

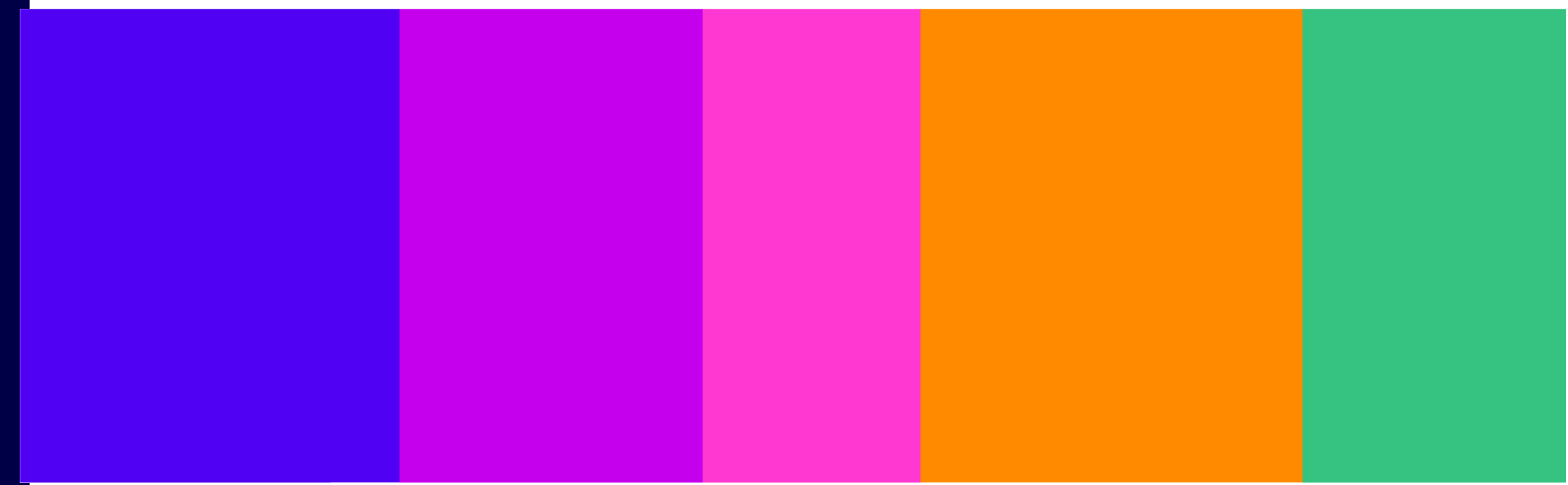
Future of TV Distribution

[Future of TV Distribution](#) – Welsh translation available

Call for Evidence

Published 17 October 2023

Closing date for responses: 12 December 2023



Contents

Section

1.	Overview	3
2.	Context for this work	4
3.	Summary of relevant factors	6
4.	Collecting evidence	14

Annex

A1.	Responding to this call for evidence	15
A2.	Ofcom's consultation principles	17
A3.	Call for evidence coversheet	18
A4.	Call for evidence questions	19

1. Overview

Television has been a fixture in households for almost a century, and it is an important part of our daily lives. However, the way in which audiences are watching TV has continued to change, with more and more video content being watched over the internet in recent years. This has brought access to a wider range of content, but also created a more fragmented experience. This change is relevant for a number of Ofcom's regulatory duties and in particular for our focus on supporting the availability of and engagement with media we trust and value.¹

It is therefore timely to consider what internet distribution will mean over the long term for the dedicated TV platforms² and services which people rely on today, and how broadband networks are evolving to meet and be resilient to this new demand.

This document gives an overview of the factors that might affect the landscape for TV distribution over the next decade and beyond. We are seeking evidence from stakeholders and consumers on how they anticipate the market developing and any key questions that arise for regulators and the Government. In particular:

1. How are audience demands and expectations evolving, and how does that vary for users of different TV platforms and different demographics?
2. What do audience trends mean for the financial prospects and sustainability of TV distribution platforms, and what are the key decision points over the next ten years?
3. How do broadband networks and supporting infrastructure need to evolve to support resilient delivery of TV over the internet in the future?
4. In what ways might different types of 'hybrid' terrestrial and internet services deliver benefits for audiences and what risks may arise?
5. Given the sharing of infrastructure, what would the implications for other sectors be if there was a change to the use of digital terrestrial television (DTT)?
6. What coordination and planning across the value chain might be necessary to secure good outcomes for audiences and key providers over the long term?

¹ As stated in our [plan of work for 2023-24](#), our priorities for the year ahead focus on delivering four outcomes, among which is 'media we trust and value'.

² For the purposes of this document, 'platform' refers to a specific distribution method, such as digital terrestrial TV (DTT), IP-based distribution, satellite, or cable.

2. Context for this work

Securing the distribution of media we trust and value for the long term

TV has an important place in most of our day-to-day lives. TV programmes are there when we want them, to be entertained or educated or simply to keep us company; when we want to hear stories that resonate with our lives, or stories that open our minds to new perspectives. Most importantly, TV is there when we need it – to tell us what is happening in the world, and why, or to bring the nation together in moments of national importance or celebration. And it is there for all of us, with free-to-view³ TV services available universally.⁴

While TV is just as vital as ever, the way it is delivered has changed for every one of us. The digital switchover⁵ meant terrestrial television went from offering five channels to dozens, available to 98.5% of the population without a subscription. Millions of households have taken up satellite and cable TV services. More recently, streaming services have opened up even more choice of TV content received over the internet and ushered in what is often called a new ‘Golden Age’ of television.

This ongoing evolution has brought choice to audiences, but also raises questions over the best way to secure those good outcomes in a way that is sustainable for the long term.

Digital terrestrial television (DTT) has been the most popular way to receive TV in the UK since the digital switchover. Also known to audiences as Freeview, it sends TV content to premises over radio spectrum via an aerial.

Some stakeholders have raised questions about DTT, suggesting that the Government and industry should manage a migration of customers away from DTT and towards internet distribution. Others argue that DTT should continue to have a role well beyond 2034, when the current multiplex licences⁶ expire.

Changes to the way TV is delivered are relevant for a number of Ofcom’s statutory duties. These include maintaining broadcast standards to protect audiences, and the regulation and licensing of the public service broadcasters (PSBs)⁷, managing the optimal use of radio-spectrum, and promoting the availability of high quality, resilient broadband networks.

³ Free-to-view television is TV that is available without an on-going subscription. Since the digital switchover, free-to-view television has been provided primarily through two platforms: (i) a DTT-based platform, marketed as Freeview, and (ii) Freesat, delivered by satellite. More recently, free-to-view is becoming increasingly delivered over broadband (which, in itself, does require a subscription).

⁴ As we put forward in the [Small Screen: Big Debate](#) statement in 2021, universality is the ability of people of all backgrounds to access content which is valuable to them, through which they are connected to others across the UK. Universality ensures not only that everyone has ready access to a reliable source of news and information, but also to a range of differing opinions and cultural experiences of life in the UK.

⁵ The digital switchover was the process of changing the UK’s television broadcasting from analogue to digital. It took place on a region by region basis between 2008 and 2012.

⁶ DTT multiplex licences give broadcasters the right to use certain radio frequencies (spectrum) to transmit television services across the UK in a digital format receivable by everyone over their TV aerials at home. The list of licensees can be found on our website: [Multiplex licensees - Ofcom](#).

⁷ The PSBs are the BBC, the Channel 3 services, Channel 4, Channel 5, and S4C.

The Government's ask of Ofcom

In its White Paper, '[Up next - the government's vision for the broadcasting sector](#)', DCMS set out that it would ask Ofcom to undertake an early review of market changes that may affect the future of content distribution on DTT and other distribution platforms. In September 2023, the Secretary of State for Culture, Media and Sport announced a new programme of work in Government on the future of TV distribution, including a six-month research project looking at changing viewing habits and technologies that will impact how TV shows are brought to our screens.⁸

As the Government noted in its announcement, this 'call for evidence' will allow stakeholders to share their perspectives and evidence on the future of TV distribution to inform our early review of market changes for Government. This includes the long-term role DTT could play in delivering for audiences beyond 2034 when the current national multiplex licences expire.

This document invites stakeholders and viewers to share evidence on the key factors that will affect audience and market outcomes to 2034 and beyond. To support this, we briefly set out what we consider to be the relevant factors affecting the landscape for TV distribution today.

⁸ [Lucy Frazer's speech to the Royal Television Society - GOV.UK \(www.gov.uk\)](#)

3. Summary of relevant factors

1. As habits change, we need to ensure audiences have access to media they trust and value for the long term

How audience habits are changing

While widespread engagement with TV content continues to thrive in the UK, the market looks very different⁹ to when the digital switchover happened over 10 years ago:

- We are spending more time watching short form content on online services such as TikTok and YouTube. We are also spending less time watching ‘long form’ content.
- We are watching more content on demand, when it suits us, rather than when it’s scheduled. This includes video-on-demand (VOD) content from traditional providers through free broadcaster apps like the BBC iPlayer, as well as from new subscription or advertising-funded services that aren’t broadcast, such as Netflix or Disney+.
- Despite these new options, most of us also continue to watch ‘linear’ content¹⁰ on a schedule, at least some of the time. This is either because the programme is a live event, because we want to watch at the same time as others, or because it’s what we’re used to. Even this type of viewing is changing as we make the most of new functionalities such as ‘start from beginning’ or ‘pause’ on linear TV, enabled by either internet delivery or personal video recorders (PVRs).
- Some people continue to only view scheduled TV, at the time it is broadcast (see Figure 1 below). These people rely on their dedicated terrestrial aerial, cable service, or satellite dish and may not have connection to the internet in their homes.
- There are also a growing number of people who never watch any linear TV, or only consume linear or live content over the internet (e.g. through broadcasters’ apps or FAST¹¹ channels). This may be because they don’t have the equipment to receive broadcast TV services, or simply prefer watching TV in this way.

What this means for TV distribution

These changes in audience habits raise big questions of the TV landscape that has served audiences for decades. We must ensure that, in this changing landscape, all audiences can still access the media that they trust and value. This is particularly true for older audiences, those with disabilities, those with a lower income, and rural households, many of whom rely on DTT to access TV services.

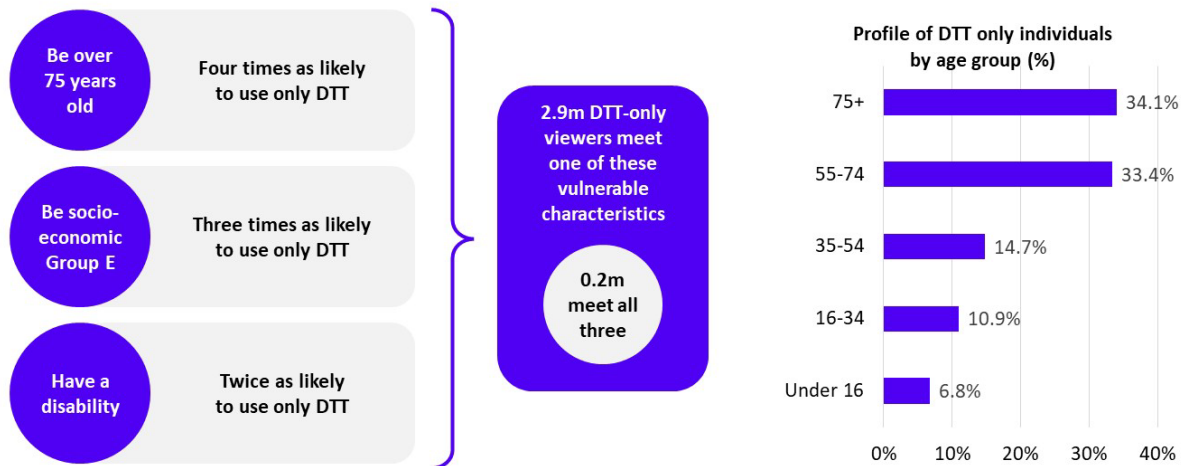
⁹ As set out in our [Media Nations reports](#) and [Small Screen: Big Debate](#) work.

¹⁰ ‘Linear’ content refers to content that is broadcast according to a schedule. It can be watched either live (at the time it happens) or delayed by pausing live TV or using a recording device. It excludes on-demand/streaming services.

¹¹ Free Ad-Supported Streaming Television (FAST) channels are linear channels that viewers access to watch TV shows, films, and other content without paying a subscription fee. These channels generate revenue through advertising.

Figure 1: Demographic profile of households receiving digital terrestrial television (DTT) only

Barb data suggests that there are about 3.7 million UK households (5.7 million individuals) who only use DTT to receive linear TV services. The data for individuals living in these households suggests, compared with UK population, they are more likely to...



Source: Barb Establishment Survey Q2 2023

Under current trends, millions of households will use DTT well into the 2030s.¹² Many of these will be hybrid, getting a mix of services from DTT and internet-based services. However, some of these, without intervention, would likely not choose to adopt, or be capable of adopting, internet-delivered services.

Call for evidence: How are audience demands and expectations evolving, and how does that vary for users of different TV platforms and different demographics?

2. Industry players are looking to respond to the changing needs of audiences

How industry players are responding to change

A proliferation of content and ways to access it has changed audience behaviour. Industry players across the value chain, such as TV platforms and broadcasters, are responding to this.

Broadcasters are seeking to meet changing audience expectations, delivering their content in new and varied ways and investing in internet-based content delivery.¹³ This will also have implications for the investment decisions they make in the coming years.

For example, advertisers look to place their ads where they can target high-value audiences and are increasingly buying advertising space online and on VOD platforms. As a result, the profitability of different platforms for broadcasters is changing. This may influence their willingness to invest in certain delivery methods.

Changing audience behaviour is often leading broadcasters to deliver their content using multiple distribution methods. This carries costs, and over time providers may decide that some platforms

¹² Projections from 3Reasons forecast 10.15 million primary set DTT homes in 2032.

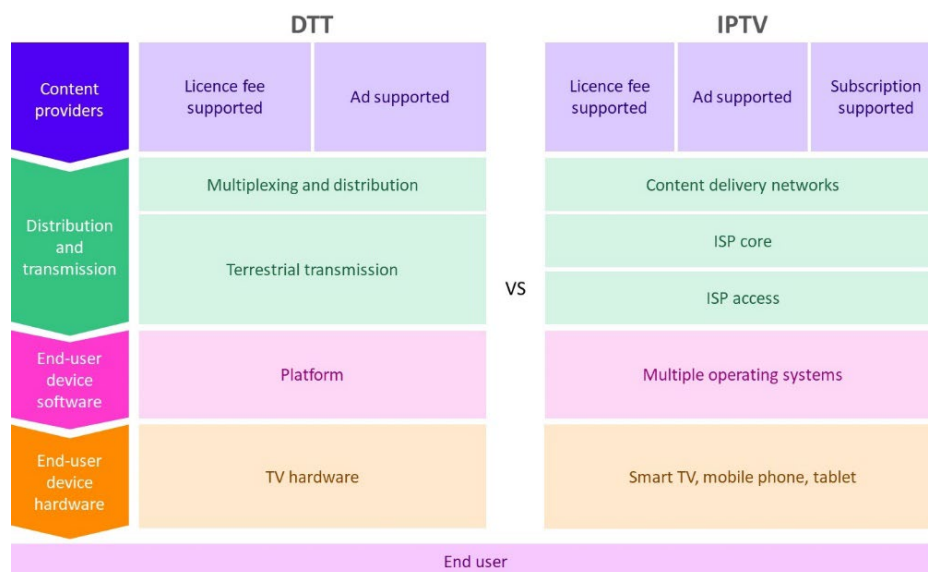
¹³ For example, the PSBs have recently announced a new collaborative TV service to deliver live TV over the internet: [Freely press release, Everyone TV](#).

are no longer commercially viable for them and withdraw their channels or content from those platforms.

For example, some broadcasters have indicated to us that there can be a tipping point where the costs of running a DTT channel outweigh the benefits to the broadcaster. If a large number of channels made the same decision about any given platform, that would raise questions about its long-term sustainability.

These decisions aren't straightforward for broadcasters. Any change in distribution methods requires careful planning, investment, and new commercial negotiations. This is especially true where broadcasters move into internet-based distribution, where the number of players involved in distribution is higher than for broadcast on DTT, cable, or satellite – see Figure 2 below.

Figure 2 – Simplified value chain in delivering TV content to audiences on DTT vs IP networks



What this might mean for the health of free-to-view platforms

To compete with the content offering and functionalities available via the internet, operators of both free-to-view and pay-TV platforms are seeking to improve their services. They will have key decisions to make over the next decade on how to invest in infrastructure and user experience.

Our work has a particular focus on the prospects for TV platforms which are free at the point of use. This is due to their wide reach and because of the reliance on these platforms by older people, and those with disabilities or on a lower income. Combined, the footprints of DTT and Freesat¹⁴ mean that almost everyone in the UK can currently access free-to-view TV if they want to. The operating model for these platforms is underpinned by the PSBs¹⁵, both with the benefits conferred by their licences (such as guaranteed access to radio-spectrum) and as operators of the multiplexes which carry groups of channels.

While any significant change in free-to-view TV distribution is unlikely to take place in the near term, investment decisions made now will influence the viability of these platforms in the long term. Our

¹⁴ Freesat coverage is 98% and DTT coverage is 99% per PSB Mux (which equates to 98.5% for all three PSB Muxes), [Connected Nations 2017](#). As the Freesat and DTT coverage footprints are not correlated, the combined reach is likely over 99%.

¹⁵ The BBC, ITV, Channel 4, and Channel 5 own and support [Everyone TV](#), which runs Freeview (free-to-view DTT) and Freesat (free-to-view satellite).

review will explore the prospects of the current free-to-view TV platforms in terms of their use by audiences and the commercial partnerships that support their operating models.

We welcome views on the financial health and prospects of these free-to-view platforms as means of delivering TV to audiences. We also welcome views on whether, through commercial pressures or policy preference, a managed move of free-to-view TV to internet distribution is likely or desirable and what such a move would require of industry, the Government, and regulatory support.

We want to hear from content providers, device manufacturers, and TV and internet platform operators about the investment decisions they need to make, and what certainty they might need from each other, the Government, or regulators in order to make them in a timely way.

Call for evidence: What do audience trends mean for the financial prospects and sustainability of TV distribution platforms, and what are the key decision points over the next ten years?

3. The take-up of broadband is currently a significant barrier to widespread reliance on internet delivery

Coverage and take-up

As more audiences choose to watch content online, and content providers seek to reach them over internet platforms, the availability and take up of internet services becomes more important to TV distribution. This is particularly the case for services that are founded on the principles of universality, such as the PSBs. Considering the internet as a bigger part of the answer for audiences raises questions about how universal broadband access and take-up can become, especially in any future scenario where DTT and/or Freesat are materially or fully scaled back.

As it stands, 97% of homes are able to get superfast broadband¹⁶ in the UK, while 99% are able to receive a service which meets the specifications Parliament set for the broadband 'Universal Service Obligations' (USO), including a 10Mbit/s download speed.¹⁷ The Government has stated its ambition to get gigabit broadband to over 99% by 2030.¹⁸

Broadband coverage has been steadily increasing. Our regulatory approach has driven investment and growth in fibre infrastructure, which in turn ensures people have access to high-speed, affordable internet, facilitating cross-economy growth. Over half of UK premises now have access to full fibre. This, along with the help of public funded schemes, Government schemes, and the USO mean that over the next decade coverage will likely become less of a barrier.

However, there is a much larger cohort of people who choose not to take up broadband at all.¹⁹ While a household might be technically able to receive linear content over the internet, they may

¹⁶ Superfast broadband offers speeds of 30Mbit/s or more.

¹⁷ [Connected Nations: Summer update 2023](#)

¹⁸ [Levelling Up the United Kingdom White Paper – GOV.UK \(www.gov.uk\)](#) (p.183). There are also broadband programmes that look to improve connectivity specifically in Northern Ireland, Scotland and Wales, such as the Scottish Government's R100 Programme and Welsh Government's Superfast Cymru programme.

¹⁹ 7% of households do not have access to the internet at home (via any device, e.g. PC, mobile phone, etc) and 14% of households have no fixed connection to the internet. [Tech Tracker 2023](#) and [Communications Market Report 2023](#)

not be paying for a connection, or may be getting a very basic package (with insufficient data or speed to support reliable peak-time TV viewing). This also means many households would face a higher cost if they had to take up broadband to receive their TV content.²⁰

There are various reasons why someone may not choose or be able to take up a broadband connection, including cost or simply not requiring a high-speed service. If linear content is to be delivered solely over the internet, this gap in take-up is a significant barrier and those who wish to access it will need to have the infrastructure, skills, and means to do so.

Resilience in internet delivery

The availability and adoption of internet services isn't the only barrier to reliably delivering TV over the internet. The demand for broadband network capacity overall and at peak times will increase. This is already happening – most TV homes²¹ are 'hybrid' content homes, watching a mixture of on-demand and linear content over internet connections, while also using dedicated broadcast networks for some of the time.

We looked at current traffic peaks and the impact on broadband networks in our [Net Neutrality consultation](#). Popular TV events and gaming downloads already drive large peaks in traffic. To date, a combination of investment by broadband networks and content providers, more efficient traffic delivery approaches, including the use of content delivery networks (CDNs) and compression technologies by content providers, has generally managed this demand to deliver a good experience for audiences. Industry is also working to develop technical approaches to managing capacity demand efficiently, such as distribution via multicast. In the future, it is important for audiences that this continues to be managed effectively without compromising resilience and that they continue to have access to the content they want to watch.

DTT is a highly reliable technology for delivering TV content and has significant resilience to power and other failures. The value chain for the distribution of content over the internet is more complicated than that of DTT (see figure 2, above). This means that there are more potential points of failure. For example, the delivery of content relies on the consumer's in-home Wi-Fi, the telecoms operator providing the underlying broadband, and a range of internet infrastructure, including Domain Name System services and CDNs. There are also choices to be made on the level of resilience that should be aspired to for IP-distributed content where more audiences rely on it.

We welcome views on how an increase in demand in the next 10 to 15 years will impact broadband networks and how this can be managed, including the relevant merits and limitations of technologies being developed that could help support meeting this demand.

Call for evidence: How do broadband networks and supporting infrastructure need to evolve to support resilient delivery of TV over the internet in the future?

²⁰ In section 5 of this document, we set out how households might benefit from a breadth of services of functionality in addition to TV in taking up a broadband service.

²¹ 65% of households which watch a TV set use some method to watch TV over the internet, [Tech Tracker 2023](#)

4. Internet-based delivery presents risks and opportunities for ease of use in TV services

Newer connected or online interfaces offer greater choice of content from on-demand and subscription services, alongside traditional linear TV services listed in an electronic programme guide (EPG). A proliferation of content and content providers, as well as space held for promotional content, personalised recommendations and advertising has given more choices to audiences but made the user experience more complicated to navigate. In some interfaces, the traditional EPG is several clicks away from the home-screen. The development of user interfaces to serve different audiences is shaped by commercial agreements and content providers will likely prefer those over which they have more control.

Some audiences have relied on the programme guide for decades. The ability to use channel numbers or arrows or a guide button on a remote control to access a favourite programme is a familiar experience that they may well wish to see retained in the future, regardless of the platform. The increasing consumption of linear and on-demand content over the internet brings with it risks of an even more fragmented user experience. On the other hand, this also opens up opportunity for creative approaches to a seamless user experience. This could include personalising or simplifying navigation, access to enhanced quality picture and sound, or integrating access service options for the sensory impaired.²²

Call for evidence: In what ways might different types of 'hybrid' terrestrial and internet services deliver benefits for audiences and what risks may arise?

5. Investment decisions for DTT will have ramifications for other sectors beyond TV

None of the dedicated networks for distributing TV exist as standalone services. Cable TV is delivered alongside cable broadband, and pay-TV satellite sits alongside Freesat services. For DTT infrastructure, we are mindful that the masts and spectrum that deliver DTT support several other related communications services. These intersections need to be taken into account when thinking about the future of this infrastructure.

Broadcast radio

A number of masts that are used for broadcasting DTT are also used to broadcast analogue and/or DAB radio signals. This interdependence means that when changes happen to one platform, there are knock-on implications for the other. For example, any reduction in demand for masts from the TV sector could potentially shift more costs to radio providers.

The future of audio content was recently reviewed in the [Digital Radio and Audio Review](#) commissioned by the Government. The Review concluded that Ofcom and industry should plan on the basis that FM radio services will be needed until at least 2030. It also found that the commercial case for radio broadcasters to switch off FM radio services would be finely balanced, with cost savings partially offset by investment needed to improve DAB coverage. The DCMS Report

²² Broadcasters are legally required to provide access services on a proportion of their programming. We have recently proposed some changes to the TV access services code: [Consultation: Ensuring the quality of TV and on-demand access services](#).

recommended a transition from FM to DAB and IP should be part of long-term planning by industry, to be revisited in a further Review by 2026. We welcome evidence on whether and how interdependence with DTT might affect long-term industry planning.

Wide-reaching communications

The UK Government uses a number of methods to reach people in the event of major catastrophic or national events. This includes an agreement in the [BBC Charter](#) that the Government can ask the BBC to “broadcast or otherwise distribute any announcement” in an emergency. There is therefore a question about the expectation for the reliability, power resilience, and wide reach of a future TV distribution platform or platforms to ensure people are adequately informed.

PMSE, mobile communications and other spectrum users

We would welcome input from stakeholders on demand for spectrum from DTT or alternative services in the UHF band in the longer term (post 2034) in the UK, in light of potential technology upgrades and changing market conditions.

In accordance with a Government direction, in November Ofcom will represent the UK at the World Radiocommunication Conference (WRC-23) where the allocation of the spectrum currently reserved for DTT (between 470 and 694 MHz) will be discussed. This issue is being pursued by a number of countries that are interested in using the spectrum for other services, such as mobile broadband. However, even in the event that the WRC-23 agrees a different allocation, the UK will still have considerable freedom over how we use spectrum.

It is possible that DTT could, in the longer-term, use different compression technology to enable it to use less spectrum than it does today, or close some or all of its multiplexes to reduce the number of channels offered. Mobile handsets increasingly support mobile signals that use these spectrum bands as they are used in other parts of the world. In a few European countries, mobile operators have proposed using this spectrum to expand their offering.

The spectrum band used by DTT signals is also used for programme-making and special events (PMSE). This allocation allows devices such as wireless microphones to use the same bands as TV, using signals at relatively low power such that they don’t cause interference. It is important that these spectrum users have a predictable allocation of spectrum to support investment in the right equipment.

Even when using different spectrum bands, we note that DTT masts are used by some telecoms companies as infrastructure to deliver mobile communications services. The masts also support other services, including the spectrum used by some utilities applications like smart meters.

Digital connectivity

The landscape for technology and take-up of connectivity is likely to change significantly over the next 10 to 15 years as more and more people seek to access a wide range of online services. As such, a potential move away from DTT would need only address the remaining gap in connectivity that consumer trends and other interventions do not close.

It is likely that some level of intervention would be necessary to ensure that, in the case of a managed move away from DTT, vulnerable people are supported. This support would have ancillary benefits as improved digital skills and in-home connection to the internet could help to close a broader digital skills gap.

Call for evidence: Given the sharing of infrastructure, what would the implications for other sectors be if there was a change to the use of DTT?

6. Coordination to ensure good outcomes

There are large number of parties involved in the distribution of TV (see Figure 2), each with their own objectives and commercial incentives. In order to secure universal and resilient distribution of TV in the long term, some coordination and planning by industry or Government may be necessary.

As such, we invite stakeholders to consider where coordination over the coming decade might address tensions in the market and where intervention may help to resolve these.

Call for evidence: What coordination and planning across the value chain might be necessary to secure good outcomes for audiences and key providers over the long term?

4. Collecting evidence

This call for evidence is an opportunity for the wide range of interested parties to share their knowledge and perspectives with us. This will feed into our thinking as we conduct our review.

We want to hear from a wide range of audience groups, content providers, network and infrastructure providers, device manufacturers, and TV platforms. We are interested in stakeholders' perspectives on how TV distribution might play out over the next 10 to 15 years, and their views on how this should be coordinated to ensure the distribution of TV and other media we trust and value on a sustainable basis.

Recap of call for evidence questions

1. How are audience demands and expectations evolving, and how does that vary for users of different TV platforms and different demographics?
2. What do audience trends mean for the financial prospects and sustainability of TV distribution platforms, and what are the key decision points over the next ten years?
3. How do broadband networks and supporting infrastructure need to evolve to support resilient delivery of TV over the internet in the future?
4. In what ways might different types of 'hybrid' terrestrial and internet services deliver benefits for audiences and what risks may arise?
5. Given the sharing of infrastructure, what would the implications for other sectors be if there was a change to the use of digital terrestrial television (DTT)?
6. What coordination and planning across the value chain might be necessary to secure good outcomes for audiences and key providers over the long term?

A1. Responding to this call for evidence

How to respond

- A1.1 Ofcom would like to receive views and comments on the issues raised in this document, by 5pm on 12 December 2023.
- A1.2 You can download a response form from <https://www.ofcom.org.uk/consultations-and-statements/category-1/call-for-evidence-future-of-tv-distribution>. You can return this by email or post to the address provided in the response form.
- A1.3 If your response is a large file, or has supporting charts, tables or other data, please email it to FutureofTVDistributionCallforEvidence@ofcom.org.uk, as an attachment in Microsoft Word format, together with the cover sheet. This email address is for this call for evidence only and will not be valid after 5pm on 12 December 2023.
- A1.4 Responses may alternatively be posted to the address below, marked with the title of the call for evidence:
- Future of TV Distribution Team
c/o Strategy & Policy Team
Ofcom
Riverside House
2A Southwark Bridge Road
London SE1 9HA
- A1.5 We welcome responses in formats other than print, for example an audio recording or a British Sign Language video. To respond in BSL:
- send us a recording of you signing your response. This should be no longer than 5 minutes. Suitable file formats are DVDs, wmv or QuickTime files; or
 - upload a video of you signing your response directly to YouTube (or another hosting site) and send us the link.
- A1.6 We will publish a transcript of any audio or video responses we receive (unless your response is confidential).
- A1.7 We do not need a paper copy of your response as well as an electronic version. We will acknowledge receipt of a response submitted to us by email.
- A1.8 You do not have to answer all the questions in the call for evidence if you do not have a response; a short response on just one point is fine. We also welcome joint responses.
- A1.9 It would be helpful if your response could include direct answers to the questions asked in the call for evidence document. The questions are listed at Annex 4.
- A1.10 If you want to discuss the issues and questions raised in this call for evidence, please contact FutureofTVDistributionCallforEvidence@ofcom.org.uk.

Confidentiality

- A1.11 Calls for evidence are more effective if we publish the responses before the call for evidence period closes. This can help people and organisations with limited resources or familiarity with the issues to respond in a more informed way. So, in the interests of transparency and good regulatory practice, and because we believe it is important that everyone who is interested in an issue can see other respondents' views, we usually publish responses on the Ofcom website at regular intervals during and after the call for evidence period.
- A1.12 If you think your response should be kept confidential, please specify which part(s) this applies to and explain why. Please send any confidential sections as a separate annex. If you want your name, address, other contact details or job title to remain confidential, please provide them only in the cover sheet, so that we don't have to edit your response.
- A1.13 If someone asks us to keep part or all of a response confidential, we will treat this request seriously and try to respect it. But sometimes we will need to publish all responses, including those that are marked as confidential, in order to meet legal obligations.
- A1.14 To fulfil our pre-disclosure duty, we may share a copy of your response with the relevant government department before we publish it on our website.
- A1.15 Please also note that copyright and all other intellectual property in responses will be assumed to be licensed to Ofcom to use. Ofcom's intellectual property rights are explained further in our Terms of Use.

Next steps

- A1.16 To support the Government's research project on these topics, we will provide our early review of market changes in spring of 2024.
- A1.17 If you wish, you can register to receive mail updates alerting you to new Ofcom publications.

Ofcom's consultation processes

- A1.18 Ofcom aims to make responding to a consultation as easy as possible. For more information, please see our consultation principles in Annex 2.
- A1.19 If you have any comments or suggestions on how we manage our consultations, please email us at consult@ofcom.org.uk. We particularly welcome ideas on how Ofcom could more effectively seek the views of groups or individuals, such as small businesses and residential consumers, who are less likely to give their opinions through a formal consultation.
- A1.20 If you would like to discuss these issues, or Ofcom's consultation processes more generally, please contact the corporation secretary:
- A1.21 Corporation Secretary
Ofcom
Riverside House
2a Southwark Bridge Road
London SE1 9HA
Email: corporationsecretary@ofcom.org.uk

A2. Ofcom's consultation principles

Ofcom has seven principles that it follows for every public written consultation:

Before the consultation

A2.1 Wherever possible, we will hold informal talks with people and organisations before announcing a big consultation, to find out whether we are thinking along the right lines. If we do not have enough time to do this, we will hold an open meeting to explain our proposals, shortly after announcing the consultation.

During the consultation

A2.2 We will be clear about whom we are consulting, why, on what questions and for how long.

A2.3 We will make the consultation document as short and simple as possible, with an overview of no more than two pages. We will try to make it as easy as possible for people to give us a written response.

A2.4 We will consult for up to ten weeks, depending on the potential impact of our proposals.

A2.5 A person within Ofcom will be in charge of making sure we follow our own guidelines and aim to reach the largest possible number of people and organisations who may be interested in the outcome of our decisions. Ofcom's Consultation Champion is the main person to contact if you have views on the way we run our consultations.

A2.6 If we are not able to follow any of these seven principles, we will explain why.

After the consultation

A2.7 We think it is important that everyone who is interested in an issue can see other people's views, so we usually publish the responses on our website at regular intervals during and after the consultation period. After the consultation we will make our decisions and publish a statement explaining what we are going to do, and why, showing how respondents' views helped to shape these decisions.

A3. Call for evidence coversheet

Basic details

Call for evidence title:

To (Ofcom contact):

Name of respondent:

Representing (self or organisation/s):

Address (if not received by email):

Confidentiality

Please tick below what part of your response you consider is confidential, giving your reasons why

- Nothing
- Name/contact details/job title
- Whole response
- Organisation
- Part of the response

If you selected 'Part of the response', please specify which parts:

If you want part of your response, your name or your organisation not to be published, can Ofcom still publish a reference to the contents of your response (including, for any confidential parts, a general summary that does not disclose the specific information or enable you to be identified)?

Yes No

Declaration

I confirm that the correspondence supplied with this cover sheet is a formal call for evidence response that Ofcom can publish. However, in supplying this response, I understand that Ofcom may need to publish all responses, including those which are marked as confidential, in order to meet legal obligations. If I have sent my response by email, Ofcom can disregard any standard e-mail text about not disclosing email contents and attachments.

Ofcom aims to publish responses at regular intervals during and after the call for evidence period. If your response is non-confidential (in whole or in part), and you would prefer us to publish your response only once the call for evidence has ended, please tick here.

Name

Signed (if hard copy)

A4. Call for evidence questions

1. How are audience demands and expectations evolving, and how does that vary for users of different TV platforms and different demographics?
2. What do audience trends mean for the financial prospects and sustainability of TV distribution platforms, and what are the key decision points over the next ten years?
3. How do broadband networks and supporting infrastructure need to evolve to support resilient delivery of TV over the internet in the future?
4. In what ways might different types of 'hybrid' terrestrial and internet services deliver benefits for audiences and what risks may arise?
5. Given the sharing of infrastructure, what would the implications for other sectors be if there was a change to the use of digital terrestrial television (DTT)?
6. What coordination and planning across the value chain might be necessary to secure good outcomes for audiences and key providers over the long term?