BBC Market Impact Assessment:

Proposed changes to BBC iPlayer and BBC Three

Qualitative research report

Prepared for Ofcom

BY

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Contents

1 Executive summary

1.1 Background to the research

Ofcom commissioned Kantar Media to conduct a series of qualitative workshop groups and in-depth interviews with members of the public to help explore **the potential market impact of proposed changes to BBC iPlayer and BBC Three**. The qualitative research was required to feed into the Market Impact Assessment (MIA), assigned to Ofcom, as part of the Public Value Test (PVT) to which any new or substantially altered BBC services are subject. The purpose of the MIA is to assess the effect of the proposed service changes on other services in the market, considering both the direct impact on consumers and producers of other services and the likely impact on competition and market development.

Within the overall aim of exploring the potential market impact of the proposed changes to BBC iPlayer and BBC Three, the specific objectives of the study were to:

- Explore and understand **motivations for watching** broadcast TV, versus watching catch-up, versus watching video on-demand (VOD)
- Explore audiences' **existing perceptions** of iPlayer and BBC Three, versus other linear channels, catch-up services, VOD services, and content aggregators
- Understand how people **find on-demand content** from services that have no TV presence/ schedule
- Understand audiences' reactions towards the proposed changes to BBC iPlayer and BBC Three and the resulting **impact** of such changes on BBC linear channels, BBC iPlayer, and other linear channels, catch-up services, VOD services, and content aggregators

This report is based on qualitative research findings from a series of ten two-hour workshop groups and ten one-hour ethnographic in-depth interviews conducted across the UK. Fieldwork took place in January 2015.

1.2 Summary of key findings

Current viewing behaviour and motivations for viewing by platform and device

Stronger preference for non-linear viewing among the younger and more tech engaged

The majority of younger (under 35s) and more tech engaged participants preferred the customisable offer of non-linear viewing delivered through catch-up and on-demand services. They associated non-linear viewing with a breadth of choice and the ability to 'binge' on whole series.

By contrast, the older and less tech engaged participants were more likely to prefer linear viewing via broadcast services. For them, linear services offered a familiar, habitual viewing experience with content choices informed by schedules and well-known channel brands.

Nevertheless, across all ages, most participants expressed a preference for linear in-the-moment viewing of 'event TV' programmes that were likely to generate lots of conversation. Moreover, by completing pre-task viewing diaries, the younger and high tech engaged participants were often surprised by the amount of linear TV that they actually still watched compared with the relatively low levels they claimed when recalling their habits. However, most associated linear with more passive viewing than the active selection of non-linear content.

Devices play a role in shaping viewing behaviours, fuelled by the emergence of more personal and connected devices

The majority of participants preferred larger screen devices, such as TV sets and smart TVs, for more shared and immersive viewing. However, the younger and more tech engaged were most likely to advocate the intimacy and personalisation offered by smaller screen devices like tablets and smartphones. The individually tailored experience of personal devices reflected their preferences for more customised non-linear viewing.

Market perceptions

Market perceptions vary by age, with younger participants demonstrating a more nuanced understanding of the services and platforms available

Younger and more tech engaged participants demonstrated a more granular understanding of the plethora of audiovisual (AV) services available, fuelled by their greater familiarity with and use of emerging video and social media services.

Exploration of participants' market understanding began to uncover perceptions of the services central to this study, BBC iPlayer and BBC Three:

- iPlayer was widely considered a platform leader in the catch-up category and was used by participants across the age range. Similarly, most participants considered Netflix to be preeminent among the on-demand and, specifically, subscription on-demand services. However, the majority of participants recognised differences between iPlayer and Netflix, with iPlayer strongly associated with the linear schedule and watching content that had been missed, whilst Netflix was synonymous with 'binging' on whole series and more behavioural-based content recommendations.
- The majority of participants recognised BBC Three as a free-to-air service within the BBC channel family. Younger participants were much more likely to view BBC Three regularly, with the channel valued for showing light and entertaining content. Within the broader market context, participants most readily likened BBC Three to other linear services that showed similarly undemanding content, such as E4, ITV2, Dave, and Channel 4.

Finding content

The balance between searching for and browsing content varies by linear and non-linear viewing

When exploring how participants found content to watch, a distinction emerged between occasions where they searched for a particular item, and when they browsed services with no specific title in mind.

The vast majority of participants considered linear viewing to be well suited to searching for and browsing content, with decision-making influenced by channel schedules, recommendations, trailers, and expectations of well-known brands.

Most participants perceived catch-up services as closely tied to linear schedules, with content most commonly found by searching for specific programmes that had been missed or had been recommended.

Whilst the majority of on-demand viewing focused on searching for particular items, discoverability was more fuelled by active recommendations based on previous viewing and social media links.

The experience of finding something to watch is influenced by the type of device used to search for and browse content

The majority of participants considered laptops to be the most user-friendly device when searching for specific content as titles can easily be entered using keyboards. Conversely, several participants considered smart TVs and games consoles to be less suited to searching due to relatively cumbersome entry devices like remote controls.

Most participants identified TV sets and smart TVs as the easiest devices for browsing content. The perceived ease stemmed from their familiarity with using TVs to scroll through channels, rather than any of the more internet-connected features of smart TVs. By contrast, participants considered laptops to be less well suited to browsing than searching for content, with keyboards and trackpads failing to offer a seamless browsing experience.

In relation to searching for and browsing content on touchscreen devices, participants understood the experience to vary depending on the functionality and usability of the specific apps used.

Social media performs a dual role of discovering and consuming content within the context of ever-more choice for viewers

Many participants, particularly the younger and more tech engaged, frequently used social media such as Facebook and Twitter as a means of discovering content.

In addition, younger participants were most likely to use video-orientated services such as YouTube to search for, browse, and consume AV content. They appreciated the breadth of content offered by these services, which were not tied to a specific broadcaster or bound by content availability windows.

Several participants also discussed the challenges of deciding what to watch amidst a content overload stemming from an ever-increasing range of linear channels and on-demand services. Therefore, recommendations – whether through word of mouth or social media – were increasingly important in helping decide what to watch.

Reactions to the proposed change to iPlayer[1]

iPlayer synonymous with a catch-up role and tailoring viewing to busy lives

The vast majority of participants primarily associated iPlayer with catching-up on content that had been missed or recommended to them, and with tailoring viewing to busy lives. They used iPlayer less frequently to browse content without specific programmes in mind.

A generally positive response to the proposed iPlayer premieres, but personal appeal dependent on the actual content to be included

Most participants had a positive impression of the proposed change, although there was limited enthusiasm with several struggling to see a personal benefit. The most positive impressions of the proposal were from regular iPlayer users, the high tech engaged, and those aged under 35.

[1] A full description of the proposed change to iPlayer, as presented to participants, is provided in Appendix A

Participants who liked to be 'ahead of the crowd' responded most positively to the proposal, yet the appeal depended largely on the specific content items that would be premiered.

Many participants had misgivings over how they would find out about premieres, with promotion seen as essential. Participants had mixed responses towards the focus on premiering children's shows, with non-parents struggling to see a compelling personal benefit. From a societal perspective, several participants had concerns about older people, the less tech-literate and less affluent potentially being excluded from viewing online premieres. In addition, a few participants pointed to the potential confusion that could result from watching a premiere if they then had to wait two weeks to view the next episode of the series. However, there was likely to be less confusion where standalone items (i.e. those not forming part of a series) were premiered, or where each episode of a series was premiered on iPlayer before broadcast.

The proposed change is likely to have a marginal impact on iPlayer use, and on viewing of other services

Around 4 in 10 participants anticipated a slight increase in their iPlayer use as a result of the proposal.[2] However, they foresaw their use increasing 'a bit' rather than 'a lot', and this was dependent on the personal appeal of the content premiered. Around a quarter of participants envisaged a corresponding slight increase in their viewing of linear BBC services where premieres drew them into watching the rest of the series when broadcast. Despite this, around half the participants foresaw no change in their iPlayer use, with around two thirds also envisaging no change in their viewing of linear BBC services.

The vast majority of participants projected no impact on their use of non-BBC services (linear and non-linear) unless there was a high-volume of attention-grabbing premieres relevant to them

By extension, most participants anticipated no change in their viewing of other catch-up and on-demand services as the majority of viewing occasions concentrated on seeking out specific content items rather than general browsing.

[2] It should be noted that the ratings are based on a qualitative research sample and, whilst the results are indicative, they should be treated with caution and interpreted alongside broader qualitative feedback on the proposal.

Reactions to the proposed changes to BBC Three[3]

BBC Three is widely perceived as a 'flicking' channel and strongly associated with linear viewing

The majority of regular BBC Three viewers perceived the service as a 'flicking' channel synonymous with linear viewing. Furthermore, even the younger and more tech engaged were likely to have a preference for watching BBC Three on linear TV, despite their general inclination towards non-linear viewing. The majority of BBC Three viewers valued the channel's easy, effortless and light content, with viewing often satisfying 'wind down', late evening needs. Across the age groups, BBC Three was strongly identified with a younger audience, although several older viewers occasionally dipped into content. In particular, several older and less tech engaged viewers used BBC Three to catch-up on BBC One and BBC Two favourites such as EastEnders.

There were mixed impressions of the proposed changes to BBC Three with many highlighting the increased effort of using an online-only service

Overall, participants had mixed impressions of the proposed changes to BBC Three, although there was little evidence of markedly emotional or hostile reactions. The majority of negative impressions concentrated on the perceived effort of consuming online-only content versus the existing broadcast offer. Negative perceptions of the move to an online-only service were reflected in less tech engaged participants responding least favourably to the proposition.

Several participants also expressed misgivings about the future quantity and quality of BBC Three content in light of the proposed halving of the service's budget. In addition, from a societal standpoint, several had concerns about older, less tech savvy, and less affluent viewers potentially being disadvantaged by the proposed changes.

There were positive impressions of the proposal from those, particularly non-viewers of BBC Three, who associated an online-only service with the future evolution of TV. There were also more positive responses to the proposal among those who recognised the need for budgetary cuts amidst a challenging economic climate. Participants who were low BBC approvers and non-viewers of BBC Three were most likely to espouse the cost savings generated by BBC Three becoming an online-only service.

[3] The full description of the proposed changes to BBC Three presented to participants is provided in Appendix B

There is likely to be reduced viewing of BBC Three as a result of the proposed changes, with marginal benefits for other services

The majority of current BBC Three viewers anticipated less frequent use of the service in light of the proposed changes. In particular, they cited the move to an online-only service as requiring more effort to access and select content. They considered the increased effort entailed to compare unfavourably with the effortless, 'wind down' experience of current BBC Three viewing. A few participants foresaw emerging devices such as smart TVs as potentially offsetting the effort of accessing content, yet an active selection of content would still ultimately be required.

Other BBC linear services, especially BBC Two, were projected to benefit from the proposed changes where programmes and viewers migrated from BBC Three (with recent examples such as *Russell Howard's Good News* and *Backchat with Jack Whitehall and His Dad* helping participants to envisage possible moves in the future). Many participants foresaw other linear services as being the main beneficiaries as they would 'flick' to alternative channels that had similar content to BBC Three (e.g. E4, ITV2, Dave, and Channel 4). BBC Three viewers with paid-TV services also envisaged increased use of premium channels that met similar needs, such as Fox and Comedy Central. Nevertheless, non-linear catch-up and on-demand services were seen as unlikely to benefit from the proposed changes as they also required the effort of accessing and selecting content.

2 Background and objectives

2.1 Background

In March 2014 the BBC announced that, subject to regulatory approval, it was planning the following changes to services[4]:

- BBC Three to become an online-only service with no broadcast channel
- Enhancements to BBC iPlayer
- The launch of a BBC One+1 channel
- Extended CBBC hours

Any new or substantially altered BBC service is subject to a Public Value Test (PVT) – a cost-benefit analysis that weighs up the 'public value' of the proposed changes against its impact on the market, including both commercial and not-for-profit concerns.

This determination is done in three logical steps:

a. **The Public Value Assessment** (PVA), assigned to the BBC Trust, determines whether the service satisfies some criteria (fit with BBC purposes, quality and distinctiveness) and whether it generates enough 'public value' to justify its costs in terms of licence fee funds
b. **The Market Impact Assessment** (MIA), assigned to Ofcom, assesses the effect of the proposed changes on other services in the market. It considers both the direct impact on consumers and producers of other services, for example in terms of price and choice, and the likely impact on competition and market development, which will affect consumer and citizen interests in the longer term
c. **The Public Value Test** (PVT) then combines the public value and market impact estimated by the PVA and the MIA to determine the overall 'net value' of the service

As part of the MIA assigned to Ofcom, new audience research was required to investigate people's opinions towards the enhancement to iPlayer (specifically the introduction of iPlayer premieres) and the closure of BBC Three as a broadcast channel (and its reinvention as an online-only service). The research also needed to explore people's existing use of online-only services to deliver contextual understanding of responses towards the proposed changes.

[4] *'BBC announces plans to close BBC Three as a TV channel in 2015'* http://www.bbc.co.uk/mediacentre/latestnews/2014/bbc-three-tv-closure.html

2.2 Research aim and objectives

Overall aim

To explore the potential market impact of the proposed changes to BBC iPlayer and BBC Three.

Specific objectives

- To explore and understand **motivations for watching** broadcast TV, versus watching catch-up, versus watching video on-demand (VOD)
- To explore audiences' **existing perceptions** of iPlayer and BBC Three, versus other linear channels, catch-up services, VOD services, and content aggregators
- To understand how people **find on-demand content** from services that have no TV presence/ schedule
- To understand audiences' reactions towards the proposed changes to BBC iPlayer and BBC Three and the resulting **impact** of such changes on BBC linear channels, BBC iPlayer, and other linear channels, catch-up services, VOD services, and content aggregators

2.3 Research approach

2.3.1 Overview

A programme of qualitative research centred on workshop groups and in-home ethnographic depth interviews was devised to best meet the objectives of the study.

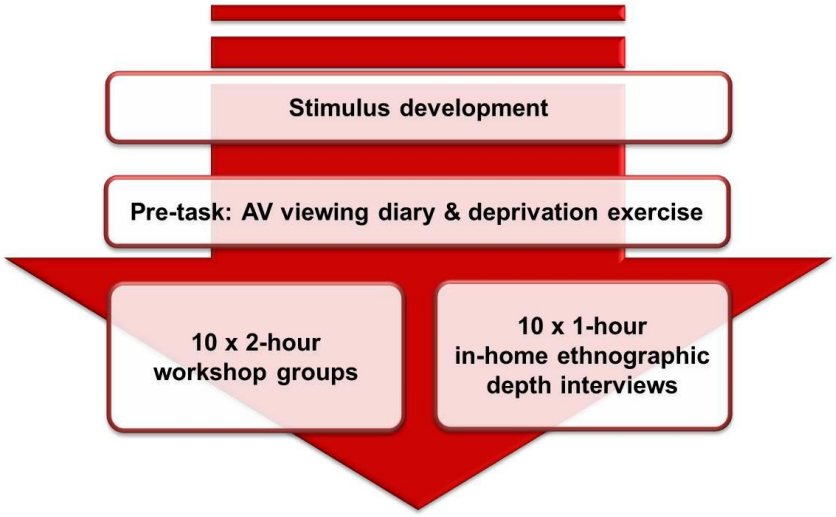

Figure 1: Research design overview

The research was founded on the development of a range of user-friendly stimulus materials, which helped inform participants about the proposed changes to BBC iPlayer and BBC Three. The main research sessions were preceded by pre-tasking to help sensitise participants to their actual viewing

behaviours and motivations. The pre-task included an audiovisual (AV) viewing diary to build awareness of the content, services, platforms and devices used. In addition, a deprivation exercise required participants to either live without linear broadcast content for a day, or rely solely on broadcast content. The deprivation process helped uncover participants' existing motivations for viewing linear and non-linear content, and encouraged informed responses in the subsequent group discussions and depth interviews. The final element of the pre-task was an AV technology questionnaire, which identified the various devices and services available to participants to view content.

Ultimately, a series of ten two-hour workshop groups and 10 one-hour depth interviews were conducted across the UK. A summary of the sample composition and approach for these elements is provided below.

2.3.2 Workshop groups – overview and sample

The workshop groups formed the majority of the research fieldwork, with 79 participants in total taking part in sessions across the UK. The groups encompassed a range of individual self-completion and group-based tasks and discussion to explore the key research objectives.[5] The sample composition for the workshop groups is summarised below:

Table 1: Workshop groups sample matrix (79 participants in total)

Group	Age band	Life stage	Social grade	Location
1	35-54	Family	ABC1	London
2	21-24	Pre-family/ single	BC1C2	London
3	16-17	Pre-family/ single	C1C2D	Cardiff
4	55+	Older family/ empty nest	ABC1	Cardiff
5	16-17	Pre-family/ single	BC1C2	Watford
6	25-34	Pre & young family	C2DE	Watford
7	18-20	Pre-family/ single	C1C2D	Glasgow
8	35-54	Family	C2DE	Glasgow
9	55+	Older family/ empty nest	C2DE	Belfast
10	25-34	Pre & young family	ABC1	Belfast

Note: Workshop groups conducted from 19th – 29th January 2015

The workshop groups were principally split by age to encourage constructive group dynamics amongst those of similar life stages. Each group was comprised of around eight participants, with an even gender split. The sample was not designed to be nationally representative, but instead broadly reflected the audience profiles of BBC iPlayer and BBC Three with the majority of the sessions concentrated on those aged 16 to 34. Recruitment was monitored to ensure that regular viewers of

[5] The discussion guide, stimuli, and self-completion exercises are provided in the appendices of this report.

BBC Three and regular users of iPlayer were included in the discussions. The sample also covered a range of socio-economic groups, and a mixture of parents and non-parents. The groups in Glasgow and Watford were conducted in suburban settings to avoid a focus on purely urban locations.

2.3.3 In-home ethnographic interviews – overview and sample

The in-home ethnographic interviews primarily focused on exploring how people find content using online-only services. Interviews were conducted in participants' homes to facilitate observation, demonstration, and discussion of habitual behaviours. The interviews concentrated on those aged 16 to 34 who were most likely to be using online-only services to view AV content.

Table 2: In-home ethnographic depth interviews sample matrix (10 participants in total)

Depth	Age band	Life stage	Social grade	Location
1	16-17	Pre-family/ single	ABC1	London
2	30-34	Pre & young family	C2DE	London
3	18-20	Pre-family/ single	ABC1	Cardiff
4	25-29	Pre & young family	C2DE	Cardiff
5	21-24	Pre-family/ single	ABC1	Watford
6	18-20	Pre-family/ single	C2DE	Watford
7	16-17	Pre-family/ single	C2DE	Glasgow
8	30-34	Pre & young family	ABC1	Glasgow
9	25-29	Pre & young family	ABC1	Belfast
10	21-24	Pre-family/ single	C2DE	Belfast

Note: In-home depths conducted from 22nd – 29th January 2015

The locations for the in-home depth interviews mirrored the workshop groups, with fieldwork conducted across the UK. The sample encompassed a range of age-appropriate life stages, with even gender and high and low socio-economic splits.

3 Current viewing behaviour and motivations for watching by platform and device

3.1 Introduction

This chapter explores participants' current viewing behaviours and motivations, across a range of platforms and devices. The findings are predominantly based on group discussions, with participants sensitised to their existing viewing habits (including the platforms and devices used) by completing the pre-task viewing diary. Achieving an understanding of participants' existing viewing habits and motivations provides valuable context for interpreting their subsequent reactions to the BBC iPlayer and BBC Three propositions.

3.2 Summary of key findings

- Non-linear viewing more prevalent among the younger (under 35s) and more tech engaged; conversely, linear viewing more predominant for older and less tech engaged
- Increasing claimed use of and preference for catch-up and VOD services in recent years
- Linear preferences fuelled by a habitual and familiar viewing offer, with decisions shaped by trailers, electronic programmes guides (EPGs), listings and channel brand expectations. Linear the preferred choice for 'event TV' viewing – e.g. live sports, talent show finals, and other programmes that generate conversation and social media 'buzz'
- Participants with non-linear preferences cited a more individually tailored viewing experience offering greater freedom. Non-linear was associated with a wide range of content and 'binge' viewing. However, it was widely perceived as requiring more effort to access and select content than linear alternatives
- Devices play a role in influencing viewing behaviours, especially with the emergence of more personal and connected devices
- Larger screen devices (e.g. TVs and smart TVs) preferred for more shared and immersive viewing occasions, yet can lack the intimacy and personalisation of smaller devices
- Smaller screens offer a more individually tailored experience (paralleling non-linear viewing), but fail to offer the immersive experience of larger screen devices

3.3 Viewing behaviour and motivations by platform

The majority of participants observed that their viewing of non-linear services [i.e. catch-up, on-demand, and digital video recorder (DVR) services] had increased in recent years. However, there

was a marked divide between participants with a preference for non-linear viewing, and those favouring linear, scheduled TV viewing.

Linear viewing preference

Older (those aged 35 and above) and less tech engaged participants were most likely to prefer linear viewing. Participants with a preference for watching linear content associated it with easy, effortless and undemanding viewing. Moreover, linear was valued for content served to viewers via a schedule, and offered a familiar, long-standing and habitual means of watching programmes.

Across all participants, there was more likely to be a preference for watching 'event TV' content live, through linear rather than non-linear services. For example, many preferred live viewing of sports events and other TV content that generated a lot of conversation (whether in person or via social media), in order to avoid spoilers. Those who preferred watching 'event' content live also valued the shared, in-the-moment social experience of viewing with others.

> *"It's because it's a fear of missing out on something new, some big news that something's going to happen; not that it ever does. But no, the fear of missing out on something that was broadcast – I can't believe I missed that, I didn't see that! You know?"* (Male, 25-34, Belfast)

> *"Say about 60:40 in favour of live TV. I watch soaps and then we will plan things that we both like, that takes us up to bedtime. We probably watch more on-demand at the weekend."* (Female, 35-54, Glasgow)

> *"I think our family has quite an old fashioned idea about there being an evening where there's like two hours or so of programmes that we all want to watch which is usually Friday night. So that's what I remember doing when I was at school. There was usually one particular evening which was good TV. And so I think our kids still think of there being things on TV live."* (Male, 35-54, London)

Non-linear viewing preference

Younger (under 35s) and more tech engaged participants were most likely to express a preference for non-linear viewing. Moreover, by completing AV viewing diaries before the research sessions, these participants had become more aware of the high proportion of their viewing that was non-linear; although several participants were equally surprised by how much scheduled TV they continued to watch, despite their perceived preference for non-linear viewing. These participants

often associated non-linear with more active viewing of specifically chosen programmes, whereas linear was more synonymous with passive, background consumption. Furthermore, the younger participants frequently associated linear TV with viewing with other family members, where they were not necessarily free to choose what was watched. For the majority, the preference for non-linear consumption was related to the ability to customise viewing in line with personal preferences, whilst fitting viewing around other home, work, and social commitments.

> *"I probably watch more on-demand, than I do live TV. I probably catch-up after the kids have gone to bed, they watch whatever they want to watch and then it is my time to sit and watch something."* (Female, 35-54, Glasgow)

Many of those with a non-linear preference had embraced the opportunity to 'binge' on content by working through entire series on subscription on-demand services, with Netflix a prominent example. The experience of watching whole series through on-demand services was likened to viewing DVD 'box sets', and was particularly popular at weekends when there was usually more time to immerse.

> *"I prefer Netflix because you don't even have to press the next one, it just keeps playing. That is what I like. My parents usually - obviously because they work all day, every day at 9pm is when they sit down and watch their programs. They watch it live, because it's something they look forward to, it is really sad, but…"* (Female, 16-17, Watford)

> *"There's things like 'House of Cards' and 'Breaking Bad', which you can binge watch, 30 episodes in a day, which is better than waiting once a week to watch it. I prefer to do it that way."* (Male, 16-17, Cardiff)

Summary of linear versus non-linear viewing preferences

The figure below summarises the main elements feeding into participants' preferences for either linear or non-linear viewing.

Some prefer LINEAR

- Familiar and habitual
  - Low effort, content comes to you
  - Easy to find content
  - Fits rhythm of life, esp weekday routines – regular programme durations, punctuation of continuity announcers and ad breaks
  - Live gives sense of a human presence
- Preeminent for live events (sport, news)
  - Shared experience, spectacle
  - Enhanced by social media
  - Avoid CU spoilers of social media
- Trailers/EPG/listings and channel brand expectations all guide decisions
- But it dictates, have to fit with schedule
- Feels like less choice to some

Some prefer NON-LINEAR

- Sense of freedom – content fits around you
  - Can choose exactly what you want to watch, and when to watch it – own curator
  - Gives content greater sense of value
- Can 'binge watch' for deeper immersion
  - Esp at weekends, no time constraints
  - Can be a problem on weeknights if watch too much
- Wide range of choice
  - But better with OD than CU
  - CU requires some knowledge of linear schedule
- But requires more effort than linear
- Buffering can compromise experience
- Illegal torrent/streaming sites for content not yet available in UK

Figure 2: Summary of linear versus non-linear viewing preferences

3.4 Viewing behaviour and motivations by device

The pre-task viewing diaries and technology questionnaires raised participants' awareness of the role of an increasing range of devices in shaping their viewing habits. In particular, many participants observed the influence of more personal and internet-connected devices in opening up viewing of new services and in shaping consumption around other commitments. Indeed, with many participants now accessing a range of catch-up and on-demand services, this was seen to be fuelled by the ready access delivered by connected devices.

Overall, a distinction emerged between the roles of large screen and more personal devices. Large screen devices included TV sets and smart TVs, and games consoles when used to deliver content through such screens. The more personal devices included laptops, tablets and smartphones, and these were particularly influential in shaping the viewing habits of younger (16 to 34) and more tech savvy participants.

Figure 3: Larger screen and more personal AV viewing devices

The role of larger screen devices

The vast majority of participants related larger screen devices with more social and shared viewing. Moreover, they recognised the value of larger screens in delivering a more immersive, high-quality viewing experience. Most continued to associate TV sets primarily with linear viewing, and the experience of scrolling through channels and consuming scheduled content. However, several participants mentioned increasingly accessing catch-up services and recorded content (using DVRs) via subscription TV services.

Whilst several participants owned smart TVs, most were not using them extensively to watch content through connected services. Indeed, many had simply purchased a new TV set that happened to be a 'smart' model, rather than specifically setting out with using the connected features in mind. Several participants who had used smart TV apps mentioned frustrations with interfaces and navigation, which did not meet expectations shaped by touchscreen, personal smart devices. A few participants, particularly the younger and more tech engaged, used games consoles to bridge the gap between a traditional TV set and a smart TV. Younger participants still living with parents occasionally used games consoles to access VOD and catch-up services in their own rooms. However, they were still as likely to simply use the TV sets in their rooms to watch linear content that met their preferences.

> *"I have got a tablet and smartphone but I don't really use them for TV, I would rather sit there on the sofa with a friend and watch it, rather than have a smaller screen, I don't think that will change."* (Male, 21-24, London)

"I think there's a whole world that I haven't explored. We didn't set out to buy a smart TV and I think that's why we're at where we are because it wasn't something we set out to… And because I've got the PlayStation as well and you can access the internet through that it just gets so confusing." (Female, 30-34, London)

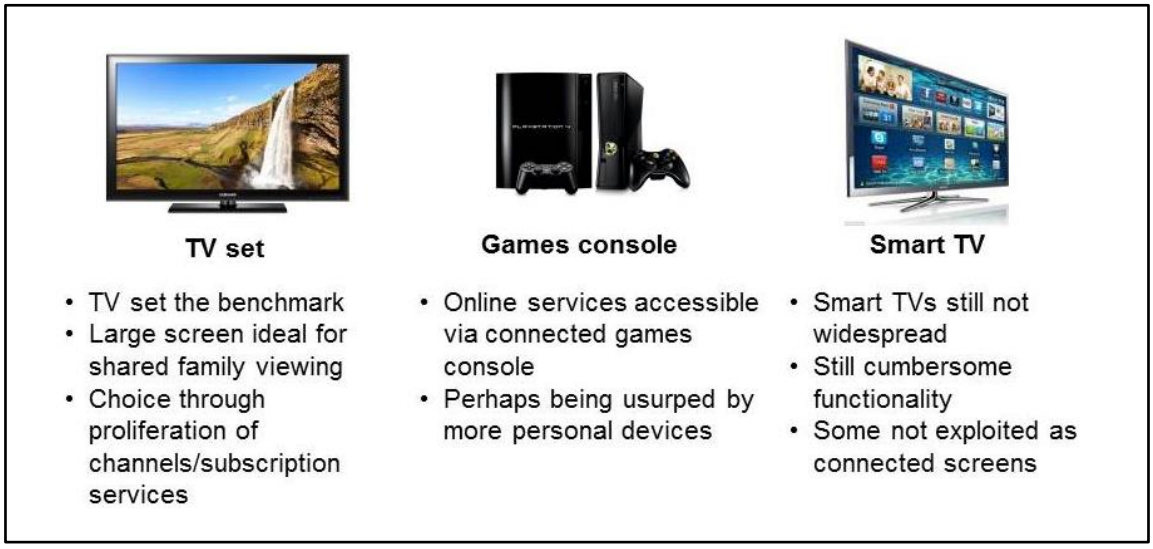

Figure 4: Summary of the role of larger screen AV viewing devices

The role of more personal devices

Many participants, particularly the younger and more tech engaged, described the more individual and intimate viewing experience of personal devices (i.e. laptops, tablets, and smartphones). They saw personal devices as ideal for consuming on-demand content, allowing them to watch content where they wanted and when they wanted. Nevertheless, the typically smaller personal devices failed to offer the immersive big-screen experience of TV sets and smart TVs.

For several participants, including those aged 35 and over, laptops had an established role for individual viewing. The keyboard offered a familiar and user-friendly means of searching for and selecting content via catch-up and on-demand services. However, participants with tablets thought they compared favourably with laptops in terms of portability and comfort of viewing. Younger participants, especially those living with parents, were most likely to use tablets to view what they wanted in their bedrooms rather than having to concede to the viewing preferences of other family members. The younger participants were also most likely to use smartphones to view content. Whilst smartphones allowed them to watch content in their rooms or even in bed, there were drawbacks in terms of the small screen size and the competing, communications roles that the devices served.

"I watch it on my iPad, so I can watch it on my own, away from everyone and at whatever time I want. But on TV I have got to sit there with everyone at a certain time." (Female, 16-17, Watford)

"I don't really sit with my family…'cause normally they're watching the news or something stupid like that, so I'll just go upstairs straight away and go on my iPad." (Male, 16-17, Cardiff)

"I use my phone. Like kids have got the TV normally so yes generally I tend to use Sky Go on my phone. Out and about walking the dogs and I'll still watch my programme." (Male, 25-34, Watford)

"Before it seemed to be that my life revolved around the telly to sit down and watch a programme. Whereas now it is much more flexible…because one of us is watching something in one room and I will go in and both my children have got iPads as well and it is just constant. They are watching different things on there, YouTube and things and I am on the iPad, my husband is watching the telly." (Female, 35-54, Glasgow)

Laptop

- Laptop/computer the traditional access to online content for individual viewing
- Being challenged by tablet
- But keyboard aids searching

Tablet

- Tablet combines intimacy of smartphone with comfort of larger screen
- Easy to use and less cumbersome than laptop
- Portability great for journeys and bed

Smartphone

- Smartphone the ultimate personal device
- But small screen compromise
- Also drain on battery jeopardises other roles
- And risk of interrupted viewing

Figure 5: Summary of the role of more personal AV viewing devices

4 Market perceptions

4.1 Introduction

This section examines participants understanding and perceptions of the current viewing landscape. Firstly, participants' broad market perceptions will be discussed, with particular reference to variations by age group and level of engagement with AV technology. Secondly, perceptions of BBC iPlayer will be investigated through comparative analysis with other catch-up and on-demand services. Finally, there will be initial consideration of participants' views on BBC Three, although these will be revisited in greater detail in Chapter 7 of this report.

4.2 Summary of key findings

- Younger and more tech engaged participants demonstrated a more detailed market understanding, driven by their familiarity with and use of more AV and social media services
- iPlayer predominantly seen as a catch-up service, alongside equivalent players from other broadcasters
- Within the catch-up category, iPlayer considered a platform leader and widely used by participants across the age range
- Netflix stood out for participants as emblematic of the on-demand category, with greatest familiarity and highest use among the subscription services
- Regular Netflix users identified it with 'binging' on whole series, and with more intelligent, behavioural and social-media-generated content recommendations
- BBC Three was widely recognised by participants as a free-to-air service within the BBC channel family. Younger participants much more likely to view BBC Three regularly, with the channel valued for showing light and entertaining content

4.3 Varying market perceptions by age and level of tech engagement

During the research sessions participants took part in a group task, which involved arranging a variety of sort cards containing different brands and services into groupings. The participants were free to determine how the groups were defined, and the activity uncovered varying perceptions and understandings of the current viewing landscape.

The younger participants were most likely to display a nuanced understanding of the viewing landscape based on first-hand experience of many of the services being considered (especially the online technology and new media services) and a higher propensity towards high tech engagement. Moreover, those aged 16 to 24 were most likely to identify more granular differences between

similar types of service – e.g. between catch-up or on-demand services. The younger participants were also more likely to go beyond simply technical or functional categories (e.g. TV channels, catch-up services) and begin to group items based on relevance or shared appeal.

By contrast, the older and less tech engaged participants were more likely to generate fewer and less detailed groupings, and were often simply unaware of several services (particularly social media and more niche services). Whilst those aged 35-54 were generally able to make broad distinctions between catch-up and on-demand services, the over 55s typically struggled to unpick the differences between these services, especially when faced with several unfamiliar brands.

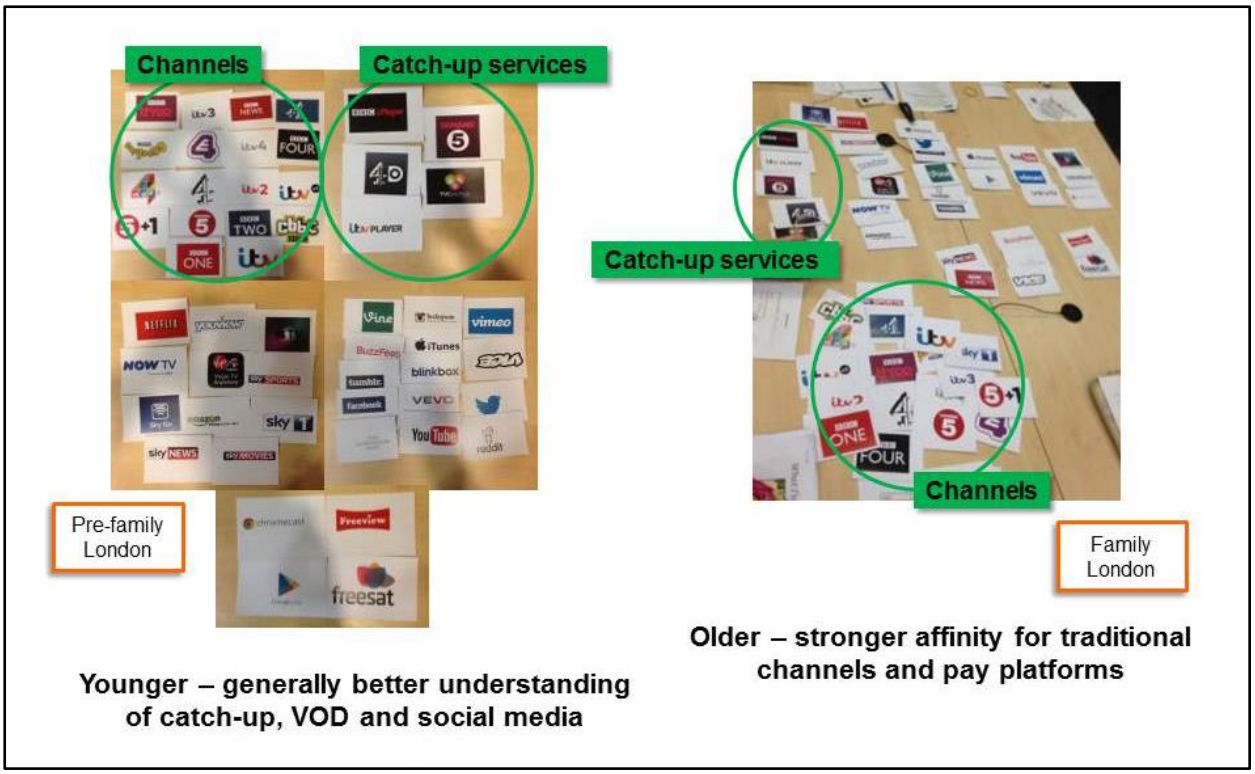

Figure 6: Card-sort exercise example images from London workshop groups

With regards to the services of principal interest to this study, BBC Three was most likely to be placed alongside other broadcast TV channels. In most of the research sessions, with the exception of the older participants, BBC Three was usually placed in a category with other 'Freeview' (free-to-air) channels, which were contrasted with groupings of paid-for or subscription channels (such as Sky Sports and Sky Movies). A few of the research groups opted for a more granular approach, with the 'five main channels' split out from the other 'Freeview' channels. The younger participants, especially those aged 16 to 24, often separated out BBC Three along with other brands they liked to watch or felt close to (e.g. E4, ITV2). The older participants were most likely to cluster services by brand, with BBC Three grouped with other BBC services (channel brands and iPlayer) regardless of personal connection, familiarity or current viewing preferences.

The majority of the research groups placed iPlayer alongside other broadcaster catch-up services (e.g. ITV Player, 4oD, Demand 5). The younger groups (16 to 34) were more likely to make a distinction between the catch-up services, and the subscription on-demand services that were paid-for and not linked to a TV schedule. Moreover, the younger participants were generally more likely to have used such services, which helped them unpick differences. The following sections explore participants' perceptions of iPlayer versus other catch-up and on-demand services.

4.4 Perceptions of BBC iPlayer versus other catch-up and on-demand services

4.4.1 Perceptions of iPlayer versus other broadcaster catch-up services

As mentioned in the previous section, the majority of participants readily appreciated the similar role of BBC iPlayer and other broadcaster catch-up services (e.g. ITV Player, 4oD, and Demand 5). However, many participants were also able to identify differences between these catch-up services.

Perceptions of iPlayer

iPlayer was recognised by most participants as a pioneering service, and the first of its kind that they were aware of. This widespread familiarity with iPlayer was reflected in it being used, to varying degrees of frequency, by participants across the age range. Younger participants were most likely to be using iPlayer on personal devices to shape viewing around the competing preferences of other household members. The older participants, generally those aged 35 and over, mainly accessed iPlayer via TV sets or through laptop or desktop computers. Whilst the vast majority of participants recognised that content on iPlayer was time-limited in terms of availability, several thought the window was still 7 days rather than 30 days.[6] Closely associated with a catch-up role and broadcast services, the majority of participants mainly used iPlayer to watch programmes that they had missed rather than using the service to browse for content without a specific item in mind.

Perceptions of 4oD

4oD was the next most prominent catch-up service, in relation to participants' familiarity with it and current use. Several participants, particularly the younger and more tech engaged, recognised that 4oD delivered access to a broader content library than iPlayer without a time-limit on availability. Younger participants, in particular, often responded positively to a quirkier and more youthful tone of 4oD, which corresponded to their wider perceptions of Channel 4 brands. A few participants also mentioned that the 4oD interface was more user-friendly than iPlayer, although there was not an overtly negative response to the navigation experience offered by the latter.

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[6] iPlayer programmes have been available to view for 30 days since autumn 2014
http://www.bbc.co.uk/mediacentre/latestnews/2014/iplayer-30-days

Perceptions of ITV Player and Demand 5

The vast majority of participants struggled to pick out defining aspects of the other broadcaster catch-up services: ITV Player and Demand 5. Indeed, participants typically focused on perceptions of the channel brands, rather than specific characteristics of the catch-up services. Like 4oD, many participants highlighted the volume of advertising on these services, which compared unfavourably with the advertising-free iPlayer.

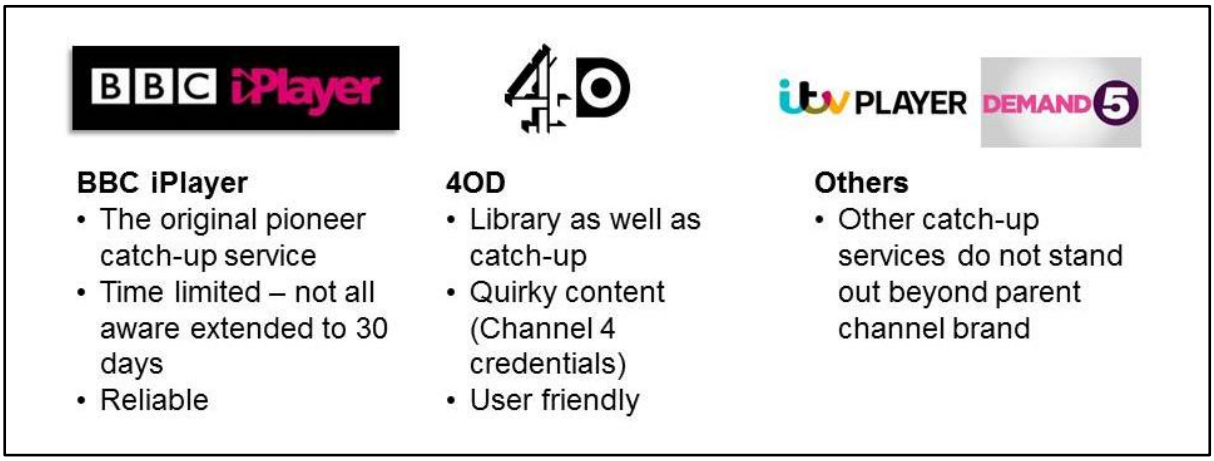

Figure 7: Summary of perceptions of iPlayer versus other broadcaster catch-up services

4.4.2 Perceptions of iPlayer versus on-demand services

The research also explored perceptions of iPlayer within the broader context of on-demand services. Netflix was the subscription video-on-demand service (SVOD) most familiar to the majority of participants and offered the most enlightening point of comparison with iPlayer. The comparison was important in light of the research objective of gauging responses to premiering content on iPlayer before it was broadcast on linear TV. Indeed, Netflix represented a well-known service that allowed several participants to watch content that had not previously been broadcast, and thus offered useful context.

The majority of participants considered iPlayer to be the pre-eminent catch-up service, whilst Netflix stood apart among the SVOD services. Most participants were able to identify elements that distinguished them from each other.

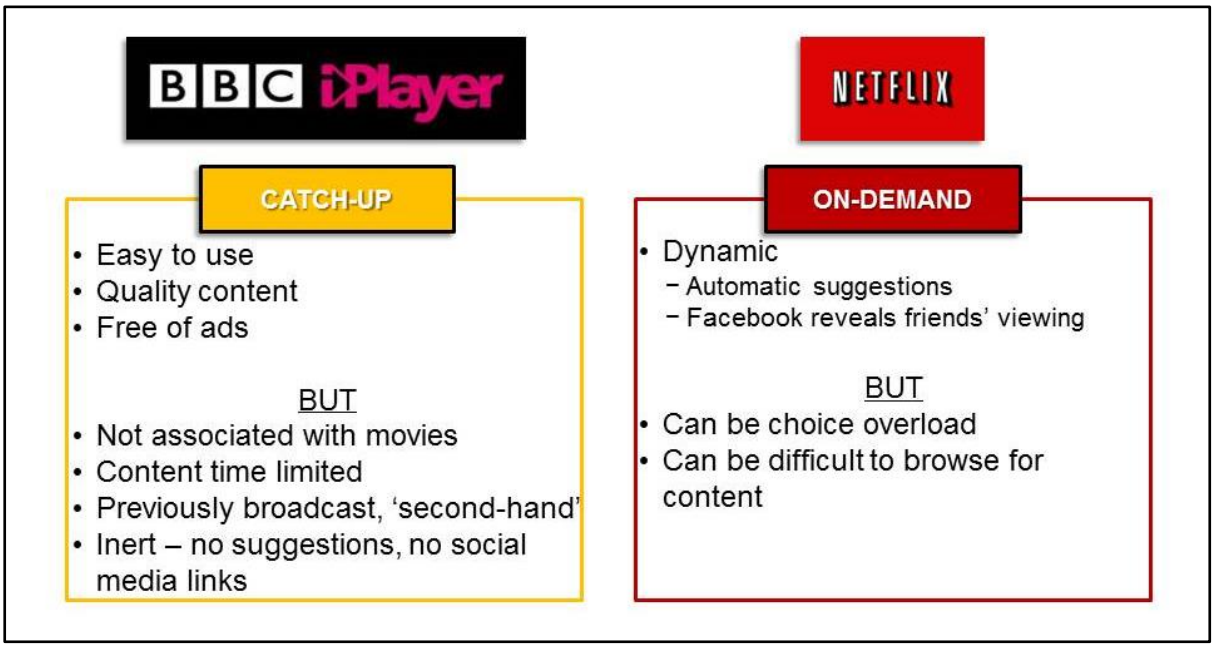

Figure 8: Comparing the usability of iPlayer and Netflix

In relation to usability, the vast majority of regular iPlayer users considered it to be easy to use, with the broadcast schedule helping to signpost content likely to be available. With regards to the content available, most participants associated iPlayer with high-quality programming, in line with broader perceptions of BBC services. However, very few participants associated iPlayer with movies, and the content lacked exclusivity as it had previously been shown on TV. The limited appeal of catching-up on previously broadcast content for a few participants gave early indications of the potential appeal of premiering content on iPlayer.

Participants who were using Netflix regularly described a more dynamic user experience, with content selection aided by suggestions based on previous viewing or through social media integration. Despite this, several participants thought that the sheer volume of content available on Netflix made it difficult to choose what to watch. Moreover, amidst a high volume of content, some participants found Netflix difficult to navigate, although this was also influenced by the usability of the device used to access the service.

The vast majority of participants using Netflix highlighted its role in allowing them to watch entire series of programmes. They valued the ability to 'binge' on several episodes of a series, with Netflix making it easy for them to pick up from where they left off. By contrast, many participants noted the time constraints presented by content availability on iPlayer, with viewing entire series on the service not the norm.

"The thing with iPlayer is they can't really do the shows off Netflix or anything on there because it's BBC iPlayer it's meant to be BBC programmes and they don't tend to show things like that. And it's not on long enough is it, really? If you don't watch it for a certain time – isn't it on for like a week or something? " (Female, 16-17, Cardiff)

"There's so much content on Netflix. It's endless; you'd never have enough time to watch all of it. There really is something for everybody." (Male, 16-17, Cardiff)

Several Netflix users cited the appeal of the American shows featured, which were often not available to view on broadcast channels in the UK. Moreover, a few participants even mentioned accessing the American version of Netflix in order to take advantage of the broader content library.

"Netflix is good for…like some shows are just exclusive to the US and won't come here, so the only way you're going to watch them really is by going on things like that." (Female, 16-17, Cardiff)

"You can change the country you're in and because you pay for Netflix there's more…variety" (Female, 16-17, Cardiff)

The figure below summarises the roles iPlayer and Netflix, within the 'catch-up' and 'on-demand' categories.

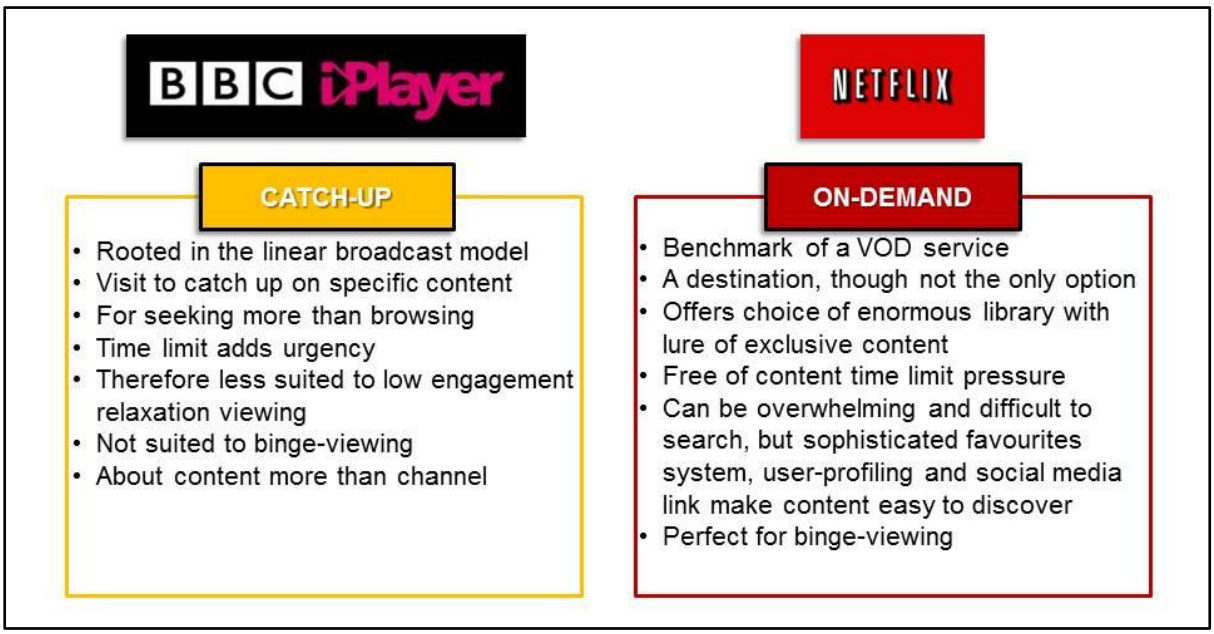

Figure 9: Comparing the roles of iPlayer and Netflix

4.5 Initial perceptions of BBC Three

Whilst participants' existing perceptions of BBC Three are explored in greater detail in Chapter 7, the figure below summarises the initial views of the service emerging from the card-sort exercise. Most participants perceived BBC Three as a relatively niche service, and it was more familiar to the younger people who watched it regularly.

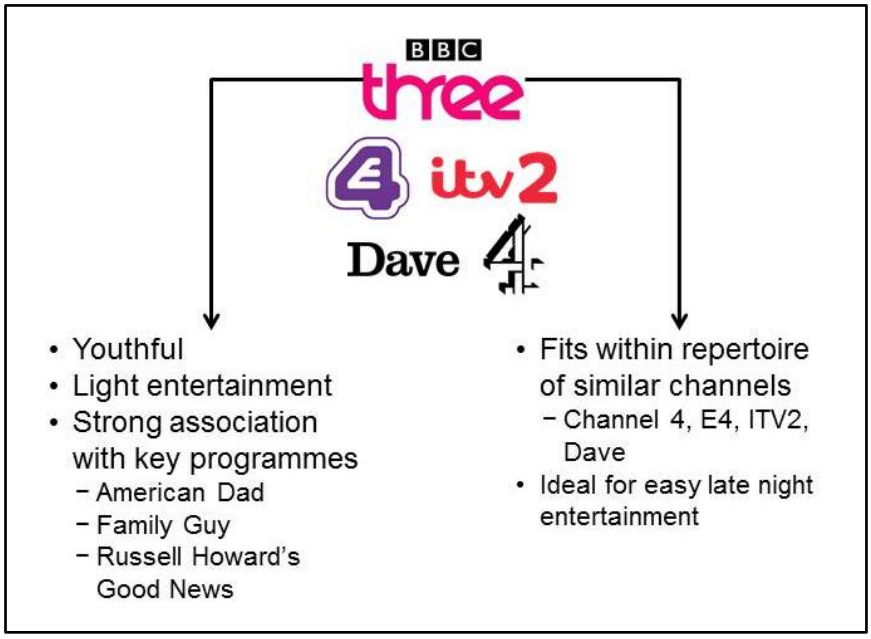

Figure 10: Initial perceptions of BBC Three

The vast majority of regular BBC Three viewers strongly associated the service with lighter content, with *Family Guy* and *American Dad* standouts in terms of specific programmes mentioned. In the broader market context, BBC Three was likened – particularly by younger participants and regular viewers – to other broadcast channels with similar light and undemanding offerings, such as E4, ITV2, Dave, and Channel 4.

5 Finding content

5.1 Introduction

This chapter explores how participants discover and select content, with particular reference to online-only services. Understanding of how people find content on online-only versus more traditional services delivers valuable context given the nature of the propositions that will subsequently be explored: i.e. proposed online premieres of programmes through iPlayer, and an online-only BBC Three with no broadcast channel. The chapter draws heavily on evidence from the ethnographic in-depth interviews, where participants were able to discuss and demonstrate how they found content on their own devices.

5.2 Summary of key findings

Content discoverability by platform

- The balance between searching for and browsing content varies by linear and non-linear viewing
- Linear well suited to searching for specific content or browsing, with selection fuelled by the EPG, channel listings, recommendations, trailers, and well-known channel brands
- Most participants see catch-up services as tied to linear schedules with most searching for specific content items that they have missed or that have been recommended rather than browsing
- On-demand also used most frequently to search for content based on recommendations from friends and family, or through 'buzz' generated around programmes
- However, subscription on-demand services aid content selection and browsing through recommendations based on previous viewing and social media links

The role of devices in content discoverability

- Laptops the favoured device to search for content as titles can easily be typed using keyboards. Smart TVs and games consoles less suited to searching for specific items due to cumbersome entry devices such as remote controls
- TV sets and smart TVs the most user friendly devices for browsing content – strongly associated with 'flicking' through channels rather than using connected services to browse. Laptops less well suited to browsing than searching as keyboard and trackpads do not offer seamless scrolling
- The user experience of personal, touchscreen devices depends on the functionality and design of apps used

Social media as a channel of content discovery and as a content destination

- Services such as Facebook and Twitter frequently used to discover content based on recommendations from friends and family
- Video-orientated services like YouTube used mainly by younger participants to search for, browse, and consume AV content – valued for not being limited to specific broadcasters or having time limits on content availability

The challenges of content overload and decision making

- Several participants faced challenges finding content amidst an ever-growing volume of choice on linear and non-linear services

5.3 Content discoverability: searching versus browsing

When exploring how participants found content, two broad categories emerged: *searching* for content, and *browsing* content. 'Searching' for content relates to where participants used a service to look for a specific programme, film or other video item. 'Browsing', by contrast, refers to where they accessed a service – whether linear or non-linear – to find something to watch but without a content title in mind. The categories of searching and browsing will be referred to throughout this chapter, as content discoverability is explored across different platforms, services and devices.

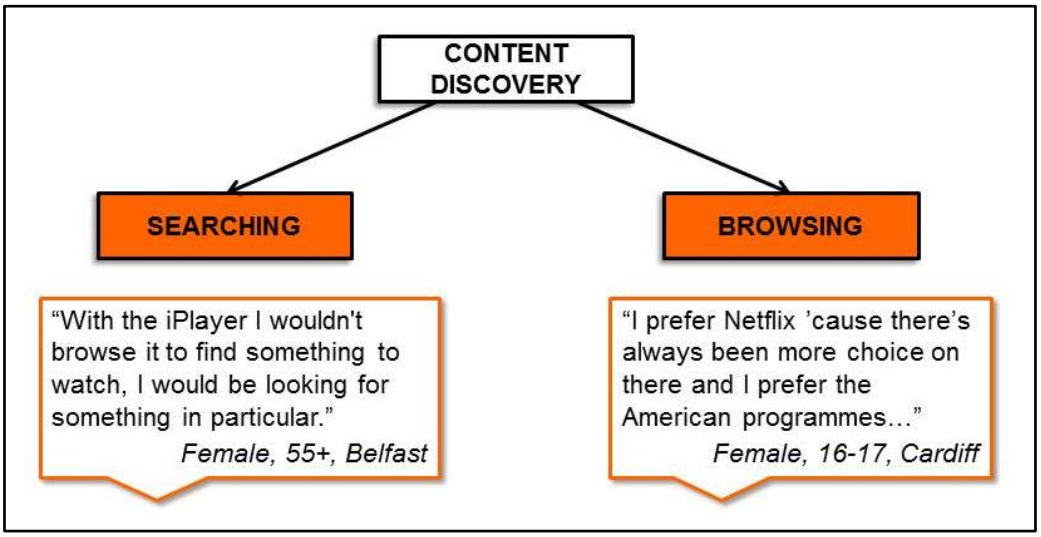

Figure 11: The two categories of content discovery – *searching* versus *browsing*

5.4 Content discoverability by platform

The way in which participants found content was seen to vary by linear and non-linear viewing and – within non-linear itself – differences emerged between finding content on catch-up versus on-demand services. The figure below summarises how participants found content on linear and non-linear services, with reference to the balance between searching for and browsing content.

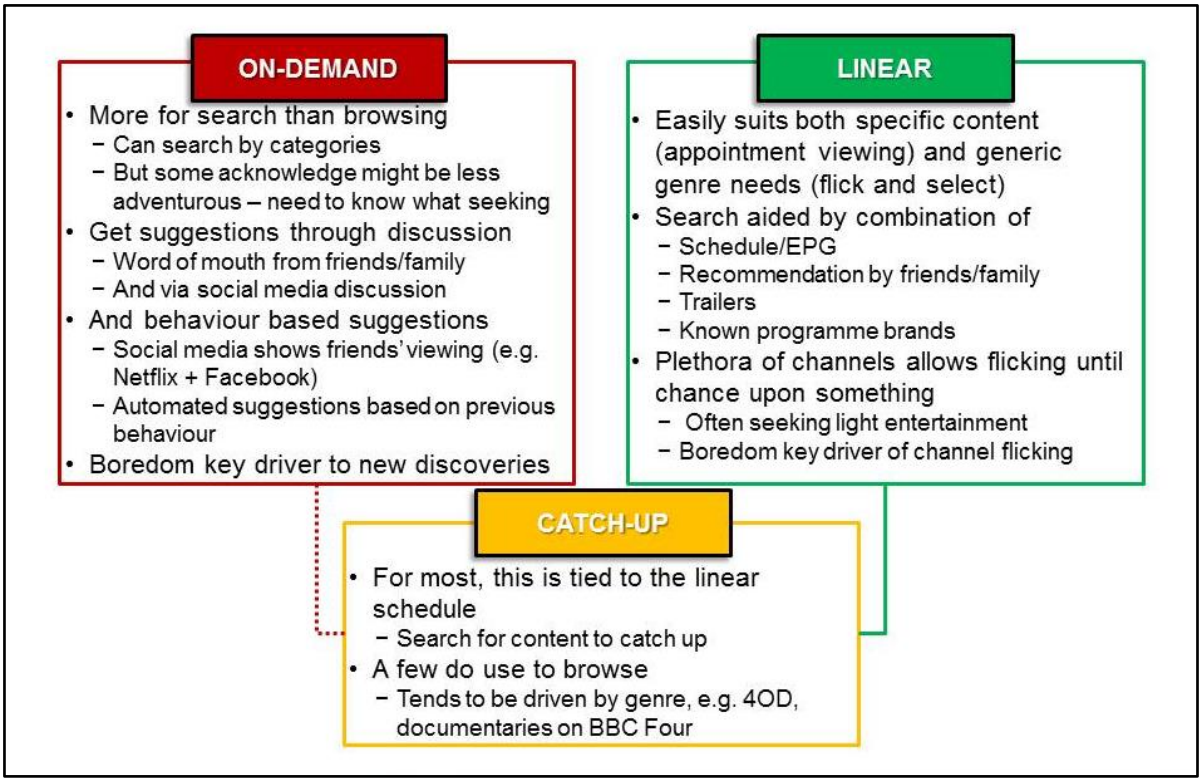

Figure 12: Summary of content discovery by platform

5.4.1 Finding linear content

Firstly, it is useful to explore how participants went about finding content on linear services, to provide context for potentially different approaches to discovering items on non-linear and online-only alternatives. The vast majority of participants, of all ages and levels of tech engagement, had well-established approaches to finding something to watch on broadcast TV. They readily associated linear TV with 'appointment viewing' of specific programmes at specific times, as well as more general browsing through channels to see what grabbed their interest.

When searching for a particular programme, most participants recognised the value of a linear schedule and EPGs in helping them navigate to the desired content. Moreover, the majority of participants often viewed specific programmes based on the recommendations of friends and family. Several mentioned the role of trailers and advertising in sparking their interest to seek out particular programmes. For a few participants, particularly the older and less tech engaged, print TV

guides continued to provide a useful source of finding something to watch on linear TV, through detailed listings and recommendations.

> *"It's either been recommended to you, or it's just by chance that you sat down at that time and started watching that program."* (Female, 16-17, Watford)

> *"Every Saturday I buy The Sun as well because it has the magazine with the TV listings in it. It is the best magazine which gives you the list of all the channels and all the Sky and the Freeview. It gives you the number and day you are on Sky, or Freeview or Virgin or whatever it gives you the number for all of it and the time. That is for the Saturday and it does this for the Sunday and the Monday, it is brilliant…I don't read The Sun but that is what I buy it for."* (Female, 55+, Belfast)

The vast majority of participants also related linear TV to more passive viewing, where they browsed through channels without a certain programme in mind. However, even when they had no particular programme in mind, familiarity with channel brands helped them navigate to types of content that were likely to meet specific needs. Moreover, many participants browsed linear content as a means of relieving boredom or relaxing, and valued having a selection of programmes served to them rather than having to actively seek out and choose an item. The value of browsing through linear channels is illustrated in the quote below, with the participant reflecting on having to avoid watching linear TV for a day as part of the deprivation exercise pre task.

> *"The only thing that I would say I missed doing is flicking, to see what was on. I had to sit and think about what I was going to watch, rather than go I will have a look and see what is on and see what is there."* (Female, 35-54, Glasgow)

5.4.2 Finding catch-up content

Whilst offering on-demand access to content, participants mainly considered catch-up services to be tied to linear schedules. As a result, there were some similarities between how participants found content on catch-up and linear services. For those using catch-up services regularly, the majority of viewing occasions concentrated on searching for specific items rather than browsing. They frequently searched for programmes that they had forgotten to watch when broadcast, or that had been recommended to them. The majority of participants found the specific content item by accessing the relevant broadcaster catch-up service, and typing the name of the programme in a search box. Alternatively, a few participants searched for programmes on catch-up services by

scrolling back through the TV guide section to the day on which the programme was broadcast to then select the item to watch.

Whilst several participants used catch-up services to browse for content, this was done less frequently than using these services to watch a particular item. They would generally browse catch-up services when there was nothing of interest on broadcast channels, or if they did not have access to the TV set. When browsing catch-up services, several participants mentioned using 'most popular' or prominently featured content sections to help find something to watch. In addition, a few participants also browsed by genre or channel to find programmes fitting with their specific needs or moods when browsing.

The case study below illustrates how catch-up services were predominantly used to search for specific content rather than for browsing. It also touches upon similarly targeted use of other online video services such as YouTube.

Case study: Paula, 32, London

- ***Searching for content on catch-up and other internet services***

Paula rarely has time to watch TV at the time of broadcast and finds it irritating to scroll through channels. Instead, she relies on catch-up and other online services to find something to watch.

Catch-up plays a very specific role for Paula aimed at searching for particular programmes. She uses BBC iPlayer to find programmes that she missed when they were shown on TV. Paula doesn't spend any time browsing for programmes on iPlayer and uses it purely to catch-up.

> *"I wouldn't purposefully go to BBC iPlayer or the ITV Player and see what they've got for us to watch on there."*
>
> *"I don't look at it [iPlayer] as a channel…and that's how I would have to view it in order to go onto it and look and see what content there was."*

Paula also watches lots of programmes online that she searches for using YouTube. She considers YouTube to have a wide range of programmes available and it's not limited by time constraints like the iPlayer.

When looking for a particular programme, Paula will often use Google to check the latest season available, before following links to YouTube and the latest episode available via specific YouTube channels.

5.4.3 Finding on-demand content

This section explores how participants find content through on-demand services that are not linked to a linear schedule, such as subscription on-demand services (e.g. Netflix, Amazon Prime Instant). Participants who were regularly using on-demand services, most often had a specific programme or series in mind when they accessed the service. In this respect, there were broad parallels between participants' balance between searching for and browsing content on catch-up and on-demand services. However, the majority of those using on-demand services considered them to offer a better browsing experience than catch-up services.

In the absence of a linear schedule, most participants found content through word-of-mouth recommendations from friends and family, whether in person or via social media. Moreover, several participants were influenced by the conversation and 'buzz' generated around high-profile shows, such as *Breaking Bad* and *House of Cards*.

> *"One thing that is interesting, which you guys with Netflix would have experienced this as well, there is, although we have choice, a lot of the time we are actually quite conservative in how far away from what we expect to watch we will actually watch. So you will see something which is similar to the programme you are looking for, you are like I want to find something that I can recognise, so I am not so inclined to watch something I have never heard of, against a repeat of a show that I know that I like, which seems strange, but it's sometimes difficult to make that if it hasn't been specifically recommended by a friend."* (Female, 21-24, London)

When accessing on-demand services with particular content in mind, most participants typed the name of the item in a search box. Whilst this avoided navigating through menus, the user experience often depended on the device used and whether or not the interface (app or browser) was intuitive.

The majority of regular users of on-demand services thought that they were better enabled for browsing content than catch-up alternatives. Netflix, in particular, was viewed by several users as proactively helping them find content when they did not have a specific item in mind. Reflecting the profile of Netflix users, younger and more tech engaged participants were most likely to identify the value of behavioural recommendations, either based on what they had watched previously or by using social media links to generate suggestions based on their friends' viewing. With many users searching for content through on-demand services to relieve boredom or to relax, they valued the active nature of recommendations that offset the effort of finding and selecting content.

"You buy Netflix and then everyone in the family will have their own account so it'll be like – so it recommends videos that suit which things you've watched. It relates what you've already watched with something else. So if you watch a chick flick it'll bring up more chick flicks underneath and say recommended for Harriet, for example." (Female, 16-17, Cardiff)

"iPlayer doesn't have any suggestions. Netflix will recommend things based on what your friends are watching, or what you have just watched, whereas iPlayer doesn't do that, you have to scroll through and there was nothing on recently that takes your fancy then it will be hard to find something to watch. Whereas Netflix is really easy to find something that you will like." (Female, 21-24, London)

The following case study, taken from one of the ethnographic depth interviews, highlights the value of recommendations in helping people find on-demand content easily and quickly.

Case study: James, 26, Belfast

- ***Browsing for content using on-demand services***

James really values the convenience of the apps that are now available for catch-up and on-demand services. Whilst James used to have to make an effort to watch content live, he can now use apps to view programmes at times that suit him.

For James, catch-up services allow him to download content for journeys and when he wants to watch programmes without an internet connection. But in terms of browsing or finding new content, on-demand services remain at the forefront of his viewing.

James sees no effort in using Netflix to search for content – there are recommendations available based on his previous viewing and saved items.

"You can always go on there and you know with no effort on your part you can probably find something to watch."

"So that would be popular on Netflix, then there's top picks and then you can go in and check the reviews and that'll give you an indicator… it's not hard to find something worth watching."

James rarely goes out of his way to search for specific content – and instead generally watches content that is either suggested to him through his profile or that he comes across via browsing.

5.5 The role of devices in searching for and browsing content

Participants also considered the role of devices in the process of finding content. The figure below plots selected AV viewing devices by relative ease or difficulty when used to search for or browse content. Firstly, in relation to searching for content, most participants identified laptops as the most user-friendly device. Indeed, as discussed in the previous section, most searched by entering the name of a content item and a keyboard offered the quickest and most familiar means of doing this. At the opposite end of the scale, several participants found searching for content through smart TVs to be a difficult process, due to the limitations of entry devices and interface navigation. For example, using a traditional remote control to type in programme names was often an onerous process, which failed to meet expectations set by using keyboards to type or even touchscreen devices. Games consoles presented similar difficulties in terms of searching for content, with users typically relying on hand-held controllers to select characters from on-screen keyboards.

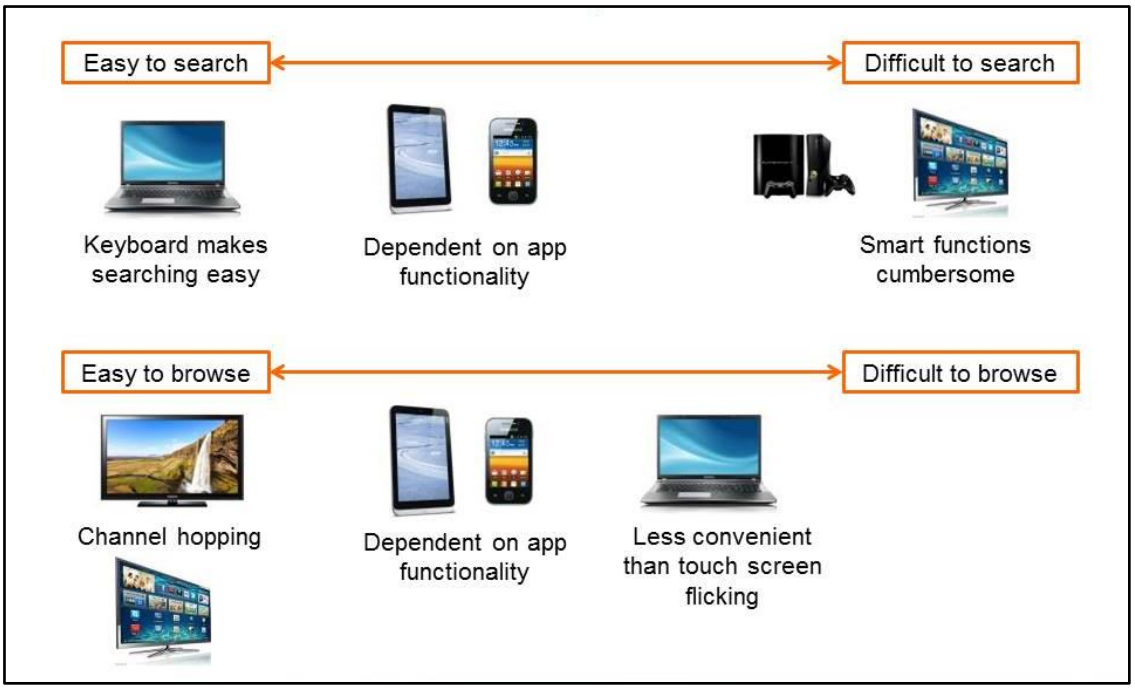

Figure 13: Ease of searching and browsing by device

Whilst not as familiar as keyboards for text entry, most participants recognised that tablets and smartphones offered a better search experience than smart TVs or games consoles. Indeed, a few participants identified touchscreen devices as offering a means of improving content search on smart TVs when the devices were synched (e.g. using a Samsung tablet to navigate a Samsung Smart TV interface, or similar). Many of the younger and more tech engaged participants were well accustomed to using touchscreen devices to search for content, but several viewed the quality of the experience as contingent on the functionality and design of the particular app being used.

In relation to browsing, most participants thought that TV sets and smart TVs offered the best user experience. This perceived ease of use reflects the strong associations between linear TV, TV sets, and 'flicking' or scrolling through channels to find something to watch. Indeed, whilst smart TVs were associated with ease of browsing content, participants related this to the standard TV features rather than the use of connected services and apps. Several participants, especially the younger and more tech engaged, noted the ease of browsing content on smartphones and tablets. They were most likely to be viewing AV content on personal devices and were familiar with using touchscreen interfaces to browse content. Nevertheless, as with searching for content, they recognised that the experience of browsing content depended largely on the design and functionality of the particular app used. In contrast to searching, laptops were considered to be less well suited to browsing. The ease of typing content titles to search was not reflected in the somewhat more cumbersome process of using keyboards or trackpads to browse content.

5.6 The role of social media in searching for and browsing content

When exploring how participants found content, a recurring theme was the use of social media as a means of influencing what people watched and as a destination where content was consumed. In order to illustrate the role of social media as a 'channel of influence' and as a 'content destination', the next section explores two of the services most frequently used by participants: Facebook and YouTube.

5.6.1 Social media as a channel of influence

Many participants, especially but not exclusively the younger and more tech engaged, valued the role of social media in inspiring content selection. They frequently cited Facebook and, to a slightly lesser extent, Twitter as sources that helped them discover content. Many participants had sought out programmes after friends or family members had mentioned them on Facebook. As a result, they would either make the effort to watch them on broadcast TV, or seek them out through catch-up or on-demand services. Their motivations included watching content that was likely to be of high quality based on these recommendations, and allowing them to be part of the conversation where items generated significant 'buzz'. The influence of social media was felt most by younger viewers, but also by those with young families who valued the efficient means of learning about new programmes. A few participants had also noticed adverts for programmes on social media, although the recommendations of others proved to be a more compelling influence. As was mentioned in the previous section, where services like Netflix connected with social media this provided an even more integrated and immediate means of aiding content choices.

"You can connect your Netflix to your Facebook, so you can see what your friends are watching as well, not just suggestions based on what you have been watching, but what others have been watching as well." (Female, 21-24, London)

"Yes, I sometimes get a link coming through on Facebook. They'll say oh did you watch this. It's on '4 on Demand' or whatever. And I might go in and have a look. If I fancy it I'll have a look at it. If not I'll just ignore it." (Female, 35-54, London)

5.6.2 Social media as a content destination

Several participants also used social media as a destination for viewing content, particularly through video-orientated services such as YouTube. Younger participants were especially likely to use YouTube to search for and browse content. Indeed, YouTube allowed them to find a range of content, not bound by a specific broadcaster or content provider, and offered an array of related video suggestions. In addition, YouTube also delivered a means of finding content that was no longer available through time-limited catch-up services. Most regular YouTube users found content through searching for specific items, although programme- or genre-related YouTube channels were also useful in finding something to watch. Whilst the majority of users visited YouTube to search for content, a few also used search engines to find programmes and then followed links to familiar services such as YouTube (as demonstrated in the depth interview case study on page 33). A few of the youngest participants, those aged 16 to 24, also used more niche services such as Vevo or Vimeo to find content. However, in these instances, they were more likely to be viewing short-form or music videos rather than full-length programmes or movies.

"On YouTube there's lots of different communities and it even splits it down into sports, gaming, music, film creation or stuff like that. So it's pretty easy to find stuff you want to watch and then the comment section is full of people talking." (Male, 16-17, Cardiff)

5.7 Too much choice can hinder decision-making

Finally, several participants observed the challenges of finding and choosing content when faced with an ever-increasing volume of material. This sense of content overload was mentioned by participants across the age range in relation to linear and non-linear viewing. In terms of linear viewing, they often mentioned the challenges of finding something to watch amidst a growing array of channels to choose from. These challenges were encountered by participants with paid subscription services, and also those who compared the broad selection of channels available on free-to-air digital TV with the previous analogue offer. Older participants were most likely to cite the

difficulties in finding content on linear TV amidst broad channel selections, with several gravitating towards a more manageable sub-set of favourite or frequently viewed services.

> *"I get to some stage and I go there's that many channels on Sky that I don't even know what I have. I probably watch the same ones over and over again. Probably the channels I watch on Sky would be the same top fifteen, twenty, all over."* (Male, 25-34, Belfast)

> *"Before, when we had RTÉ[7], you had four channels and you had no problems and you watched them. Then they gave you up to ten channels, and you watched what was there. Now there are about one hundred and you have to start working through the channels and thinking about…working out what you want to watch."* (Male, 55+, Belfast)

Several participants with subscription on-demand services also noted the difficulties in finding content when faced with an extensive content library. Whilst they found searching for specific content items to be aided by type-in search features, browsing through vast archives made decision-making difficult. In addition, a few regular users of subscription on-demand services, such as Netflix, cast doubts over whether the high volume of content available was reflected in depth of quality. As a result, many Netflix subscribers only actively sought out a fraction of the content available, and were guided by recommendations and, to a lesser extent, reviews to help determine likely quality and relevance.

> *"I think there is a problem with stuff like Netflix, I had it on Saturday, you know, if you are with someone or with others you sit there and you are like let's watch film, then there is so much you can't make the decision, so one person will want to watch this and then you will all disagree, because there is so much choice, sometimes it's quite hard to pick."* (Male, 16-17, Watford)

[7] RTÉ (Raidió Teilifís Éireann) is Ireland's national public service media organisation, with its television services widely available in Northern Ireland.

6 Reactions to the proposed change to BBC iPlayer

6.1 Introduction

This chapter explores participants' reactions to the proposed change to BBC iPlayer regarding premiering programmes on iPlayer before they are shown on the broadcast TV channels.[8] The findings are taken from a combination of individual self-completion responses and group discussions, and encompass personal and societal perspectives. Firstly, participants' existing perceptions of BBC iPlayer are briefly summarised to provide context for their responses to the proposal. Secondly, initial reactions to the proposed change are examined, alongside consideration of the likely impact on future viewing behaviours. Finally, the projected market impact will be assessed, in terms of the likely effect of the proposed change on linear and non-linear viewing, including consumption of BBC and non-BBC services.

6.2 Summary of proposal

The BBC iPlayer proposition is summarised in the figure below. The proposal entails premiering programmes on iPlayer before they are shown on broadcast channels.

PROPOSED CHANGE TO BBC IPLAYER

Summary of proposal

BBC iPlayer

The BBC is proposing to make changes to iPlayer by:

Premiering programmes on iPlayer before they are shown on the broadcast TV channels

- Currently, all of the programmes available on BBC iPlayer have previously been shown on the broadcast channels (e.g. BBC One, BBC Two, etc.)
- The BBC would like to begin to premiere some programmes on iPlayer – i.e. make them available online before they are shown on the broadcast channels
- Most premieres are likely to be children's shows from CBBC, CBeebies, but could include a small number of others too, e.g. new shows, documentaries. Established shows or programmes that generate lots of conversation **won't** feature, e.g. *The Apprentice*, *EastEnders*

Figure 14: Summary of proposed change to BBC iPlayer

[8] We note that the BBC's PVT application also included a proposal relating to including selected third-party commissioned content on iPlayer. However, this proposal was not considered as part of this market research.

Participants were informed that most of the premieres were likely to be children's shows, although a small number of other programme types could be included. However, the proposed change would not involve premiering programmes that currently generate lots of conversation. The full description of the proposed change, as presented to participants, is provided in Appendix A.

6.3 Summary of key findings

Existing perceptions of iPlayer

- Synonymous with catching-up with content and tailoring viewing to busy lives
- Majority have programme in mind: if missed, failed to record, recommended
- Used less frequently to browse without specific programme in mind

Impressions of the proposed change

- Generally positive impression of the proposition, although without great enthusiasm (many struggled to see a personal benefit). Most positive impressions from regular iPlayer users, the high tech engaged and those aged under 35
- Particular appeal to those who like to be 'ahead of the crowd' and discover new content
- Appeal of proposal dependent on specific content items included and individual preferences
- Misgivings about how viewers would find out about premieres: promotion needed
- Mixed response to focus on children's shows – limited relevance for non-parents
- Concerns that the older, less tech engaged and less affluent could be disadvantaged because of the online nature of iPlayer premieres
- Viewing the first episode a week ahead could result in confusion, due to being out of synch with remainder of the series

Projected impact on viewing behaviours and the market

- Likely to result in marginal increase in iPlayer use, depending on the appeal of specific premieres
- Impact dependent on building awareness of premieres
- Could encourage non-users to try iPlayer, whilst introducing current users to new content
- Potential to slightly increase viewing of BBC linear channels if premieres raise interest in broadcast series
- Likely to be negligible impact on other broadcast channels unless a high-volume of attention-grabbing premieres on iPlayer
- Projected to be negligible impact on other catch-up and VOD services, with viewing occasions mainly based on having specific content items in mind

6.4 Existing perceptions of BBC iPlayer

Whilst perceptions of iPlayer have been discussed earlier in this report, it is useful to briefly identify relevant aspects of current habits that establish context for participants' responses to the proposed change.

The vast majority of participants primarily associated iPlayer with a catch-up role, with the service allowing them to tailor viewing around other everyday commitments. On most occasions, participants had a specific programme in mind when they used iPlayer, whether to watch a programme that they had missed or failed to record on a DVR service, or if it was recommended by a friend or family member.

> *"I think it's [iPlayer] handy to have as a back-up if I haven't watched something or if I have forgotten to record, but I wouldn't go on there just to browse."* (Female, 25-34, Watford)

With regards to occasions when participants did not have a specific programme in mind, iPlayer – and other broadcaster catch-up services – generally ranked below linear viewing and watching recorded programmes in viewing hierarchies. Indeed, when they were in a browsing mind set, scrolling through the EPG was typically the first option, followed by dipping into archives of content recorded on DVRs, followed by taking the additional step of accessing catch-up or on-demand services to browse. Several participants mentioned using the 'Most Popular' section of iPlayer as a launching point to help choose what to watch, when they did not have a specific programme in mind.

> *"I very much like iPlayer. It has the content that I'm looking for from a broad spectrum of subject material. The 'most popular' section is a very good way of generating interest in a show."* (Male, 18-20, Glasgow)

Participants across the age spectrum were frequently using iPlayer as part of their viewing repertoires. In this respect, iPlayer generally had more cut-through among older viewers than subscription on-demand services such as Netflix, which were not associated with a linear schedule.

> *"I think iPlayer is a great addition to my viewing habits. My working hours mean that I miss a lot of programmes and iPlayer helps me keep up."* (Female, 55+, Cardiff)

6.5 Impressions of proposed change to BBC iPlayer

6.5.1 Initial ratings

Following the presentation of the BBC iPlayer proposition, participants were asked to complete questionnaires to capture their individual impressions.[9] The questionnaires recorded ratings for personal value (to the individual and their household) and societal value, alongside open-ended questions to note the 'best' and 'worst' aspects of the proposed change. Participants were asked to give their impressions of the proposal, both personal and societal, on a scale of 1 to 10 with 1 being 'extremely unfavourable' and 10 being 'extremely favourable'. It should be noted that the ratings are based on a qualitative research sample of 74 participants and, whilst the results are indicative, they should be treated with caution and interpreted alongside broader qualitative feedback on the proposal.

Most participants had a favourable impression of the iPlayer proposal, although the concept failed to generate significant excitement or enthusiasm. Indeed, whilst the majority of participants did not identify anything overtly negative in the proposal, they struggled to see a strong personal appeal. There was an average rating of 6.3 out of 10 for personal value, rising to an average of 6.8 when rated from a societal standpoint.

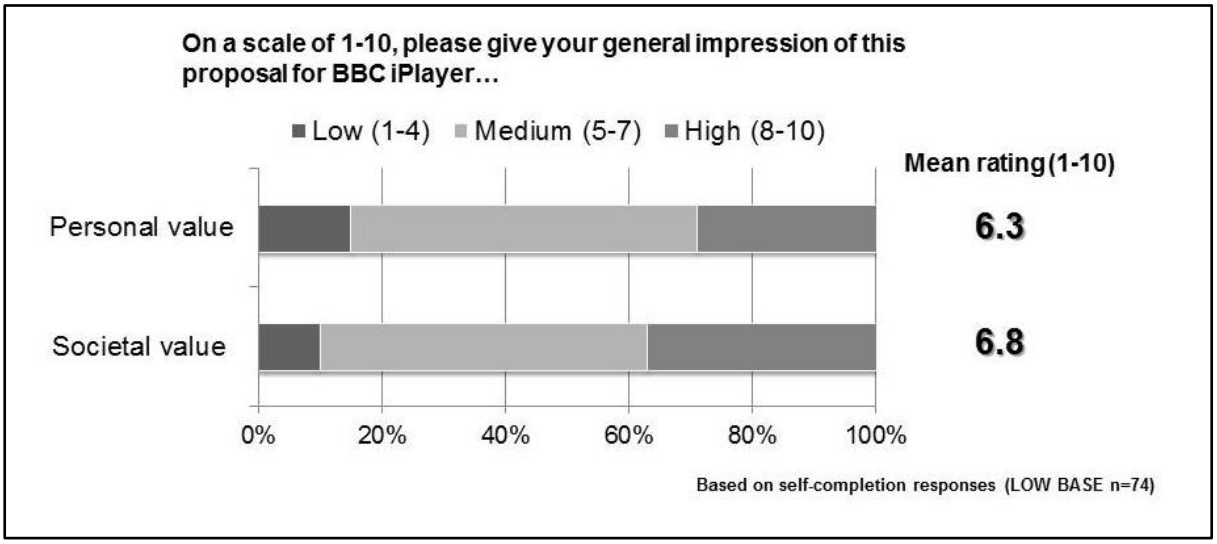

Figure 15: Individual self-completion ratings – BBC iPlayer proposal[10]

[9] Please see Appendix H for the self-completion questionnaire for the BBC iPlayer proposal

[10] The self-completion ratings for the iPlayer proposal are based on responses from 74 rather than all 89 participants. The iPlayer proposal was amended after the initial workshop groups in London and, therefore, the self-completion ratings from the London groups have been excluded to prevent a potentially confounding impact on the results.

Overall, just over half of the participants had a mid-level impression of the proposal, giving it rating of between 5 and 7 on the favourability scale for personal and societal value. There were marginally higher ratings for personal value among participants who used iPlayer regularly, were high AV tech engaged, and among those aged under 35.

The more positive impressions of the proposal on a societal level were fuelled by the focus on premiering children's shows. Whilst several participants without children failed to see a compelling personal appeal of premiering such programmes, there was recognition that they could be of value to parents and children.

The sections below explore participants' reactions to the iPlayer proposal in more detail, unearthing the positive, neutral and negative feedback emerging through the ensuing group discussion.

6.5.2 Considered impressions of the proposed change

Appeals to those who want to be 'ahead of the crowd'

Participants already predisposed towards watching exclusive content and being 'ahead of the crowd' were more likely to have a positive impression of the iPlayer premieres proposal. They recognised that premieres presented the opportunity to view programmes before family and friends, and allowed them to actively recommend content. These participants were also most likely to associate iPlayer premieres with discovering new content that they perhaps otherwise would not watch.

> *"I'd be a little more inclined to watch original programmes if they did them early."* (Male, 16-17, Cardiff)

> *"It is a good idea I think. There is always something on, and everybody likes to see it first."* (Male, 35-54, Glasgow)

> *"Being able to see programmes before broadcast is a fabulous idea."* (Male, 55+, Cardiff)

A few participants noted that premiering content on iPlayer could present the opportunity to trial or pilot new shows before they are broadcast on linear channels. They considered this to be a useful means of delivering higher quality programming stemming from feedback on the shows piloted.

"If you could use it as some platform to test pilots and then get feedback so you get better quality of TV on terrestrial channels at the end of the day, you know, you don't have to watch it if you don't like it, but you could find some good programmes." (Male, 35-54, Glasgow)

The appeal of the proposal depends on the actual content premiered

The majority of participants thought that the appeal of the proposal would depend largely on the actual content items that would be premiered. Whilst participants appreciated that the programmes premiered were unlikely to be established shows, the content did have to be sufficiently attention-grabbing to prompt them to view via iPlayer. In this respect, they considered programmes featuring familiar talent (e.g. actors, writers, directors) to be most likely to engage and inspire viewing.

"It depends on the value of the exclusives, if the exclusives are not to my liking it is no value whatsoever." (Male, 55+, Cardiff)

Several participants also highlighted the increased effort involved with accessing content through iPlayer, versus watching on broadcast TV. As a result, high-quality and attention-grabbing premieres were essential to prompt them to take the steps entailed with watching through iPlayer. The additional steps could include changing device, loading the service via an app or browser and, ultimately, using the iPlayer interface to find the premiere.

"Unless you're going to put really good stuff on it…you're fighting a very, very strong battle to try and make somebody not only get off the normal TV and go on a catch-up TV and then watch something completely new that they've never seen before." (Female, 25-34, Watford)

"I wouldn't rule it out [watching online premieres] but it wouldn't be something that I would go out of my way to look for something." (Female, 25-34, Watford)

A few participants expressed misgivings surrounding the quality of programmes that would be premiered on iPlayer. They doubted that particularly high-quality shows would be premiered on iPlayer, rather than being shown first on a 'proper' broadcast channel. In general, many participants struggled to rate the proposal in the absence of specific examples of content items that could be included, and this fuelled a high proportion of middling impressions.

Making people aware of iPlayer premieres

Several participants considered that, whilst the concept of iPlayer premieres held some appeal, they were unsure of how they would find out about specific items that were being premiered. Indeed, in the absence of a familiar channel schedule, they thought that premieres would have to be heavily promoted on broadcast channels and/or prominently on the iPlayer homepage. This corresponded with participants' existing use of iPlayer, with the majority not associating the service with discovering new programmes. A few participants added that when premieres were advertised, the focus should be on content that was 'available now' rather than 'coming soon'. Advertising content already on iPlayer was seen as a means of sparking viewing in-the-moment, rather than relying on remembering to watch the programme when it became available.

> *"I'm not sure if people will know if the show is being premiered. How will they find out? Also, what is the point if it can just be shown on TV?"* (Female, 35-54, Glasgow)

> *"Documentaries and stuff might be interesting but they'd have to really advertise it…but they'd [the BBC] never do it would they? They wouldn't get David Attenborough and not put him on BBC One."* (Male, 25-34, Watford)

Mixed response to a focus on premiering children's content

Participants had mixed reactions to the iPlayer proposal's focus on premiering children's shows. For those without children, the concentration on children's content limited the personal relevance and appeal of iPlayer premieres. Younger participants, particularly those aged 16 to 24, were least likely to see a personal appeal in premieres orientated towards children.

> *"If the main focus is children's programmes there isn't much point for the majority of people using it."* (Male, 16-17, Watford)

> *"I mean if as it says it's mainly just got like children's programmes, it makes no difference to me at all."* (Male, 18-20, Glasgow)

Among particularly proactive parents, iPlayer premieres provided the opportunity to vet programmes before children viewed them.

"Well, I suppose it is a chance, without the children being around, to have a look at the programme to see whether it is going to be suitable, whether it is going to be educational, whether it is a load of rubbish, so you can make up your mind if you want to watch it." (Male, 55+, Cardiff)

Many parents of younger children (those aged 10 and under) doubted that iPlayer premieres would actually appeal to young children. Indeed, they had observed that their children often watched the same episodes multiple times, and were less concerned about viewing new programmes. As a result of these habits, they doubted that young children would be particularly keen on having the chance to watch a new programme premiered on iPlayer.

"Kids like my daughter wouldn't care [about premieres of children's content]. Like she's five. They watch the same thing again and again…and she'll watch the same thing again and again and again." (Female, 25-34, Watford)

A significant minority struggle to see the appeal of the proposal

The participants with generally negative impressions of the proposal often failed to see the point in watching content ahead of schedule through iPlayer. Unlike participants who saw the appeal of being 'ahead of the crowd', they struggled to appreciate any benefits of early exposure to content. Rather than recognising a chance to actively recommend content, they thought that iPlayer premieres could actual dilute the social value of their viewing. Indeed, if they had watched a programme premiered on iPlayer, it was seen as less likely that friends and family would also have watched it, thus reducing the chance to discuss and relive it with them. For a few participants, 'only' being a week ahead of broadcast was not considered to be sufficiently exclusive or compelling.

"If it was there and it was a programme I really liked, I would use it. But I don't really see the point in it. There really isn't. You might as well wait a week." (Female, 16-17, Watford)

"For example, if it was only a week before, 'cause I doubt it'd be like four months before, something stupid like that, if it was a week before then you wouldn't really – that change wouldn't really have an effect on people 'cause a week is like here or there, it wouldn't really matter." (Female, 16-17, Cardiff)

"I wouldn't want to spoil a programme before it's out and be ahead of others." (Female, 16-17, Watford)

"I think it's a bit pointless, especially if there is just one episode…I don't see the point in releasing one earlier because in the end it's only a week so you might as well wait and it will be on both the TV and iPlayer, and if it's mainly children's programmes I don't think it's going to affect many people." (Female, 16-17, Watford)

Fears over excluding the older and less tech engaged

When considering the proposal from a societal perspective, several participants expressed concerns that older and less tech literate viewers could be disadvantaged by online premieres. Even the younger and more tech savvy participants often mentioned that older and less affluent people could miss out on shows that were being premiered. However, across the research sessions, there were no concerns expressed by participants about their own capacity to view iPlayer premieres, whether stemming from lower tech aptitude or access to connected devices.

"Older BBC viewers may not be familiar with iPlayer and therefore may feel 'left out' by the new programmes." (Male, 16-17, Watford)

"For people that don't have access to the facilities or don't have the know-how to use the facilities, you know, it is going to be harder for them to have the full range of viewing." (Female, 35-54, Glasgow)

Potential confusion resulting from premiering first episodes

Several participants raised the issue that iPlayer premieres could actually cause confusion and present difficulties for following a series after the first episode.[11] For them, viewing the opening episode a week early through an iPlayer premiere would result in having to wait two weeks until the next episode. As a result, the perceived benefits of early exposure to programmes were offset by a less positive, potentially disjointed experience of following the remainder of the series.

[11] Where participants identified potential confusion, this was related to instances where only the first episode of a series would be premiered. It is unlikely that such confusion would arise where single items are premiered (i.e. those not forming part of a series) or where each episode of a series was premiered online before broadcast.

"But the problem with that [online premieres] is if you did get to watch the first one and then it comes out a week later as the first one is on TV then you can't watch the second one until two weeks." (Male, 25-34, Watford)

6.6 Perceived impact of proposed change to BBC iPlayer on viewing behaviours

This section draws on participants' responses to the proposed change to explore the potential impact on future viewing behaviours.

Potential to introduce viewers to new content and increase iPlayer use

Around 4 in 10 participants thought that their use of iPlayer was likely to increase a result of the proposed change. However, the vast majority of those who anticipated increased use of iPlayer felt that their use would increase 'a bit' rather than 'a lot'. They put the likely increase down to occasionally watching premieres that appealed to them personally, and did not envisage wider changes to their viewing habits. Nevertheless, a few participants observed that by going on iPlayer to view premieres, they could be more likely to notice and watch other content available on the service. Moreover, for a few (generally older) participants who did not currently use iPlayer, a particularly attention-grabbing premiere was seen as a potential way of introducing them to the service.

"It should attract bigger audiences as people like to see things first. When they go to iPlayer for the premieres they may find an interest in other programmes." (Male, 18-20, Glasgow)

"I would probably spend more time browsing iPlayer for new or pilot shows, potentially increasing the amount of time spent using this platform." (Male, 18-20, Glasgow)

"That [online premieres] might draw me to it [iPlayer] as I have never used it. But I have the facility there at home. I have never used it." (Male, 55+, Belfast)

By contrast, around half of the participants foresaw no change in their use of iPlayer as a result of the introduction of premieres. These participants were more likely to struggle to see the appeal of the proposal in general, and cited the relative focus on children's content.

A quarter of participants anticipated a slight increase in their viewing of linear BBC channels as a result of the proposed change to iPlayer. Their slight increase in viewing was attributed to watching series on broadcast TV having been introduced to the content through premieres. Nevertheless,

around two thirds of participants considered it unlikely that there would be any change in their viewing of BBC linear channels in light of the introduction of iPlayer premieres.

The vast majority of participants foresaw no change in their use of non-BBC services, including catch-up and on-demand services. They cited that the potentially low volume of premieres with an appeal to them was unlikely to draw them away from other services. Indeed, participants who were heavy users of subscription on-demand services were often motivated by watching movies or entire series, and the iPlayer proposal was not perceived as delivering a comparable offer.

6.7 Summary of project market impact of BBC iPlayer proposal

The table below summarises the projected market impact of the proposed change to BBC iPlayer based on analysis of qualitative data. The projected impact is broken down by the potential effect on BBC iPlayer; linear channels (BBC, other free-to-air, and paid TV channels); and non-linear services (catch-up, VOD, and DVR).

It should be noted that the majority of participants envisaged very similar viewing habits in light of the proposed change to BBC iPlayer. Where shifts in viewing were foreseen, the vast majority of participants anticipated that these would be marginal rather than major changes.

Table 3: Summary of projected market impact of proposed change to BBC iPlayer

Category	Projected market impact
BBC iPlayer	• Likely to be a very marginal increase in use (depending on appeal of content premiered) • Need to trail content before premiering, or highlight on iPlayer to capture attention of those browsing, to build awareness and interest • Could help introduce some non-users to iPlayer if content appeals to them personally
Linear channels	<u>BBC services</u> • Potential to build interest in broadcast series following the online premiere of first episode (through advertising of premiere, and potential social media 'buzz'/WOM) <u>Other free-to-air channels</u> • Negligible impact unless major content items debut on iPlayer <u>Paid TV channels</u> • Negligible impact unless major content items debut on iPlayer
Non-linear (Catch-up, VOD, and DVR)	• Most likely to be negligible given that the majority of catch-up/VOD visits focused on specific content items. iPlayer may gain traction through greater general browsing as awareness of premiering builds

7 Reactions to the proposed changes to BBC Three

7.1 Introduction

This chapter explores participants' reactions to the proposed changes to BBC Three. The findings are taken from a combination of individual self-completion responses and group discussions, and encompass individual and societal viewpoints. Firstly, participants' existing perceptions of BBC Three are investigated to provide context for their responses to the proposals. Secondly, initial reactions to the proposed changes are examined, alongside consideration of the likely impact on future viewing behaviours. Finally, the projected market impact will be assessed, in terms of the likely effect of the proposed changes on linear and non-linear viewing, including consumption of BBC and non-BBC services.

7.2 Summary of proposal

The proposed changes to BBC Three are summarised in the figure below. The proposal entails BBC Three becoming an online-only service with no broadcast channel, a reduced budget and lower volume of content released each week. The full description of the proposed changes presented to participants is provided in Appendix B.

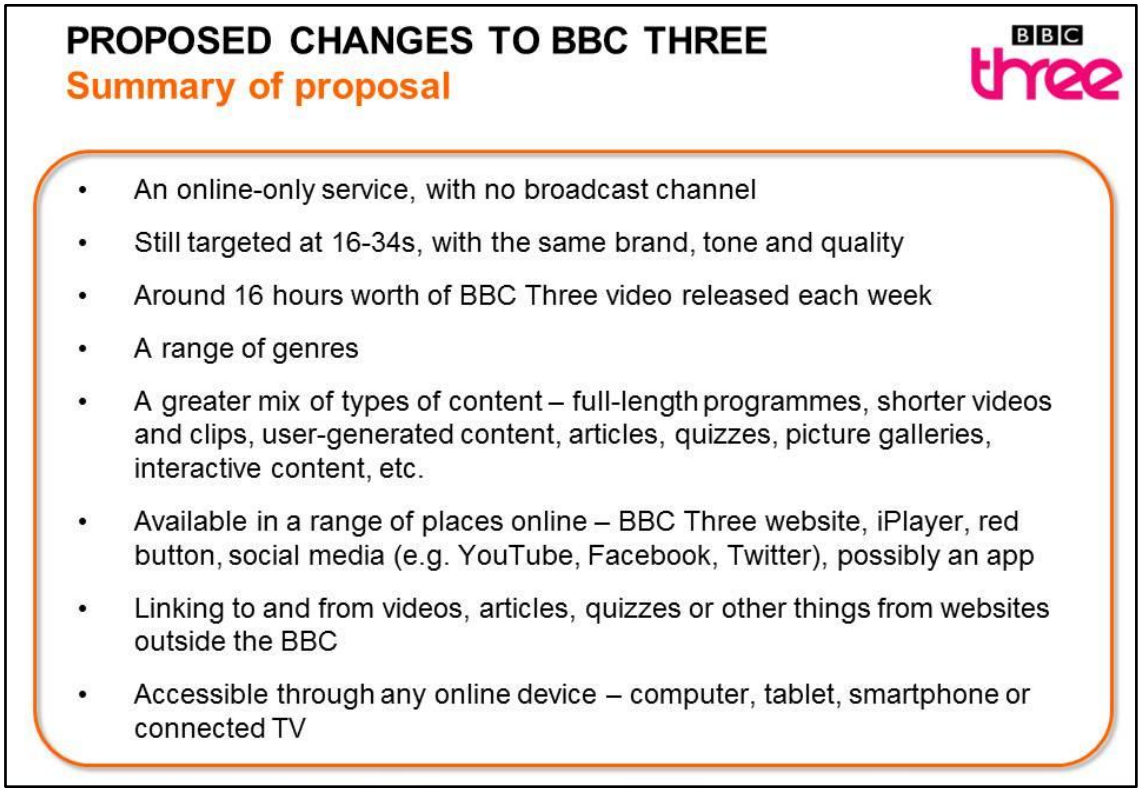

Figure 16: Summary of proposed changes to BBC Three

7.3 Summary of key findings

Existing perceptions of BBC Three

- Mainly a linear viewing preference for BBC Three, even among the younger and more tech engaged
- Seen as a 'flicking' channel, mainly associated with viewing on TV sets. However, younger participants also viewing on personal devices in bedrooms
- Associated with 'wind down' need state, effortless and easy viewing – especially late evening
- Synonymous with lighter tone and genres (e.g. comedy, light entertainment)
- Catch-up role for BBC One and BBC Two programmes, especially for older and less tech engaged
- Strongly identified with younger target (16 to 34), yet older viewers also dipping into content

Impressions of the proposed changes

- Mixed impressions of the proposed changes. Mainly muted response to online-only move, without overtly emotional reactions
- Positive impressions from those, particularly non-viewers of BBC Three, who associate the online-only service as being in line with the evolution of TV
- Recognised by some (especially non-viewers and low BBC approvers) of offering cost savings in a challenging economic climate
- Majority of negative impressions focus on the perceived effort of accessing and selecting online-only content, compared with the current broadcast channel
- Several participants had misgivings over the future quality and quantity of content with the budget halved
- Concerns, predominantly societal, that an online-only service could exclude the older, less affluent, and less tech engaged

Projected impact on viewing behaviours and the market

- Reduced viewing of BBC Three viewing likely as a result of the perceived effort of accessing and choosing content online
- Emerging devices such as smart TVs may offset the perceived effort of accessing online content, but navigation and interface issues with some models make finding content difficult
- Other BBC linear services (especially BBC Two) likely to benefit from the migration of BBC Three programmes and viewers
- Free-to-air channels that meet similar need states (e.g. E4, ITV2, Dave, Channel 4) likely to gain viewers
- Also potential for paid-TV channels that show lighter content to acquire viewers. Especially Fox which already shows *Family Guy* and *American Dad*, and Comedy Central
- Non-linear catch-up and VOD services unlikely to be major beneficiaries as they are associated with the same effort to access and select content as an online-only BBC Three

7.4 Existing perceptions of BBC Three

BBC Three strongly associated with a younger audience

The vast majority of participants, across all age groups, thought that BBC Three was aimed at young people. Reflecting these perceptions, younger participants (those aged 16 to 34) were more likely to have a stronger connection with BBC Three than those aged 35 and over. Indeed, nearly three quarters of 16-34s taking part in the research watched BBC Three about once a week or more, with around half considering it to be among their favourite linear channels.[12]

> *"Great channel with a range of content. My personal favourite channel as it is suited to my age group and style of genre."* (Male, 16-17, Watford)

Reflecting their weaker connection with the channel, older participants (aged 35+) were less likely to view BBC Three frequently. Moreover, there was an inverse relationship between BBC Three viewing and age, with consumption of BBC Three content lowest among those aged 55 and over. Despite this, several older participants did watch BBC Three occasionally, whether by stumbling upon content when browsing channels or by following selected programmes.

> *"I assumed it [BBC Three] was for a younger audience. I don't feel that any of the content would be something that I would be interested in or particularly enjoy."* (Female, 55+, Cardiff)

> *"I only watch it for Russell Howard's Good News…but I would expect for the younger age group it's a good channel."* (Male, 55+, Cardiff)

Preference for linear viewing and channel 'flicking'

The majority of participants primarily associated BBC Three with linear viewing, and often discovered content when 'flicking' through channels. There was even a linear preference for BBC Three viewing among the younger participants and the more AV tech engaged, despite them otherwise favouring non-linear and more customised viewing.

[12] It should be noted that the qualitative research sample was structured to include a sufficient number of BBC Three viewers, and these figures should not be treated as being nationally representative.

> *"I think BBC Three is the first thing I look for when I'm scrolling and I believe it's one of those channels that you can literally just go, 'I like that programme let's put it on'. But it's not a thing I dedicate myself to at a specific time…it's one of those channels that I click on and watch whatever is going on, because you can rely on it, it seems to always be good."* (Male, 16-17, Watford)

By extension, with BBC Three widely perceived as a 'flicking' channel, the majority of participants associated it with TV-set viewing. For older participants, in particular, there was a preference for watching BBC Three content on a TV set, often when scrolling through channels. Despite this, the youngest participants, those aged 16-24, also frequently watched BBC Three on personal devices such as tablets, smartphones, and laptops. Personal devices allowed them to watch what they wanted, where they wanted (often in their own rooms), and meant they did not have to fit in with the viewing preferences of other family and household members. Nevertheless, they were mainly watching BBC Three content live (at the time of broadcast) on such occasions, rather than catching-up on specific programmes through services such as iPlayer.

Participants' perceptions of BBC Three as a 'flicking' channel were fuelled by its relatively high EPG placement. Moreover, several participants often 'flicked' to BBC Three without a specific programme in mind, to relieve boredom when there was nothing of interest on the other channels.

> *"BBC Three's more like something you watch when things are on it rather than something you'd go out of your way to watch something on."* (Male, 18-20, Glasgow)

> *"BBC Three's like my 'go to' channel. Like because like there's absolutely nothing on [elsewhere] you can always rely on something there…but it's not something, any of the programmes, not something that I'd watch religiously. It's just something if I was bored."* (Female, 35-54, Watford)

Identified with easy and relaxing content

BBC Three was seen by most participants to provide 'lighter' content than other BBC channels (especially when compared with BBC One and BBC Two). In particular, the majority of participants linked BBC Three with easy and relaxing content, especially comedy and light entertainment titles. These participants were often motivated to view BBC Three based on expectations of the light content that could be consumed, rather than making an 'appointment to view' specific programmes. Despite this, standout programmes like *Family Guy* and *American Dad* were emblematic of the type of effortless content that could be expected.

"I like it [BBC Three]…it's a softer side to the BBC channels. It's a young, fresh channel showing comedies and is easy watching aimed at a younger audience." (Female, 25-34, Watford)

"It's [BBC Three] really easy to watch at night time when you're tired but you're not sleeping. Just like put it on. It's not something that you need to concentrate on to enjoy. It's just on in the background and it's funny…It's always about 11pm and I'll put it on and it'll be on until about 12:30am because it's one of the only channels that actually shows something half interesting that late at night. Every day." (Female, 25-34, Watford)

"It is not one of the main channels that people go to if someone wants to watch something, it is more like Family Guy and that you watch because it's on TV." (Female, 21-24, London)

Several participants also pointed to the undemanding 'guilty pleasures' on BBC Three, such as *Snog Marry Avoid?* and *Don't Tell the Bride.* There were weaker associations with factual content, with a minority of participants making reference to the channel's documentaries and investigative programmes. In this respect, participants' perceptions of existing BBC Three content resonated more with the channel's 'make me laugh' editorial pillar than the 'make me think' equivalent.[13]

A number of participants recognised that BBC Three had played a role in developing new comedy and entertainment programmes that had subsequently migrated to BBC One or BBC Two. As a result, they considered BBC Three to perform a valuable 'testing ground' function for new comedy, which bolstered the channel's associations with lighter content.

A relatively high volume of repeats on BBC Three was mentioned by several participants. Whilst they did not consider repeats to be a positive feature of the channel's output, it did not result in overtly negative perceptions of the service. Indeed, many had become accustomed to the volume of repeats, and it was not a major issue for those dipping into content when 'flicking' through channels or seeking to fill time with easy, relaxing programming.

[13] http://www.bbc.co.uk/mediacentre/latestnews/2014/bbc-three-proposal

Valued for 'winding down' late in the evening

In keeping with perceptions of easy and undemanding content, the majority of regular viewers also associated BBC Three with late evening, 'wind down' viewing. They frequently cited 'lean-back' style viewing in living rooms at the end of the day, or watching in bed immediately before sleep.

The perceptions of effortless 'lean-back' viewing also help explain preferences for linear rather than non-linear consumption of BBC Three content. Indeed, the majority of participants saw linear viewing as 'easy', simply requiring them to switch on the TV set and scroll through scheduled content; conversely, non-linear, on-demand viewing was associated with the 'effort' of accessing devices and services, and actively searching for and selecting content.

> *"Well I mean I usually would go on-demand but it's about that time of night where you like turn on the telly and it's a thing like Family Guy on BBC Three and you've got like Family Guy or American Dad on Fox, etc."* (Male, 18-20, Glasgow)

> *"The only thing I really watch on it is Family Guy. And that would be last thing at night, say eleven o'clock. And I wouldn't even intentionally go to watch Family Guy. I'd just be flicking. As soon as I'd see it I'd stop and watch a few episodes and then go off to bed. It wouldn't be intentional watching."* (Male, 25-34, Belfast)

Used to catch-up with BBC One and BBC Two favourites

BBC Three was used by several participants to catch-up on programmes that had previously been broadcast on BBC One or BBC Two. BBC Three was most likely to be used in a catch-up role by older and less AV tech engaged participants. EastEnders was a notable programme example, with the BBC Three repeat allowing viewing to fit around family and work commitments earlier in the evening. A few participants also noted using BBC Three to catch-up on episodes of Top Gear and The Voice.

> "*I use it [BBC Three] mainly for catching-up on EastEnders. It's good to know it's on later and I can watch it in bed*." (Female, 18-20, Glasgow)

> *"Especially BBC Three if I forget EastEnders or have been out, it is always in my mind that whatever time it is on, you sit there and make an appointment to do it."* (Female, 35-54, Glasgow)

"I very rarely watch BBC Three. I will stop at it when flicking through channels to see if there is anything worth watching, but I mainly use it to watch EastEnders when it is repeated." (Female, 18-20, Glasgow)

Summary of existing BBC Three viewing

The table below summarises current perceptions of BBC Three and existing viewing habits.

Table 4: Summary of existing BBC Three viewing habits and motivations

HOW?	• Linear preference (even amongst young & high AV tech engaged) • 'Flicking' channel, viewing fuelled by high EPG placement • Mainly associated with TV set, yet young & more AV tech engaged also streaming via personal devices • Series link/ recorded to dip into archive; offsets 'effort' of searching
WHY?	• Synonymous with 'wind down' need state • 'Lean-back' and background viewing • Effortless, undemanding and light content • Catch-up role, esp. for less tech engaged
WHO?	• Strongly identified with younger target audience • More emotional connection with 16-34s, with BBC Three a favourite channel for many • The majority of 16-34s viewing regularly, even if not making appointment to view • Resonates less with those aged 35+, yet many still viewing regularly (often following one or two content items of interest or using in catch-up role)
WHAT?	• Identified with lighter tone & genres (e.g. comedy, entertainment) • Often flicked to with type of content in mind, rather than specific items • Associated with 'guilty pleasures', undemanding viewing (e.g. *Don't Tell the Bride*, *Snog Marry Avoid?)* • *Family Guy* & *American Dad* frequently cited in relation to 'winding down' at end of evening • BBC One & Two favourites when catching up, tailoring evening schedules
WHEN?	• Strongly associated with late evening viewing, esp. during the week (depending on work schedules) • Weekend more linked to planned (effort) viewing & catching up
WHERE?	• At home, typically when winding down in front of main TV set for 35+ • For younger, often in bedroom, on personal devices (avoiding clashes with other household members' viewing preferences)

7.5 Impressions of proposed changes to BBC Three

7.5.1 Initial ratings

Following the presentation of the BBC Three proposition, participants were asked to complete questionnaires to capture their individual impressions.[14] The questionnaires recorded ratings for personal value (to the individual and their household) and societal value, alongside open-ended questions to note the 'best' and 'worst' aspects of the proposed changes. Participants were asked to give their impressions of the proposed changes, both personal and societal, on a scale of 1 to 10 with 1 being 'extremely unfavourable' and 10 being 'extremely favourable'.

Overall, there was a mixed response to the proposed changes, with an average personal rating of 5.6 out of 10 and an average societal rating of 5.7. (These were lower than the average ratings for the iPlayer proposal, where there was an average of 6.3 for personal value, rising to 6.8 from a societal standpoint.) Whilst the average ratings for personal and societal value for the BBC Three proposition were broadly similar, on a societal level fewer participants assigned low favourability ratings (1 to 4 on the 10-point scale) to the proposed changes. It should be noted that the ratings are based on a qualitative research sample of 89 participants and, whilst the results are indicative, they should be treated with caution and interpreted alongside broader qualitative feedback on the proposals.

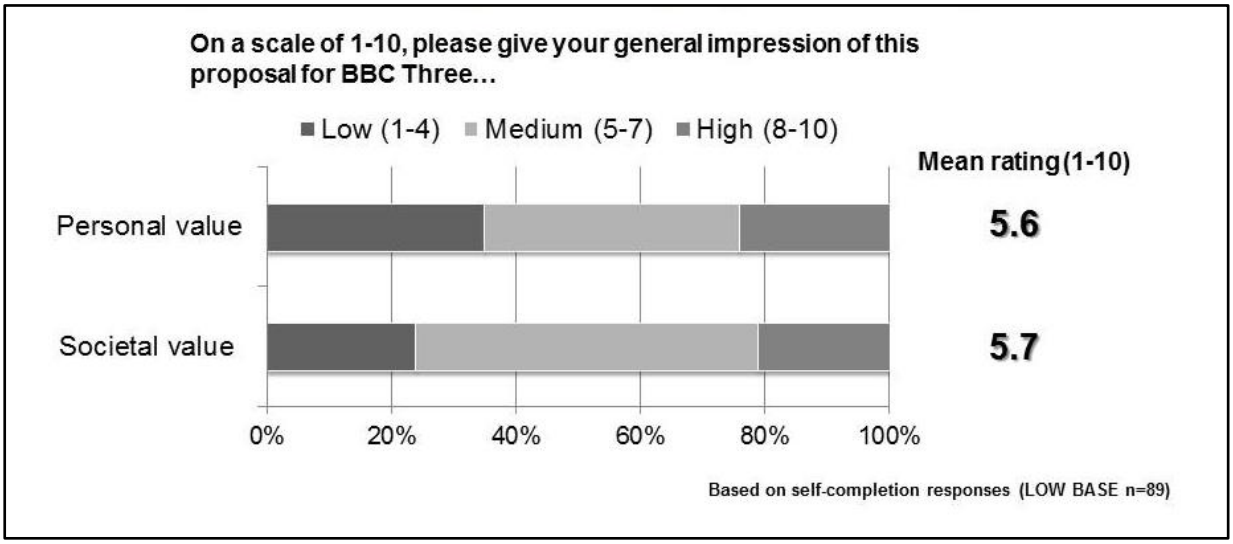

Figure 17: Individual self-completion ratings – BBC Three proposal

Despite the mixed responses to the proposed changes, very few participants gave extreme positive or negative favourability scores. Indeed, even among participants who disliked the proposal, there was not a hostile or impassioned negative reaction. The majority of participants who gave low

[14] Please see Appendix I for the self-completion questionnaire for the BBC Three proposal

favourability ratings cited the increased effort entailed with watching BBC Three content online rather than via a broadcast channel. However, they were generally open to alternatives, with less frequent BBC Three viewers citing that it was nice to have, if not essential.

The impressions of the proposed changes were fairly consistent across the sub groups covered by the research. However, the ratings were slightly lower among the low tech engaged participants, reflective of their low technology usage and preference for linear viewing.

The sections below explore participants' reactions to the BBC Three proposal in more detail, unearthing the positive, neutral and negative feedback emerging through the subsequent group discussion.

7.5.2 Considered impressions of the proposed changes

Proposed changes in keeping with perceptions of future viewing

Several participants who reacted positively to the proposed changes thought that the move to an online-only service was in line with their view of the future evolution of TV. Moreover, for participants who increasingly consumed content via catch-up and on-demand services, online content delivery was in line with their current habits.

Across the sessions, the majority of participants appreciated that the younger target audience for BBC Three made it an obvious candidate for a move to an online-only service. Younger participants, especially those aged 16 to 24, responded positively to increased linkages of BBC Three to social media given their existing propensity to use such services. Despite this, the more positive impressions of changes to BBC Three in line with evolving technology were most likely to be cited by those who were currently more tech engaged, and also those who were not viewing BBC Three regularly.

> *"It will allow content to be more approachable to young people. I think the idea of linking to social media and apps will be a great idea."* (Female, 16-17, Watford)

> "I think my viewing habits have changed to watch more on-demand and will continue to go that way even more so*." (Female, 18-20, Glasgow)*

> *"I think if you asked us to visualise the future of TV channels, this is probably it."* (Female, 35-54, Glasgow)

"I'm not overly familiar with BBC Three as it stands. This new concept seems fine and with the times. I like its focus on incorporating with social media." (Male, 21-24, London)

Recognised as a means of saving money in a difficult economic climate

A few participants responded positively to the proposed changes as they were viewed as a sensible means of saving money in a difficult economic climate. These mentions of cost savings emerged relatively spontaneously, with no briefing information given to participants regarding the strategic context of the proposals for the BBC amidst budgetary constraints.[15]

"I'm not surprised. They've [the BBC] got to make cuts somehow haven't they and this is the way to do it. And I think with this channel putting it online it's how the younger people view stuff anyway so it makes sense to put their channel online. I suppose if you're going to put anything online. But then it does make me think that there's not a dedicated channel on the television for a young adult audience." (Female, 35-54, London)

"It will save money and I think it will be one of the first channels to go the way that every channel will eventually go anyway, so why not get on the train first." (Male, 35-54, Glasgow)

Participants with lower approval of the BBC were most likely to identify the benefit of potential cost savings, which were often mentioned alongside concerns regarding the licence fee. In addition, financial savings were more likely to be cited by participants who were older (35+) and were not regular viewers of BBC Three.

Often indifferent responses amongst non-viewers of BBC Three

Participants who were only very occasional or non-viewers of BBC Three were most likely to give neutral responses to the proposal. As they did not currently watch the channel regularly, the proposed move online was not perceived as likely to have a tangible impact on their viewing habits. Indeed, these participants were unlikely to perceive any loss entailed by the proposals, and were open to alternatives even where they watched BBC Three occasionally. In line with the profile of non-viewers of BBC Three, they were generally older and often less tech engaged.

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[15] Information on the strategic context was not provided as the study focused on investigating the impact of the proposed changes to BBC services on viewing behaviours and the market, rather than broader considerations of the perceived value of the proposals.

"I do like BBC Three although I tend to label it as 'unserious'. Only once or twice have I personally viewed what I would describe as 'serious' programmes. I am only a fan of Russell Howard's Good News, so for me it will be no great loss." (Female, 21-24, London)

"I am just thinking my family and friends, if I was to say BBC Three is going to stop, I don't think they'd bat an eye. I'd be honest. I don't think anybody would miss it or anybody would say oh I'll miss such and such. I can't even think of a show to say that's good to watch on BBC Three. There's nothing sort of comes to mind for me personally anyway." (Male, 25-34, Belfast)

"BBC Three is not one of the ones that I watch a lot, to be honest, two or three perhaps good things on there, but I don't think it is going to make a lot of difference to me to be quite honest." (Male, 55+, Cardiff)

"No real opinion – it serves a purpose for those who watch certain programmes. It's mainly on in our house when our son visits." (Female, 55+, Belfast)

Online-only content perceived as requiring more effort

The majority of participants responding negatively to the proposed changes discussed the effort of watching content online rather than through a traditional broadcast channel. The perceived effort diverged from their existing perceptions of BBC Three as an undemanding, effortless 'flicking' channel.

The effort identified by participants can be split into two categories: *access* effort and *selection* effort. *Access* effort relates to participants' identifying the potential to have to switch devices or open a browser window or app to access BBC Three content, rather than simply scrolling through TV channels. The *selection* effort centred on the subsequent need to choose which content item to watch, as opposed to having programmes served through a linear schedule. For participants anticipating extra effort in consuming BBC Three online, the perceived effort was likely to be amplified by the often late evening, 'wind down' nature of viewing.

"The best BBC channel taken away and made harder to watch." (Female, 25-34, London)

"I'd watch less of BBC Three as it's harder to access. If programmes move to BBC One or Two then I'd watch more of them." (Male, 16-17, Watford)

"I think I would watch less of BBC Three and would watch more accessible channels." (Male, 18-20, Glasgow)

Losing TV-channel focus and trying to do too much

Some participants reacted negatively to aspects of the BBC Three proposal that were seen to depart from existing perceptions of what is offered by a TV channel. The low tech engaged, in particular, struggled to see benefits in linkages with social media and other interactive elements, preferring instead for channels to focus on delivering programmes.

"I don't like that it's trying to be more than a TV channel." (Female, 18-20, Glasgow)

"The one thing that I really don't like about it is that the channel is trying to be more than a TV channel, quizzes and clubs and people you can upload your own stuff to it, it is like what are you? Are you a TV channel? Or are you trying to do everything? You know. Maybe I am a bit old fashioned with these things…" (Female, 35-54, Glasgow)

A few high tech engaged participants also expressed misgiving over elements of the proposal that lost focus on being a TV channel. They often pointed to existing non-TV channel services that already met these needs, such as user-generated content being provided by YouTube and Vine.

"The prospect of user-generated videos being available…I think this would be pointless and not the point of watching programmes on BBC Three, it's more for YouTube or Vine." (Female, 16-17, Watford)

Misgivings over the quantity and quality of content

Many of the participants with concerns over the proposition pointed to the potential impact of a reduced budget on the quantity and quality of BBC Three content. In relation to the quantity of content, several considered the 16 hours of video released each week to be lower than their existing expectations of the channel. However, several of the participants with concerns over the quantity of content struggled to appreciate that there would, in practice, be more than 16 hours of BBC Three content available online at any time, with content typically available to view for longer than a week.

"It is the fact that it has such a wide range of programmes that not only like suit our sort of age, they have got a range of genres as well and I think if you are limiting it to 16 hours a week, I don't think that's enough new content, personally." (Male, 16-17, Watford)

Participants with reservations regarding the future quality of BBC Three content struggled to accept that the same high-level could be maintained if the channel budget was halved.

"It's a massive cut in the budget. They're halving it. So it makes you think will they be able to put the same effort into it. It says it's going to be the same high quality, but how can they promise that if it's being cut by fifty percent?" (Male, 25-34, Belfast)

Societal concerns over the impact of a 'digital deficit'

With discussion encompassing societal perspectives, several participants expressed concerns about those who could potentially be disadvantaged by a move to an online-only service. Participants' concerns centred on three groups who could be left behind by the proposed changes: the elderly, the less affluent, and those with lower tech literacy. In the vast majority of cases, participants expressed concerns for other people who could be disadvantaged, rather than feeling that they personally would be directly impacted. In particular, the younger and more tech engaged participants frequently cited those who could be negatively impacted by the changes, even though they personally were well placed to consume online content. However, participants' concerns regarding the impact on the less tech literate did mirror the generally more negative impressions of the proposed changes among the less tech engaged.

"I'd probably watch less as at the moment I don't have full access to the internet." (Male, 18-20, Glasgow)

"I think that the older generations watch it on TV, maybe they are not used to smartphones and stuff and won't go online to view it." (Female, 16-17, Watford)

"The majority of older people I couldn't really see them going on to the internet or anything or YouTube 'cause unless their children or someone tells them about it or shows them what to do – 'cause my mum didn't know how to use Netflix until I showed her, now she loves it. But I don't think my mum would say 'can you show me how to use BBC Three?' It's not something she would really bother with." (Female, 16-17, Cardiff)

"Yes, I think we've got to remember that not everyone can afford the internet. It's a subscription that people can't always afford. So where there's Freeview will give them BBC Three, the internet subscription they won't have." (Male, 35-54, London)

7.6 Perceived impact of proposed changes to BBC Three on viewing behaviours

This section explores participants' responses to the proposed changes to consider the potential impact on future viewing behaviours.

Reduced BBC Three viewing envisaged

Stemming from the mixed feedback to the proposal, the majority of participants anticipated reduced viewing of BBC Three as a result of the proposed changes. The extent of the likely reduction in viewing is indicated by self-completion responses, with participants noting down their existing frequency of BBC Three viewing at the start of the sessions, and their projected future viewing having considered the proposed changes. The figure below illustrates the less frequent viewing of BBC Three anticipated by most participants.

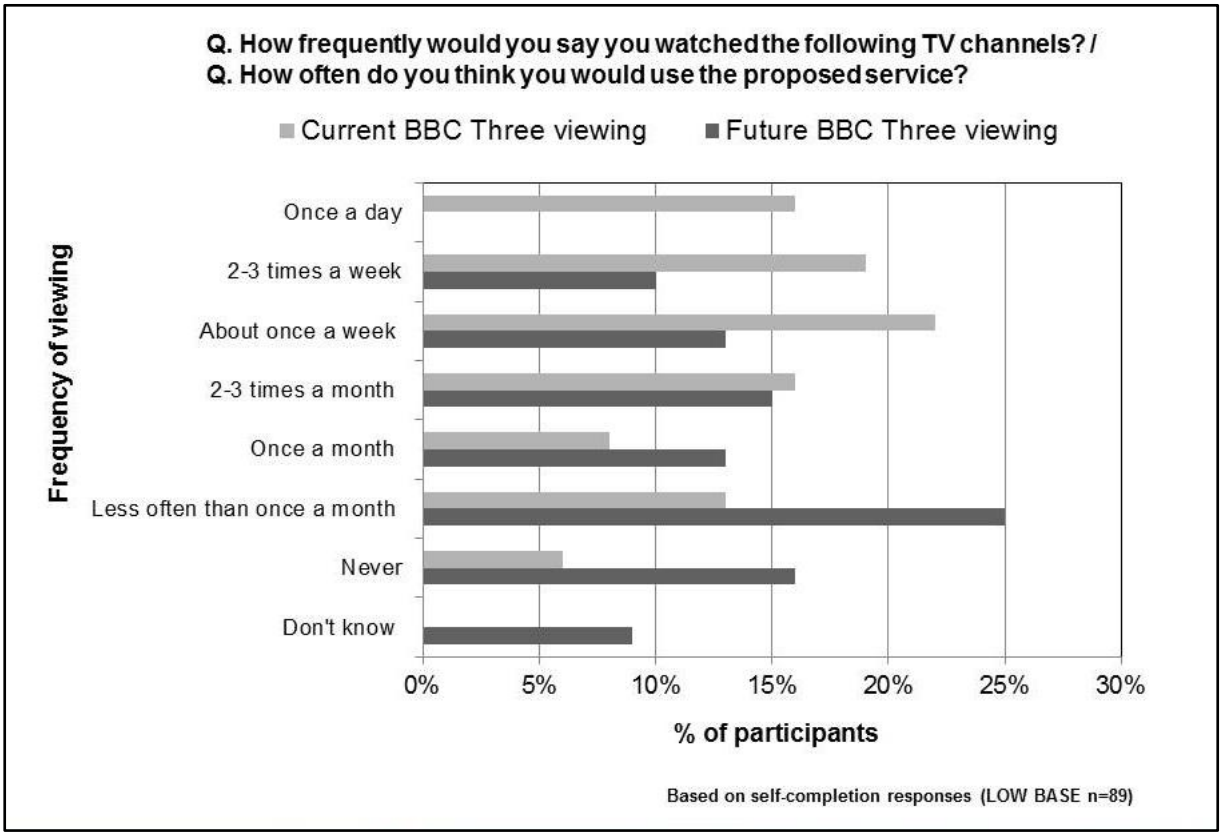


Figure 18: Frequency of BBC Three viewing – current versus projected future viewing

The percentage figures should be treated with caution given the low base sizes, and the requirement for participants to predict their future habits without experiencing the new service. Nonetheless,

there are strong suggestions of a move to less frequent viewing. The following sections further explore the rationale underpinning the perceived reduction in BBC Three viewing.

A perceived reluctance to make the effort to go online likely to impact BBC Three viewing

The vast majority of participants who foresaw reduced BBC Three viewing attributed it largely to the perceived effort of accessing and selecting online-only content. By contrast, they described the current BBC Three service as delivering easy and immediate access to programmes, with strong associations with linear, scheduled viewing.

Even among the predominantly younger, frequent viewers of BBC Three, the supposed effort entailed with watching the proposed service compared unfavourably to the current broadcast channel. The anticipated effort involved with watching an online-only BBC Three is echoed in the verbatim extracts below, with participants commenting on having to "strive to" or "go out of my way" to watch it online:

> *"If you totally got rid of the [broadcast] channel, I don't think that many people would strive to go online and watch the programmes. I think they would find an alternative."* (Male, 16-17, Watford)

> *"I would probably watch it less since it's not a channel I watch all the time, so I probably wouldn't go out of my way to watch it online."* (Male, 21-24, London)

> *"As I said previously, I watch most of my programmes on scheduled TV. I can't be bothered searching online much to be honest so will not be watching much [BBC Three] anymore."* (Male, 25-34, Watford)

Impact of the passive nature of BBC Three viewing on likelihood to seek out content online

The likelihood of reduced viewing of the new BBC Three also owes much to participants' contrasting motivations for watching linear versus non-linear content. The majority of participants who were currently regular viewers of BBC Three described a predominantly *passive* viewing experience, with the channel 'flicked to' often without specific programmes in mind. By contrast, the majority of catch-up and on-demand viewing occasions were more *active*, with participants having specific content items in mind. As a result, many participants foresaw reduced consumption of BBC Three in future as their current viewing was largely fuelled by 'flicking' to the channel, in a 'lean back' context, rather than a more 'lean forward' active programme selection.

"It would reduce the amount of BBC Three I watch as apart from one or two programmes I don't consciously make the effort to watch." (Male, 16-17, Watford)

"BBC Three you can flick through it and if there is nothing on TV there will be something there to watch. If it's not a [broadcast] channel then nobody would consciously go onto the computer to watch a certain programme." (Female, 16-17, Watford)

"I think because it's [BBC Three] not something that I'd specifically ever search for, ever go to watch any of the programmes, like I'd never think 'oh God I really want to watch Family Guy'. It's just always if there's nothing on I'd watch it. But that tends to happen more often than not. So if it was [only] online I just would never bother to watch it." (Female, 35-54, Watford)

Emerging devices may offset the perceived effort

A few participants thought that the evolution of smart devices could help offset the perceived effort required to watch online-only content, and could therefore make viewing an online-only BBC Three easier. In particular, they identified smart TVs as perhaps offering more immediate access to online-only BBC Three content in the 'lean back' viewing context in front of the main TV set.

Despite this, viewing online-only BBC Three content through a smart TV still required participants to actively select programmes rather than being served by a schedule. In addition, several participants who already had smart TVs highlighted navigation and interface issues, which often made accessing content a painstaking and effortful experience.

"If I have a smart TV and it was easy, like it is just 'press 7', if it's easy just to go to BBC Three then I'll still watch it. But I don't have…I can't tell you that I would do that. I think most people who it is easy for them and they do know what they're doing with it and they can just put it on really simply, they'll probably still watch it." (Female, 35-54, Watford)

"I only watch BBC Three to watch Family Guy and it is usually when I am in my bed, because it is on quite late and I think it is on about 11pm or something like that. That is the only time that I would say that I have watched BBC Three and I think that it is quite funny. You see for me I don't watch a lot of telly. Now I would need to go into the smart TV and then into the internet." (Male, 35-54, Glasgow)

Other linear services could be the immediate beneficiaries

In relation to the potential impact of the proposed changes to BBC Three on other services, many current viewers suggested that they would use other linear channels that met similar needs. The potential use of other linear services resonates with the current role of BBC Three as a 'flicking' channel with a marked linear preference. Many participants gave examples of other channels that offer light and undemanding content, which they would be likely to scroll to should BBC Three be removed from the EPG. The most frequently mentioned free-to-air alternatives were E4, ITV2, Dave, and Channel 4. Participants associated these services with comedy and entertainment genres, and it was seen as easier to scroll to them than going to the effort of finding content via online services.

Beyond free-to-air alternatives, several participants with subscription TV services stated that Fox and Comedy Central could meet the same needs as the existing BBC Three. Where Fox was discussed, participants noted that it offered a way of continuing to watch *Family Guy* and *American Dad*. There is also the potential for BBC Two to gain audience, with many participants responding favourably to the idea that some BBC Three titles may migrate to the channel (with recent examples such as *Russell Howard's Good News* and *Backchat with Jack Whitehall and His Dad* helping participants to envisage such moves).

> *"Channel 4 has got similar programmes to BBC Three and I think when BBC Three does go online I'll probably watch Channel 4 instead…I go to certain channels and normally they have stuff on that I like so probably instead of going to BBC Three I'd just go to Channel 4 and see what was on there instead of going online."* (Female, 16-17, Cardiff)

> *"Probably just find American Dad and Family Guy elsewhere but say you used to watch BBC Three at this time; you could just fill it with something else like YouTube or another TV programme."* (Male, 16-17, Cardiff)

> *"Yeah, there's very few people that will watch BBC Three and normally it'll be at a certain time which results in certain programmes, so BBC Three moving to the internet, if other channels all researched that and look into it and find out what programmes people were watching on BBC Three if they just take them, then the internet BBC Three will literally be non-existent, 'cause everyone will just move onto the channels that broadcast them live, other than going onto BBC Three online."* (Female, 16-17, Cardiff)

7.7 Summary of projected market impact of BBC Three proposal

The table below summarises the projected market impact of the proposed changes to BBC Three based on analysis of qualitative data. The projected impact is broken down by the potential effect on BBC Three; linear channels (BBC, other free-to-air, and paid TV channels); and non-linear services (catch-up, VOD, and DVR).

It should be noted that the majority of participants envisaged broadly similar viewing habits in light of the proposed changes to BBC Three. Where shifts in viewing were foreseen, the vast majority of participants anticipated that these would be marginal rather than major changes.

Table 5: Summary of projected market impact of proposed changes to BBC Three

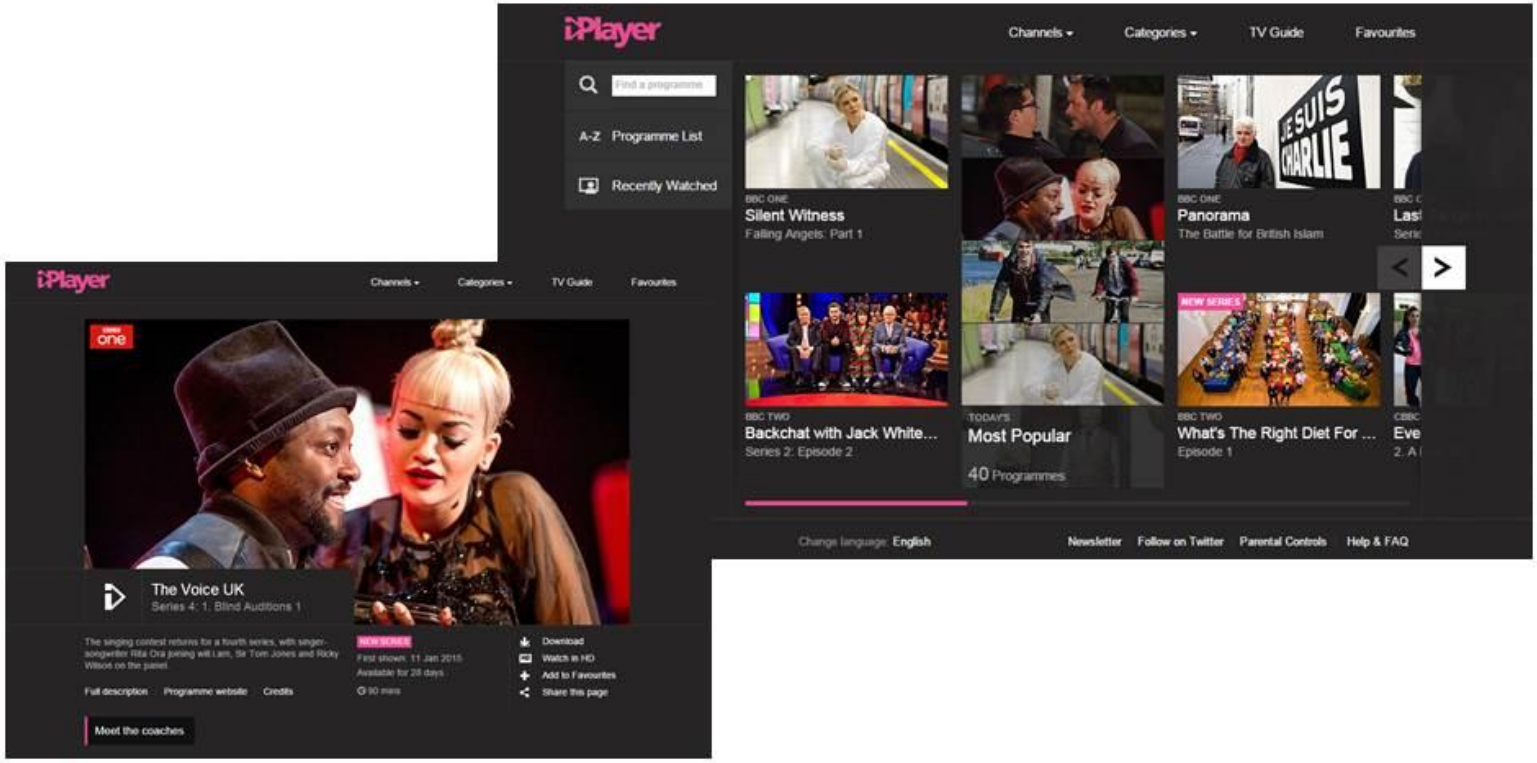
Category	Projected market impact
BBC Three	• Likely that BBC Three will lose viewers and/or viewing will become less frequent • Stems from perceived effort in accessing and selecting non-scheduled content • BBC Three currently primarily associated with easy, fast access to a type of content rather than specific appointment-to-view occasions
Linear channels	<u>BBC services</u> • BBC Three viewers likely to migrate to BBC Two along with familiar programme titles (e.g. *Russell Howard's Good News*, *Backchat with Jack Whitehall*; potentially *Family Guy* & *American Dad*) <u>Other free-to-air channels</u> • Some BBC Three viewers likely to scroll to other linear services that meet similar needs (relaxation, 'wind down', etc.). For example, Channel 4, E4, ITV 2, Dave <u>Paid TV channels</u> • For pay-tv subscribers, viewing may increase for channels further along the EPG that show similar (or the same content) as BBC Three. For example, titles like *Family Guy* may be watched more on Fox, and channels such as Comedy Central could meet similar needs to BBC Three
Non-linear (Catch-up, VOD, and DVR)	• Catch-up & VOD may not be major beneficiaries due to the perceived effort required in accessing and selecting content (similar to challenges faced by the new BBC Three) • Services like Netflix could benefit where viewers are already engaged in watching a series (hence the effort of selection is circumvented) • Viewers may turn to DVR archives where content has previously been recorded to meet similar needs to BBC Three

Appendix A: BBC iPlayer proposal

BBC iPlayer: An overview

- Launched in 2007, BBC iPlayer is an online service that allows users to 'catch-up' on recently broadcast BBC TV and radio programmes
- In 2014, the service was extended to allow users to catch-up on programmes broadcast over the last 30 days rather than the last 7 days
- iPlayer can also be used to watch programmes 'live' online as they are being broadcast on TV
- iPlayer can be accessed through a range of devices and screens, such as:
  - All PC and Mac desktop or laptop computers
  - Tablet computers
  - Smartphones
  - Pay TV platforms
  - Connected TVs
  - Modern games consoles

BBC iPlayer: example screenshots



BBC iPlayer

3

BBC iPlayer is available on a range of screens

BBC iPlayer

4

The proposed changes to BBC iPlayer

The BBC is proposing to make changes to iPlayer by introducing:

1. Premiering programmes on iPlayer before they are shown on the broadcast TV channels

BBC iPlayer

5

Premiering programmes on iPlayer

- Currently, all of the programmes available on BBC iPlayer have previously been shown on the broadcast channels (e.g. BBC One, BBC Two, etc.)
- The BBC would like to begin to premiere some programmes on iPlayer – i.e. make them available online before they are shown on the broadcast channels
- Most premieres are likely to be children's shows from CBBC, Cbeebies, but could include a small number of others too, e.g. new shows, documentaries. Established shows or programmes that generate lots of conversation **won't** feature, e.g. *The Apprentice*, *Eastenders*

BBC iPlayer 6

Appendix B: BBC Three proposal

BBC Three: An overview

- Launched in 2003
- Its target audience is 16-34 year olds
- Available on all television platforms (paid and free) and through iPlayer
- Exists online through its website and on social networks
- Broadcast from 7pm to 4am every day

Example week day schedule

BBC three

7:00pm

World's Craziest Fools (Repeat)
Comedy

7:30pm

Top Gear (Repeat)
Entertainment

8:30pm

Waterloo Road
Drama

9:30pm/
10:30pm

Russell Howard's Good News Show (Repeat)
Comedy

10:30pm

EastEnders (Repeat)
Drama

Example week day schedule

BBC three

11:00pm/
11:25pm/
11:45pm/
00:10am

Comedy
Family Guy (Repeat)

00:30am/
01:00am

Russell Howards Good News (Repeat)
Comedy

01:30am/
02:00am/
02:30am

Siblings (Repeat)
Comedy

03:00am

Who Needs Ibiza? The Great British Holiday (Repeat)
Factual

4

Example weekend day schedule

BBC three

7:00pm

Great Movie Mistakes (Repeat)
Factual

8:00pm

Top Gear (Repeat)
Entertainment

9:00pm

Armageddon
Sci-Fi Film

11:25pm/
11:45pm/
12:10am/
12:30am/
12:50am/
01:15am/
01:35am

Family Guy (Repeat)
Comedy

Example weekend day schedule

BBC three

02:00am

Crims (Repeat)
Comedy

02:30am/
03:00am/
03:30am

The Revolution Will Be Televised (Repeat)
Comedy

Proposed changes to BBC Three

What is proposed for BBC Three?

- From Autumn 2015, BBC Three will no longer be a broadcast TV channel (i.e. a scheduled TV channel with a slot on your EPG)
- It will continue to make and show programmes but these will mainly be available online
- It will remain targeted at 16-34s, keeping the BBC Three name and tone
- BBC Three will still aim to provide high-quality, innovative, public service UK content
- The budget to make programmes and online material will reduce from around £60m to around £30m

Proposed changes to BBC Three

Where would I find the new BBC Three?

- The BBC Three website – where all its programmes are gathered and linking out to other places where BBC Three programmes exist
- A channel on the iPlayer
- On the red button, and possibly through a mobile app
- Outside of the BBC, some content would be available on social networks, e.g. YouTube, Facebook, Twitter, Instagram, etc.
- A selection of BBC Three programmes would be repeated on BBC One and BBC Two
- Accessed through any online device – e.g. smartphone, laptop, tablet, or connected TV

Proposed changes to BBC Three

Where would I find the new BBC Three?

Dedicated BBC Three website…

Through social media…

iPlayer channel…

9

Proposed changes to BBC Three

How much content would I find?

- New BBC Three content will be available daily
- Around 16 hours worth of video made by BBC Three (some new and some existing BBC Three favourites) will be released each week
- BBC Three will also pull in, or link to, other online material such as video, articles, games or other things from other websites
- It will also use other media and social media websites to promote and engage with audiences (e.g. YouTube, Facebook, Twitter)

Proposed changes to BBC Three

What will be on the new BBC Three?

- Covering comedy, entertainment, factual, current affairs, news, sport & drama
- Full-length programmes (20-60 mins or even longer)
- 'Short-form' videos (from 6 secs to 20 mins)
- Some user-generated content – i.e. Videos made by the public
- Content from, and with, other BBC services, e.g. Radio 1, BBC Sport
- Articles, quizzes, picture galleries, social media posts, and other interactive content

Proposed changes to BBC Three

In summary…

- An online-only service, with no broadcast channel
- Still targeted at 16-34s, with the same brand, tone and quality
- Around 16 hours worth of BBC Three video released each week
- A range of genres
- A greater mix of types of content – full-length programmes, shorter videos and clips, user-generated content, articles, quizzes, picture galleries, interactive content, etc.
- Available in a range of places online – BBC Three website, iPlayer, red button, social media (e.g. YouTube, Facebook, Twitter), possibly an app
- Linking to and from videos, articles, quizzes or other things from websites outside the BBC
- Accessible through any online device – computer, tablet, smartphone or connected TV

Appendix C: Workshop groups discussion guide

1. WELCOME & INTRODUCTION (5 mins)

HAND OUT SELF-COMPLETION EXERCISE A
• Before we get started, I'd like you to complete this brief questionnaire about your current viewing habits & preferences
 	
• Arrival, registration, welcome all to the group
• Introduction and establish house rules
  ○ Speak openly and honestly
  ○ Opinions, no right/wrong
  ○ Confidential
  ○ Recording, speak one at a time, mobiles off
  ○ 2 hours' duration
  ○ Any questions

2. WARM-UP & PRE-TASK REFLECTIONS (10 mins)

After introductions, dip into pre-task diary to understand viewing behaviour and heighten self-awareness of services/platforms/devices
 	
• INTRODUCTIONS: I'd like us to learn something about each other in pairs and then introduce one another to the group – first name, family/home, occupation
• WARM-UP: tell me about what you currently enjoy watching (on TV or using other services)
 	
• Christmas has just been-and-gone…
  ○ How was it different from previous Christmases (probe catch-up/on-demand)
  ○ How is your viewing different at Christmas to the rest of the year
  ○ Impact of any new AV devices received/ purchased over Christmas period
• Thinking about the viewing diary you completed before coming to today's session, what did you notice about the ways you watch programmes/content…did anything surprise you
• ASK EACH IN TURN: what ways do you have of watching TV at home
  ○ Devices e.g. laptop, tablet, smartphone, games console, smart TV
  ○ Broadcast services e.g. Freeview, Virgin Media, Sky, Freesat,
  ○ On-demand/VOD services e.g. Netflix, Amazon Prime (Love Film), Blinkbox, Now TV
  ○ Other internet based services e.g. Google Chromecast, Apple TV

3. MARKET, SERVICE & BRAND PERCEPTIONS AND BEHAVIOURS (25 mins)

Explore different ways of viewing content, noting perceptions of BBC iPlayer and BBC Three within the mix of platforms, services and brands
 	
CARD SORT/MAPPING EXERCISE
• Here are some cards, which I'd like you to sort into groups. You can define the groups any way you like and then we'll talk about how you've sorted them
  ○ Probe on: platform, brand
  ○ Note position of iPlayer, BBC Three

    - Which ones do you feel closest to, why
- Explore when/how different groupings are used, the role they play
    - To watch specialist vs mainstream content
    - To watch different types of content, e.g. for information, for entertainment
    - To watch live/at time of broadcast vs catch up
    - To watch different forms of content, e.g. TV programmes, films
    - Because have a subscription/pay vs available free
    - To catch-up, versus trying something new

Explore perceptions of iPlayer vs other catch-up/ VOD/ content aggregator services

CARD SORT/MAPPING EXERCISE [FOCUSING ON ONLINE SERVICES]

- Let's explore some of the online services…(might have been grouped together in the mapping exercise)
- How do you feel the iPlayer compares with other online services, why (probe: content, functionality/usability, etc.)
    - Compare with ITV Player, 4OD, Demand 5
    - (Note any mention of gradual shift from catch-up to VOD; 4OD becoming All4)
    - Compare with Netflix, Amazon Prime, Blinkbox, Now TV
    - Compare with Google Chromecast, Apple TV
    - For each service unpick brand perceptions/ associations
        - Free vs. paid content
        - Type/ genre of content (e.g. TV series, films, documentaries, short-form vs. long form)
        - Service features
        - When used, which devices
    - Word associations with services

- How does the iPlayer compare with BBC channels
    - Complementary vs replacement
    - How would you feel if you had no live BBC channels and only the iPlayer

4. CURRENT BEHAVIOUR (10 mins)

Explore current behaviour with focus on non-linear content

PRESENT SUMMARY SLIDE ON TODAY'S VIEWING LANDSCAPE

- How much time / what proportion of your viewing do you think you spend on watching live/broadcast TV compared with non-live services – catch-up TV, on-demand TV, and other online services such as YouTube
- What do you watch live vs on-demand – does it differ by type of content (e.g. watch news live vs watch drama on-demand)
- Explore whether anyone is subscribing to more than one service, if so why
    - Has this changed over time, if so how/why

5. PLATFORM VIEWING MOTIVATIONS & FINDING CONTENT (20 mins)

Explore reasons for using linear vs catch-up vs VOD
 	
• How/why do you chose to watch something on catch-up vs on-demand vs linear/live TV (i.e. when broadcast)
  o How do you use each, what is the difference
  o In what ways if any are they interchangeable
  o How do they relate, is there a hierarchy
 	
REFLECTIONS ON DEPRIVATION EXERCISE
• Show of hands: identify those undertaking the <u>scheduled only</u> vs. <u>no scheduled</u> pre-task exercises
• For each sub group:
  o What did the task make you notice about your current habits?
  o What did you miss most?
  o What alternatives used?
• Compare & contrast experiences – which task do you think was easier/ preferable and why? If you had to live without one way of viewing content, what would it be and why?
 	
Explore how people find on-demand content from services that have no TV presence/ schedule
 	
• Tell me about the ways you find out about programmes/content…
• How do you find out what is being broadcast
  o Probe: EPG, listings, reviews, etc.
• What are you watching on-demand
• How do you find out what is available on a catch-up service, on a VOD service
  o Probe: social media, Buzzfeed, Huffington Post, Vice, Reddit
• Map a path to discovery for catch-up, VOD…
  o Explore decision process – what are the factors when deciding which platform to use – explore specific scenarios
  o Note where respondent starts (brand vs content type)
  o Explore the influences (e.g. discovery via browsing, promotional materials, trailers, recommendations from friends, recommendations via targeted e-mails, etc.) – which are most important
  o Do you look for all online content in the same way
  o Has anyone watched any programmes they've only discovered by stumbling across them on a VOD service
  o How does the process compare when looking for specific content (e.g. a particular TV programme or film), versus more general browsing

6. FUTURE BEHAVIOUR (5 mins)

Having examined current behaviour and perceptions of different ways of viewing content, explore likely future behaviour – before revealing proposed changes

TIMELINES EXERCISE

- We talked earlier about how we're viewing things now… what are your expectations of how you'll be watching in 2-3 years' time
- Split participants into 2 teams and give them a few minutes to brainstorm how their habits may change. Get feedback from each group, and probe as required:
    - Device habits…more/the same/less TV set, use of other devices, use of other TV/set top box functions outside regular linear TV (e.g. VOD, apps)
    - Platform changes…level of live, on-demand, catch-up, other internet
    - Content type…new vs. previously broadcast
- How might that vary by provider/brand
    - Subscription services
    - YouTube or other online services
    - Main 5 channels/portfolio brands

7. MARKET IMPACT OF PROPOSED CHANGES (40 mins)

Reveal proposed changes and explore how this might change future behaviour across the market (not just BBC)

A. READ OUT PROPOSED CHANGES TO SERVICES – **BBC THREE**

HAND OUT INDIVIDUAL SELF-COMPLETION QUESTIONNAIRE

- General impression of proposed changes (personal & citizen)
- Best & worst aspects of the proposal
- Describe likely impact of proposed changes on your viewing habits (OPEN)

OPEN TO GROUP DISCUSSION (focus on impact on market/ behaviours rather than public value of proposed changes)

- What are your initial reactions
- How do you think this will impact on you/your family
    - What would you do the same/differently
    - How would it change the way you use BBC services
    - How would it change the way you use non-BBC/competitor services

- How likely are you to decrease/increase your viewing, why

- Probe expected change in behaviour, if any, and why
    - Watch BBC Three content online – if so, how would you access it? Homepage, iPlayer, social media/YouTube
    - Use of other devices (shift from TV set?)
    - Watch alternative content – which content, platform, service, brands

- How do you think this will impact other people (citizen perspective)
    - Who will benefit, how
    - Who will suffer, how

B. READ OUT PROPOSED CHANGES TO SERVICES – **BBC IPLAYER**

HAND OUT INDIVIDUAL SELF-COMPLETION QUESTIONNAIRE

- General impression of proposed changes (personal & citizen)
- Best & worst aspects of the proposal
- Describe likely impact of proposed changes on your viewing habits (OPEN)

OPEN TO GROUP DISCUSSION (focus on impact on market/ behaviours rather than public value of proposed changes)

- What are your initial reactions
- How do you think this will impact on you/your family
    - What would you do the same/differently
    - How would it change the way you use BBC services
    - How would it change the way you use non-BBC/competitor services
- How likely are you to decrease/increase your viewing, why
- What is the likelihood that you would not subscribe to/renew other catch-up/on-demand/ aggregator services, or cancel a subscription

- Probe expected change in behaviour, if any, on your use of… and why
    - … the iPlayer with online-only programmes/content
    - … the iPlayer with online-first programmes/content
    - … the iPlayer with online-only channels/ BBC Three as an online-only channel
    - … other channels, other BBC channels
    - … other catch-up player services (e.g. ITV Player, 4OD, Demand 5)
    - … webcasts
    - … subscription VOD services (e.g. Netflix, Amazon Prime, Blinkbox)
    - … other online services (e.g. YouTube)

- How do you think this will impact other people (citizen perspective)
    - Who will benefit, how
    - Who will suffer, how

- Which providers, if any, should be most worried about the proposed changes?
- And, all things considered, what – if anything – will you do differently as a result of the proposed changes?

HAND OUT SELF-COMPLETION EXERCISE B

- Lastly, I'd like you to complete this questionnaire about your own viewing preferences going forward.

8. CLOSING (5 mins)

- Any final comments
- Disclose Ofcom if not already revealed
- Collect pre-task/materials
- Thank and close

Appendix D: In-depth interviews discussion guide

1. WELCOME & INTRODUCTION (5 mins)

• Introduction and overview of interview process
  ○ Speak openly and honestly
  ○ Opinions, no right/wrong
  ○ Confidential
  ○ Recording
  ○ 1-hour duration
  ○ Any questions

2. WARM-UP & PRE-TASK REFLECTIONS (5 mins)

HAND OUT SELF-COMPLETION EXERCISE A
• Having discussed as a group the ways we can watch programmes/content, I'd now like you to fill in this brief questionnaire about your own preferences of how you view content
 	
After introduction, dip into pre-task diary to understand viewing behaviour and heighten self-awareness of services/platforms/devices
 	
• INTRODUCTION: first name, family/home, occupation
• WARM-UP: show me what devices you currently enjoy watching content on, what kind of content are you particularly enjoying (on TV or using other services)
• Christmas has just been-and-gone…
  ○ Can you show me anything you might have recorded (explore mediums)
  ○ How was it different from previous Christmases (probe catch-up/on-demand)
  ○ How is your viewing different at Christmas to the rest of the year
  ○ Impact of any new AV devices received/ purchased over Christmas period
• Thinking about the viewing diary you completed before coming to today's session, what did you notice about the ways you watch programmes/content…did anything surprise you
• ASK EACH IN TURN: what ways do you have of watching TV at home
  ○ Devices e.g. laptop, tablet, smartphone, games console, smart TV
  ○ Broadcast services e.g. Freeview, Virgin Media, Sky, Freesat,
  ○ On-demand/VOD services e.g. Netflix, Amazon Prime (Love Film), Blinkbox, Now TV
  ○ Other internet based services e.g. Google Chromecast, Apple TV
• Explore whether if subscribing to more than one service, if so why
  ○ Has this changed over time, if so how/why
  ○ Show me how you use preferred approach

3. CURRENT BEHAVIOUR AND PLATFORM MOTIVATIONS (20 mins)
Explore current behaviour with focus on non-linear content • How much time / what proportion of your viewing do you think you spend on watching live/broadcast TV compared with non-live services – catch-up TV, on-demand TV, and other online services such as YouTube • What content do you have archived (e.g. on desktop PC, subscription, set top box)   ○ What methods do you use to access this

- Probe on method(s) of access
- Return to devices as explored in the Warm up: What do you watch live vs on-demand – does it differ by type of content (e.g. watch news live vs watch drama on-demand)
  - Probe on influence of brand
  - Probe on influence of platform / service
  - Probe on any mention of iPlayer / BBC Three content
  - Show me how you use preferred approach
- Focus on non-broadcast…
  - Which non-broadcast services do you use most, why
  - Which if any do you prefer, why
  - Show me how you use preferred approach
  - Probe status of iPlayer vs other catch-up/on-demand services
- How/why do you chose to watch something on catch-up vs on-demand vs linear/live TV (i.e. when broadcast)
  - How do you use each, what is the difference
  - Devices and locations of use
  - In what ways, if any, are they interchangeable
  - How do they relate, is there a hierarchy
  - What difference, if any, does it make whether the service is pay-for or free
- What would you normally be watching now, how about this evening
  - Via what method of access

REFLECTIONS ON DEPRIVATION EXERCISE

- What did the task make you notice about your current habits?
  - What did you miss most?
  - What alternatives used?

4. FINDING CONTENT (15 mins)

Explore how people find on-demand content from services that have no TV presence/ schedule

- Tell me about the ways you find out about programmes/content…
- How do you find out what is being broadcast
  - Probe: EPG, listings, reviews, etc.
- What are you watching on-demand
- How do you find out what is available on a catch-up service, on a VOD service
  - Probe: social media, Buzzfeed, Huffington Post, Vice, Reddit
- Do you feel the way you search for content has changed over time, how, why
  - How do you see this changing in the future
- What role does cross-brand promotion play (for example, you're watching BBC One and then you're informed that there is X programme on BBC Two next)
  - What about in the context of iPlayer
- Do you ever use BBC iPlayer specifically to find new content, which, why
  - How does it fare against other similar platforms (e.g. ITV Player)

SHOW AND TELL EXERCISE

Select 2 online-only services (those without a schedule) used and invite participant to demonstrate how they access and select content. Refer to recruitment quotas to ensure that a range of services and devices are covered across the interviews

- Map a path to discovery for services…
    - Explore decision process – what are the factors when deciding which content to view – explore specific scenarios
    - Note where respondent starts (brand vs content type)
    - Explore the influences (e.g. discovery via browsing, different kinds of browsing, promotional materials, trailers, recommendations from friends, recommendations via targeted e-mails, etc.) – which are most important
    - Do you look for all online content in the same way
    - Have you ever watched a programme that you've discovered by stumbling across it on a VOD service
    - How does the process compare when looking for specific content (e.g. a particular TV programme or film), versus more general browsing

5. PROPOSITIONS AND FUTURE BEHAVIOUR (13 mins)

Having examined current behaviour and perceptions of different ways of viewing content, explore likely future behaviour

TIMELINES EXERCISE

- We talked earlier about how we're viewing things now… what are your expectations of how you'll be watching in 2-3 years' time
    . Probe likely use of VOD
    a. Device habits… more/the same/less TV set, use of other devices, use of other TV/set top box functions outside regular linear TV (e.g. VOD, apps)
    b. Platform changes… level of live, on-demand, catch-up, other internet
    c. Content type… new vs. previously broadcast
- How might that vary by provider/brand
    . Subscription services
    a. YouTube or other online services
    b. Main 5 channels/portfolio brands

C. READ OUT PROPOSED CHANGES TO SERVICES – **<u>BBC THREE</u>**

HAND OUT <u>INDIVIDUAL</u> SELF-COMPLETION QUESTIONNAIRE

- General impression of proposed changes (personal & citizen)
- Best and worst aspects of the proposal
- Describe likely impact of proposed changes on your viewing habits

RETURN TO DISCUSSION

- What's your initial reaction
- How do you think this will impact on you/your family
    . What would you do the same/differently
    a. How would it change the way you use BBC services
    b. How would it change the way you use non-BBC/competitor services
- How likely are you to decrease/increase your viewing, why
- What is the likelihood that you would not subscribe to/renew other catch-up/on-demand/ aggregator services, or cancel a subscription
- Probe expected change in behaviour, if any, and why
    - Watch BBC Three content online – if so, how would you access it? Homepage,

iPlayer, social media/YouTube
    - Use of other devices (shift from TV set?)
    - Watch alternative content – which content, platform, service, brands
- How do you think this will impact other people (citizen perspective)
    - Who will benefit, how
    - Who will suffer, how

D. READ OUT PROPOSED CHANGES TO SERVICES – **BBC IPLAYER**

Repeat questions A adding, where applicable (time allowing)
Probe expected change in behaviour, if any, and why
    - … the iPlayer with online-only programmes/content
    - … the iPlayer with online-first programmes/content
    - … the iPlayer with online-only channels/ BBC Three as an online-only channel
    - … other channels, other BBC channels
    - … other catch-up player services (e.g. ITV Player, 4OD, Demand 5)
    - … webcasts
    - … subscription VOD services (e.g. Netflix, Amazon Prime, Blinkbox)
    - … other online services (e.g. YouTube)

- Which providers, if any, should be most worried about the proposed changes?
- And, all things considered, what – if anything – will you do differently as a result of the proposed changes?

HAND OUT SELF-COMPLETION EXERCISE B
- Lastly, I'd like you to complete this questionnaire about your own viewing preferences going forward.

6. CLOSING (2 mins)

- Any final comments
- Disclose Ofcom if not already revealed
- Collect pre-task/materials
- Thank and close

Appendix E: Recruitment screener questionnaire

Table 1: Recruitment & fieldwork schedule – 10 groups & 10 IDIs

Work stream	Timing
Final recruitment screeners & pre task to recruiters	By lunchtime Wed 7th January
Recruitment & pre-tasking	Wed 7th – Sun 18th January 2015
London groups	Mon 19th January 2015
London IDIs	Tue 20th January 2015
Amends to materials based on London groups	Tue 20th January 2015
Cardiff groups	Wed 21st January 2015
Cardiff IDIs	Thu 22nd January 2015
Watford groups	Mon 26th January 2015
Watford IDIs	Tue 27th January 2015
Glasgow groups	Wed 28th January 2015
Belfast groups	Wed 28th January 2015
Glasgow IDIs	Thu 29th January 2015
Belfast IDIs	Thu 29th January 2015

Table 2: Workshop groups sample design (c.80 participants)

Group	Age	Life stage	SEG	Location	Date
1	35-54	Family	ABC1	London (MLP)	Mon 19th Jan
2	21-24	Pre-family/ single	BC1C2	London (MLP)	Mon 19th Jan
3	16-17	Pre-family/ single	C1C2D	Cardiff	Wed 21st Jan
4	55+	Older family/ empty nest	ABC1	Cardiff	Wed 21st Jan
5	16-17	Pre-family/ single	BC1C2	London (suburban)	Mon 26th Jan
6	25-34	Pre & young family	C2DE	London (suburban)	Mon 26th Jan
7	18-20	Pre-family/ single	C1C2D	Glasgow	Wed 28th Jan
8	35-54	Family	C2DE	Glasgow	Wed 28th Jan
9	55+	Older family/ empty nest	C2DE	Belfast	Wed 28th Jan
10	25-34	Pre & young family	ABC1	Belfast	Wed 28th Jan

- Overall 50/50 split between, attitudinally derived, high & low AV tech engagers [likely to skew towards high in younger groups, and towards low in older groups]
- Even gender split (50/50 within each workshop group)
- Mix of parents and non-parents
- Mix of urban, suburban, and rural
- Inclusive of minority ethnic groups (aim for representation within location)
- Include a range of:
  - Users of catch-up services (e.g. BBC iPlayer, 4oD, ITV Player, etc.) – including users & non-users of BBC iPlayer
  - Users of VOD television services (e.g. TalkTalk, BT TV, Virgin Media)
  - Users of content aggregators (e.g. Netflix, Amazon Prime Instant, Blinkbox)
  - Non-VOD users but BBC viewers
- Range of devices owned (e.g. smartphone, tablet, laptop, smart TV, connected games console, DVR)
- Mix of channel brands watched regularly (inc. coverage of BBC Three viewers & non-viewers)
- A nationally reflective mix of BBC approval levels

Key quotas summary

- 50/50 gender split within each group
- C.50/50 split overall for AV tech engagement (Q4), although would expect the younger groups to skew towards high tech engagers, and the opposite for the older participants
- Q7:
    - Aim for half overall to be regular BBC Three viewers– again, this may skew younger
    - Exclude rejecters of all of the BBC channels: i.e. those coding 'never' (Q7b) for all of the BBC channels (codes 1-4)
- Q8: At least half overall must use iPlayer – may skew younger
- Q9: Aim for nationally reflective spread of BBC approval levels overall: c.50% High (codes 8-10), c.40% Medium (codes 5-7), and 10% Low (codes 1-4)

Q1. Do you, or does anyone in your household, work in any of the following occupations?
CODE ALL MENTIONED. CLOSE IF CODED ANY OF 1-8

Market Research	1	THANK AND CLOSE
TV / broadcasting	2	
Radio	3	
Journalism	4	
None of these	5	GO TO Q2

Q2. Have you ever taken part in Market Research focus group, workshop or interview within the last 6 months?

Yes	1	GO TO Q3
No	2	GO TO Q4

Q3. Have you participated in a focus group, workshop or interview about TV or radio in the last 6 months?

Yes	1	THANK AND CLOSE
No	2	CONTINUE

AV TECH ENGAGEMENT

Q4. Which of the following best describes how you watch TV and / or related content nowadays?

I mainly watch broadcast TV through my TV set (using Freeview, Sky, BT TV, Virgin Media, etc.) **and only occasionally record programmes** (e.g. Sky+, TiVo) **or use catch-up or on-demand TV services** (e.g. BBC iPlayer, ITV Player, 4oD, etc.) **or other online services** (e.g. Netflix, Amazon Prime Instant, Blinkbox, etc.).	1 [LOW]	REFER TO QUOTAS
I use a variety of devices to watch TV content (e.g. laptop, tablet, smart TV, games console, smartphone) **and often record programmes** (e.g. Sky+, TiVo) **or use catch-up and on-demand TV services** (e.g. BBC iPlayer, ITV Player, 4oD, etc.) **or other online services** (e.g. Netflix, Amazon Prime Instant, Blinkbox, etc.).	2 [HIGH]	
None of these – I don't watch TV	3	THANK AND CLOSE

AV DEVICES, PLATFORMS AND SERVICES

Q5. Which of the following devices do you **(a) own**, and which do you **(b) use to watch TV and / or related content nowadays**?

DEVICE	**a. Own**	**b. Use to watch TV and/or related content**	
Desktop computer	1	1	ENSURE A MIX OF DEVICES OWNED & USED
Laptop computer	2	2	
Tablet computer (e.g. iPad, Kindle Fire)	3	3	
Games console	4	4	
Smartphone	5	5	
Smart TV (which can be directly connected to the internet without any other device, also known as Connected TV or IPTV)	6	6	

Q6. Which of the following TV services do you currently have at home on any TV set?

Any Freeview (through a set top box or built into a TV set)	1	ENSURE MIX OF TV SERVICES
Any Freesat (Satellite TV without a monthly subscription)	2	
Any Sky (Satellite TV for a monthly subscription)	3	
Any Virgin Media (Cable TV)	4	
Any BT	5	
Any TalkTalk or other digital TV via broadband	6	
Don't know	7	

Q7. Which of the following TV channels do you **(a) watch regularly**, and which do you **(b) never watch**? By 'regularly' we mean around once a week or more.

TV CHANNEL	**a) Watch regularly**	**b) Never watch**	
BBC One	1	1	REFER TO QUOTAS – AT LEAST HALF TO WATCH BBC THREE REGULARLY. ENSURE A MIX OF OTHER CHANNELS VIEWED. THANK & CLOSE IF 'NEVER WATCH' ANY OF THE BBC CHANNELS
BBC Two	2	2	
BBC Three	3	3	
BBC Four	4	4	
ITV	5	5	
ITV2	6	6	
ITV3	7	7	
Channel 4	8	8	
E4	9	9	
Film Four	10	10	
Channel 5	11	11	
5 USA	12	12	
Sky Sports	13	13	
Sky 1	14	14	
Sky Atlantic	15	15	
Sky Movies	16	16	
Sky News	17	17	
Dave	18	18	
Discovery Channel	19	19	
G.O.L.D	20	20	
None of these	21	21	

Q8. Which of the following services for watching TV programmes or films do you use regularly? By 'regularly' we mean around once a week or more.

BBC iPlayer	1	REFER TO QUOTAS – AT LEAST HALF SHOULD USE BBC IPLAYER REGULARLY
ITV Player	2	
4oD	3	
Sky On Demand or Sky Go	4	
Now TV	5	
Demand Five	6	
Virgin TV On Demand/ Virgin TV Anywhere	7	
iTunes	8	
YouTube	9	
Amazon Prime Instant Video (formerly Lovefilm Instant)	10	
Netflix	11	
Blinkbox	12	
None of these	13	

Q9. On a scale of 1 to 10, where 1 means extremely unfavourable and 10 means extremely favourable, please tell me your general impression of each of the organisations below.

	1 Extremely unfavourable	2	3	4	5	6	7	8	9	10 Extremely favourable
Channel 4	1	2	3	4	5	6	7	8	9	10
BBC	1	2	3	4	5	6	7	8	9	10
Channel 5	1	2	3	4	5	6	7	8	9	10
Sky	1	2	3	4	5	6	7	8	9	10
YouTube	1	2	3	4	5	6	7	8	9	10
Netflix	1	2	3	4	5	6	7	8	9	10
ITV	1	2	3	4	5	6	7	8	9	10

REFER TO QUOTAS – ENSURE MIX OF BBC APPROVAL LEVELS [HIGH = CODES 8-10; MEDIUM = 5-7; LOW = 1-4]

DEMOGRAPHICS

Q10. GENDER

Male	1	REFER TO QUOTAS
Female	2	

Q11. AGE

Write exact age and code below to ensure quotas met.

16 – 17	1	REFER TO QUOTAS
18 – 20	2	
21 – 24	3	
25 – 34	4	
35 – 54	5	
55+	12	

Q12. LIFESTAGE

Which of the following best describes your current life stage?

I live with my parent(s) / guardian(s)	1	REFER TO QUOTAS
I live in a shared house with friends or flatmates	2	
I live alone and don't have any children	3	
I live with my spouse/partner and we don't have any children	4	
I am a parent and live with my child/ren aged between 2 and 10 years old	5	
I am a parent and live with my child/ren aged 11 and over	6	
I am a parent and have children aged between 2 – 10 AND 11 - 15	7	
I live with my spouse/partner and our child(ren) has/have left home	8	
I live alone and my child(ren) has/have left home	9	

LOCATION CATEGORY

Q13. Where do you currently live?

PROBE TO IDENTIFY URBAN, SUBURBAN, RURAL

URBAN	1	REFER TO QUOTAS
SUBURBAN	2	
RURAL	3	

SOCIAL GRADE
Q14. What is the occupation of the main income earner in your household? That is, the person with the largest income, whether from employment, benefits, investments or any other source.

RECORD VERBATIM RESPONSE(S)
If required PROBE for: Position/rank/grade; industry/type of company; qualifications/degree/apprenticeship; number of staff responsible for, etc.

A	1	REFER TO QUOTAS
B	2	
C1	3	
C2	4	
D	5	
E	6	

ETHNICITY
Q15. How would you describe yourself?
Aim to be inclusive of minority ethnic groups, reflecting the make-up of each location.

WHITE		AIM FOR REFLECTIVE SPREAD FOR EACH FIELDWORK LOCATION
British	1	
Irish		
Other white background		
MIXED		
White and Black Caribbean	2	
White and Black African		
White and Asian		
Any other mixed background		
ASIAN		
Indian	3	
Pakistani		
Bangladeshi		
Any other Asian background		
BLACK OR BLACK BRITISH		
Caribbean	4	
African		
Any other black background		
CHINESE OR OTHER ASIAN		
Chinese	5	
Any other background	6	

Appendix F: Self-completion questionnaire A

Please write your name here: _____

1. Are you:

Please place a tick in one of the boxes below.

☐ Male ☐ Female

2. Which age bracket do you fall into?

☐ 16-17 ☐ 18-20 ☐ 21-24

☐ 25-34 ☐ 35-54 ☐ 55+

3. How many people in each of the following age groups live in your household including yourself? ***Please write the number in each of the boxes below***

☐ Children 0-5 ☐ Children 6-12 ☐ Children 13-15

☐ Adults 16-17 ☐ Adults 18-20 ☐ Adults 21-24

☐ Adults 25-34 ☐ Adults 35-54 ☐ Adults 55+

4. Which of the following TV services do you currently have at home on any TV set?

- ☐ Any Freeview (through a set-top box or built into a TV set)
- ☐ Any Freesat (Satellite TV without a monthly subscription)
- ☐ Any Sky (Satellite TV for a monthly subscription)
- ☐ Any Virgin Media (Cable TV)
- ☐ Any BT
- ☐ Any TalkTalk or other digital TV via broadband
- ☐ Unsure

5. Which of the following devices do you **(a) own**, and which do you **(b) use to watch TV and/or related content** nowadays?

	a. Own	**b. Use to watch TV and/or related content**
Desktop computer	☐	☐
Laptop computer	☐	☐
Tablet computer (e.g. iPad, Kindle Fire)	☐	☐
Games console	☐	☐
Smartphone	☐	☐
Smart TV (which can be directly connected to the internet without any other device, also known as Connected TV or IPTV)	☐	☐

6. Which of the following best describes how you watch TV and/or related content nowadays?

☐ **A. I mainly watch broadcast TV through my TV set** (using Freeview, Sky, BT TV, Virgin Media, etc.) **and only occasionally record programmes** (e.g. Sky+, TiVo) **or use catch-up or on-demand TV services** (e.g. BBC iPlayer, ITV Player, 4oD, etc.) **or other online services** (e.g. Netflix, Amazon Prime Instant, Blinkbox, etc.)

☐ **B. I use a variety of devices to watch TV content** (e.g. laptop, tablet, smart TV, games console, smartphone) **and often record programmes** (e.g. Sky+, TiVo) **or use catch-up and on-demand TV services** (e.g. BBC iPlayer, ITV Player, 4oD, etc.) **or other online services** (e.g. Netflix, Amazon Prime Instant, Blinkbox, etc.)

7. What is your opinion of the following broadcasters? Please consider the broadcasters as a whole – not just the programmes they show. Please mark on the scale below, 1 being 'extremely unfavourable' and 10 being 'extremely favourable'

	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
ITV	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Sky	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BBC	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Channel 4	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Channel 5	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

8. Thinking about the last three months, how frequently would you say you watched each of the following TV channels?

	Once a day or more	2-3 times a week	About once a week	2-3 times a month	Once a month	Less often than once a month	Never
BBC One	☐	☐	☐	☐	☐	☐	☐
BBC Two	☐	☐	☐	☐	☐	☐	☐
BBC Three	☐	☐	☐	☐	☐	☐	☐
BBC Four	☐	☐	☐	☐	☐	☐	☐
BBC News	☐	☐	☐	☐	☐	☐	☐
BBC Parliament	☐	☐	☐	☐	☐	☐	☐
CBBC	☐	☐	☐	☐	☐	☐	☐
CBeebies	☐	☐	☐	☐	☐	☐	☐
ITV	☐	☐	☐	☐	☐	☐	☐
ITV 2	☐	☐	☐	☐	☐	☐	☐
ITV 3	☐	☐	☐	☐	☐	☐	☐
Channel 4	☐	☐	☐	☐	☐	☐	☐
E4	☐	☐	☐	☐	☐	☐	☐
More 4	☐	☐	☐	☐	☐	☐	☐
Channel 5	☐	☐	☐	☐	☐	☐	☐
Sky One	☐	☐	☐	☐	☐	☐	☐
Sky Sports 1	☐	☐	☐	☐	☐	☐	☐

9. Please mark your favourite 3 channels from the selection below (*not necessarily the ones you watch the most*). **Place ticks in the boxes next to your 3 favourite channels.**

- BBC One ☐
- BBC Two ☐
- BBC Three ☐
- BBC Four ☐
- BBC News ☐
- BBC Parliament ☐
- CBBC ☐
- CBeebies ☐
- ITV ☐
- ITV 2 ☐
- ITV 3 ☐
- Channel 4 ☐
- E4 ☐
- More 4 ☐
- Channel 5 ☐
- Sky One ☐
- Sky Sports 1 ☐

10. How often do you…

	Multiple times a day	Once a day	Multiple times a week	A couple of times a week	About once a week	Less often	Never
Listen to the radio	☐	☐	☐	☐	☐	☐	☐
Use the internet	☐	☐	☐	☐	☐	☐	☐

11. How regularly do you do any of the following things online?

	Once a day or more	2-3 times a week	About once a week	1-2 times a month	Less often	Never
Visit websites linked to TV channels	☐	☐	☐	☐	☐	☐
Watch short video clips online	☐	☐	☐	☐	☐	☐
Watch live TV programmes online	☐	☐	☐	☐	☐	☐
Watch on-demand / 'catch-up' TV programmes online	☐	☐	☐	☐	☐	☐
Watch feature films online	☐	☐	☐	☐	☐	☐

12. Please think about the last three months. How frequently would you say you used each of the following TV and video services (commonly referred to as 'on-demand' or 'catch-up' services)?

	Once a day or more	2-3 times a week	About once a week	2-3 times a month	Once a month	Less often than once a month	Never
BBC iPlayer	☐	☐	☐	☐	☐	☐	☐
ITV Player	☐	☐	☐	☐	☐	☐	☐
4oD	☐	☐	☐	☐	☐	☐	☐
Demand 5	☐	☐	☐	☐	☐	☐	☐
Sky Go	☐	☐	☐	☐	☐	☐	☐
Virgin TV Anywhere	☐	☐	☐	☐	☐	☐	☐
Netflix	☐	☐	☐	☐	☐	☐	☐
YouTube	☐	☐	☐	☐	☐	☐	☐
NOW TV	☐	☐	☐	☐	☐	☐	☐
Amazon Prime Instant (formerly Lovefilm)	☐	☐	☐	☐	☐	☐	☐

Please turn over…

13. Thinking about the last three months. How frequently would you say you used each of the following social media services?

	Once a day or more	2-3 times a week	About once a week	2-3 times a month	Once a month	Less often than once a month	Never
Facebook	☐	☐	☐	☐	☐	☐	☐
Twitter	☐	☐	☐	☐	☐	☐	☐
LinkedIn	☐	☐	☐	☐	☐	☐	☐
Pinterest	☐	☐	☐	☐	☐	☐	☐
Google+	☐	☐	☐	☐	☐	☐	☐
Tumblr	☐	☐	☐	☐	☐	☐	☐
Instagram	☐	☐	☐	☐	☐	☐	☐
Flickr	☐	☐	☐	☐	☐	☐	☐

Thank you – please return your completed questionnaire to the group moderator

Appendix G: Self-completion questionnaire B

Please write your name here: _____

SECTION ONE: BBC Three proposal

Please read the summary below in full before answering the following questions:

BBC Three – proposal summary
What is BBC Three now? • **A channel on all TV platforms and on iPlayer and online through its website and on social networks** • **Target audience of 16-34 year olds** • **Broadcast from 7pm to 4am every day** **What are the proposed changes?** • **No broadcast channel – an online-only service, on iPlayer and online through its website and on social networks** • **Still targeted at 16-34s, with the same brand, tone and quality** • **Its programme budget would half and around 16 hours' worth of BBC Three video content would be released each week**

1. How often do you think you would use the proposed service?

Once a day or more	2-3 times a week	About once a week	2-3 times a month	Once a month	Less often than once a month	Never	Don't know
☐	☐	☐	☐	☐	☐	☐	☐

2. To what extent, if at all, do you think your time spent watching programmes through TV channels on the TV set would change in light of the proposal?

It would be a lot less	It would be a bit less	It would stay the same / no change	It would be a bit more	It would be a lot more	Don't know
☐	☐	☐	☐	☐	☐

3. And to what extent, if at all, do you think your time spent watching TV programmes through other means including online TV and video on demand services would change in light of the proposal?

It would be a lot less	It would be a bit less	It would stay the same / no change	It would be a bit more	It would be a lot more	Don't know
☐	☐	☐	☐	☐	☐

4. To what extent, if at all, do you think your use of the following would change in light of the proposal?

	It would be a lot less	It would be a bit less	My use would stay the same / no change	It would be a bit more	It would be a lot more	I'm not aware of this service
BBC iPlayer	☐	☐	☐	☐	☐	☐
ITV Player	☐	☐	☐	☐	☐	☐
4oD	☐	☐	☐	☐	☐	☐
Demand 5	☐	☐	☐	☐	☐	☐
Sky Go	☐	☐	☐	☐	☐	☐
Virgin TV Anywhere	☐	☐	☐	☐	☐	☐
Netflix	☐	☐	☐	☐	☐	☐
YouTube	☐	☐	☐	☐	☐	☐
NOW TV	☐	☐	☐	☐	☐	☐
Amazon Prime	☐	☐	☐	☐	☐	☐

5. And to what extent, if at all, do you think your use of the following would change in light of the proposal?

	It would be a lot less	It would be a bit less	My use would stay the same / no change	It would be a bit more	It would be a lot more	Don't know
BBC channels	☐	☐	☐	☐	☐	☐
ITV channels	☐	☐	☐	☐	☐	☐
Channel 4 channels (including Channel 4, E4, More 4)	☐	☐	☐	☐	☐	☐
Channel 5 channels (including Channel 5, 5USA, 5*)	☐	☐	☐	☐	☐	☐
Sky Channels (including Sky One, Sky Two, Sky Atlantic)	☐	☐	☐	☐	☐	☐
Any children's channels	☐	☐	☐	☐	☐	☐
Any sports channels	☐	☐	☐	☐	☐	☐

SECTION TWO: BBC iPlayer Proposal

Please read the summary below in full before answering the following questions:

iPlayer – proposal summary
What is BBC iPlayer now? • BBC iPlayer is an online service which allows you to play BBC TV and radio programmes from the past week. It is often referred to as an 'on-demand' or catch-up' service • You can watch live BBC programmes on BBC iPlayer, as well as almost all programmes that have been broadcast in the past 30 days • BBC iPlayer is available on all PC and Mac computers, and virtually all tablets, smartphones, pay TV platforms, connected TVs and modern games consoles **What is the proposed change?** BBC iPlayer is proposing to include a new element in its service: • Premiering programmes before they are shown on the broadcast channels

6. How often do you think you would use the proposed service?

Once a day or more	2-3 times a week	About once a week	2-3 times a month	Once a month	Less often than once a month	Never	Don't know
☐	☐	☐	☐	☐	☐	☐	☐

7. To what extent, if at all, do you think your time spent watching programmes through TV channels on the TV set would change in light of the proposal?

It would be a lot less	It would be a bit less	It would stay the same / no change	It would be a bit more	It would be a lot more	Don't know
☐	☐	☐	☐	☐	☐

8. And to what extent, if at all, do you think your time spent watching TV programmes through other means including online TV and video on demand services would change in light of the proposal?

It would be a lot less	It would be a bit less	It would stay the same / no change	It would be a bit more	It would be a lot more	Don't know
☐	☐	☐	☐	☐	☐

9. To what extent, if at all, do you think your use of the following would change in light of the proposal?

	It would be a lot less	It would be a bit less	It would stay the same / no change	It would be a bit more	It would be a lot more	I'm not aware of this service	Don't know
BBC iPlayer	☐	☐	☐	☐	☐	☐	☐
ITV Player	☐	☐	☐	☐	☐	☐	☐
4oD	☐	☐	☐	☐	☐	☐	☐
Demand 5	☐	☐	☐	☐	☐	☐	☐
Sky Go	☐	☐	☐	☐	☐	☐	☐
Virgin TV Anywhere	☐	☐	☐	☐	☐	☐	☐
Netflix	☐	☐	☐	☐	☐	☐	☐
YouTube	☐	☐	☐	☐	☐	☐	☐
NOW TV	☐	☐	☐	☐	☐	☐	☐
Amazon Prime	☐	☐	☐	☐	☐	☐	☐

10. And to what extent, if at all, do you think your use of the following would change in light of the proposal?

	It would be a lot less	It would be a bit less	My use would stay the same / no change	It would be a bit more	It would be a lot more	Don't know
BBC channels	☐	☐	☐	☐	☐	☐
ITV channels	☐	☐	☐	☐	☐	☐
Channel 4 channels (including Channel 4, E4, More 4)	☐	☐	☐	☐	☐	☐
Channel 5 channels (including Channel 5, 5USA, 5*)	☐	☐	☐	☐	☐	☐
Sky Channels (including Sky One, Sky Two, Sky Atlantic)	☐	☐	☐	☐	☐	☐
Any children's channels	☐	☐	☐	☐	☐	☐
Any sports channels	☐	☐	☐	☐	☐	☐

Thank you – please return your completed questionnaire to the group moderator

Appendix H: iPlayer proposal self-completion questionnaire

Please write your name here: _____

1. Which of the following best describes what you knew about **BBC iPlayer** before coming this evening? (Please tick one option).

- ☐ I had never heard of BBC iPlayer
- ☐ I had heard of BBC iPlayer but didn't know what it was
- ☐ I knew what BBC Player was but had never used it
- ☐ I had used BBC iPlayer once or twice but not regularly
- ☐ I had used BBC iPlayer regularly, but it was not one of my main catch-up services
- ☐ BBC iPlayer was one of the main catch-up services that I used

2. Overall, what do you think of **BBC iPlayer**?

(If you have never used BBC iPlayer, please comment on what you have just heard about it)

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3. On a scale of 1 to 10, please give your general impression of this proposal, where 1 is 'extremely unfavourable' and 10 is 'extremely favourable'.

a) Thinking **personally** about its value to you and your household

1. Extremely Unfavourable	2	3	4	5	6	7	8	9	10. Extremely Favourable

b) Thinking about its wider value to **society** as a whole

1. Extremely Unfavourable	2	3	4	5	6	7	8	9	10. Extremely Favourable

4. What do you think are the **best** things about this proposal?

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5. What do you think are the **worst** things about this proposal?

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6. If iPlayer was changed in this way, do you think your viewing habits would change at all? If so, in what ways?

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Appendix I: BBC Three proposal self-completion questionnaire

Please write your name here: _____

1. Which of the following best describes what you knew about **BBC Three** before coming this evening? (Please tick one option).

- ☐ I had never heard of BBC Three
- ☐ I had heard of BBC Three but didn't know what it was
- ☐ I knew what BBC Three was but had never watched it
- ☐ I had watched BBC Three once or twice but not regularly
- ☐ I had watched BBC Three regularly, but it was not one of my main channels
- ☐ BBC Three was one of the main channels that I watch

2. Overall, what do you think of **BBC Three**?

(If you have never watched BBC Three, please comment on what you have just heard about it)

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3. On a scale of 1 to 10, please give your general impression of this proposal, where 1 is 'extremely unfavourable' and 10 is 'extremely favourable'.

a) Thinking **personally** about its value to you and your household

2. Extremely Unfavourable	2	3	4	5	6	7	8	9	10. Extremely Favourable

b) Thinking about its wider value to **society** as a whole

1. Extremely Unfavourable	2	3	4	5	6	7	8	9	10. Extremely Favourable

4. What do you think are the **best** things about this proposal?

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5. What do you think are the **worst** things about this proposal?

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6. If BBC Three was changed in this way, do you think your viewing habits would change at all? If so, in what ways? What would you watch more of, and what would you watch less of?

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