
EPG Prominence

A report on the discoverability of Welsh language services, and other PSB and local TV services

Welsh Annex

About this document

The Digital Economy Act 2017 added a duty to the Communications Act 2003 for Ofcom to, from time to time, prepare and publish a report dealing with the provision by electronic programmes guides of information about and access to public service channels and video on demand content provided by these broadcasters.

This report sets out the availability and discoverability of designated channels (i.e. those PSB and local TV channels which are entitled to prominence) and video on demand content provided by these broadcasters across a range of platforms and devices. This report is related to availability and discoverability in Wales, as Wales presents a unique scenario given the historical position of S4C on EPGs for viewers specifically in Wales. A UK-wide report has also been prepared.¹

Alongside this report, we have launched a consultation on proposed revisions to the Code on the provision of electronic programme guides and options for future regulation of prominence for video on demand services.²

¹ EPG Prominence: A report on the discoverability of PSB and local TV services: <https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/tv-research/epg-prominence>

² Review of the prominence regime: Consultation on proposed changes to the linear EPG Code and future of the regime: <https://www.ofcom.org.uk/consultations-and-statements/category-1/epg-code-prominence-regime>

Availability and discoverability of PSB and local TV content in Wales

Introduction

Ofcom has put in place a code of practice for the provision of electronic programme guides (EPGs). The Code requires public service broadcasters and local TV channels to be given “such degree of prominence as Ofcom consider appropriate”

- 1.1 Electronic programme guides (EPGs) are services which consist of the listing or promotion of programmes included in radio and television services³, and which provide a facility for obtaining access to the services listed or promoted in the guide.⁴ They are screen-based menus of channels and/or programmes which allow viewers and listeners to click through to a programme of their choice using their remote control. Providers of EPGs which are broadcast or transmitted such that they comprise a television licensable content service⁵ – linear EPGs – are licensed and regulated by Ofcom.⁶
- 1.2 Under the Communications Act 2003 (“The Act”), Ofcom has a duty to draw up, and from time to time review and revise, a code giving guidance to be followed by providers of electronic programme guides (EPGs) (“the Code”).⁷ The Code must include requirements relating to the giving of such a degree of prominence as Ofcom considers appropriate to:
 - a) the listing and/or promotion of the programmes included in each public service channel; and
 - b) the facilities enabling the audience to select or access the programmes included in the EPG directly from the EPG (i.e. ensuring there is a function in the EPG that enables views to ‘click through’ to view the relevant programme).
- 1.3 The designated channels entitled to prominence are set out in legislation. These are: all BBC channels; the Channel 3 services (including ITV and STV); Channel 4; Channel 5; S4C and local TV channels.⁸ The prominence requirements apply to the provision of programmes on the broadcast channels themselves, and, as such, does not extend to content provided on-demand (for example through the BBC iPlayer or ITV hub).

³ These must include services provided by persons other than the provider of the guide.

⁴ Section 310(8) of the Communications Act 2003

⁵ Within the meaning of section 232 of the Communications Act 2003

⁶ Currently Ofcom has no power to regulate non-linear EPGs, for example those which provide access to video-on-demand content

⁷ Section 310 of the Communications Act 2003

⁸ Section 310(4) of the Communications Act 2003. Local TV channels have been entitled to prominence following an amendment made with effect from 31 January 2012 through the Code of Practice for Electronic Programmes Guides (Addition of Programme Services) Order 2011 ((SI 2011/3003)

- 1.4 The Code was first published in 2004, following public consultation. Licensed EPG providers must comply with the Code.⁹
- 1.5 As noted, the Code applies to those services providing a linear EPG, which lists and gives access to linear TV programmes. Currently, internet devices, such as the inbuilt internet functionality of a smart TV¹⁰ and streaming devices (e.g. Amazon Firestick, Apple TV), do not provide a linear EPG, and as such, these are currently out of scope.

Ofcom has a new duty to prepare and publish a report on EPGs and public service channels

- 1.6 The Digital Economy Act 2017 (DEA)¹¹ added a duty to the Communications Act 2003 for Ofcom to, from time to time, prepare and publish a report dealing with:
- a) the provision by electronic programme guides of information about programmes:
 - i) including in public service channels, or
 - ii) provided by means of on-demand programme services¹² by persons who also provide public service channels, and
 - b) the facilities provided by such guides for the selection of, and access to, such programmes.¹³
- 1.7 We have consulted a number of stakeholders in preparing this report¹⁴, to better understand the technologies they use to deliver content, how viewers use these technologies to find content and the concerns they have about content discovery in a changing market.
- 1.8 The findings in this report, and our UK-wide report¹⁵, have informed proposed revisions to the Code, as set out in our consultation. We are also seeking views on extending the prominence regime to VoD and other routes to PSB content. We welcome further contributions as part of our consultation. Any changes to the regime would require

⁹ Ofcom, Code of Practice on electronic programme guides, available at: https://www.ofcom.org.uk/_data/assets/pdf_file/0031/19399/epgcode.pdf. The term 'EPG provider' means any organisation providing an electronic programme guide as defined by section 310 of the Communications Act under a Broadcast Act licence.

¹⁰ A smart TV is a stand-alone television set with inbuilt internet functionality. Users connect to the internet via a broadband router or modem. A smart TV also has an in-built platform providing an EPG, such as Freeview or Freesat, the functionality of which is in scope for this report.

¹¹ Section 95(2) and (3) Digital Economy Act 2017

¹² On-demand programme services are defined in section 368A of The Act. A service is an on-demand programme service if: its principal purpose is the provision of programmes the form and content of which are comparable to the form and content of programmes normally included in television programme services; access to it is on-demand; there is a person who has editorial responsibility for it; it is made available by that person for use by members of the public; and that person is under the jurisdiction of the United Kingdom for the purposes of the Audiovisual Media Services Directive.

¹³ Section 311A of the Communications Act 2003, inserted by section 95 of the Digital Economy Act 2017

¹⁴ Pursuant to section 311A(2) of The Act (introduced by section 95 of the DEA). We requested information from and / or met with the following stakeholders: S4C, Virgin Media, Digital UK, Sky, Viacom, Channel 4 Corporation, STV, ITV, BBC, Local TV Network, YouView, Freesat and COBA. We also met a range of stakeholders in the nations.

¹⁵ EPG Prominence: A report on the discoverability of PSB and local TV services: <https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/tv-research/epg-prominence>

legislative change, so stakeholder responses to issues and ideas related to extending the regime will therefore inform our recommendations to Government.

We have tested the availability and discoverability of PSB and local TV content from the main EPG providers and a number of internet enabled devices

- 1.9 As part of our duties under the DEA, we have undertaken an assessment of the availability and discoverability of designated channels (i.e. those PSB and local TV channels which are entitled to prominence) and VoD content provided by those broadcasters across a range of platforms and devices.
- 1.10 The main EPG providers are: Sky, Virgin Media, Freesat, YouView, EE, BT, Digital UK (which provides the Freeview EPG) and TalkTalk. We have tested the availability and discoverability of linear PSB and local TV content for at least one set top box for the following EPG providers, as set out below:
- Sky: Sky+ HD and SkyQ
 - Virgin Media: Virgin Media TiVO V6
 - Freesat: Freesat Humax
 - Digital UK: Samsung TV with integrated Freeview and Humax Freeview Play
 - EE: EE TV
 - YouView: BT YouView¹⁶
- 1.11 As well as providing EPGs, each of the devices listed above (with the exception of the basic Freeview device) also offers access to a range of VoD content. Pursuant to our duty as part of under the Act, we have also tested the availability and discoverability of PSB and local TV on-demand content on each of the above listed devices.
- 1.12 For completeness, and to account for the increasing number of ways people now consume television, we have also reported on the availability of on-demand PSB and local TV content on a number of internet enabled devices, noting that the range of devices considered is by no means exhaustive. These are:
- Amazon Fire TV
 - Apple TV
 - Now TV
 - Games consoles (Microsoft Xbox and Sony PlayStation)

¹⁶ Note that we have not tested set top boxes from BT and TalkTalk: While the YouView box that we have tested is from BT, BT also holds a separate licence from YouView for its BT Vision EPG. However, BT Vision was switched off in June 2017 (existing customers can still use the box for DTT channels). TalkTalk is no longer operating its own EPG, as its channels have been integrated into the YouView EPG.

Platforms' user interfaces and EPG lists

- 1.13 The results of our assessment reveal that availability and discoverability of the PSB and local TV channels within the linear EPG can vary significantly across the different channels and on different platforms/set top boxes.
- 1.14 Below we present our results, where we have grouped the channels as follows:
- a) BBC One, BBC Two, ITV, S4C, Channel 5 and Channel 4
 - b) BBC Four
 - c) PSB news channels: BBC News and BBC Parliament
 - d) PSB children's channels: CBBC and CBeebies
 - e) Other area specific channels: BBC Alba and Local TV channels
- 1.15 We note that the layout and positioning of content within EPG providers' user interfaces (UIs) and EPGs can vary by different box types. For example, Sky's Sky+ and Sky Q UIs are different, while Freeview's vary according to manufacturer and, the number of channels listed per EPG page can vary. However, channel slots are allocated by platform providers, and do not vary by box type¹⁷. Where we present channel slots we have presented these for the platforms: DTT, Freesat, Sky and Virgin Media. We note that all platforms, with the exception of Virgin Media, provide regional or national variations to their EPGs.
- 1.16 Throughout these results, we first consider the channel slot of the PSB and local TV channels on the main platforms. Throughout, we have tested channel slots, and verified these on platform providers websites¹⁸, including where channel slots vary by nation/region. We then consider the indicative page number that these channels would be found on within the EPGs of each of the box types that we tested.¹⁹

In Wales, slots 1 to 5 (or 101 to 105) are occupied by BBC One, BBC Two, ITV, S4C and Channel 5 on all platforms except for Virgin Media. Channel 4 is further down the EPG on all platforms except for Virgin Media, where it is at slot 104.

- 1.17 In Wales, across the main EPG providers, with the exception of Virgin Media, slots 1 to 5 (or, where the ordering begins at 100 or 101, 101 to 105) are occupied by BBC One, BBC Two, ITV, S4C and Channel 5. On Virgin Media S4C is at slot 166 across the whole of the UK.
- 1.18 S4C was the fourth channel launched in Wales and has historically been located in slot 4. It initially provided a mixture of programming in Welsh along with some Channel 4 programming. Following digital switchover,²⁰ Channel 4 became available across Wales and

¹⁷ Digital UK allocates channel slots for all DTT providers

¹⁸ Digital UK for DTT channels

¹⁹ Given viewers are most likely to view the first instance of a channel (whether it is in SD or HD), in this exercise, we have recorded the first instance of the relevant channel, regardless of whether it is broadcast in SD or HD.

²⁰ In Wales digital switchover took place in 2009 and 2010.

S4C became a 100% Welsh language channel. S4C retained its slot on EPGs provided for viewers in Wales and Channel 4 has been located in slots further down on these EPGs.

- 1.19 On all platforms, BBC One, BBC Two, ITV and Channel 5 are found on the first page of the all channels EPG list. On all platforms apart from Virgin Media, S4C is on the first page of the all channels EPG list. On the Virgin Media TiVO box that we tested, it is found on the tenth page.
- 1.20 While Channel 4 occupies slot 4 or 104 in England, Scotland and Northern Ireland, in Wales, Channel 4 is located at channel 7 on DTT, channel 117 on Sky and channel 120 on Freesat. On Virgin Media it retains its slot at channel 104, as shown in Figure 1. Across the boxes we tested, it is found on at least the first four pages²¹ of the all channels EPG list, as shown in Figure 2.

Figure 1: Channel slots of the main PSB channels in Wales by platform

	BBC One	BBC Two	ITV	S4C	Channel 5	Channel 4
DTT	1	2	3	4	5	7
Freesat	101	102	103	104	105	120
Sky	101	102	103	104	105	117
Virgin Media	101	102	103	166	105	104

Source: Ofcom research. Data collected in May to June 2018

Figure 2: Page number of S4C and Channel 4 in Wales on all channels lists by device²²

	S4C	Channel 4
BT YouView	Page 1	Page 2
Freeview	Page 1	Page 1
Freeview Play	Page 1	Page 1
EE TV	Page 1	Page 1
Freesat	Page 1	Page 4
Sky Q	Page 1	Page 3
Sky+	Page 1	Page 3
Virgin Media TiVO V6	Page 10	Page 1

Source: Ofcom research. Data collected in May to June 2018. Note these page numbers are estimated based on channel slots and positioning tested in London.

²¹ Note that page numbers are estimated based on testing undertaken in London.

²² Note that throughout this report, page numbers are based on the specific devices we have tested. Page numbers will vary by manufacturer and box type due to differing number of channels listed per page.

BBC Four is generally in a fairly high position on the EPG

1.21 Across the UK, on DTT BBC Four is on channel 9, on Freesat and Virgin Media it's on channel 107 and on Sky it's at 116 (see Figure 3). Across the majority of boxes we tested it is located either on the first or second page of the all channel listing. On SkyQ it is on the third page, as shown in Figure 4.

Figure 3: Channel slots of BBC Four by platform

Type	BBC Four
DTT	9
Freesat	107
Sky	116
Virgin Media	107

Source: Ofcom research. Data collected in May to June 2018.

Figure 4: Page number of BBC Four on all channels lists by device

Type	BBC Four
BT YouView	Page 2
Freeview	Page 2
Freeview Play	Page 2
EE TV	Page 2
Freesat	Page 1
Sky Q	Page 3
Sky+	Page 2
Virgin Media TiVO V6	Page 1

Source: Ofcom research. Data collected in May to June 2018. Note these page numbers are estimated based on channel slots and positioning tested in London.

The BBC's children's and news channels are further down the all channels EPG lists as they sit within their specific genre groupings.

Children's

1.22 On DTT, CBBC and Cbeebies are located at channels 201 and 202 respectively. On Virgin Media they are at channels 701 and 702, on Freesat they are at 600 and 601 and on Sky they are at 613 and 614 (see Figure 7).

1.23 On Freesat, Virgin Media TiVo and BT YouView both children’s PSB channels are located on the first page of the children’s genre pages, while on Sky+ and Sky Q they are on the second page. On Freeview, Freeview Play and EE TV no genre filters are available, so when going through the EPG, viewers must navigate via the all channels list, although the channels located are at the top of the genre grouping (which starts at 201). Of the boxes we tested on Freeview the children’s PSB channels were found on the 13/14th page, on Freeview Play they were on the 15th page and on EE TV they were on the tenth page (see Figure 6).²³

Figure 5: Channel slots of PSB children’s channels by platform

Type	CBBC	CBeebies
DTT	201	202
Freesat	600	601
Sky	613	614
Virgin Media	701	702

Source: Ofcom research. Data collected in May to June 2018

Figure 6: Page number of PSB children’s channels via children’s EPG menu by device*

Type	CBBC	CBeebies
BT YouView	Page 1	Page 1
Freeview	Page 13	Page 14
Freeview Play	Page 15	Page 15
EE TV	Page 10	Page 10
Freesat	Page 1	Page 1
Sky Q	Page 2	Page 2
Sky+	Page 2	Page 2
Virgin Media TiVo V6	Page 1	Page 1

Source: Ofcom research. Data collected in May to June 2018. Note these page numbers are estimated based on channel slots and positioning tested in London.

*As noted above, genre filtering was not available on the Freeview, Freeview Play and EE TV devices we tested, so the page numbers listed for these devices is via the all channels menu.

²³ Note, this is based on testing undertaken in London. Page numbers are indicative only and may vary due to different channels being available in different parts of the UK.

News

- 1.24 On DTT, BBC News and BBC Parliament are located at channels 231 and 232 respectively (BBC News is also at 107 in HD). On Freesat they are at channels 200 and 201, while on Virgin Media they are at 601 and 605, and on Sky they are at channels 503 and 504 (see Figure 7).
- 1.25 Of the boxes where genre filtering is available, BBC News is at the top of the news genre menu in all cases except for Sky+ and Sky Q, where it is third on the list (although still on the first page). Similarly, where genre filtering is available, BBC Parliament is consistently found on the first page of the news genre list.
- 1.26 For Freeview, Freeview Play and EE TV (all of which provide DTT channels), where genre filtering is not available, the channels are found between the 11th and 16th pages of the all channels list.²⁴ However, these channels do occupy the top two slots in the DTT platform’s news genre grouping (which starts at 231). The channel slots and page numbers on the genre EPGs are shown below.

Figure 7: Channel slots of PSB news channels by platform

Type	BBC News	BBC Parliament
DTT	107/231*	232
Freesat	200	201
Sky	503	504
Virgin Media	601	605

Source: Ofcom research. Data collected in May to June 2018

Notes: *On Freeview and YouView, the BBC News HD channel is at slot 107 and BBC News SD is at slot 231

Figure 8: Page number of PSB news channels via news EPG menu by device*

Type	BBC News	BBC Parliament
BT YouView	Page 1	Page 1
Freeview	Page 15**	Page 15
Freeview Play	Page 16**	Page 16
EE TV	Page 11***	Page 11
Freesat	Page 1	Page 1
Sky Q	Page 1	Page 1
Sky+	Page 1	Page 1

²⁴ As noted above, this is indicative, and based on testing undertaken in London

Virgin Media TiVo V6	Page 1	Page 1
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Source: Ofcom research. Data collected in May to June 2018. Note that these page numbers are estimated based on channel slots and positioning tested in London.

*As noted above, genre filtering was not available on the Freeview, Freeview Play and EE TV devices we tested, so the page numbers listed for these devices is via the all channels menu. **The SD version (channel 231, at the top of the news genre grouping) was on page 15 on Freeview and 16 on Freeview Play. The HD version (channel 107) was on page 13 on Freeview and page 14 on Freeview Play. ***Note, the HD version (channel 107) was not available on the EE TV box we tested, at time of testing, most likely due to lack of reception.

BBC Alba and the local TV channels’ positions in the EPG vary considerably by platform

- 1.27 BBC Alba is available across the UK on Freesat, Sky and Virgin Media. On Freesat and Virgin Media it is at channels 109 and 161 respectively, across the UK. On Sky it is at channel 169 outside of Scotland (and 141 in Scotland). It is not available on DTT outside of Scotland. Its location on the platforms’ EPG pages varies considerably, as shown in Figure 10.
- 1.28 On DTT in Wales, local TV channels are found at channel 8. On Sky in Wales, they are found on channel 134, while on Virgin Media they are at channel 159 across the UK, as shown in Figure 9.²⁵ This means that for the boxes we tested, the page number of local TV channels on the all channels list varies from the page 1 or 2 (on EE TV, Freeview, Freeview Play and BT YouView) to page 5 on Sky+ and Sky Q, and page 9 on Virgin Media (see Figure 10).

Figure 9: Channel slots of BBC Alba and Local TV by platform in Wales

Type	BBC Alba*	Local TV
DTT	n/a	8
Freesat	109	n/a
Sky	169	134
Virgin Media	161	159

Source: Ofcom research. Data collected in May to June 2018.

Notes: *BBC Alba is not available on DTT outside of Scotland. Its channel slots on Freesat and Virgin Media are UK wide. Sky’s channel slot for BBC Alba is 141 in Scotland, and 169 for the rest of the UK.

Figure 10: Page number of BBC Alba and Local TV on all channels lists by device in Wales

Type	BBC Alba	Local TV
BT YouView	n/a	Page 2
Freeview	n/a	Page 2

²⁵ Note that Local TV is not available in all parts of the UK, and not all local TV channels are carried on Sky and Virgin Media. Note that local TV channels are not available on Freesat.

Freeview Play	n/a	Page 2
EE TV	n/a	Page 1
Freesat	Page 2	n/a
Sky Q	Page 10	Page 5
Sky+	Page 9	Page 5*
Virgin Media TiVO V6	Page 9	Page 9

Source: Ofcom research. Data collected in May to June 2018. Note these page numbers are estimated based on channel slots and positioning tested in London.

Notes: *On Sky+, local TV listings can also be accessed by pressing the yellow button on the remote control from the all channels list, which takes viewers directly to a local TV list.

Availability and discoverability of PSB and local TV VoD content

- 1.29 In this section, we describe the discoverability of on-demand PSB and local TV content accessible through internet enabled devices connected to television sets.²⁶
- 1.30 We have not, however, reported on the availability and discoverability of PSB VoD on smart TVs²⁷ because there is a broad range of smart TVs available in the market and manufacturers have significant control over the way software applications (including VoD players) are presented in their menus at any given time. Furthermore, the VoD interfaces vary between models from the same manufacturer. We consider that reporting on a particular manufacturer or model may not be entirely reflective of the presentation of VoD apps, particularly PSB VoD players, on smart TVs. However, we note that most smart TVs support the main PSB players (BBC iPlayer, ITV Hub, All 4 and My 5). We consider that the smart TV market is too diverse and complex to have meaningfully reviewed it in this report and, further to this, this is an area subject to technical and commercial complexity between manufacturers and player providers.
- 1.31 We have also not included connected devices such as smart phones, tablets and desktops in our report due to the huge range of devices and manufacturers. However, the PSB players²⁸ are generally available on these as they can be downloaded on devices running on both iOS (Apple) and Android operating systems.

²⁶ This includes internet dongles or streamers (e.g. Apple TV, Amazon Firestick) or an internet enabled games console.

²⁷ A smart TV is a stand-alone television set with inbuilt internet functionality. Users connect to the internet via a broadband router or modem.

²⁸ BBC iPlayer, ITV Hub, All4, My 5, STV and S4C (also available through BBC iPlayer)

The main PSB VoD players²⁹ are generally available on the main EPG service provider platforms while the S4C player is only available on YouView. There are no known local TV VoD players.

- 1.32 The main PSB VoD players are available on the main EPG service provider platforms except for EE TV which supports only the BBC iPlayer and My5 Player and Freesat, which doesn't have All4. They are also available on a broad range of internet media streamers such as Amazon Fire TV, Apple TV and game consoles such as the Microsoft Xbox and Sony PlayStation. Figure 11 illustrates the availability of PSB on-demand players on the devices we have looked at.
- 1.33 We note that, in contrast to linear channels, VoD players' availability on platforms is subject to commercial agreements.
- 1.34 Although S4C's on-demand content can be accessed through the BBC's iPlayer, its own on-demand Player, S4C player, is only available on YouView.³⁰
- 1.35 There are no local TV channels with on-demand players/apps.³¹

Figure 11: Availability of PSB VoD players across different devices

Device	BBC iPlayer	ITV Hub	All 4	My 5	S4C Player
Freeview Play	✓	✓	✓	✓	✗
Freesat	✓	✓	✗	✓	✗
YouView	✓	✓	✓	✓	✓
Virgin Media	✓	✓	✓	✓	✗
Sky Q	✓	✓	✓	✓	✗
Sky+ HD	✓	✓	✓	✓	✗
EE TV	✓	✗	✗	✓	✗
Amazon Fire TV	✓	✓	✓	✓	✓
Apple TV	✓	✓	✗	✓	✓
Now TV	✓	✓	✓	✓	✗
Xbox Consoles ³²	✓	✓	✓	✓	✗

²⁹ By the main PSB VoD players we mean BBC iPlayer, ITV Hub, All4 and My5. We also note that the main PSB VoD players may also provide content from their smaller PSB channels too, so they are not equivalent to the main PSB channels. The commercial PSB VoD players also provide content from their portfolio channels, which are not PSB channels, such as ITV2, E4 or 5star.

³⁰ YouView has one page of Players once this option is selected, the S4C player appears on this page.

³¹ Some local TV stations, for example NVTV (Belfast) and Notts TV (Nottingham) have catch-up content available on their websites.

³² We have assumed that a game console supports a PSB VoD player provided at least one of its generation does so.

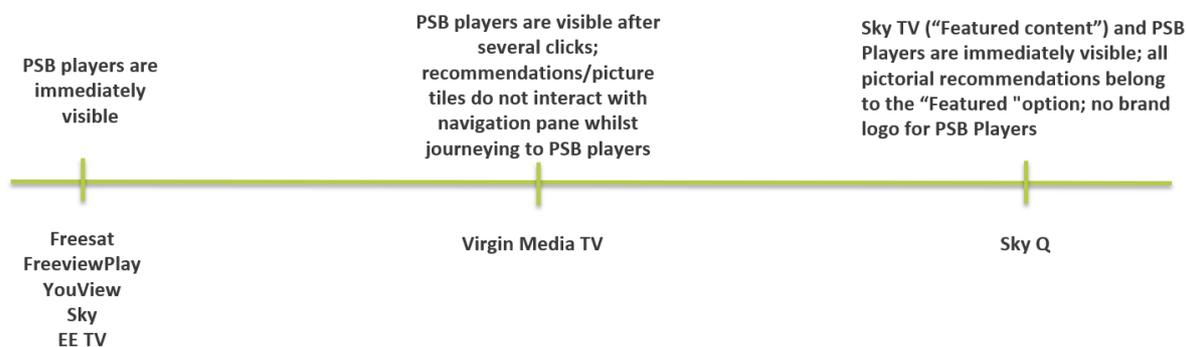
Play Station Consoles³³	✓	✗	✓	✓	✗
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Source: Ofcom research, Data collected in May 2018

Once in the VoD space, the PSB players are easily discoverable on the main EPG service providers' TV platform

1.36 The journey time from the home page to PSB players varied across different platforms, for the devices we tested from the main EPG providers. However, the main PSB VoD players, where available, are located in the top row of the VoD player grid and are therefore easy to locate in the VoD space.

Figure 12: Discoverability of PSB players after selecting the on-demand menu option across different platforms



Source: Ofcom research, data collected in May 2018

- 1.37 Figure 12 describes the discoverability of PSB players on a range of platforms. On FreeviewPlay, Freesat and YouView, the PSB on-demand players are presented upfront (as a part of a sub-grid of the on-demand players supported by the platform) after highlighting and prior to selecting the on-demand option. The main PSB players occupy the top positions in this sub-grid. When the on-demand menu option is selected, the PSB players retain their lead positions in the grid of players. FreeviewPlay allows users to select PSB players from its home page.
- 1.38 On Virgin Media TV, a few more clicks are required from the catch-up home page before PSB players are located. Within the VoD players grid, the main PSB VoD players occupy the top row.
- 1.39 On EE TV, once viewers are in the VoD space, the PSB players that are available (BBC iPlayer and My5) are immediately visible and are listed on the top row. The ITV Hub and All4 are not available.
- 1.40 On Sky+ HD, the main PSB players are listed in the top row of the VoD players grid in the catch-up TV home page. Sky Q is different in its presentation of VoD players compared to

³³ We have assumed that a game console supports a PSB VoD player provided at least one of its generation does so.

other platforms. It uses a text-based description of the VoD players without the brand logos. The main PSB players are listed just below the link to Sky's "Featured" content.

- 1.41 On internet streamers, in some cases, the main PSB players are pre-loaded on to devices, whereas on others, consumers can download them. In addition, on some devices it is possible to re-order the apps on menus, and for some, the ordering depends on the apps used most recently.

Recommendations are now common across all platforms

- 1.42 Most EPG providers' set-top-boxes provide users with recommendations, as do the over-the-top (OTT) platforms such as Amazon Prime and Netflix. The platforms vary in the amount of on-screen recommendations they provide. While some have dedicated menu items for recommendations such as FreeviewPlay's Freeview Explore and Freesat's Showcase, others present varying amounts of on-screen recommendations (in terms of volume and screen area occupied) as users navigate through the menu items whilst making a choice on what programme to watch.
- 1.43 The recommendations are usually picture-tiles describing the programme with the larger-sized tiles reserved for programmes that platform operators seek to promote above others. Some platforms also reserve some channel slots for previews, movie trailers and sports/general highlights that they wish to promote, for example, Virgin Media's preview channel and BT TV's BT Sport Showcase. Virgin Media TV's recommendation channel is the first in its EPG list (at slot 100).
- 1.44 We found that platforms generally provide recommendations based on content they seek to promote as well as consumer's viewing habits. When based on the former, the recommendations are available to all consumers while in the case of the latter they tend to be personalised. Some examples of recommendation menu items we found across the platforms are "Freeview Explore" (FreeviewPlay), "Showcase" (Freesat), "Featured and Top Picks" (Sky and Sky Q), "Virgin Exclusives" (Virgin Media TV) and "Recommended for you" (BBC iPlayer). Some platforms also provided recommendations based on popularity or overall consumption for example "Trending" recommendations menu on Virgin Media.

Although PSB content is generally available on most of the main EPG providers' recommendation menus, the free TV platforms tended to have more overall PSB recommendations compared with the pay TV platforms

- 1.45 Although most of the main EPG providers include PSB content in their recommendations, we found that the amount of recommendations varied across the platforms.
- 1.46 The amount tended to correspond with the visibility of the PSB players as described in Figure 12 above. Based on a few snap shots of the PSB recommendations available across the platforms, we found that the free TV platforms (FreeviewPlay and Freesat) had more overall PSB content listed in their recommendation menus. The pay-TV (Virgin Media, Sky and Now TV) platforms had less. In some cases, the availability of PSB within

recommendations is dependent on the existence of commercial deals between PSBs and the platform providers.

1.47

Next steps

This report has fed into Ofcom's consultation on the Code

- 1.48 The findings in this report have informed proposed revisions to the Code, as set out in our consultation. We are also seeking views on principles and ideas that could underpin any future changes that Parliament could make to the statutory regime, to maintain the prominence of PSB content and services. Any changes to the prominence regime would require legislative change, so stakeholder responses to issues raised with regards to the future of the regime will therefore inform our recommendations to Government. The consultation is open until 5 October 2018 and can be found here: <https://www.ofcom.org.uk/consultations-and-statements/category-1/epg-code-prominence-regime>.
- 1.49 As part of our duty under the DEA, we will update this report from time to time.