unsure whether they had any interactive services at all as part of

their package. All argued that it was difficult to get an overview of what was available, and many had found services by accident, or had been shown by friends and family. Such services were generally seen as 'an interesting extra', and were not part of the justification for, and value in, their digital subscription.

The main concern was distinguishing between free and paid for services, and those who had not incurred charges were particularly unclear as they hadn't been through the 'purchasing' sequence.

Most respondents had experienced technical difficulties with interactivity : freezing, having to reboot, PIN code problems; but the most common complaint was the speed of interactive services.

Like the TV Guide, interactive services tended to 'take over' the television when being used, and were consistently criticised for doing so. Respondents argued that this was a 'selfish' use of the television when others were watching.

Whilst the 'player cam' was sometimes seen as a gimmick, alternative cameras were felt to genuinely offer 'more' television, surprisingly, without charging any more.

Respondents were very confused indeed about the home shopping offer. Most felt it was a significantly limited offer, with only a few retailers subscribing to the service. Where added value was offered via special offers and last minute bargains, the service rose in their estimation. However, again the issue amongst viewers was that it meant a selfish, inappropriate use of the television in multi-person households.

On-line banking was almost universally rejected. Those who wanted to bank remotely already did so (via telephone and internet banking), and those who did not already have 'remote' accounts were extremely uncomfortable with the idea of managing their account on a large screen TV in the middle of their living room.

Email also has very limited appeal, and those who had tried it out once or twice had experienced technical difficulties and had simply given up. In any case most already had at least one email address and they were extremely concerned about the lack of compatibility with PCs, particularly in relation to the management of attached documents.

All such services were felt to involve 'work' type activities: thinking, rationalising, judging, assessing etc., whereas respondents felt that their home, and particularly television was a much more casual, looser environment. This environment was a more emotional, haphazard, serendipitous one, and thus they found it very hard to accommodate most of the on-line activities in that context.

Games were an exception to this, as they too were much more 'lighthearted', irrational and thus relaxing. Many households used the games as a 'short break' activity, never taking the games seriously, but valuing them as a nice extra. Family members sometimes competed against one another.

A minority of the sample however rejected the games, seeing them as very unsophisticated, and "naff".

5.6. Digital Text Services

There was very low awareness indeed of digital text services amongst this sample, however those who had come across it (a few within the sample) liked it a great deal. They felt that like the EPG, this represented breakthrough technology, technology which spoke their language and was much more intuitive. The only criticisms they made was of the speed of the service and any lack of a symbol to reassure them that their request had been received and was being worked on.

5.7. PC Versus Digital Television

Watching digital television was felt to be a communal, social, 'browsing', imprecise and unplanned activity and as such, was extremely relaxing for respondents. Having to actively "pull yourself together", start thinking and 'driving' the television was for them, anathema. Thus, activities such as games, or basic letter writing or video choosing might fit the environment, however in their current thinking 'rational' activities such as banking, even shopping were difficult to envisage.

The second issue of whether the digital television is an alternative to the PC or not depended very much on whether respondents had any PC experience or not, and whether they expected to have to acquire PC skills in the future.

A very small group within the sample had not acquired PC skills, but felt very left behind in terms of the internet. They tended to be elderly, and very nervous of the PC learning curve. For them digital television offered a unique chance to get on-line without having to learn to use a PC and without having to make an investment in equipment which would be so over-specified for their needs as to intimidate them. They loved the idea that they could get internet access and an email address from their digital television. They tended to be people who had explored their service fairly extensively, so already had a relationship with the service providers' helpline, and so felt much more confident in trying out the internet with their service provider than with some unknown ISP (although they would not know the term ISP). This, very small, group were very enthusiastic.

The rest of the sample, it must be said, were not, and they rejected the idea fairly actively. In the first place most had some knowledge of PCs and felt that they were becoming easier and easier to understand, and that it was worth learning how to use them to access the internet in its entirety. Most already had an email address, and had everything set up to be sent to that email address.

As mentioned above, the whole ethos of 'working' the television was resisted, so the idea of surfing, composing and reading emails was rejected. The compatibility issues were also extremely important for them: they wanted to be able to save what they were doing, print it, and exchange it with their PC (and not just by emailing it).

Thus, for a very small minority, the digital television offered an extremely attractive alternative, but for the vast majority, it usurps a family or household resource, and was felt to involve inappropriate and selfish behaviour.

5.8. Integrated Digital Television

The appeal of such televisions was much more to do with widescreen picture and stereo quality sound than the integration of the decoder. Indeed some subscribers were very concerned indeed about having a piece of equipment they had found to be very unreliable integrated into their main source of entertainment.

There was some awareness of what 'basic' channels in a package were, and which were the 'premium' channels which pushed up the price of a package, however there was almost no awareness of which channels were free to air – indeed the concept was a foreign one for them in the context of subscription television.

5.9. Into the Future

For most respondents the main 'breakthrough' had come with subscription television: more channels, more choice. The EPG had added the ability to browse through those channels easily, and digital text promised a service with the same user friendliness as the EPG. Their vision of the future therefore was simply 'more of the same', i.e. there will be more and more channels added, and the EPG and text services will become even more comprehensive and easy to use. The appearance of voice commands was anticipated with interest, although there was some amusement expressed at the idea : for instance, if two users within the household disagreed over which programmes to watch, which voice would the television give priority to?

Digital subscribers felt they already had a version of Video-on-Demand, and Sky subscribers were aware that a new version of their Box Office service was coming which would allow them more options, which again for them, obviated the need for Video-on-Demand.

Interactivity in the context of advertising was liked and indeed the two ideas fitted one another :i.e. they were both seen as 'lighthearted' and gimmicks. Some had even tried out the interactivity in certain ads, and had received their free samples and booklets.

As with Video-on-Demand, respondents felt that although the automatic recording function sounded interesting and useful on first hearing about it, on reflection they already used channels for catch up TV when they had missed a programme they had wanted to see. There was a definite perception that programmes were available throughout the schedule, and that a programme missed could fairly easily be picked up elsewhere.

Finally, when faced with a variety of options for services to help them make sense of even greater numbers of channels respondents found it hard to identify the value to themselves. They were actually quite confident that they would be able to make sense of an offer that included thousands of channels – they argued they would only ever value 40 to 50 of those thousands, and given the EPG, could find their way through that offer quickly and efficiently themselves.

5.10. Conclusions

Throughout the discussions, respondents constantly referred back to their satisfaction with their service. At the core of their decision to take out digital subscription television, was a desire for more choice and more channels. They feel they have had this delivered, therefore critical comments are not really justified.

The way the audience is watching television has fundamentally changed with the arrival of digital subscription television. Viewers are taking responsibility for their own viewing, and are sticking to favoured genres much more tightly than with terrestrial, scheduled television. This is particularly true of children's viewing. It seems to lead to a marked increase in conservatism over viewing choice, significantly shorter attention spans, and regular browsing whilst watching a programme.

Parents are significantly less likely to check and monitor their children's viewing, and have withdrawn from the standards debate. There is a significantly increased sense of having no power to change their service in the face of the enormity of the three main service provider. This is enhanced by a sense that they are being 'worked over' for increased revenue, and that there seems little that anyone can, or is, doing to stop this.

The EPG and its organisation of channels by genre are crucial to viewers being able to find programmes. It is irrelevant at which 'end' of the list new channels are put, so long as they are within genre, viewers see 'the list' as a continuous one, rather than a hierarchical one. However channel identity and branding have become crucial, given the few seconds (maximum) which viewers will give a channel to 'prove' itself of interest.

The technical delivery of the service has discouraged many from fully exploring the service, and the perceived lack of clarity around when and what is being charged has also had an impact.

Some overview of the range of services available and how they work would help viewers a great deal. This should be a printed version, as many of the viewers still felt uncomfortable outside of the 'main' channels, and wanted to be able to come back and check a service at their own pace.

6. Main Findings of the Research

6.1. Characteristics of the Sample

There were a number of features noted in the sample, which were distinctive, compared with previous research and with broadcast research with other groups.

First, aside from big media events such as Wimbledon and Big Brother (both of which were broadcast during the research fieldwork period), or genre interests, it was very difficult for respondents to find programmes in common to discuss. This was one of the most clear pieces of evidence of an unprecedented fragmentation of the audience, and of their experience of television. Certainly it indicated a major change to how programmes are watched, and possibly heralds the end of the audience's valuing of schedules and scheduling in traditional terms.

"You haven't got anything to talk about because you don't watch the same things"

(PG4)

Digital television viewers felt that they had enormous choice and that they were truly now 'consumers', however choice of programme on this level implied a different kind of viewer. That is, these viewers expected to have to be much more active in both reviewing the range of 'what's on', as well as choosing a programme to suit their tastes. Thus, there was clear evidence of a dramatic increase in the incidence of 'zapping', i.e. dipping into programmes for just a few seconds, and then moving on to another channel speculating that "there's probably something better somewhere else".

"I change my mind all the time, I like flicking through the channels"

(PG4)

This meant that often viewers had seen only part of programmes, and there was little sense of the 'point' of television being to watch whole programmes.

"My mates say 'did you see such and such?' and I say, 'I saw some of it'"

(HD4)

One implication of this change was that the descriptions and labelling of both programmes and channels had become much more important. They often made decisions on the basis of very little information, and on the basis of their knowledge of the channel, rather than individual programmes. Thus they talked about channels in the way they used to talk about individual programmes, expecting that each channel would have a strongly themed and clear 'personality' and offer.

Another major change was identified : the rising importance of genre interests. Because there were so many programmes on offer, viewers felt that they always had a choice which included their favourite genre or type of programme. The main genre interests identified in the sample clearly echoed the groupings identified in the electronic programme guide : entertainment, films, sports, factual (news and current affairs, history, 'the natural world' etc), children's, and film. Viewers knew exactly where and how to find these channels, and because they were all grouped together, felt that there was real

choice at all times, compared with their non-digital and non-subscription options.

Discussion tended to be pitched at a general, genre/ channel level, rather than at the individual programme level, yet there was surprisingly little discussion of individual broadcaster, and certainly none of the declarations of loyalty to BBC or ITV which are normally heard in such research groups.

Another point of difference was the confidence each member of the household had in naming the channels and programmes of interest to other members of their family. One key factor throughout the research also explains this confidence: that is, the general restriction of digital television to one set, almost always the set in the common living room. This television is very visible, at the heart of the family's interaction (particularly in the context of households with digital television), and is used more by all members of the family. Normal patterns of interaction were also sometimes reversed by the digital services – children were often showing parents how to switch channel, or where particular services were. Families also reported the digital television being in great demand because of what they called the high quality of the picture. Although the instances of joint usage of digital services was erratic, and based on how long they had had the service (i.e. the newer the service, the more likely family members would be 'learning' and showing each other newly discovered features together), there was relatively little evidence of a 'new' type of watching. That is, there was little evidence of families actually playing games together, using the internet together, or other digital services. The new behaviour in evidence was much more casual, with parents and children looking over their shoulder much more at what the other was looking at or doing, and occasionally being pulled in to what they were doing or watching.

Another result of the 'communal digital television' was that parents were much more laissez faire about what their children were watching than is the case in non-digital households (even when compared with other non-digital subscription households).

"I don't really worry about him ... the time of day he's watching, ... he only really looks at kids things"

(HD4)

Part of the reason for this must be the sheer number of channels available and the inability of parents to understand, know and control the whole range of what is available to digital subscription viewers. However, another reason for this is the location of the digital television : in the very public area of the living room. This seemed to give parents confidence that they knew what their children were watching, and therefore could be relatively confident that they weren't watching anything too demanding.

In relation to service providers, this sample tended to have a very 'laissez faire' attitude. There were a number of reasons for this: first, they felt that there were so few providers (getting fewer) and therefore you had to accept what they offered fairly uncomplainingly.

"What can you do, I can't get cable here, and so the only option's Sky"

(PG3)

Second, they argued that all "decent" television nowadays costs money and therefore dealing with one or another commercial organisation providing

television services was inevitable. Third, as they defined themselves as consumers because of the wide choice they felt they had, they expected to have a more commercial, utilitarian relationship with service/ platform providers. Fourth, unlike “normal” television, even analogue subscription, they all felt that the digital providers were constantly trying to upgrade, update and improve their service.

“Every time I look there’s something new. If they haven’t got something now, you can bet they’ll have it soon.”

(HD 8)

However, there was no spontaneous mention of public service broadcasting. Respondents definitely saw television as a matter of profit rather than standards, and were becoming more and more sensitive about how they were approached and the way in which service providers were targeting them.

“I used to subscribe to the movie package, but when Box Office came along, they put all the good films on there, and you ended up paying more for it. So I got rid of the package and I now just do the Box Office thing”

(PG 3)

They defined themselves as consumers, and felt that as consumers, they could hardly complain, since they did have a choice from amongst an enormous number of channels. The fact that they only used a small proportion of those channels tended to be explained by them as a factor more to do with their taste than the quality or range of what’s provided.

“There’s over 200 channels on there, you can’t complain really, can you. And they’re adding new ones all the time”

(PG 6)

Thus, most declared they were “very happy” with their subscription, and there were surprisingly few complaints – again an unusual feature of a sample which includes mostly subscription viewers. Another element in the high level of satisfaction identified was the electronic programme guide (EPG), which they felt was simply “a new way of getting around the channels”. The EPG is discussed in section 6.4.

Whilst the additional services – “the other bits” – were noticed, liked and used heavily by some, for all they were peripheral to their perception of digital subscription television, and the value they put on it.

The arrival of their digital subscription service had also had a significant impact on their use of other, related equipment. All argued that its introduction had resulted in them using their video only very rarely. They felt that they could easily find the programme they had missed somewhere else another time, but also felt that because they always had so much choice, the need to store up ‘extra’ programmes to watch via the video had disappeared. The only exception to this were drama series where the respondents had missed one – particularly the last – episode. Thus television had become much less of an ‘event’ which was anticipated and enjoyed. Further, the inclusion of pay per view (PPV) films, and the quality of their digital picture, meant that many rejected the purchase of a DVD player.

“I was going to get one until we got the digital TV, but we use that now, and you don’t have to buy the DVDs so it’s much cheaper”

(TD 2)

In discussing their satisfaction with their service provision, respondents made a very clear distinction between the 'service' itself (i.e. the programmes, EPG, interactive services, and on-line offer), and the technology that delivered those services to them. Whilst they were generally very pleased indeed with the former, there were many, many complaints about the latter. Interestingly however, they did not blame the service providers for poor technology, unless they were asking for money over and above their monthly subscription. Part of their tolerance of technical difficulties (explained in 6.2 in the discussion of the relative merits of the various service providers) was that they felt they were using 'cutting edge' technology, and that digital television was still in its infancy.

"They've obviously had some teething trouble, but then you expect that"

(PG 6)

Obviously part of their tolerance comes from their comparison of digital television with terrestrial television: once multi-channel environment is the norm, it is likely that expectations will rise, and this tolerance will disappear.

Further, although satisfied and tolerant, respondents' tolerance was partly characterised by fatalism : they regularly asked the question 'what would we do if we weren't happy'? That is, with so few providers, and such powerful providers, what chance does one individual and their preferences have? Therefore they argued that it was best to 'go with the flow', and pick and choose what you want from within the overall set package.

There were clear demographic factors which were important in terms of determining both attitudes to and use of, digital television.

Age was an important factor. Children tended to be much more confident with the service as a whole. They tended to learn to use it much more quickly, and would explore more widely than their parents, partly because they had a very strong tendency to flick through channels quickly, trying out and finding new channels for them to watch. Generally within the household the younger viewers would then pass on what they had learned to their parents, or older brothers and sisters.

Older respondents tended to be more interested in watching whole programmes – even through dull periods of the programme – than younger people. The latter had a very low tolerance threshold, and if a programme was failing to actively interest them, then they would simply start 'zapping' through other channels to see what was available. Further, older respondents also reported regularly watching programmes they wouldn't necessarily have chosen from TV listings, and enjoying the 'surprise' element. Younger people, on the other hand, seemed to 'cruise' for programmes within tried, tested and liked genres, and only very rarely gave programmes which were not within those categories a trial.

Older people, excepting those with an interest and time on their hands (e.g. retired respondents), tended to explore what was offered less. Indeed most felt that there was just so much available that no-one could know the whole of what was offered within the service, so they tended to stick to what they knew and enjoyed.

Whether respondents had been analogue subscribers or not also made a difference to both attitudes and behaviour. Those who had been analogue subscribers tended to be much happier with digital television. They argued that they had already been paying for their television, and digital television

offered better value for money because it provided so much more for a subscription which was little (if any) more than their analogue subscription. Cable subscribers in particular, reported being offered special offers which meant their subscription stayed the same whilst being provided with their digital receiver.

On the other hand, those jumping from terrestrial only to digital subscription tended to be less happy. They typically struggled with the idea of paying for television in any case, but what particularly irritated them was being asked not only for a subscription, but also for PPV. Some reported having to subscribe to digital television because of very poor quality reception, particularly in relation to Channel 5, and in the context of discussions with friends and family, felt that they were being left behind and making do with a very poor second best. On investigation, this was the group who were most likely to feel that the choice was very limited: they had no track record with any subscription service provider, and therefore tended to be more cynical and concerned when taking out their digital subscription.

Not unexpectedly, men tended to be more interested in the technical side of the service: they tended to learn to use the new remote control, after which they reported having to explain its use to their partner. They also tended to use the remote in a slightly different way, being more likely to switch channels using direct channel numbers rather than via the 'big list' (TV Guide), or scrolling through channels.

Women, in contrast, reported learning how to use it, and learning what the service offered via their children, or through friends. Typically they would be at a friend's house and notice something about their use which they would learn and then try out at home. Women were very unlikely to sit down and systematically work their way through the range of services on offer – they were very much more driven by interest and need.

There was some evidence of a North/ South divide in relation to concerns about cost and the calculation of value for money. Certainly subscribers in the North seemed to be much more careful about what elements of a package they took, whilst those in the South seemed more likely to take the 'whole' package.

Whether or not respondents had internet access at home via a PC was also a variable. For a very few, digital television offered a real alternative to going on-line via the PC, particularly for those who did not have internet access at home already. However, as described in detail in section 6.7, for most, particularly for those with internet access either at work or at home, digital television was preferred as a source of entertainment, rather than a tool for more work-associated activities, or for something which required an individual to concentrate on the television screen.

Finally, there were surprisingly few class differences within the sample, except those related to the North/ South difference outlined above.

6.2. Digital Television : Its Appeal

6.2.1 The Decision to 'Go Digital'

Amongst the sample there was a strong sense of digital television being almost 'normal' television, the only 'real' option. They argued that given good television has to be paid for nowadays, a subscriber may as well go for the

best quality subscription, which for them, meant digital. In any case, many reported service providers offering very cheap deals, with discounted telephone services, or a digital upgrade for no outlay and no additional subscription. Some respondents had been given their subscription free.

"We went to buy a new television – we wanted a widescreen one – and they gave us the subscription free for a year, and nothing to pay for the box obviously. ... The television wasn't that expensive either, it was a deal you just couldn't turn down (ITV Digital)"

(PD 1)

Most had read about digital television, indeed about "digital this, digital that", in the press, and felt that it was being signalled as a significant development – although very few had any idea what the 'digital difference' was. Certainly they felt it an appropriate time to make the leap into the "digital future", although all justified and rationalised their interest in digital television because of its offer of "more television".

"I've read so much about it in the paper, it's one of those words they bandy around. I don't know what it means, but it's supposed to be very good"

(PG 3)

"It's wonderful. It's the future. You can do everything with it ... even order a pizza"

(HD 8)

Picture quality was another important factor in the decision to 'go digital', particularly in areas where reception quality was bad. However all reported a significant improvement in their picture quality, which was also important in their judgement of value for money.

"Better picture, better package ... everything's going that way"

(HD2)

Another motivator in relation to digital television was the knowledge that analogue signals were to be switched off (although there was a great deal of confusion about when, by whom and why).

"It's the government, they're just trying to get more money from us. You wait, the licence fee will shoot up"

(PG 3)

Children also played an important role. Parents reported being nagged and cajoled into upgrading to digital, but again the children were nagging for more channels, rather than for any of the digital services such as interactivity, games or email.

"I think they got (Digital TV) for us, because when we're watching it we're not fighting"

(PG2)

All in all, however, respondents felt that the decision to go digital had not been a very big one, and one that they were almost surprised to have been asked about.

Interestingly, there was much discussion about not only subscription being necessary if you had a particular interest that you wanted to follow on television (even if that was ‘just to be entertained’), but nowadays, digital subscription. Thus, those who liked cinema felt that they needed digital subscription to have the choice of films they wanted. Those who were sports fans in particular, argued very strongly that the only way to have access to sports coverage was to have digital subscription. Finally, for everyone else, it meant viewing via ‘genre’ to the extent that it satisfied their interest in “being able to see the kind of thing I’m interested in” whenever they want.

The additional services available via digital were almost never spontaneously mentioned as part of the motivation for a digital subscription. They were ‘nice to have’ once the subscriber had made the decision, however they were not part of the initial decision at all. That decision was made purely on the grounds of ‘more choice’, and with ‘better quality picture/ reception’ as the chief support.

6.2.2. Issues in Relation to Service Providers

A contradiction emerged in the discussions, one which the respondents identified themselves, yet could not resolve. That is, on the one hand they were very content with their digital subscription, and they felt that one day soon everyone will be paying for their television. On the other hand, given the change in the marketplace towards the dominance of commercial imperatives, they were uncomfortable about their position. As subscribers, they felt they should be valued, cherished as customers. However, on the contrary, they actually felt ‘targeted’ and manipulated by their service providers. The feeling was that these companies are such strong global players that they could, do and would, do exactly what they want. Of particular concern was PPV, and they cited a variety of examples to illustrate the grounds for their fear. First, they talked about taking out subscriptions to packages which were supposed to include very recent film releases, but then with the advent of Box Office were in effect downgraded, and those who wanted to see the newest releases had to pay – again. A second example given in evidence was recent changes to the configuration of packages : again this made them feel they were being manipulated to maximise ‘yield per customer’. Third, they pointed out changes in charging structures which meant (they thought) that they had ended up paying more. Changes in sports packages were particularly controversial, and given that some were already annoyed that they had to pay for sports per se, the added pain of ppv for sports made the men in particular, rather angry. They felt that ‘in the old days’ they had unlimited access to all sorts of top sports events, but that the introduction of subscription television had meant that all sports fans had to now pay for what had been free.

“The price just keeps going up. I’ve got to pay twice as much for the same amount of viewing”

(HD7)

“I used to have the movie package, but then they moved all the best films to Box Office, so I’ve downgraded to the basic package”

(PG 3)

“I don’t like the way they change the offer all the time”

(HD7)

Generally the outcome of this argument was an agreement that they hoped that good competition would always be around, and that they would always feel they had an option, should one company ever cross their tolerance boundary.

6.3. Learning About Services

Respondents reported very varied levels of service as far as demonstration on delivery was concerned. For most, the installer had simply shown them 'the list', i.e. the TV Guide page, and then left, usually without leaving a manual. Some had discovered the tutorial, however most had found their own way around the service. A very few had been shown all the relevant services by the installer, which was appreciated.

Most respondents started by trying to find how to change channel. Then they tried to build up some sense of where their favourite, known channels were within the overall ordering of the channels. Once this had been mastered, they tended to 'go exploring', first of all via the buttons on the remote.

"You see these buttons and because they've got labels on them, to try them out and see"

(PG 8)

For digital satellite subscribers this meant some exploration of the four keys at the top as well as the rest of the remote. For all it soon became obvious that the keys meant different things in different contexts, so they would start experimenting.

Given the main motivation was more television, the crucial part of the service to explore was the range of channels available, and indeed some respondents, having found the range, didn't try to explore their service any further.

Most, however, did start exploring other services, particularly younger respondents. This would start a discussion in the household, with members who had discovered something (such as games, or digital text, or the function of the 'i' button), demonstrating their finds to the rest of the household. They also reported discovering services at friends' houses, and the friends would then demonstrate to them how they worked.

"My parents read all the instructions, but I didn't, I just fiddled around with the remote and found things"

(PG3)

Some respondents reported reading their digital subscribers' magazine, in order to pick up some tips of what was available and how to use it. During the period of the research, the BBC introduced interactive Wimbledon which many of the sample had read about in the press.

Respondents sometimes came across extra services simply by accident. One common mistake which was made was to go to the TV Guide and hit the planning section instead of browsing, so that the reminder came on-screen when the programme they thought they were choosing actually came on. Respondents had made a point of learning how they'd done that, and then used the service regularly in the future.

Generally respondents felt the whole system was very easy, user friendly and intuitive. One key point of differentiation between the 'extra' services was whether the viewer could still watch television whilst using the extra service. That is, those services which meant the picture was temporarily lost tended to be used less regularly.

"Sometimes it's a little confusing to start with, but you've got to expect that. We've just worked out the news thing (interactive). It only takes a few minutes"

(HD5)

Respondents compared their new digital system with their old remote control and the logic of the video and argued that the new way of changing channel was supremely logical and easy.

Finally, respondents felt that they had learned a lot about the range of services offered on digital as well as the range of channels simply because the television was on more often. It was used as background 'noise', as radio, as well as providing a short and entertaining diversion from housework, homework or even DIY. This tended to be the most typical use of those extra services; i.e. as a short 'extra' that's fitted in between other activities (including watching television), rather than activities in their own right.

6.4. The Electronic Programme Guide

6.4.1. Defining the EPG

There was absolutely no awareness amongst the sample of what an electronic programme guide was. For them, digital television meant an enormous choice, but because of the 'new remote', they felt it was actually much easier to find the desired programme – even compared with terrestrial only television. Further, respondents argued that the 'real' choice was never the mythical 400 channels in any case; actually they saw the real choice as being the much more limited range of channels which were of interest to that viewer – typically 40-50, but as low as 10 or 20.

When finding and choosing programmes respondents tended to use a mix of different kinds of navigation methods, all of which are dependent on an understanding of the 'order' and 'grouping' of the channels.

"Everything's laid out together ... the different types of channels are together"

(HD4)

All in all, respondents felt that they were using their new service to a much deeper level than their old service. Not only did they have many more channels to choose from, they also were able to find programmes they wanted to watch.

"The whole concept of navigation was interesting because we didn't have it before .. this is going to make the papers redundant ...it's constantly updated"

(HD5)

Two principles methods of changing channel were used. The 'big list' was obviously one of those, but many others used the scrolling function. A third method was used less often, but strategically, i.e. inputting the channel number direct. Viewers used different methods within the same household, and others used all three methods at different times. None of these navigation methods were referred to as the 'electronic programme guide',

indeed none of these methods were seen as 'methods' or services, they were simply an intuitive and easy way of finding your channel.

6.4.2. 'The Big List'/ TV Guide

This was generally demonstrated by the installer, and then used frequently. It was interesting that respondents found it so difficult to spend one day without using their list – even with the 'scrolling' facility which they should not have used. They reported feeling lost, feeling they were wasting time looking through channels, and indeed.

The TV Guide was very valuable to viewers in this new context. They felt that there was so much available, and that they needed to know the range of what's on very quickly (to maximise their viewing from the range, as well as to reassure themselves that there's nothing better on another channel), or to move quickly to another channel. It's visual quality was extremely valuable: being able to scan the page and look at the relevant start and finish times whilst checking what was on, was liked a great deal. The 'i' button was also praised, as it made it so easy to find further information on specific programmes. To sum up, it allowed them a general overview, and also allowed them to go to the depth they wanted all in a quick and easy format.

"Basically you've eliminated having a Radio Times"

(HD5)

Most respondents tended to use the complete listing, rather than going through genres, unless they specifically only wanted to watch a film, or sports, or news. The feeling was that the list was so fast in any case, and the total range of channels was what they were paying for, that it made more sense to go through the large list. This also helped them keep track of new channels. It also helped them see what was coming up later, making planning their evening's viewing easier. The exception to this was children, who tended to go straight to the children's section.

Having gone through the TV Guide helped respondents build up a picture of the order of channels, and where genres were in relation to one another. They tended to build up a very clear mental picture of the list, which proved invaluable when using other types of navigation.

Because of the speed at which viewers scanned through the list, it was vital that the channel identity was clear and distinct, and that the name evoked a particular identity and set expectations realistically.

For a few the guide was not as attractive or simple as the printed version, however for most it had all the information required, presented in a simple and easy form, and worked simply and intuitively.

"I think the information is especially good for films, it tells you how long they're on"

(HD7)

The TV Guide had some distinct disadvantages which were pointed out. First, it was clearly an advantage to be near to top of the list, even when they said they went through the whole list, they reported that they tended to have chosen a channel fairly quickly. It encouraged more frequent switching, as mentioned, particularly amongst young people. However the key issue with the TV Guide was that it interrupted viewing, which they saw as the main 'point' of the television. It also annoyed others who were watching at the time,

and had what was described as “annoying” accompanying music. However, as with their judgement of other elements of the service, respondents were sure that the service would improve, and that in the future, significant improvements would be made.

Because the TV Guide was used so often, and because its logic was liked so much, respondents wanted to stay within that environment, which meant that any channel not listed – such as ITV – was missed. Indeed respondents reported a significant decrease in the ITV viewing since their digital subscription.

Finally, because they are flicking through channels so quickly, it was easier to miss new channels on the list. Respondents therefore suggested that new channels could be highlighted in some way for the first month. This was only really an issue in relation to new channels which had no launch promotion – for a channel such as E4 this was felt to be completely unnecessary.

Since they can find more of what they want through their digital subscription, there were high levels of satisfaction with digital television. Children were the most promiscuous viewers, with a very short evaluation period for each channel when looking for a programme of interest. Parents tended to be much more laissez faire about their children’s viewing in this context, feeling that there were so many channels, and that digital television was becoming so ubiquitous, that they as parents had had to give up the attempt to control what their children were watching. Rather, they felt they had to trust their children, and for those who were very concerned, the parental control button gave them the opportunity to screen what their children were viewing. However, by and large, parents were unconcerned about the children’s viewing, feeling that if their children were watching on the digital television, then they would be directly under their supervision in any case, since they would be in the living room.

6.4.3. Scrolling

The key advantage of this method is that the current programme could be watched whilst checking out what was on the other channels. Many respondents used this alongside other methods of scanning and choosing channels. Few actually used the facility to scroll through the channels themselves, rather they would keep watching the channel they were on, whilst checking the information available on the other channels until they found what they judged to be a better offer. The genre organisation was particularly helpful here, since most viewers wanted to browse within a genre, which this allowed easily.

“I use the thin blue one ... as far as the main TV guide is concerned”

(HD4)

“I like that (the channel bar) because you can see what’s on without leaving the channel”

(HD5)

However, this method was annoying or off-putting for some, since it took some time to scroll through the channels, and because of the linear and therefore chronological delivery of the information, some respondents had forgotten what was on a previous channel, and so could not compare the offers.

Another issue was that family members read at different speeds, and whilst the children in particular would be scrolling at high speed, older people found it difficult to assimilate the information so quickly.

Finally, this method was felt to be very inadequate if the viewer wanted to change genre. So, for instance, if someone had been watching news and wanted to go to entertainment, they had too far to scroll. Many respondents would learn one or two channel numbers from each genre so that they had an easy and quick way of jumping to the genre, after which they could easily scroll to the channel of interest, or have a look at what was on offer within the genre.

6.4.4. Favourites/ Personalisation

No-one spontaneously mentioned personalisation or favourites, and only a small handful had actually personalised it. One example was a young father who had customised the blue button in digital satellite to allow his two young children to use the one button to scroll round their favourite children's channels without touching any of the rest of the remote. Another was a young ITV Digital subscriber who had just bought a new television, and had had fun "playing around" with it when he first took delivery.

For others, it was difficult to see the point of customisation. They argued that they had subscribed to digital television specifically to have more choice, so the idea of restricting their choice subsequently struck them as odd. They argued that they wanted to see the range of what was available, just to keep up with the range of what digital subscription services were offering.

Long-term subscribers had seen channels change (e.g. Bravo), and new channels being introduced, so they felt there was a strong argument for keeping an eye on all channels, just in case any changed, evolved or were introduced.

Indeed on a couple of occasions the customisation had caused a little friction between partners – one partner being worried that they would be restricted to the others' choices. For most it added an unnecessary and unwelcome additional level of complication.

Others felt that it was crazy to edit out channels, unless this had an impact on their subscription.

A kind of customisation was carried out by respondents, i.e. when they were flicking through channels (via scrolling or the TV Guide), they were mentally excluding some which were on the list, which helped make it easier for them to scan.

Most felt that if there was some level of customisation available in relation to internet or email (particularly for confidentiality), then if they did find a use for those services then personalisation and customisation might be relevant in that context. However generally there was a negative response to the idea, except in relation to children or where it would mean a reduction in their subscription.

6.4.5. The 'i' Button

Most respondents found this button extremely useful, clear and helpful. When used by respondents when they were viewing a particular channel it was felt to give the right level of information, in the right depth. When used in the context of the TV Guide, it was also felt to be very useful, providing further information at the point of decision. As with other navigation tools, it was

cited as another example of how well thought out the whole process of finding and choosing channels was, and it was described as a contemporary example of how text information should work. It was judged to be very clear in its label and in its position on the remote.

"I like the information. You press this button and get information about the programme that's on"

(HD5)

For a few there was some confusion between 'information' and 'interactive', however most felt that the red button was becoming established as the interactive key.

Finally, the 'i' button gave information only on the channel being viewed. Respondents wanted to have the facility to have more information on channels being browsed via the 'i' button.

6.4.6. The Remote

Cable users complained bitterly that the volume had to be adjusted via their television remote, which meant they had to use two remote controls concurrently.

In all other cases the remote was very highly praised. Unlike previous remote controls, they felt they understood what all of the buttons were for and that they were labelled clearly. The navigation keys were clear, straightforward, and encouraged experimentation. The colour coding of some of the buttons was also liked, particularly where purchase decisions might be made: they hoped that it would ensure that they knew exactly when they were doing and confirming.

6.4.7. Implications

Viewers felt that their digital subscription had given them a breakthrough in terms of finding and choosing programmes. It was, however, absolutely crucial for them that the organisation of the 'big list' or TV Guide follow the channel order, particularly the location of channels by genre. This meant that it was vital for new channels to be inserted into the right genre area, although there were no complaints about the allocation of channels to genre, nor the allocation of new channels at the edges of genres.

It would be very helpful if the language used could be standardised, although there was no 'winner' in terms of either perceived clarity or popularity within this research.

Finally, respondents' orientation to this list was anchored by the channel they were currently watching. They therefore wanted to be able to move from that point, rather than from the beginning of the TV Guide. Thus, it would be helpful if the list could reflect the start point of the channel currently being viewed.

6.5. Interactive Services

Generally the research uncovered mixed responses to interactive services. Some subscribers had no idea whether they actually had any interactivity at all or not, even after 2 hours' discussion. Others knew there were some such services available within their subscription but had only briefly tried them out, then ignored them.

Whilst such services were felt to be easy to find for those who naturally enjoyed exploring the service on-screen, most respondents felt it was more difficult to get an overview of what was actually available, and the benefit or 'point' of the service. Many had found out from friends and family about both the existence of such services and how they work, however it must be said that generally they were felt to be a little 'gimmicky', albeit nice to have.

Their understanding of what was included in and excluded from 'interactive services' definition was very hazy, and the main distinction they used was between interactive services which were free, and those which had to be paid for. The reasons why some incurred charges and others didn't was not always clear, and this led to some confusion about when they were paying and when they were not. So for instance, alternative camera angles were available free, but voting to participate in Big Brother was not, even though both were accessed via the red button.

Many had concerns about security, given the context for interactivity : i.e. the very public front room.

Awareness of interactive services generally was very low, Sky News Interactive being seen as the only currently available 'genuine' full time version. Others were certainly available, however they only appeared sporadically, which confused.

Most respondents reported technical difficulties with their interactivity. For instance, many had experienced difficulties connecting, and were concerned that their line wasn't working; other had had to reboot and start again; yet others had experienced problems with PIN codes; most complained about the very slow speed (particularly where there was no on-screen indication of whether the command had been received or not – e.g. such as in BBC's digital text), and finally, most complained that the interactive services interrupted normal viewing. Throughout the research most respondents cited this 'selfish' use of the digital television as something very irritating. For them, since there can only be one digital television, it's use should be as communal as possible.

"You watch a programme and that's it. I don't want people messing about with things when I'm watching"

(PG4)

6.5.1. Playercam/ Alternative Camera

Only a minority within the sample knew about this facility, and fewer still had used it. Big Brother was popular at the time of the fieldwork, and in this context the alternative cameras were thought to be "just a bit of fun", and regularly checked by those who were fans of Big Brother.

In the context of Wimbledon, the alternative cameras were felt to add another choice, and thus increasing viewer choice, something which they liked a great deal. However given this extra choice, viewers were surprised that there was no extra charge. There were also concerns about the size of screen for the additional cameras, as well as the picture quality.

Where the 'extra' camera actually included highlights, again the few who had found the service rated it very highly indeed – something extra.

"I come home from work and the game is on ... I go straight to the highlights"

(HD2)

Certainly most felt that this was something they'd look out for in the future, particularly in a genre that they liked, however they hoped quality issues would be addressed.

6.5.2. Home Shopping

There was an enormous degree of confusion about what this offer was and how it would work. Very few think of digital television as internet related.

"It's not got the internet address, the w w w, dot com thing"

(PG 3)

Amongst those who did recognise that it must be an equivalent, or the internet itself, there was a feeling that it was a very limited version – "not the proper thing".

"I've looked at it, but I'd use the PC if I was going to do that"

(HD4)

Most had taken a look to assess what was included in the offer, however very few had taken it any further.

"I've looked at the shopping channels but I tend not to buy. I go to the shops to buy, I use the TV just like a catalogue"

(PG2)

There were a number of reasons for this. In the first place it was felt that television was not an appropriate context for this kind of semi-serious, individual type activity. They felt that television was much more enjoyable as a communal, lighthearted, entertaining or educational tool, something which delivered to you, and which didn't demand that you respond to it. Second, the range of shopping available was heavily criticised. Third, some felt it was far too difficult to assess the quality of goods virtually, and that they would always want to assess products in person. Fourth, some felt it to be too much of a gimmick to use as a serious tool.

A minority did like the idea and had tried it out, however they tended to praise it's last minute offers and discounts, rather than full-price goods.

6.5.3. On-Line Banking

Across the whole sample there were very few indeed who did other than dismiss the idea. They criticised the limited range of banks offering services in this way; they also felt that the public environment of the living room was inappropriate for displaying personal bank details, whilst others were simply anti-internet, electronic, or remote banking per se.

"I'm not using this for banking, no way!"

(HD2)

Some quite liked the idea, however they were all already using either internet banking via a PC or telephone banking.

Again others criticised such a 'selfish' use of the television. Security was a major issue for all, even those with PC on-line banking. The issue was the openness and unknown nature of television's connection to the internet, and its strong association with entertainment. It simply felt an uncomfortable and inappropriate environment in which to conduct something like banking. Indeed generally there was very little awareness of service providers' security

arrangements, and they were suspicious of their expertise (“Johnny come lately”)

6.5.4. Email

Interestingly this was only an appealing idea to a very few of our sample. Aside from being criticised as a ‘selfish’ use of the television, respondents resented having to buy a keyboard, and having another black box-like object cluttering up their TV corner. They were experiencing bad freezing, and many reported having struggled to type out a message using their remote only to have their screen freeze.

“I’ve done it, but it took a long time to get through, so I gave up”

(PG2)

“It’s very annoying when you’ve just written a long email and it crashes”

(HD4)

“It’s hellish slow”

(HD2)

Not surprisingly this tended to put them off experimenting with it in the future. Respondents also judged the speed of the email section to be very slow indeed. However, the strongest criticism of the email facility amongst those who were using it, was its inability to interface with other media. There was confusion about how attachments would work; children were very concerned about how they could copy, cut and paste interesting information into their homework; others wondered how they would print; yet others liked the idea of a home email so they could avoid carrying files home – so they criticised the email for not having a facility to read Microsoft Office files.

“We’ve got a computer, so I tend not to bother”

(PG2)

Cable users were generally unsure about whether they had this facility or not, and ITV Digital subscribers were very unclear indeed about what kind of on-line or interactive elements they had.

Again the issue was both need (those with the need tended to have internet access via PCs at home anyway) and use. Again and again respondents claimed to feel uncomfortable with the idea of interactive television, arguing that they wanted to have a looser, more casual relationship with their television, resisting interacting with it and the kinds of activities that involves : thinking, judging, rationalising, choosing, assessing, calculating etc. They argued that they were happy to do those things at work, or in front of a PC, but that the whole activity of TV viewing was a much more emotional, haphazard, serendipitous one. The issue was not simply one of where the user sits in relation to the equipment (PC or TV), but rather the ‘logic’ required to operate it effectively. More will be covered in Section 6.7 on the PC vs TV issue.

“It’s not the internet, it’s a Telewest service. It’s not the world wide web, it’s just Telewest’s version”

(HD4)

6.5.5. Games

Not surprisingly, given the range of knowledge of and interest in, gaming within the sample, the idea of games within the package split the sample. Some were using them frequently and thoroughly enjoyed them. For this part of the sample, the games were not to be taken seriously, were not particularly addictive, but were simply a nice distraction, a pick me up. The games themselves were very simple, which was part of their charm. Their digital satellite provider was praised for adding new games regularly, and some had even posted their high scores on the leader boards. For parents there was some reporting of communal playing with their children, just 'for a laugh', again not for long, but just as a distraction. Interestingly, this type of 'selfish' use of the television did not come in for the same level of criticism. It can be argued that games have much more in common with television entertainment : they do not require logic so much as reaction, and are a good leveller – fathers usually seem to score far lower than their daughters.

“When we first got it, it was like every night. I got repetitive strain injury”

(PG2)

“I use the games sometimes, when there's nowt on telly”

(PG2)

Others were very critical of them. They described them as 'naff', being too basic, simple and slow to be of interest to them. For this group games were criticised for being a selfish use of the television, and had led to the screen freezing regularly when trying them out.

No-one reported web or communal game playing.

6.6. Digital Text Services

There was very low awareness indeed of digital text services amongst this sample of digital subscribers. Indeed only a handful of respondents were aware, and they were only aware of Sky Digital Text.

Where respondents had come across it they had liked it a great deal. They appreciated being able to watch TV whilst choosing the appropriate text via the picture in the corner of the television, however they criticised its disappearance when they followed through their choice.

They liked the menu driven system a great deal, and found it much easier to use compared with the traditional number system. The quality and clarity of the text was highly praised: they felt it looked 'breakthrough', next generation text, which they liked to think of themselves as part of. Its ease of access was liked too: they used the same button.

However there were some criticisms of digital text services made. First, it was felt to be very slow. Respondents reported messing up their system by pressing 'go' 3 or 4 times because they hadn't realised that the infra-red signal had already been picked up. The BBC's time bar was cited as a much clearer system. (N.B. The researchers demonstrated the BBC Text service within the groups to use for comparison with other text services).

Again cable users were unclear over whether they could also get this service.

6.7. PC versus Digital Television

There are two issues relevant here: what interactive services do respondents want via digital TV versus PC and why; and secondly, do viewers see digital television as an alternative to the PC, or is it an irrelevance, and why.

The first question has already been discussed in other sections to some extent, however the argument is as follows: digital television is a communal, social, 'browsing', imprecise and unplanned activity and as such is found extremely relaxing by respondents. It was of great value to them as a way of "chilling", forgetting their pressures, unwinding and disconnecting their brain. Having to actively "pull yourself together", start thinking and 'driving' the television was for them, anathema. Thus, activities such as games, or basic letter writing (the chatty, rambling letter to a friend perhaps), or video choosing might fit the environment, however in their current thinking 'rational' activities such as banking, even shopping are difficult to envisage.

The second issue of whether the digital television is an alternative to the PC or not depended very much on whether respondents had any PC experience or not, and whether they expected to have to acquire PC skills in the future.

There was a very small group within the sample had not acquired PC skills, but felt very left behind in terms of the internet. They tended to be elderly, and very nervous of the PC learning curve. For them digital television offered a unique chance to get on-line without having to learn to use a PC and without having to make an investment in equipment which would be so over-specified for their needs as to intimidate them. They felt left out when everyone was exchanging emails (although some had family who had printed out communal emails and posted them to them!), and loved the idea that they could get internet access and an email address from their digital television. They tended to be people who had explored their service fairly extensively, so already had a relationship with the service providers' helpline, and so felt much more confident in trying out the internet with their service provider than with some unknown ISP (although they would not know the term ISP). This, very small, group were very enthusiastic.

The rest of the sample, it must be said, were not, and they rejected the idea fairly actively. In the first place most had some knowledge of PCs and felt that they were becoming easier and easier to understand, and that it was worth learning how to use them to access the internet in its entirety. Most already had an email address, and had everything set up to be sent to that email address. In fact most had a second email address already (webmail, so that they could either keep private emails if their 'main' email address was their work address, or as an alternative when away from their PC).

As mentioned above, the whole ethos of 'working' the television was resisted, so the idea of surfing, composing and reading emails was rejected. The compatibility issues were also extremely important for them: they wanted to be able to save what they were doing, print it, and exchange it with their PC (and not just by emailing it).

Thus, for a very small minority, the digital television offered an extremely attractive alternative, but for the vast majority, it usurps a family or household resource, and was felt to involve inappropriate and selfish behaviour.

6.8. Integrated Digital Television

There was some basic awareness of such televisions, however there was absolutely no awareness of the facility to have a digital television without having a subscription. Given we were interviewing digital subscribers, it is not surprising that they felt this was a crazy idea, and that anyone investing in a digital television should really be prepared to carry at least a minimal subscription to make the most of their investment.

For many there was an expectation that their next television would be digital (again not necessarily understanding what that meant). The appeal was far more in the widescreen and CD quality sound than in the 'digital' element.

IDTV as a proposition has some appealing elements: it would mean only one remote control and thus less mess around the living room; because it had been built especially for digital, respondents expected better and more consistent quality; and finally, women in particular loved the idea of one integrated box, rather than a pile of black boxes in the corner of their living room.

However some subscribers became very concerned about the integration of the digital decoder, simply because they had experienced so many problems with their own equipment. For them the idea of buying an integrated appliance was very frightening – they were very concerned that every time the decoder broke down, they'd lose their television as well.

"It belongs to you then, no-one else would come to mend it"

(HD4)

"If new technology comes out, you'd have to get rid of the TV as well"

(HD7)

Respondents were generally aware that there were 'basic' and 'premium' channels, however they were very unsure about which the 'free to air' channels were, outside of the 5 main terrestrial channels. For a few within the sample who had subscribed to digital television in order to improve their signal, this proposition sounded very interesting.

Finally, there was some confusion over who the 'decoder' element would belong to and therefore who the contract would be with, i.e. the television manufacturer, or another service provider.

"How would they get over who the contract is with?"

(HD7)

Appendix 1

Discussion Guides

1 – Telephone Depths

2 – Household Depths

3 – Peer Groups

Discussion Guide : Telephone Depth Interviews

1. Introduction & Background

Moderator to outline the length, coverage and confidentiality of the interview.

Respondent then to tell the moderator about their interests generally.

Moderator then to go through the following:

- what are their favourite programmes
- when does the television tend to get switched on in their house
- how long, on an average day when they're watching television, would they watch for

FOR 1+ HOUSEHOLDS :

- when do they watch television together, and what would they watch on their own
- which is the television that has digital on it?
- are there ever any fights over watching the digital TV
- who would they say is 'master' of all that's on that TV
- who's the most keen on TV
- who uses the 'other' services on digital television the most?
- what are these services – inasmuch as they can remember spontaneously (detail taken on which, what, how)

Respondent to talk the moderator through how they feel about television:

- what would life be like without it
- how has it changed in the last 20 years, 10 years, 5 years
- what do they get out of it
- what are their concerns

3. Attitude to Digital (subscription and non-subscription)

FOR THOSE WITH NON-SUBSCRIPTION DIGITAL:

- what did they have before digital and why
- what did they like/ not like about it
- what made them decide to have subscription television or not before
- and what made them think about going to digital subscription
- what did they see as their options
- what was their decision-making process
- what role did each member of the family have in that decision making
- what had they heard about digital television : good and bad, from where
- what were the factors that 'swung it' for them : listed
- what stopped them taking out a pay-for subscription
- have they ever had subscription television
 - : if yes, what made them cancel?
 - : if no, why not

FOR THOSE WITH SUBSCRIPTION DIGITAL :

- what made them decide to have subscription television
- and what made them decide to have digital
- what did they see as their options

- what was their decision-making process
- what role did each member of the family have in that decision making
- what had they heard about digital television : good and bad, from where
- what were the factors that 'swung it' for them : listed
- what kind of choice did they perceive themselves to have, and what are the factors in discriminating between them
- why did they choose the provider they did : listed

When they first got it:

- how did they feel about it
- how easy was it to find out about the services and options available, apart from just 'more channels'
- how did they go about finding out about the additional services and options available to them viz digital
- what did they like/ dislike and why
- what did they find interesting, and want to try out
- what stopped them from finding more
- what stopped them from using the service more at the start

Once they'd had it a month or so

- what services were they regularly using by that point
- how did they feel about the service as a whole at that point
- what were they still wishing they were able to use that they weren't
- what was putting them off using all of the services available at that point
- what had they decided wasn't worth the effort – and why
- how much 'more' television were they watching/ what had changed about the way they were watching TV

NOW

- against those factors that they'd listed as being important in their decision-making, how well has the service performed
- against those factors how well has their provider delivered – why/ why not
- how satisfied are they overall – and why
- what are their intentions as far as the service is concerned : keep it/ discontinue/ change supplier – and why

PROMPT FOR FOLLOWING

- quality of picture/ sound
- internet based services (on-line email, shopping, banking)
- update-ability
- more television channels
- interactive television
- better text services

4. Digital Interactive Services

What did respondents understand was 'packaged' with their subscription or service? Which were the services that were drivers of their choice (if not already covered above).

Moderator then to prompt for the following:

IF ANY OF THE FOLLOWING USED, MODERATOR TO ASK THE RESPONDENT TO IMAGINE THE MODERATOR IS BLIND, AND TO TALK THEM THROUGH WHAT THEY DO

- interactive services such as playercam for football matches, choice of match for Wimbledon, interactive news, camera choice for The Proms etc.
- home shopping for holidays/ tickets/ weekly food shopping
- on-line banking and financial services through television
- internet and email services
- downloading/ playing games (including Web-games)
- how well would they say they understood what kinds of services they would have to pay for and those they wouldn't have to pay for?

PROBE THE FOLLOWING

- how often do they use it
- what do they think of it
- how easy were/ are they to use
- how useful are they
- what concerns/ experience have they have about reliability/ security
- what don't they like
- what could be better about them

FOR EACH NOT USED

- what puts them off using this service
- why haven't they had a go with it
- what would make them think about it?

5. Electronic Programme Guides

Moderator to ask how digital television has changed respondents viewing patterns

- how do they know what's on
- how do they find what's of interest to them
- what did they think they'd do before they got their service – and how does that compare with their EPG
- what do they call their EPG/ menu/ programme guide etc.?
- which of the EPGs do they use (the main one, the BBC one, other – which)

ASK FOR EACH:

- how did they learn to use that

TALK THE MODERATOR THROUGH WHAT THEY DO

- respondents to describe how their EPG works, its benefits and drawbacks
- how often do they use it, and for what kinds of things typically (find specific programmes, fit with mood, check 'what's on now' etc.)
- what do they think about its logic
- what do they think about the way the list is organised
- what problems have they had with it
- how could they be resolved
- how personalised/ customised have they made it (e.g. are there different identities, how much do they know about how that works, how interesting is it for them)
 - : who personalised it
 - : who decided what the list should contain
 - : is it a joint/ individual list/ decision

- : does everyone use the list – what do the others think of the list as well as what they think of the list
- who in their household is the one who uses the EPG most – and why
- what would make their use of the EPG better/ make it more helpful/ useful/ it's operation clearer

- do they use (if not already mentioned)
 - : now/ next
 - : search by genre
 - : favourites
 - : other – describe

- what do they think about the new channels they have
- how easy are they to find
- when they're browsing, do they tend to find what they want within the first few pages of scrolling, or do they tend to look to the end

6. Digital Text

What awareness of digital text did respondents have before taking up the service

What do they think of digital text

- how easy is it to use
- what are the barriers to use
- what do they like/ use often
- have they customised their use of the text – how, and why
- what are the improvements over analogue
- how do they feel about the link logic rather than the page numbers

7. Integrated Digital Television Sets

'Digital television sets' explained to respondents (where necessary). What have they heard, what do they think.

- Respondents to list digital channels which are free to air, if they can
- impression, even if vague, of those channels, and those 'kind' of channels (e.g. if they're free they must be rubbish' vs 'the best ones are the ones you don't pay for')
 - for the unaware, what do they think? How interested would they be in purchasing one in the future – more free channels, cheaper equipment, fewer remote controls, fewer boxes in the corner (hi-fi/ TV/ video, DVD) etc.
 - decision-making process for those who already own one – what prompted them to buy one, likes/ dislikes, status viz digital pay TV (have they had it before, was this a 'test' to see if they liked it, was this an 'instead of', did they have digital pay TV previously, or might they think about it in the future?)

8. Additional Features

What do respondents see as the future for digital TV, spontaneous suggestions probed, then the following prompted:

- video on demand – explained, and reactions probed
- facility where you could click on screen to select more information about a certain programme or advert (e.g. if you liked the T-shirt of someone in a soap, you click on the shirt and the supplier's details are there; or you get a précis of who they are in the programme, or you get further news if you click on one of the headlines streaming along the bottom)
- recording functionality which learns viewing preferences and automatically records programmes which are likely to be of interest

9. Digital TV vs PC

For household with a PC, discussion of how accessing the internet services via Digital TV compare with accessing internet services via their PC compare

- do they shop/ bank/ chat/ email via PC and/ or via TV and why for EACH
- which email addresses do they have/ which do they use for email addresses
- which do they use to browse
- advantages and disadvantages of each
- preferences : for each individually, then generally, if they had to choose only the one, which would they choose and why
- future development – which do they think they'll be using more of in the future and why

9. Summing Up

Respondents to sum up how they feel about digital television – advantages it's brought them, problems arising from it, and how they'd like to see the future.

Thank and close.

Discussion Guide : Household Depth Interviews

1. Introduction & Background

Moderator to outline the length, coverage and confidentiality of the interview. (For family depths : basically, we're going to have a conversation about what you think about television, and particularly digital television. We're going to have a short conversation together, and then we'll split up into two and look at your interests separately. We'll then get together and have a general conversation before we finish).

Respondent then to tell the moderator about their interests generally.

2. Attitudes to Television

Moderator then to go through the following:

- what are their favourite programmes
- when does the television tend to get switched on in their house
- how long, on an average day when they're watching television, would they watch for

FOR 1+ HOUSEHOLDS :

- when do they watch television together, and what would they watch on their own
- which is the television that has digital on it?
- are there ever any fights over watching the digital TV
- who would they say is 'master' of all that's on that TV
- who's the most keen on TV
- who uses the 'other' services on digital television the most? Which are they, probe for 'any more'

Respondent to talk the moderator through how they feel about television:

- what would life be like without it
- how has it changed in the last 20 years, 10 years, 5 years
- what do they get out of it
- what are their concerns

3. Attitude to Digital (subscription and non-subscription)

FOR THOSE WITH NON-SUBSCRIPTION DIGITAL:

- what made them decide to have digital
- what did they see as their options
- what was their decision-making process
- what role did each member of the family have in that decision making
- what had they heard about digital television : good and bad, from where
- what were the factors that 'swung it' for them : listed
- what stopped them taking out a pay-for subscription
- ever had subscription TV before, if not why not, and if yes, what made them stop subscribing

FOR THOSE WITH SUBSCRIPTION DIGITAL :

- what did they have before digital and why
- what did they like/ not like about it
- what made them decide to have subscription television or not before
- and what made them think about going to digital subscription
- what did they see as their options
- what was their decision-making process
- what role did each member of the family have in that decision making
- what had they heard about digital television : good and bad, from where
- what were the factors that 'swung it' for them : listed
- what kind of choice did they perceive themselves to have, and what are the factors in discriminating between them
- why did they choose the provider they did : listed

When they first got it:

- how did they feel about it
- how easy was it to find out about the services and options available, apart from just 'more channels'
- how did they go about finding out about the additional services and options available to them viz digital
- what did they like/ dislike and why
- what did they find interesting, and want to try out
- what stopped them from finding more
- what stopped them from using the service more at the start

Once they'd had it a month or so

- what services were they regularly using by that point
- how did they feel about the service as a whole at that point
- what were they still wishing they were able to use that they weren't
- what was putting them off using all of the services available at that point
- what had they decided wasn't worth the effort – and why
- how much 'more' television were they watching/ what had changed about the way they were watching TV

NOW

- against those factors that they'd listed as being important in their decision-making, how well has the service performed
- against those factors how well has their provider delivered – why/ why not
- how satisfied are they overall – and why
- what are their intentions as far as the service is concerned : keep it/ discontinue/ change supplier – and why

PROMPT FOR FOLLOWING

- quality of picture/ sound
- internet based services (on-line email, shopping, banking)
- update-ability
- more television channels
- interactive television
- better text services

4. Digital Interactive Services

What did respondents understand was 'packaged' with their subscription or service? Which were the services that were drivers of their choice (if not already covered above).

Moderator then to prompt for the following:

IF ANY OF THE FOLLOWING USED, ASK THEM TO SHOW US HOW THEY USE IT, AND TO TALK THROUGH THE OPTIONS

- interactive services such as playercam for football matches, choice of match for Wimbledon, interactive news, camera choice for The Proms etc.
(Moderator note – find where interactive facilities might be being offered – probably Big Brother on E4 during this research, once Wimbledon is over – check Proms: Oftel – any other suggestions?)
- home shopping for holidays/ tickets/ weekly food shopping
- on-line banking and financial services through television
- internet and email services
- downloading/ playing games (including Web-games)
- how well would they say they understood what kinds of services they would have to pay for and those they wouldn't have to pay for?

PROBE THE FOLLOWING

- how often do they use it
- what do they think of it
- how easy were/ are they to use
- how useful are they
- what concerns/ experience have they have about reliability/ security
- what don't they like
- what could be better about them

FOR EACH NOT USED

- what puts them off using this service
- why haven't they had a go with it
- what would make them think about it?

5. Electronic Programme Guides

Moderator to ask how digital television has changed respondents viewing patterns

- how do they know what's on
- how do they find what's of interest to them
- what did they think they'd do before they got their service – and how does that compare with their EPG
- what do they call their EPG/ menu/ programme guide etc.?
- which of the EPGs do they use (the main one, the BBC one, other – which)

ASK FOR EACH:

- how did they learn to use that
- TALK THE MODERATOR THROUGH WHAT THEY DO
- respondents to describe how their EPG works, its benefits and drawbacks
 - how often do they use it, and for what kinds of things typically (find specific programmes, fit with mood, check 'what's on now' etc.)
 - what do they think about its logic
 - what do they think about the way the list is organised
 - what problems have they had with it
 - how could they be resolved

- how personalised/ customised have they made it (e.g. are there different identities, how much do they know about how that works, how interesting is it for them)
 - : who personalised it
 - : who decided what the list should contain
 - : is it a joint/ individual list/ decision
 - : does everyone use the list – what do the others think of the list as well as what they think of the list
- who in their household is the one who uses the EPG most – and why
- what would make their use of the EPG better/ make it more helpful/ useful/ it's operation clearer

- do they use (if not already mentioned)
 - : now/ next
 - : search by genre
 - : favourites
 - : other - describe

- what do they think about the new channels they have
- how easy are they to find
- when they're browsing, do they tend to find what they want within the first few pages of scrolling, or do they tend to look to the end

6. Digital Text

What awareness of digital text did respondents have before taking up the service

What do they think of digital text

- how easy is it to use
- what are the barriers to use
- what do they like/ use often
- have they customised their use of the text – how, and why
- what are the improvements over analogue
- how do they feel about the link logic rather than the page numbers

IF NOT USING – DEMONSTRATE ON BBC TEXT

IF TIME OR APPROPRIATE – INCLUDE FOLLOWING SECTION

7. Integrated Digital Television Sets

'Digital television sets' explained to respondents (where necessary). What have they heard, what do they think.

- Respondents to list digital channels which are free to air, if they can
- impression, even if vague, of those channels, and those 'kind' of channels (e.g. if they're free they must be rubbish' vs ' the best ones are the ones you don't pay for')
 - for the unaware, what do they think? How interested would they be in purchasing one in the future – more free channels, cheaper equipment, fewer remote controls, fewer boxes in the corner (hi-fi/ TV/ video, DVD) etc.
 - decision-making process for those who already own one – what prompted them to buy one, likes/ dislikes, status viz digital pay TV (have they had it

before, was this a 'test' to see if they liked it, was this an 'instead of', did they have digital pay TV previously, or might they think about it in the future?)

8. Additional Features

What do respondents see as the future for digital TV, spontaneous suggestions probed, then the following prompted:

- video on demand explained, and reactions probed
- facility where you could click on screen to select more information about a certain programme or advert (e.g. if you liked the T-shirt of someone in a soap, you click on the shirt and the supplier's details are there; or you get a précis of who they are in the programme, or you get further news if you click on one of the headlines streaming along the bottom)
- recording functionality which learns viewing preferences and automatically records programmes which are likely to be of interest

9. Joint Sessions

Moderator with children to sum up what they've been saying and parents to react. What difference has it made to them as a family

For household with a PC, discussion of how accessing the internet services via Digital TV compare with accessing internet services via their PC compare

- which email addresses do they have/ which do they use for email addresses
- which do they use to browse
- advantages and disadvantages of each
- preferences
- future development – which do they think they'll be using more of in the future and why

9. Summing Up

Respondents to sum up how they feel about digital television – advantages it's brought them, problems arising from it, and how they'd like to see the future.

Thank and close.

Discussion Guide : Peer Groups

N.B. If diaries not returned prior to the discussion, moderator to collect diaries as the respondents arrive, and to go through them quickly to see the range of TV watched, and services used.

1. Introduction & Background

Moderator to outline independence, anonymity, recording and use of results.

Respondent then introduce themselves, and to talk about their interests generally, and the role that television has generally in their lives, favourite programmes, when/ where they watch most TV. What's on the 'gossip' circuit as far as TV is concerned at the minute (Big Brother still, A Lump in my Throat, Internet chat story in Coronation St etc.)

2. Attitudes to Television

Respondents to talk through a 'typical week' nowadays, including

- channels most regularly watched
- range of additional services used (put on cards and probed)
 - : what do they do
 - : how often do they do that
 - : how long for
 - : with what 'aim' (e.g. do they think of their television as entertainment, information, a dynamic, changing resource, or is it just lots of television programmes
 - : favourites

3. Deprivation Exercise

Respondents to talk through how they felt not using their television for the day

- which day did they pick and why
- how did they feel
- what did they miss most and why
- did they take alternative action (e.g. go to watch TV/ play games/ shop etc at a friends' house)
- what did it make them feel about having their television – did it make them value it more, or did it worry them that they missed it so much
- what television channels did they actually miss/ programmes etc.

4. Attitude to Digital

Respondents to think back to the days they didn't have digital television. How did they think about television then?

- how would they feel about going back to that circumstance now
- did they have any subscription TV at that point
- what was the prompt to get digital television
- who was the main person in their household to want to get it and why
- how did they feel personally about it
- what did they want it for

- did they look around to see the range of what was available : describe to moderator
- what 'versions' did they look at
 - : Sky digital
 - : cable digital
 - : ON digital
 - : with or without interactive/ net/ email services
- why did they make the decision they did
- what do they think now – good value for money, valuable, why / why not
- for those who had subscription TV previously, how does digital pay TV compare with their analogue pay TV

5. Learning to use the Services

Moderator to draw out a critical path analysis of 'learning to use your services'.

- respondents taken back to the days when they first go their service
 - : what did they do when it first got delivered
 - : how did they go about learning about what was available
 - : what impressed them, what didn't
 - : who / what helped them find their way around the range of services they use
- then one month later – taken through the same elements
- then two months later
- ... throughout this discussion moderator to identify the 'critical input' in each stage, i.e. without X they wouldn't have found y or z
- what would have helped them find their way around their service more quickly
- how user friendly do they feel the whole thing is?
- how 'fully' do they feel they use what's on offer

6. Digital Interactive Services

Moderator to play the part of someone who has never seen / heard about digital television, and respondents are to be stuck in a lift with them, having to answer the moderator's questions :

- what is digital television, how is it different to 'normal' television
- apart from watching more television channels, what does it do?
- what's interactive television?

Respondents then to talk through each of the following:

- interactive services (red button: Big Brother camera angles, Proms, football camera angles etc.)
- digital text services
- games

- on-line shopping (food, holidays, tickets, etc.)
- on-line banking/ financial services
- internet (if available) and email

For each

- : how often do they use these?
- : what do they think of them?
- : how easy were/are they to use
- : how useful are they
- : how reliable/secure?
- : what don't they like about them
- : what could be better about them?
- : IF THEY DON'T USE THEM : why not, what stops them from trying this out/ using it more regularly

Do they do any of the above via any other means?

- how does using digital television compare with using a PC
 - : what would they do on one, and on the other and why
 - : do they 'interact' with the PC in a different way to the TV, and why
 - : how do the two compare?
- how does using digital television compare with using a Playstation/ Dreamcast
 - : what would they do on one, and on the other and why
 - : do they 'interact' with the games console in a different way to the TV, and why
 - : how do the two compare?

7. Electronic Programme Guides

Moderator to ask how digital television has changed respondents viewing patterns

- how do they know what's on
- how do they find what's of interest to them
- what did they think they'd do before they got their service – and how does that compare with their EPG
- what do they call the EPG/ programme menu/ guide ... ?
- how did they learn to use that
- respondents to describe the EPG to someone who's never used one and doesn't understand the basic concept : group work together to try to get an explanation the moderator can accept (i.e. that makes no assumptions about the moderator understanding how EPGs work)

Respondents taken through a variety of scenarios (which will be tailored to the relevant age group), and their use of the EPG probed through these scenarios, for instance:

'Imagine it's a Friday night. You're very tired indeed, it's been a hard week. You thought you were going to out with some friends for the night, but you've cancelled because you really can't work up the energy. You decide instead that you're going to have an evening at home with the television. Talk me through typically what you would do,

how you would decide what you're going to watch, how you check what's on etc., step by step.'

'You've been out and you've just got back home. You really fancy an hour/ hour and half of just what you fancy on the television. How do you go about finding 'just what you fancy'

GROUP TO DESCRIBE THEIR 'SYSTEM' TO MODERATOR

- how did respondents feel not using their EPG for the day (or how would they feel not using it)
 - what did they do instead
 - how did that alter what they watched/ the way they watched
 - did they miss it : why/ why not
 - how did it make them feel about their EPG – what changes would they make to if after not using is for a while?
-
- how do they find out about new channels
 - what difference does the EPG make in terms of noticing/ finding/ starting to use new channels

Respondents to discuss how far they've 'personalised' their EPG (who personalised it, who decided on the list, who in the household uses it)

- what's the 'point' / appeal of personalisation
- how would they/ did they do that on their own service
- what do they like/ dislike about it
- how would they expand personalisation: if this was a service, JUST for them, how would it work

8. Additional Features

What do respondents see as the future for digital TV, spontaneous suggestions probed, then the following prompted:

- video on demand explained, and reactions probed
- facility where you could click on screen to select more information about a certain programme or advert
- recording functionality which learns viewing preferences and automatically records programmes which are likely to be of interest

9. Integrated Digital TV

'Digital television sets' explained to respondents (where necessary). What have they heard, what do they think.

Respondents to list digital channels which are free to air, if they can

- impression, even if vague, of those channels, and those 'kind' of channels (e.g. if they're free they must be rubbish' vs ' the best ones are the ones you don't pay for')
- for the unaware, what do they think? How interested would they be in purchasing one in the future – more free channels, cheaper equipment, fewer remote controls, fewer boxes in the corner (hi-fi/ TV/ video, DVD) etc.

- decision-making process for those who already own one – what prompted them to buy one, likes/ dislikes, status viz digital pay TV (have they had it before, was this a ‘test’ to see if they liked it, was this an ‘instead of’, did they have digital pay TV previously, or might they think about it in the future?)

10. Into the future

Moderator to put the following scenarios to respondents and to probe what they like/ dislike about the ideas:

‘Your television is flat screen with no controls; it works by voice command and you were interviewed by it when you had it installed; it asked you about your hobbies, interests, favourites and now it does exactly what you say to it, and suggests programmes, shopping items, holidays etc., that it thinks you’re interested in. You can customise the voice, how happy your television voice is, and even how many times a day they interrupt you. ‘

“There are now so many choices of television programmes, games, films, shops, information services that you have no idea of the range that’s on offer. Now you are given 12 profiles of typical customers and asked to nominate the one that’s most like you; this will become your guide through everything that’s offered”

when you buy your next television you’ll spend half a day customising it for you; you’ll choose ‘favourites’, nice but not essentials and don’t bother me with this categories. When you browse for what’s on, you’re shown the ‘favourites’ first then the rest. You can even have a ‘surprise’ emergency button when you fancy something completely different.”

11. Summing Up

Respondents to sum up how they feel about digital television – advantages it’s brought them, problems arising from it, and how they’d like to see the future.

Thank and close.