



KANTAR

BBC iPlayer Competition Assessment Research Report

Prepared for Ofcom

June 2019

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1

Background and methodology

Research objectives

Ofcom is seeking to better understand the potential impact of the BBC's proposed changes on the consumption of other video-on-demand (VOD) services and linear TV channels

Developing a picture of the current media and viewing consumption of internet users in the UK

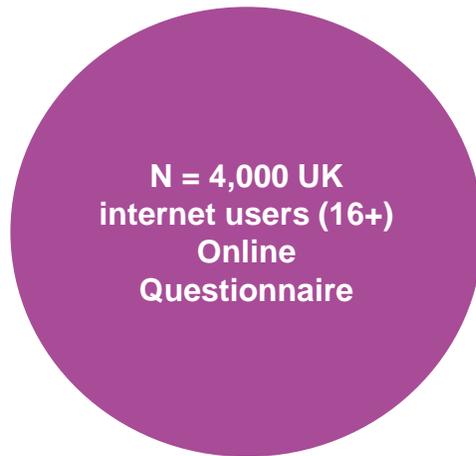
Understanding the attitude towards the proposed changes

Assessing the potential behavioural changes caused by a new BBC iPlayer offer

Our recommended approach was to gather the views of internet users and those not online/online infrequently separately

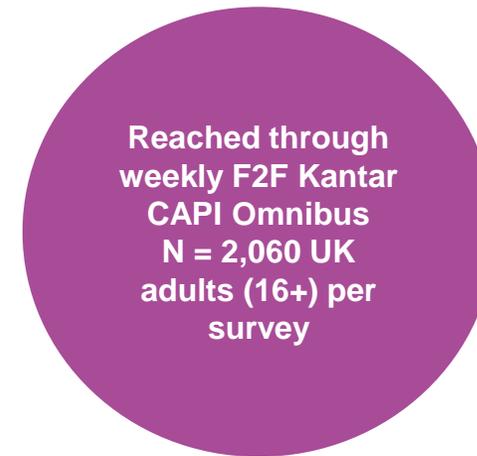
This allowed us to use the most efficient, and most cost effective, methods to reach each group within the desired timings.

Internet Users



Internet users were asked detailed questions about their TV and VOD usage as well as 3 scenarios to gauge their reaction to the proposed BBC iPlayer changes

Those not online/online infrequently



Infrequent/Non-internet users were asked a shorter, more targeted survey to ensure their views about the proposed BBC iPlayer changes were captured without putting them through a lengthy survey on a service they might not be familiar with

Questionnaire coverage and scope – online sample

In order to meet the research objectives, the questionnaire was split into 3 sections

Context – Existing TV viewing and media consumption

This section gave us a picture of the current VOD marketplace and the place BBC iPlayer occupies within it. Key questions included:

- Proportion of linear viewing vs. VOD viewing
- Existing Pay TV subscriptions and frequency of use
- VOD services used and frequency of use
- General impression of and levels of satisfaction with VOD service
- Hierarchy of VOD viewing (including services turned to first)
- VOD viewing decision making process

Assessing potential behavioural changes from the new BBC offer

We used this section to assess potential behaviour changes that may arise as a result of the proposed changes. This consisted of 3 scenarios:

- Forced diversion – Establish what people do when what they want to watch is not available on BBC iPlayer
- Scenario 1 – Extending the catch-up window on all programmes to at least 12 months, up from the current 30 days
- Scenario 2 – Including a wider range of existing programmes

Attitudes towards proposed changes

This section gauged opinions on the proposed changes and the impact they may have on the perceptions of BBC iPlayer. Key questions included:

- Appeal of changes
- Impact on levels of satisfaction with BBC iPlayer
- Likelihood of changing first port of call
- Perceptions of having larger catalogue of content on BBC iPlayer

Questionnaire coverage and scope – face to face sample

Infrequent/Non-internet users were asked a much shorter set of questions through the omnibus survey

These questions were used to establish:

- How frequently they used the internet
- Whether or not they use BBC iPlayer and (if used) how often
- Whether the changes proposed by the BBC for BBC iPlayer would have any impact on their behaviour
 - Options here mirrored the options within the scenarios in the online survey
- Which VOD services they turn to first and which others were within their consideration set

Background and methodology

Survey focus and sample design

- A total sample of 4,021 online interviews was achieved with quota targets set as below (final numbers achieved in brackets)...
 - Gender – male 50% (1807), female 51% (2214)
 - Age – 16-24 14% (513), 25-34 17% (718), 35-44 16% (588), 45-54 18% (651), 55-64 15% (691), 65+ 20% (860)
 - SEG – ABC1 56% (2526), C2DE 44% (1495)
 - Households with children under 16 – 28% (989)
 - Urban and Rural split – Urban 83% (3235) and Rural 17% (671)
 - Ethnicity – White 86% (3708) and BAME 14% (293)
 - Platform provider – Sky 35% (1559), Virgin 13% (658), Freeview only 42% (894) and Any Freeview 64% (1495)
 - Data was weighted to the gender, age, age & gender and SEG targets above to correct minor imbalances in the sample. Weighting efficiency was 84.4%.
- A total sample of 2,136 face to face interviews was achieved through the Kantar's F2F CAPI Omnibus survey

2

Executive summary

Executive summary (1/2)

Existing behaviour and age were key factors in how people responded to the scenarios

- The amount of TV that people watched, the platforms they had access to and the VOD services that they used were key influences in how people responded to the scenarios
- Age was a key factor in much of this study, shaping existing behaviour and access methods. The prevalence of Pay TV and higher use of SVOD services among younger age groups meant that they had a wider repertoire, even if they watched less TV overall. By contrast, despite watching more TV, those aged over 55 were more likely to have Freeview on the main set and were significantly less likely to have used an SVOD service in the last 3 months

When what they want to watch is not available on BBC iPlayer, people were as likely to say they would look for something else to watch on BBC iPlayer as they were to switch to another on-demand service

- In the forced diversion scenario, respondents said they were as likely to look for something else to watch on BBC iPlayer (30%) as they were to switch to another catch up or on-demand service (32%)
 - Those who said they would switch to another on-demand service said they would switch to SVOD services first, whilst those who said they would switch to a broadcast TV channel said they would opt for free-to-air non-BBC channels first
 - 16-24s, ITV Hub/Hub+ users and Netflix users were significantly more likely to switch to another on-demand or catch up service
 - Those aged 55+ were more likely to switch to a broadcast TV channel

Executive summary (2/2)

Scenario 1 – extending the catch up window was largely well received. Most said it wouldn't impact viewing elsewhere but there was a notable proportion who would watch BBC iPlayer more at the expense of other services

- Regarding extending the catch up window on content to 12 months, 12% of internet users said they would watch BBC iPlayer more at the expense of other catch up services or TV channels

Scenario 2 – including a wider variety of programmes had a similar reception to the extended window. As with scenario 1, there was also a notable proportion who would watch BBC iPlayer more at the expense of other services

- Including a wider variety of programmes on BBC iPlayer produced similar results to scenario 1. 14% of internet users said they would watch BBC iPlayer more and other catch up services or TV channels less

Infrequent/Non-internet users were less likely to be impacted by changes of this nature

- 74% of infrequent/non-internet users said that the proposed BBC iPlayer changes would not change their behaviour
 - Over a fifth (21%) said they didn't know what these changes would do to their behaviour, a much higher figure than those who use the internet regularly (6%)
 - 3% of infrequent/non-internet users said they would watch more BBC iPlayer and less of other catch up services or TV channels

3

The TV and VOD landscape

Glossary of terms

TV and VOD terms

- SVOD – Subscription video on-demand. These online services give subscribers access to TV programmes through a subscription. Examples of services include Netflix, Now TV, Amazon Prime Video, hayu, Disney Life
- BVOD – Broadcaster video on-demand. These online services give users access to programmes from a particular broadcaster. These services are usually free to access or, in the case of BBC iPlayer, paid for through the TV licence fee. Examples of services include BBC iPlayer, ITV Hub, All 4, My5, UKTV Play
- Pay TV – This is a subscription based TV service accessed via satellite, set-top box or cable which gives subscribers access to additional channels for a monthly fee. Examples include Sky, Virgin, BT TV and TalkTalk

Research terminology

- Top 3 Box (NET) – This refers to those who have rated a broadcaster or service 8, 9 or 10 out of 10 at a particular question or for a particular statement
- High Approvers – This refers to those who scored a broadcaster or service 7, 8, 9 or 10 out of 10 at a particular question or for a particular statement

Introduction

The slides that follow focus on the groups where we saw significant differences vs. the total sample

- Significance throughout these slides is at the 95% confidence level and is vs. the total sample unless otherwise stated
- Whilst all groups were looked at, the slides that follow will not show groups where the differences vs. the total sample were not notable
- Within the scenarios we have focused on the groups that exemplify the combination of factors which impacted how people responded to the scenarios
 - These factors are covered in the rest of this section
 - A breakdown of scenario results by age, SEG and ethnicity is available in the appendix
- Any results based on a base size below 100 are only indicative and have been noted with an asterisk (*)

Nearly two thirds of internet users claimed to have a Pay TV service on their main TV set

Younger respondents were significantly more likely than the total sample to say they have a Pay TV service on their main set

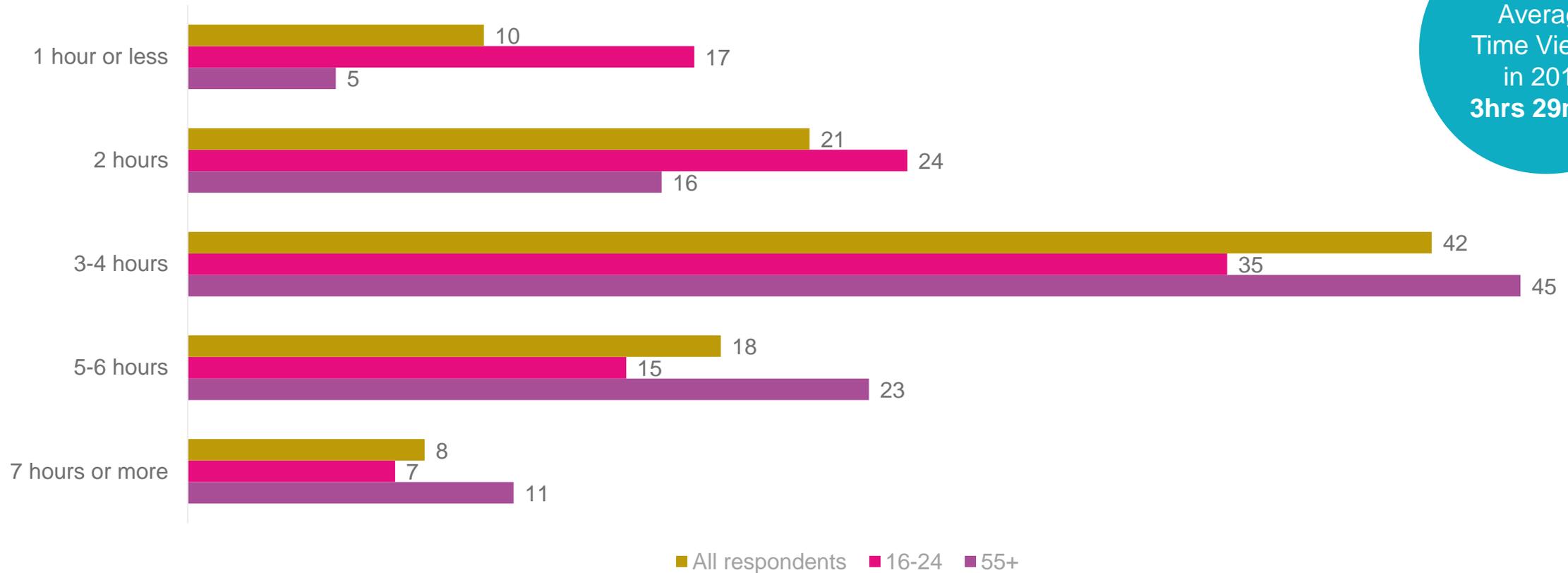
	Pay TV on main set (NET)	Sky	Virgin	BT TV	Freeview
All respondents	62%	37%	14%	5%	30%
16-24	69% ▲	39%	16%	7% ▲	25% ▼
55+	57% ▼	33% ▼	15%	5%	34% ▲

▲ Significantly higher
▼ Significantly lower

On an average day, 42% of internet users claimed to watch 3-4 hours of TV

Younger respondents were more likely to say they watch less

Hours of TV watched per day



BARB
Average
Time Viewed
in 2019
3hrs 29mins

BVOD services were more widely used by internet users with 16-24s being much more likely to say they have used an SVOD service in the last 3 months

However, 11% of internet users said they hadn't used any VOD services in the last 3 months



16-24 – 80%

55+ – 79%

ABC1 – 84% ▲



16-24 – 81% ▲

55+ – 27% ▼

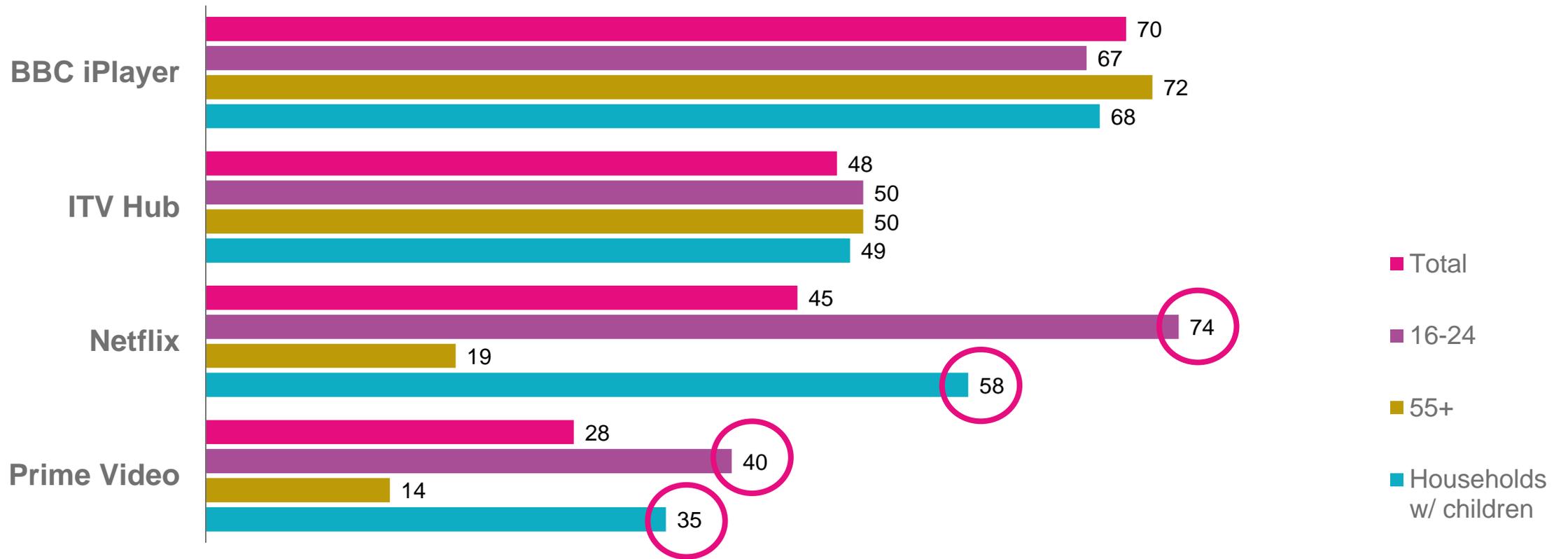
ABC1 – 56% ▲

▲ Significantly higher
▼ Significantly lower

Viewing of the top two BVOD services was similar for older and younger respondents

16-24s and 'Households with children' had a more prominent role in driving SVOD usage

A6A: Services used in last 3 months



Although more people said they used BBC iPlayer, Netflix is said to be used more often by its users

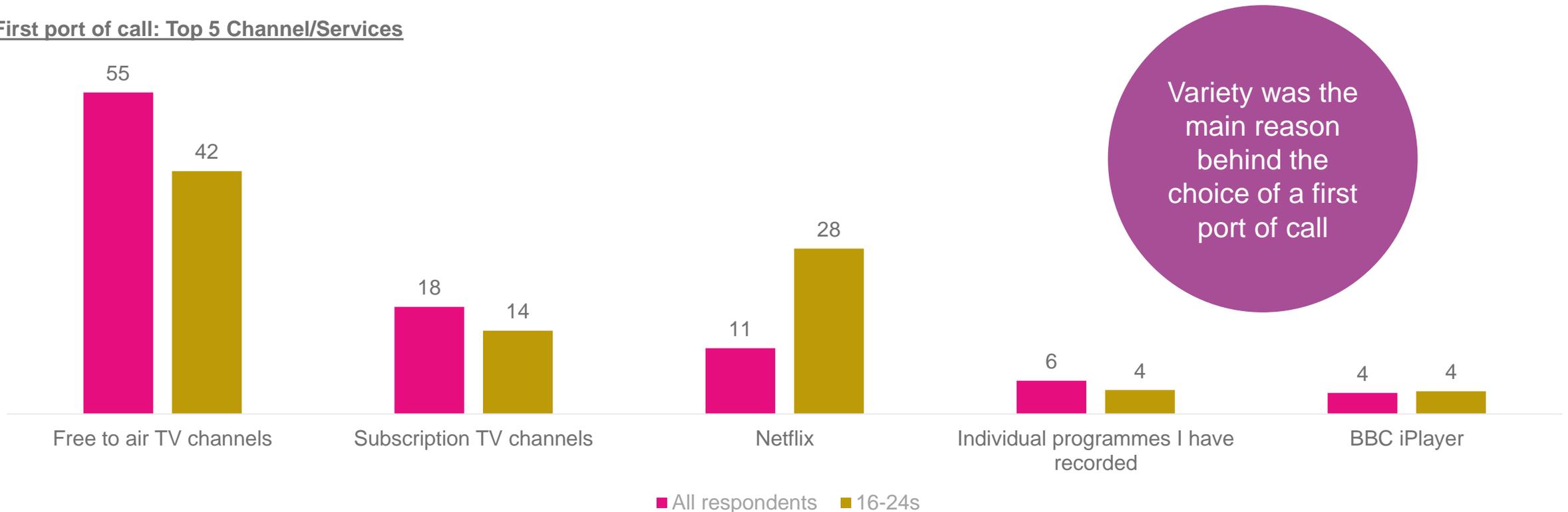
This was as true for older groups as it was for those aged 16-24

<i>% of users who used the service at least once a day</i>	All respondents	16-24s	55+	<i>% Who have used service in the last 3 months</i>
BBC iPlayer	18%	19%	9%	70%
Netflix	50%	56%	28%	45%

Free-to-air channels were the most popular first port of call with 4% of respondents saying they would turn to BBC iPlayer first

Although 28% of 16-24s said they turned to Netflix first, free-to-air channels remained the most popular first port of call for this age group (42%)

First port of call: Top 5 Channel/Services

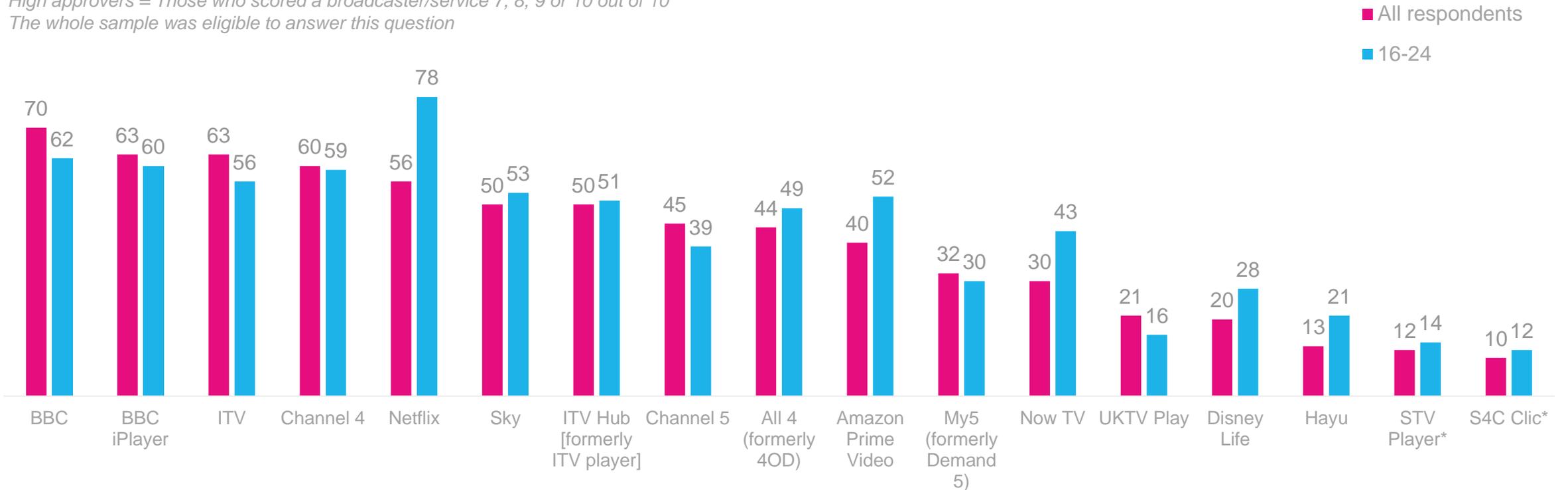


BBC and BBC iPlayer had the highest proportion of high approvers

Although ranked in 5th place for the sample as a whole, Netflix had the highest approval ratings amongst 16-24s

High approvers (NET) by broadcaster/service

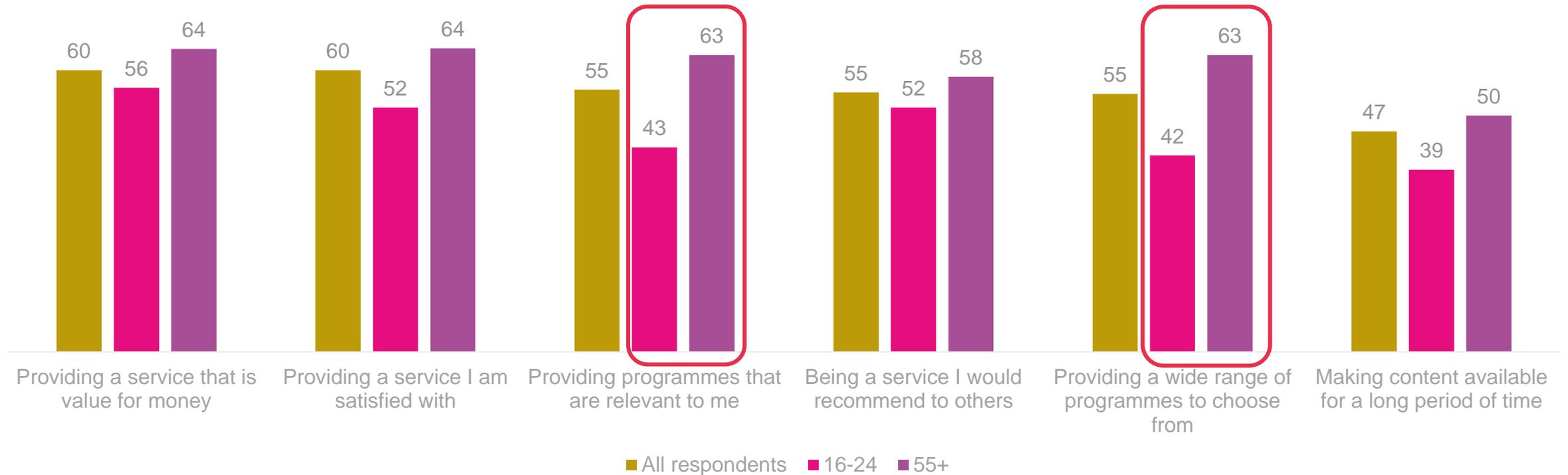
High approvers = Those who scored a broadcaster/service 7, 8, 9 or 10 out of 10
The whole sample was eligible to answer this question



BBC iPlayer was seen as providing value for money and providing a satisfactory service. It performed least well for 'Making content available for a long period of time'

16-24s and Over 55s were furthest apart for statements related to relevance and variety

BBC iPlayer performance vs. A10 statements: % Top 3 Box (NET)



Top 3 Box = Those who scored a broadcaster/service 8, 9 or 10 out of 10

4

The scenarios

Internet users were presented with three scenarios to ascertain the likely impact of the proposed changes to BBC iPlayer

1. A forced diversion scenario – To establish what people do when what they want to watch isn't available on BBC iPlayer
2. Scenario 1 – Assessing the impact of extending the catch-up window on all programmes to at least 12 months, up from the current 30 days
3. Scenario 2 – Assessing the impact of including a wider range of programmes on BBC iPlayer

Groups of focus in the scenarios

Groups have been chosen to illustrate how age, amount of time spent watching TV, TV platforms in the home as well as catch up or on-demand TV services used, impacts on how respondents navigate through the scenarios

16-24s

- Significantly more likely than the total sample to have a Pay TV service on the main set
- Watch less hours of TV per day than those aged 55+
- Significantly more likely than the total sample to have used an SVOD service in the last 3 months

Over 55s

- Significantly more likely to have Freeview on the main TV set than the total sample
- Watch more hours of TV per day than 16-24s
- Significantly less likely to have used an SVOD service in the last 3 months

ITV Hub/Hub+ users

- 50% of the sample have used ITV Hub/Hub+ in the last 3 months – this makes it the most used BVOD service in the sample after BBC iPlayer
- More likely to use BVOD services (e.g. BBC iPlayer, ITV Hub, All4, My5, UKTV Play) than that Netflix users
- More likely to be ABC1

Netflix users

- 45% of the sample have used Netflix in the last 3 months – the most used SVOD service in the sample
- Users skew younger with 57% being 16-34s vs. 37% in the total sample
- More likely than total sample to have Pay TV on the main set

Summary of forced diversion

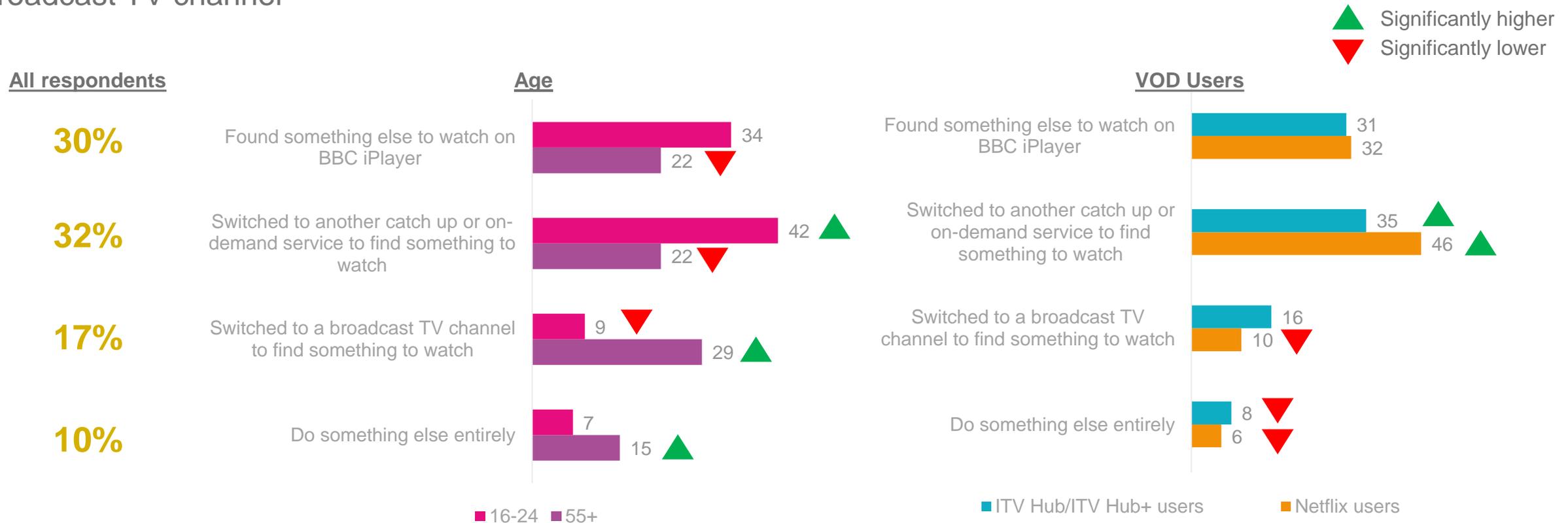
People were as likely to say they would look for something else to watch as they were to switch to another on-demand service

- Those who said they would switch to another on-demand service were most likely to turn to an SVOD service first whilst those who said they would switch to a broadcast TV channel opted for free-to-air non-BBC channels
- 16-24s, ITV Hub/Hub+ users and Netflix users were significantly more likely to say they would switch to another on-demand or catch up service
 - 16-24s and Netflix users were significantly more likely to say they would turn to an SVOD service first whilst ITV Hub/Hub+ users were significantly more likely to say they would switch to a BVOD service
- Those aged 55+ were significantly more likely to say they would switch to a broadcast TV channel
 - They were also significantly more likely to say they would turn to a BBC broadcast TV channel
- 10% of respondents said they would do something else entirely. It's worth noting that the survey topic may be a factor in this result with TV-like services being more top of mind due to the nature of the survey



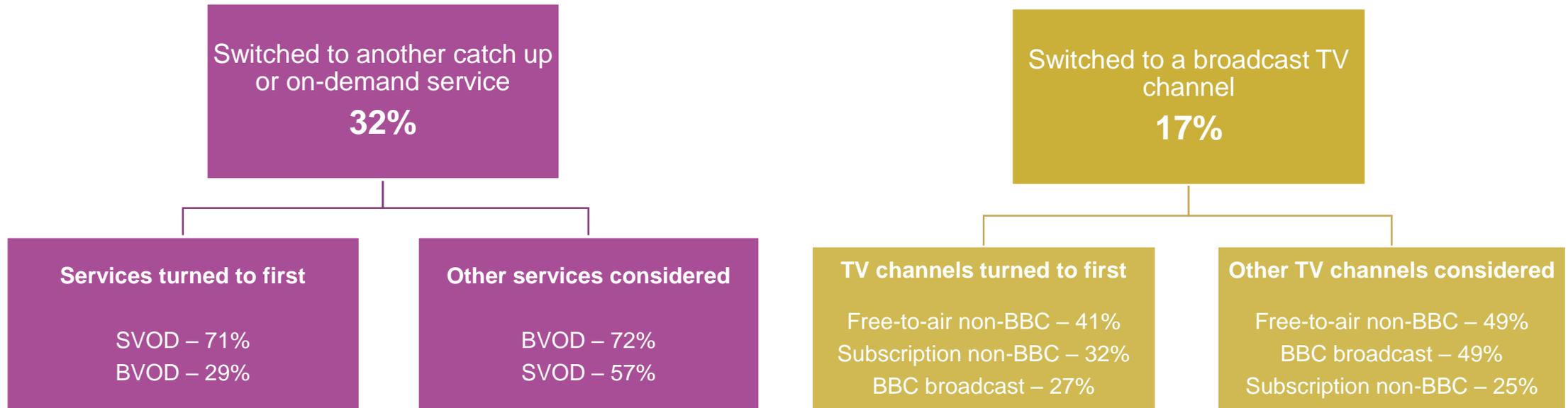
In the forced diversion scenario, respondents were as likely to say they would find something else on BBC iPlayer as they were to switch to another catch up or on-demand service

16-24s, ITV Hub/Hub+ users and Netflix users were significantly more likely to say they would switch to another catch up or on-demand service with those aged 55+ being significantly more likely to say they would switch to a broadcast TV channel



Forced Diversion

Those who said they would switch to another on-demand service were most likely to say they would turn to an SVOD service first whilst who said they would switch to a broadcast TV channel opted for free-to-air non-BBC channels



QBQ1: If programmes weren't on iPlayer, which of these do you think you would likely to have done instead? (Base: 2868)

QBQ2Ai: You said that if a programme you wanted to watch was not available on BBC iPlayer you would turn to another video on-demand service. Which service would you most likely turn to first? (Base: 877)

QBQ2Aii: And which others might you consider? (Base: 877)

QBQ2Bi: You said that if a programme you wanted to watch was not available on BBC iPlayer you would turn to a broadcast TV channel to find something to watch. Which TV channel would you most likely turn to first? (Base: 542)

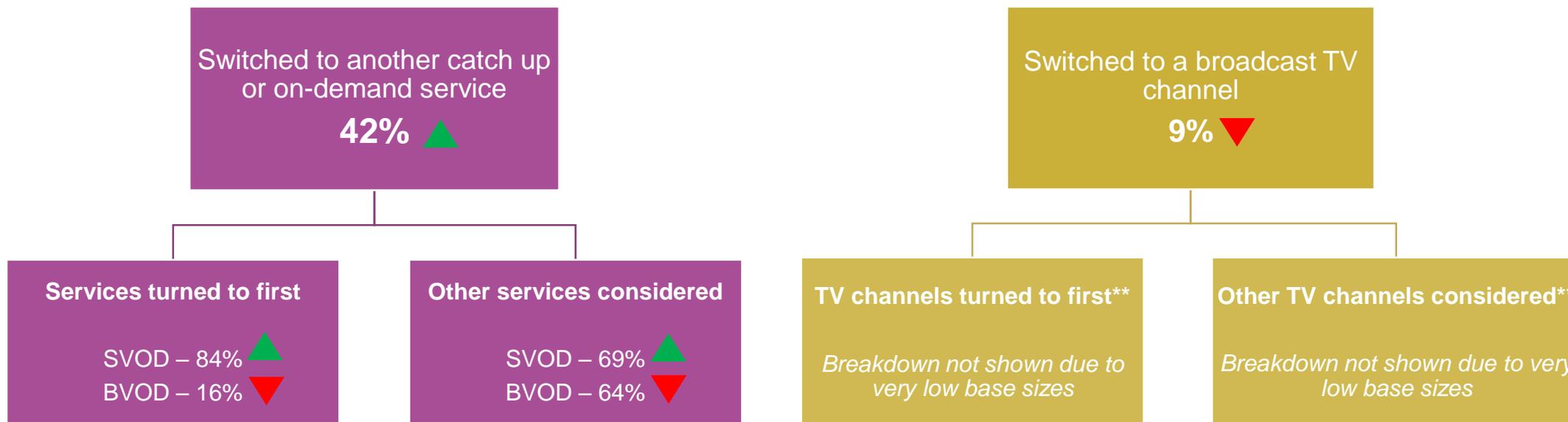
QBQ2Bii: And which others might you consider? (Base: 542)

QB2C – QB2D: Which of these channel(s) would you turn to? – QB2C – BBC broadcast channels (423), BQ2D – Free-to-air Non-BBC Channels (487), BQ2E – Subscription Non-BBC channels (295)

Forced Diversion

16-24s were significantly more likely to say they would switch to another catch up or on-demand service with SVOD services proving the most popular

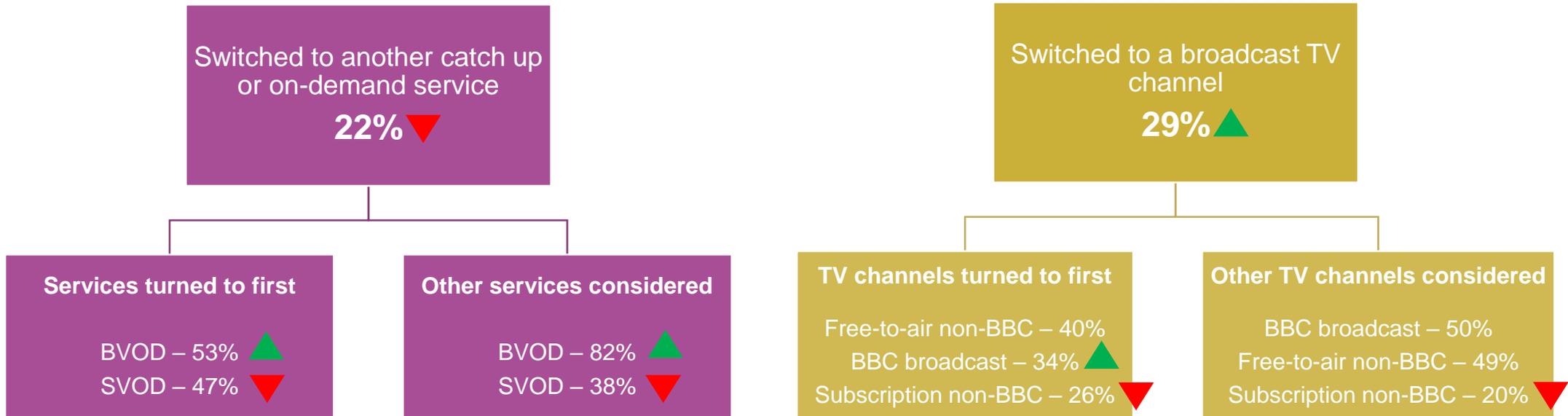
▲ Significantly higher
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Forced Diversion

Those aged 55+ were more likely to say they would switch to a broadcast TV channel. Those who said they would switch to another catch up or on-demand service said they would go to BVOD services

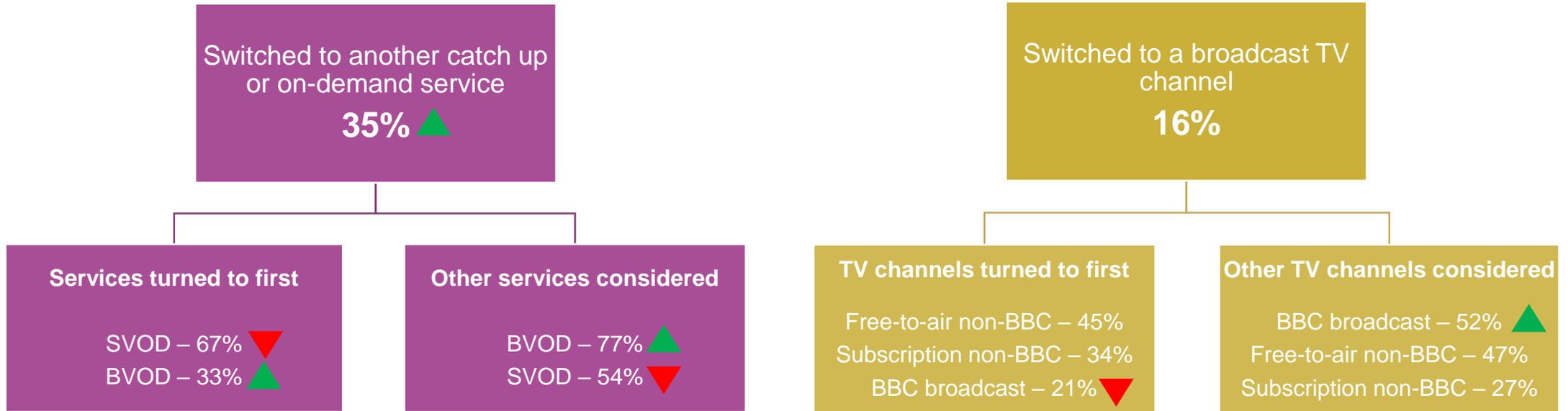
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Forced Diversion

ITV Hub/Hub+ users were significantly more likely to say they would switch to another catch up or on-demand service. They were also more likely to say they would opt for a BVOD service

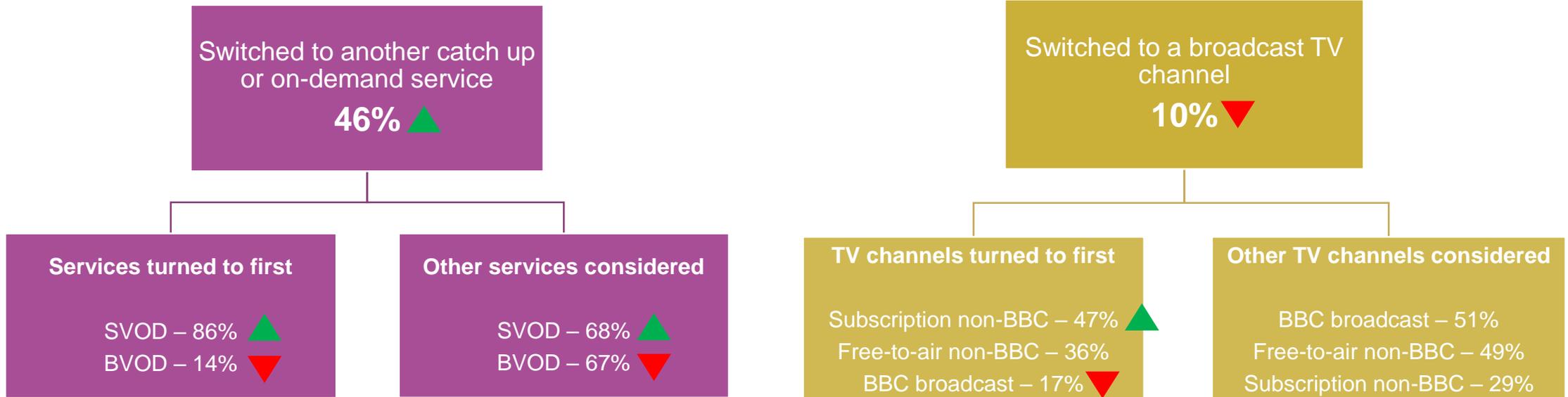
▲ Significantly higher
▼ Significantly lower



Forced Diversion

Netflix users were significantly more likely to say they would switch to another catch up or on-demand service with SVOD services being the most popular choice

▲ Significantly higher
▼ Significantly lower



QBQ1: If programmes weren't on iPlayer, which of these do you think you would likely to have done instead? (Base: 1244)

QBQ2Ai: You said that if a programme you wanted to watch was not available on BBC iPlayer you would turn to another video on-demand service. Which service would you most likely turn to first? (Base: 566)

QBQ2Aii: And which others might you consider? (Base: 566)

QBQ2Bi: You said that if a programme you wanted to watch was not available on BBC iPlayer you would turn to a broadcast TV channel to find something to watch. Which TV channel would you most likely turn to first? (Base: 130)

QBQ2Bii: And which others might you consider? (Base: 130)

QB2C – QB2D: Which of these channel(s) would you turn to? – QB2C – BBC broadcast channels (90*), BQ2D – Free-to-air Non-BBC Channels (110), BQ2E – Subscription Non-BBC channels (96*)

Summary of Scenario 1

Extending the catch up window was largely well received, with most saying it wouldn't impact viewing elsewhere. However 12% of internet users said they would watch BBC iPlayer more and other services less as a result of the extended window

- Almost half of those who said they would not change their behaviour as a result of scenario 1 were satisfied with the current catch up window of 30 days
- However 12% of internet users said they would watch BBC iPlayer more at the expense of other catch up services or TV channels
 - Those who said they would watch other services or TV channels less were marginally more likely to watch less BVOD services
 - ITV Hub/Hub+ and Netflix users were significantly more likely to say they would watch BBC iPlayer more and other catch up services less
- Almost two thirds of those who said they would watch more BBC iPlayer as a result of scenario 1 said they would spend more time browsing BBC iPlayer library as a result of the extended catch up window



Scenario 1: Extending the catch up window to 12 months

49% of respondents said they would watch more BBC iPlayer as a result of the extended catch up window with 12% saying they would watch BBC iPlayer more and other services less

▲ Significantly higher
▼ Significantly lower

All respondents

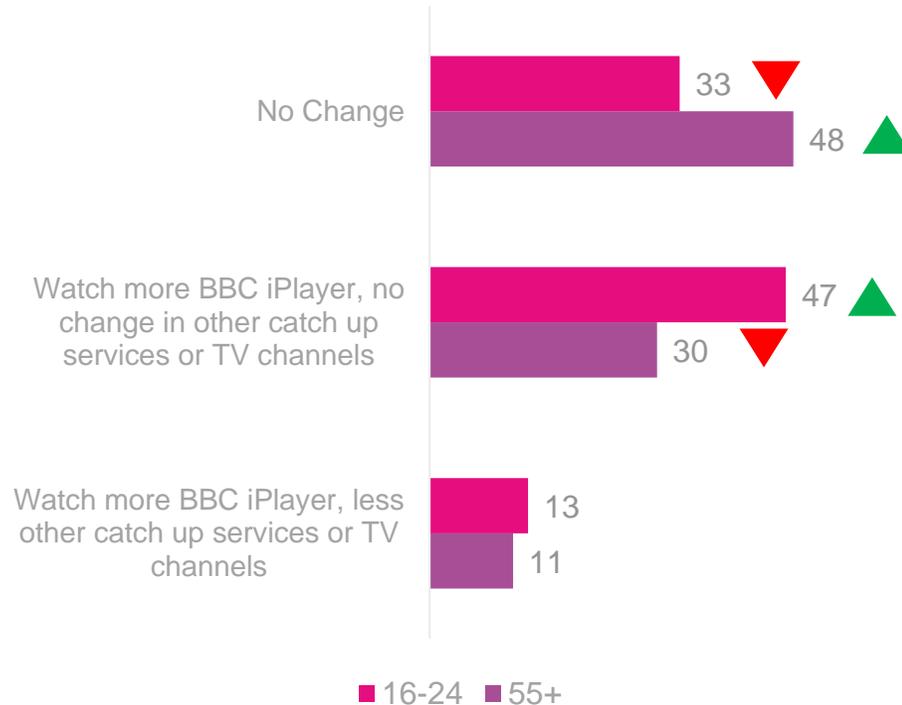
40%

37%

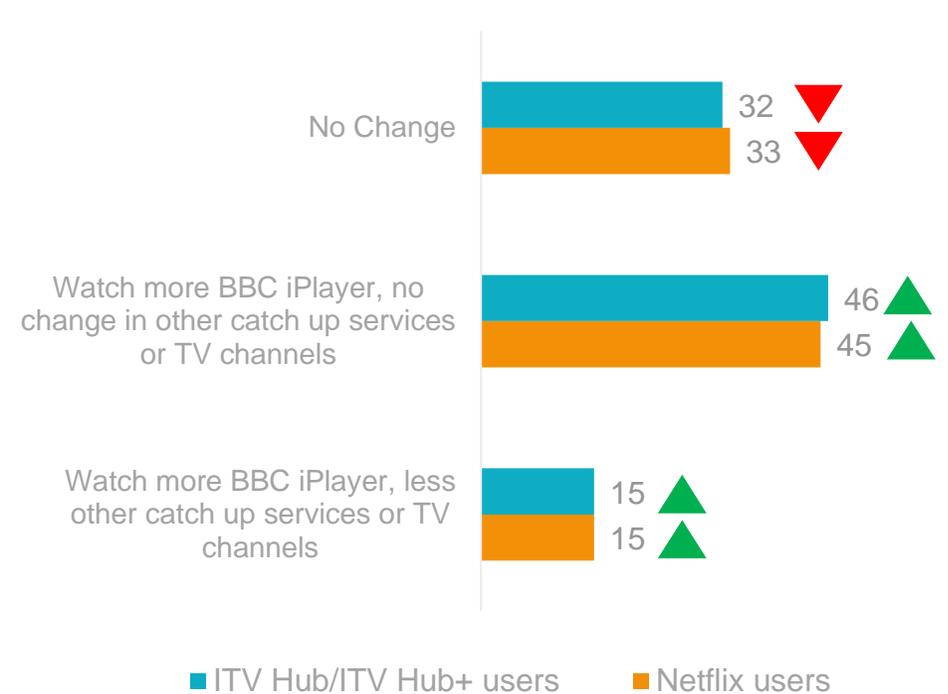
12%

Watch more BBC iPlayer (NET) 49%

Age



VOD Users

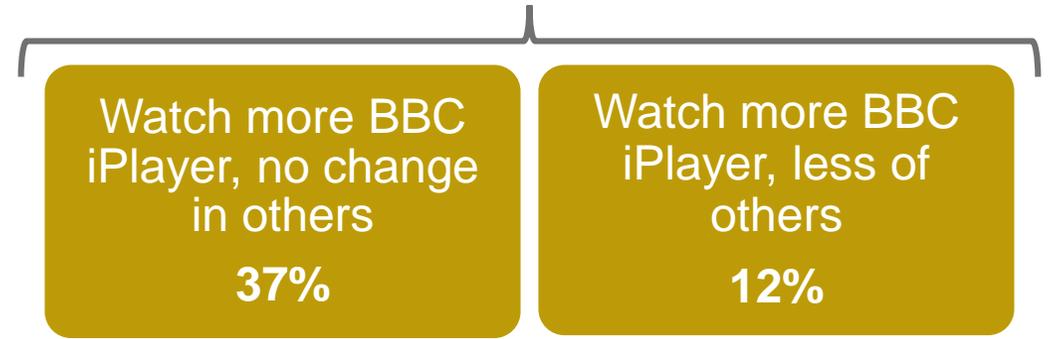


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

Although almost half of internet users would watch more BBC iPlayer, the majority of them would not change the amount they consumed other services

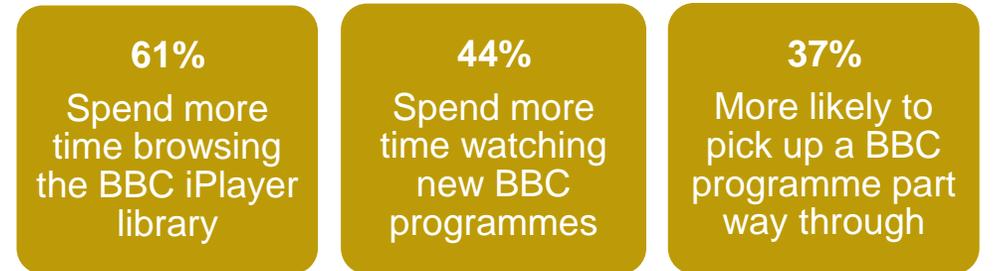
Watch more BBC iPlayer (NET) = 49%



Why would this group not change their viewing behaviour?



How would extending the catch up window change the way they spend time on BBC iPlayer?

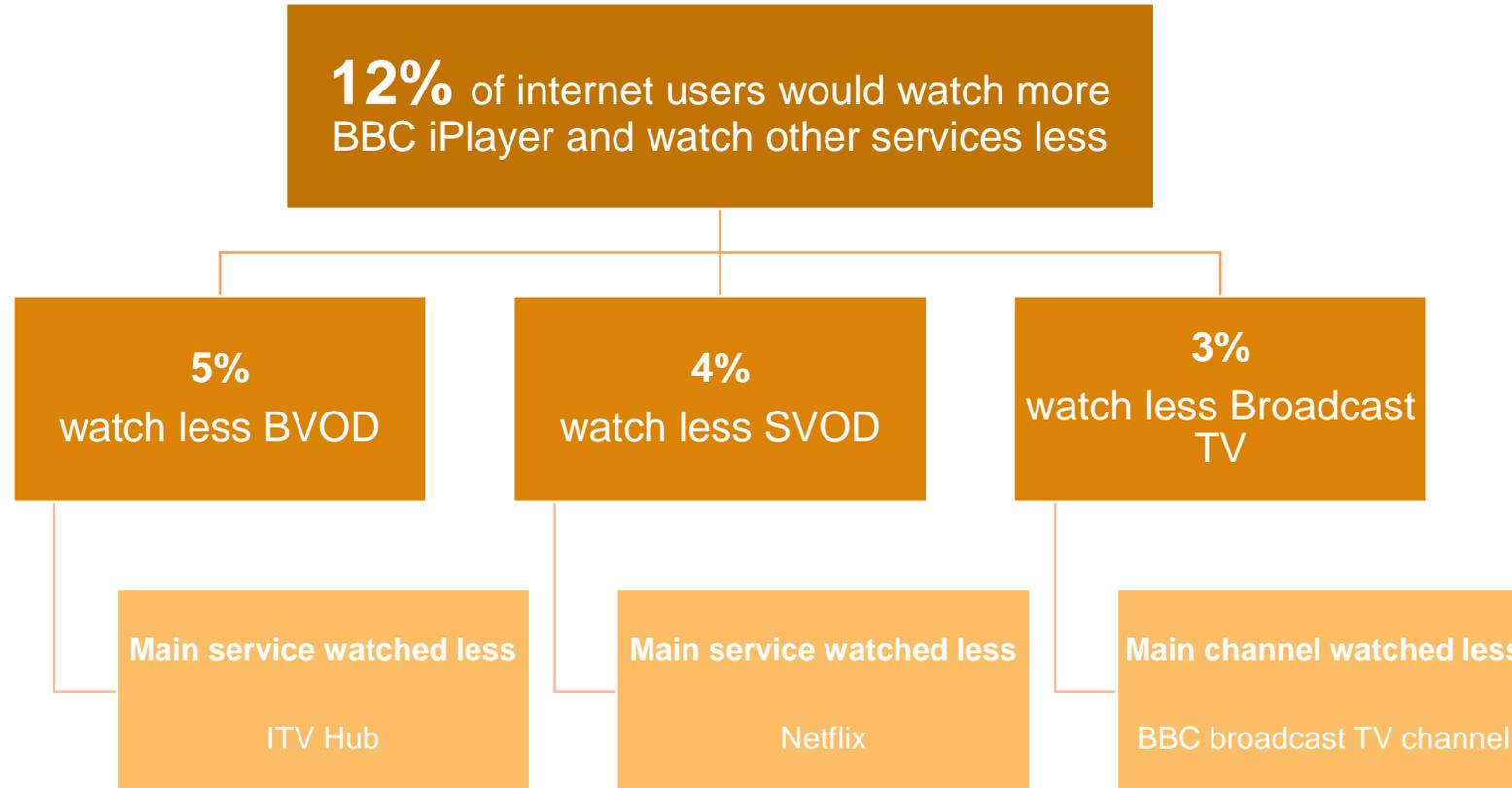


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

All

Those who said they would watch other services or TV channels less were marginally more likely to say they would watch less BVOD services

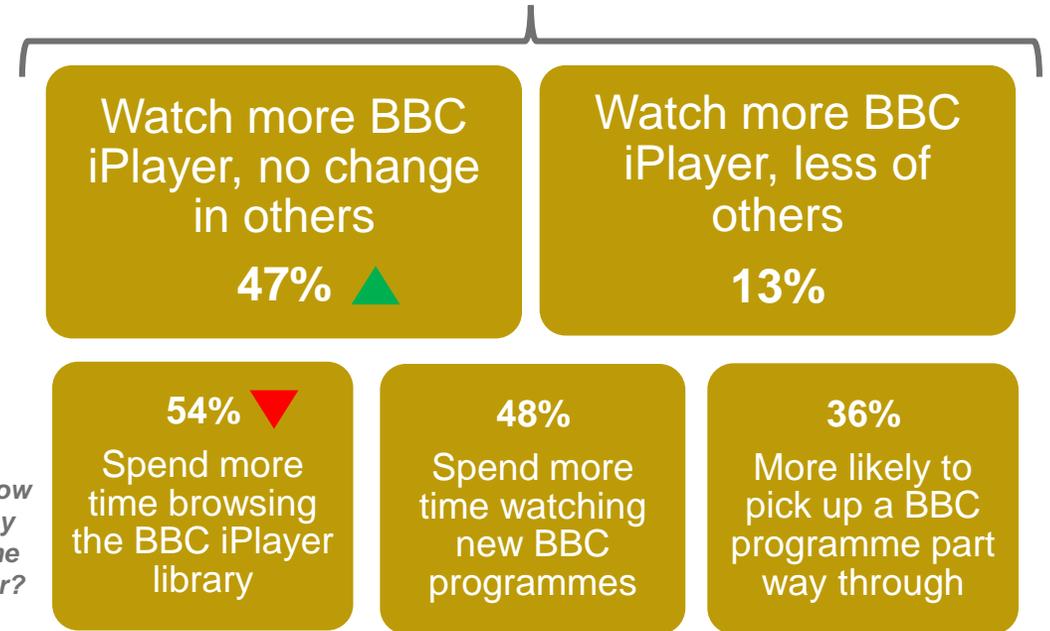
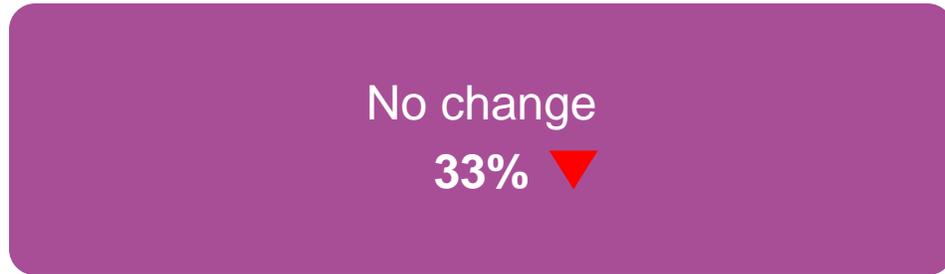


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

16-24s were significantly more likely to say they would watch more BBC iPlayer, with the change being driven by the 47% who said they would watch BBC iPlayer more and not change their viewing of other catch up services or TV channels

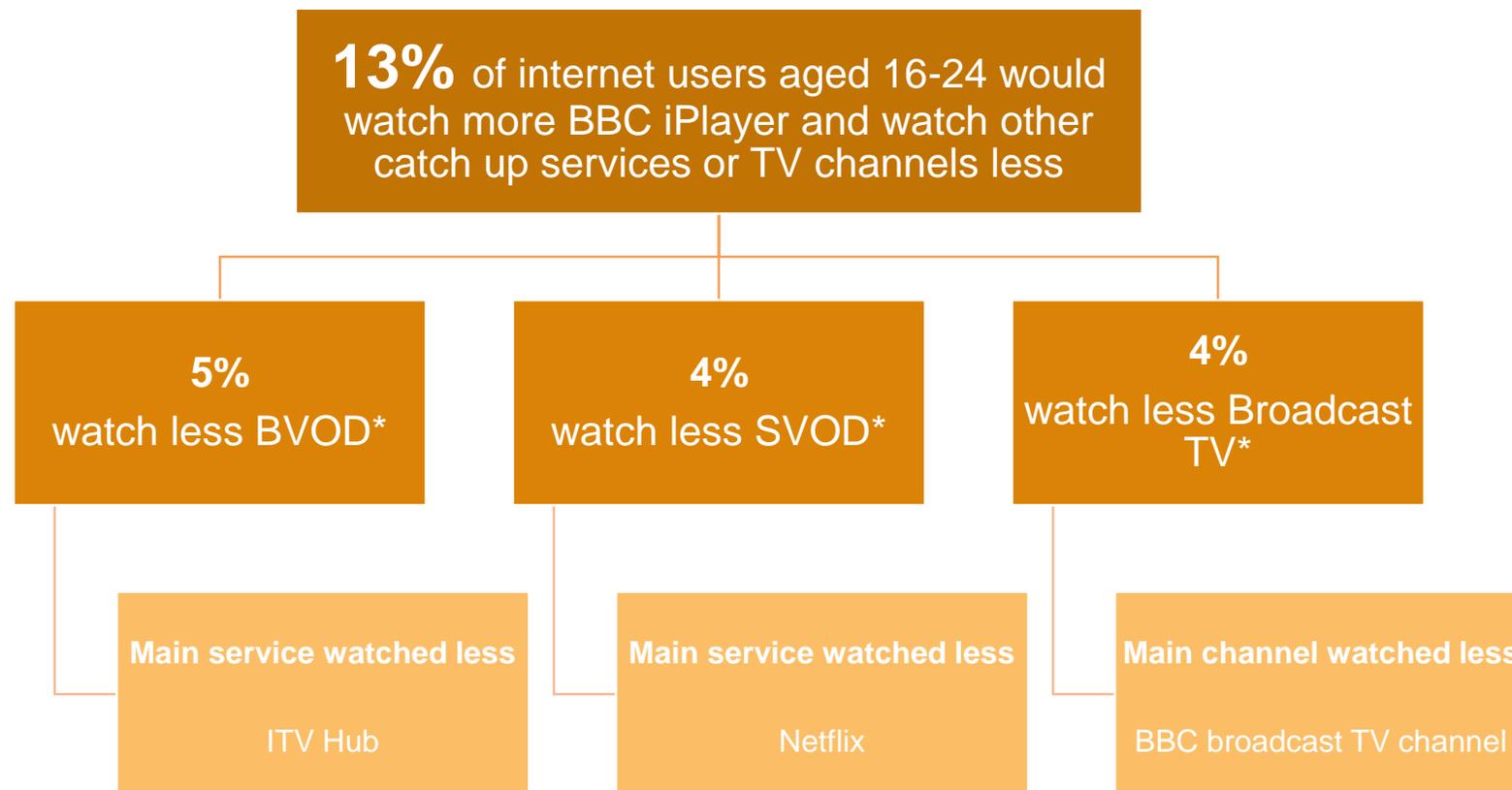
Watch more BBC iPlayer (NET) = 59% ▲



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

Those 16-24s who said they would watch less of other catch up services or TV channels as a result of watching more BBC iPlayer were marginally more likely to say they would watch less BVOD



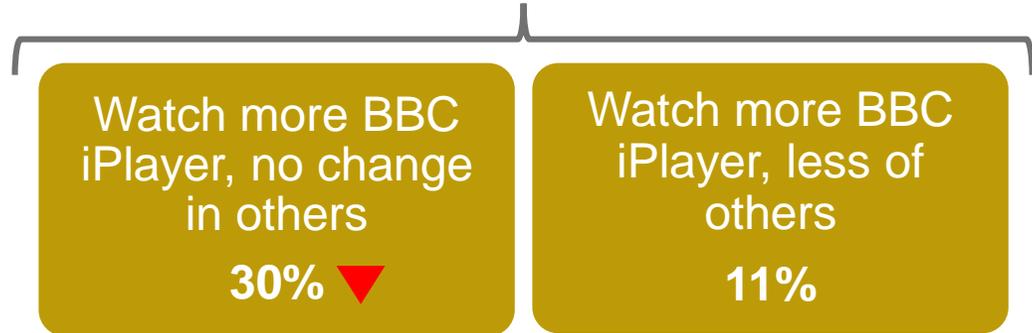
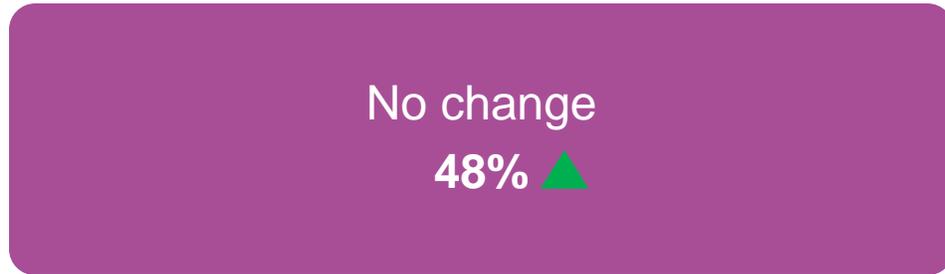
**Caution: Base size is under 100. Results are indicative*

Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

Those aged over 55 were significantly more likely to say they would not change their behaviour as a result of extending the catch up window

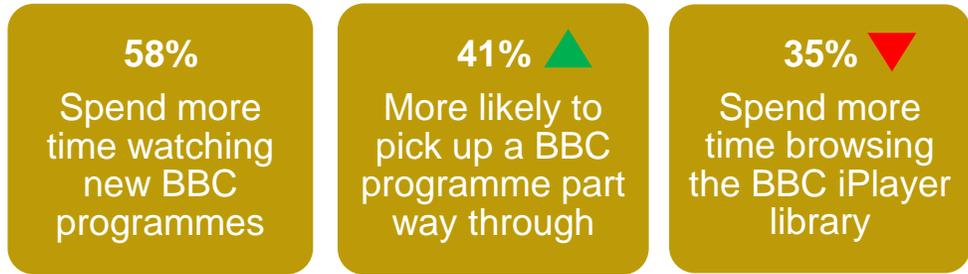
Watch more BBC iPlayer (NET) = 41% ▼



Why would this group not change their viewing behaviour?



How would extending the catch up window change the way they spend time on BBC iPlayer?



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

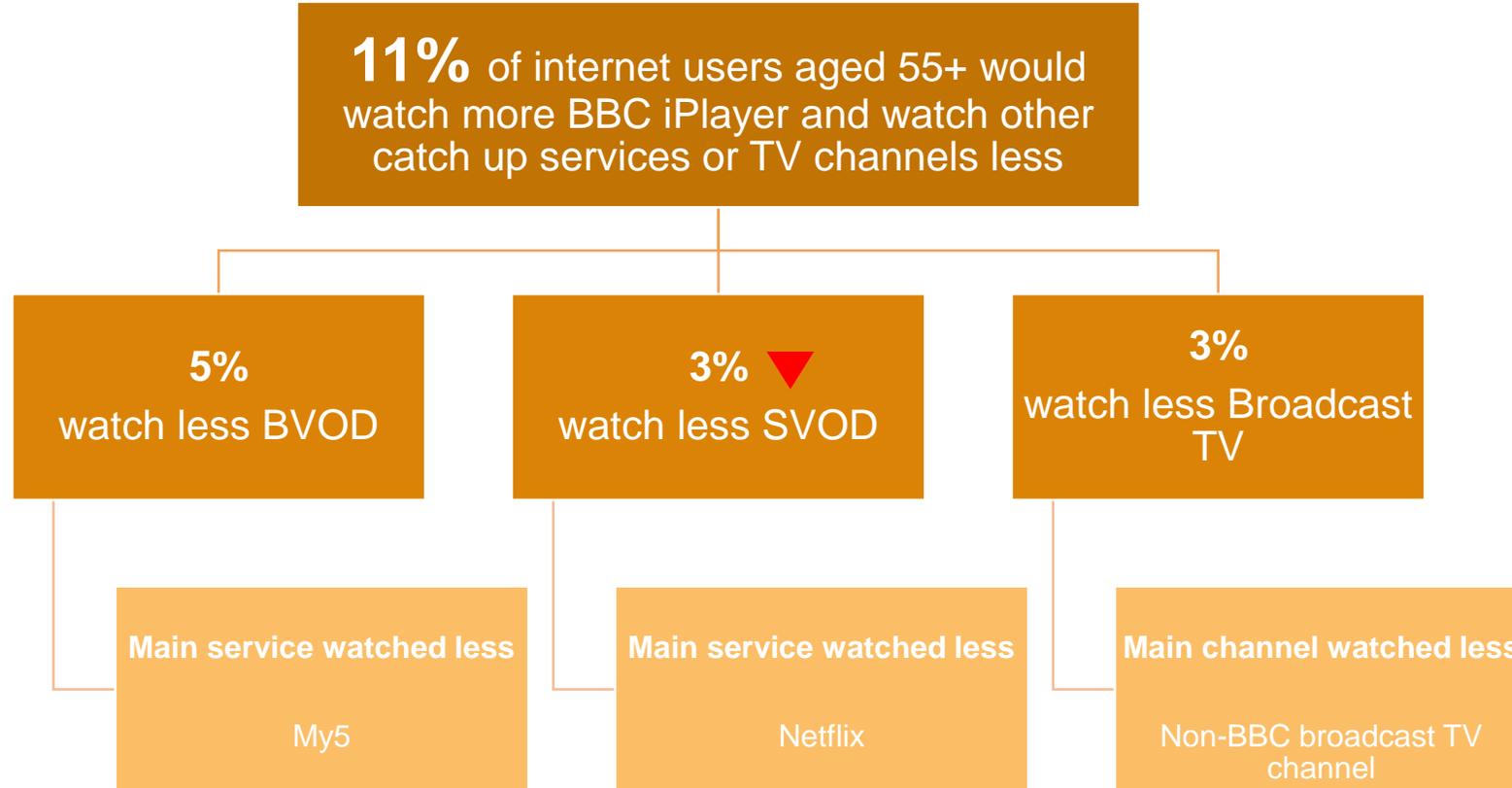
QCQ1: You said earlier that you watch <INSERT GENRES FROM A7> programmes. BBC iPlayer plans to extend the catch-up window on all programmes to at least 12 months, up from the current 30 days. If this happened, which of the following is most likely for you? (Base: 1551)

QCQ2A: You said that an extended viewing period of at least 12 months on iPlayer would not change your viewing behaviour. Why not? (Base: 749)

QCQ5: You said that the change to an extended viewing period of at least 12 months on iPlayer would make you use the iPlayer more. How would this change the way you spend time on the iPlayer? (Base: 626)

Scenario 1: Extending the catch up window to 12 months

Those aged over 55 who said they would watch less of other catch up services or TV channels as a result of watching more BBC iPlayer, were most likely to say they would watch less BVOD

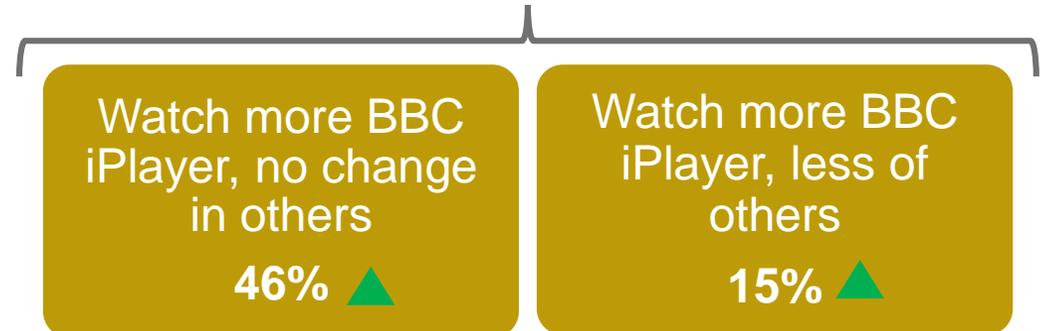
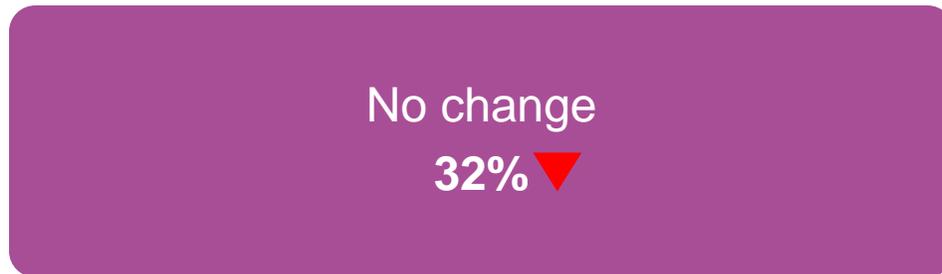


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

ITV Hub/Hub+ users were significantly more likely to say they would watch more BBC iPlayer and significantly less likely to say they would not to change their behaviour as a result of extending the catch up window

Watch more BBC iPlayer (NET) = 60% ▲



Why would this group not change their viewing behaviour?



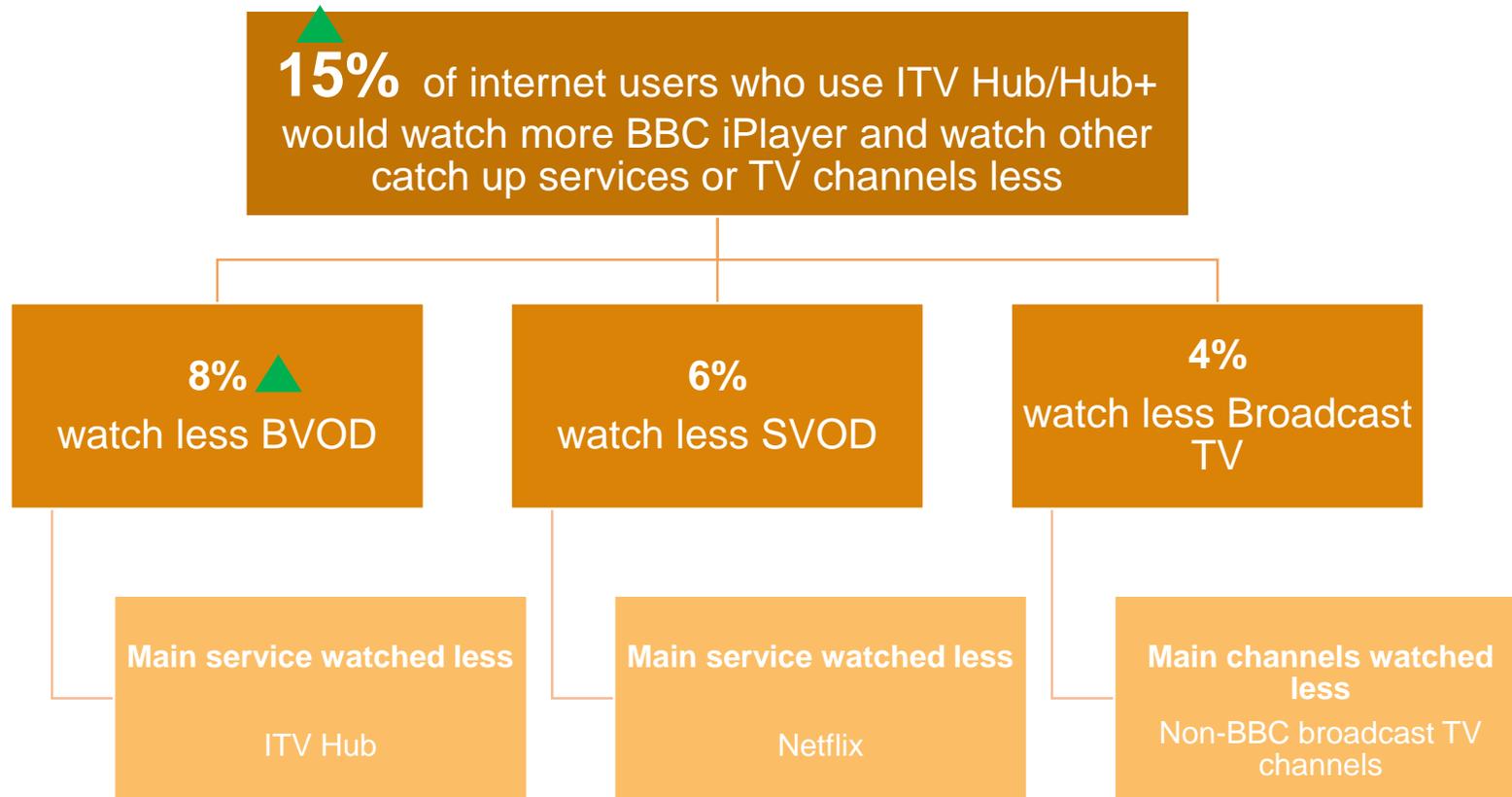
How would extending the catch up window change the way they spend time on BBC iPlayer?



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

ITV Hub/Hub+ users were significantly more likely to say they would watch more BBC iPlayer and other catch up services or TV channels less as a result of scenario 1

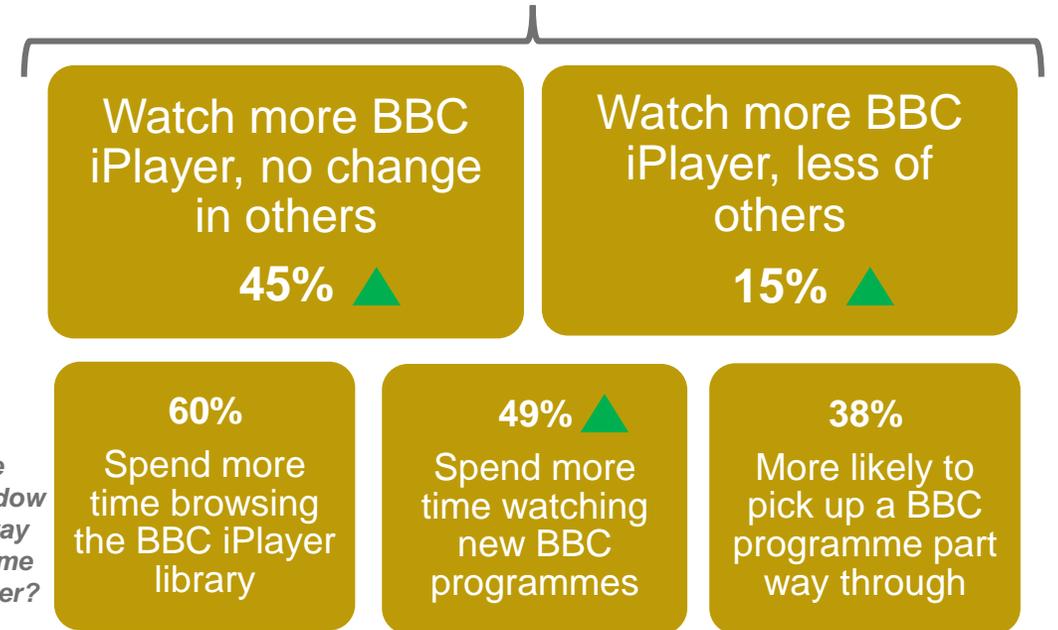
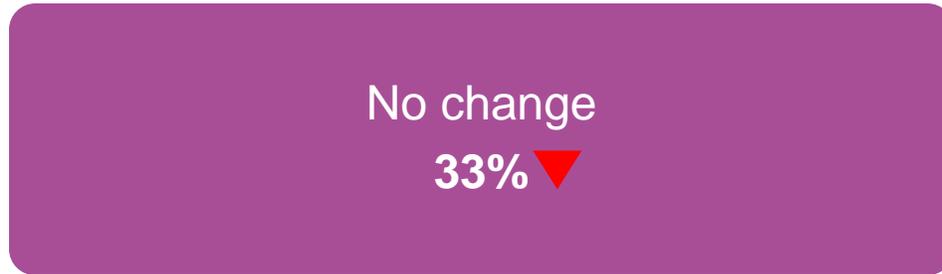


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

Netflix users were significantly more likely to say they would watch more BBC iPlayer and, like ITV Hub/Hub+ users, were less likely to say they would not to change their behaviour as result of the catch up window being extended

Watch more BBC iPlayer (NET) = 59% ▲



Why would this group not change their viewing behaviour?

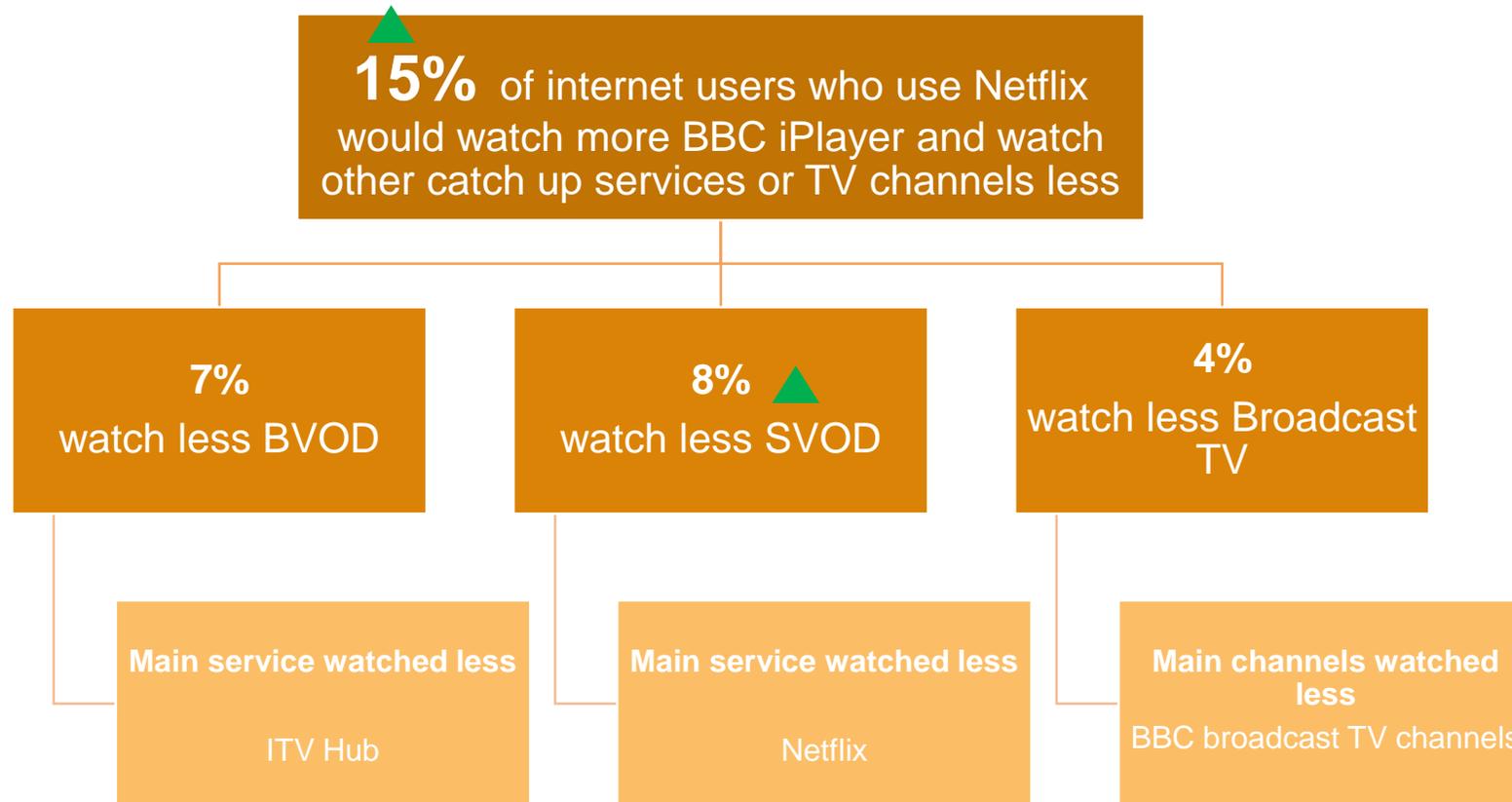


How would extending the catch up window change the way they spend time on BBC iPlayer?

Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 1: Extending the catch up window to 12 months

Netflix users were significantly more likely to say they would watch more BBC iPlayer and other catch up services or TV channels less



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

People said that they would be unlikely to change their behaviour if the catch-up window was extended to 6 months

There was also an increase in those who said they did not know what they would do should the catch up window be extended only to 6 months

All respondents	12 months	6 months
No change	40%	45%
Watch BBC iPlayer more and other catch up services or TV channels the same amount	37%	33%
Watch BBC iPlayer more and other catch up services or TV channels less	12%	8%
Don't know	10%	14%

Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Summary of Scenario 2

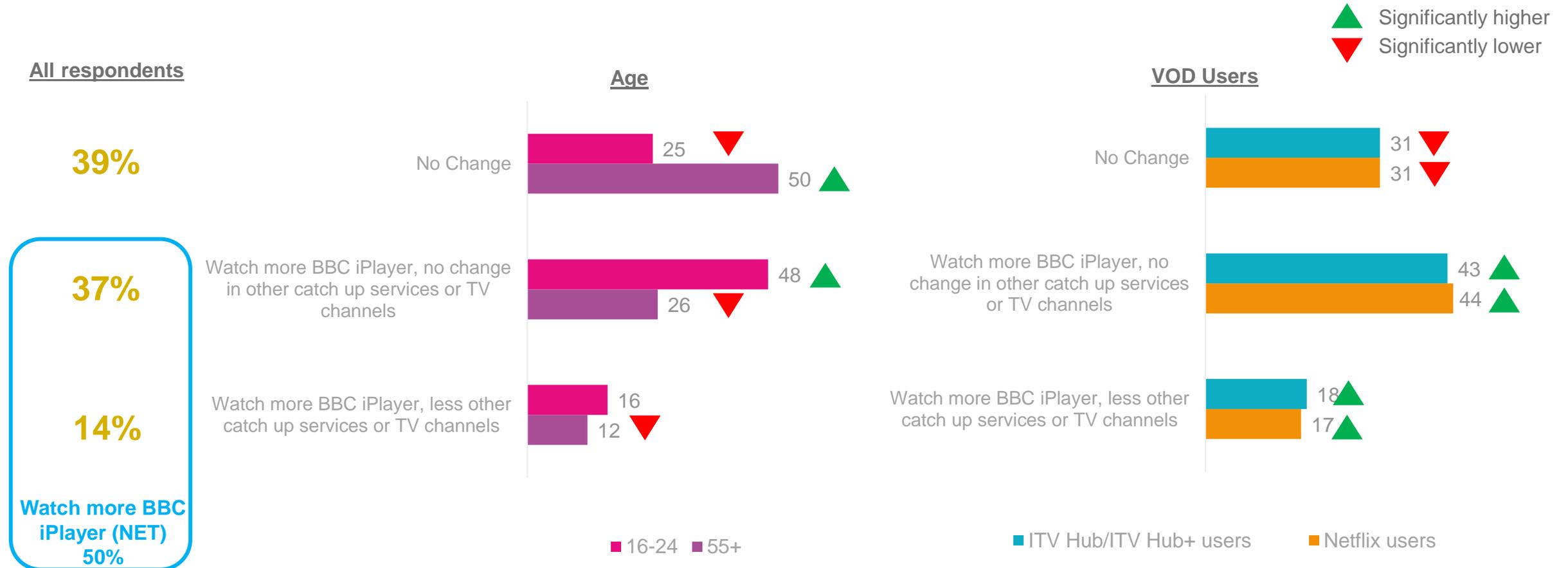
Including a wider variety of programmes had a similar reception to the extended window. There was, however, a notable proportion of respondents who say they would watch BBC iPlayer more at the expense of other services

- 14% of internet users said they would watch BBC iPlayer more and other catch up services or TV channels less as a result of scenario 2
- As with scenario 1, ITV Hub/Hub+ and Netflix users were significantly more likely to say they would watch BBC iPlayer more and other catch up services less
- Those who said they would watch more BBC iPlayer and less of other catch up services or TV channels were most likely to watch less BVOD services
- Two thirds of those who said they would not change their behaviour as a result of scenario 2 said they were satisfied with the number of programmes available on BBC iPlayer
- 59% of those who said they would watch more BBC iPlayer as a result of scenario 2 said they would spend more time browsing the BBC iPlayer library in response to the wider variety of programmes being made available on the service



Scenario 2: Including a wider range of existing programmes

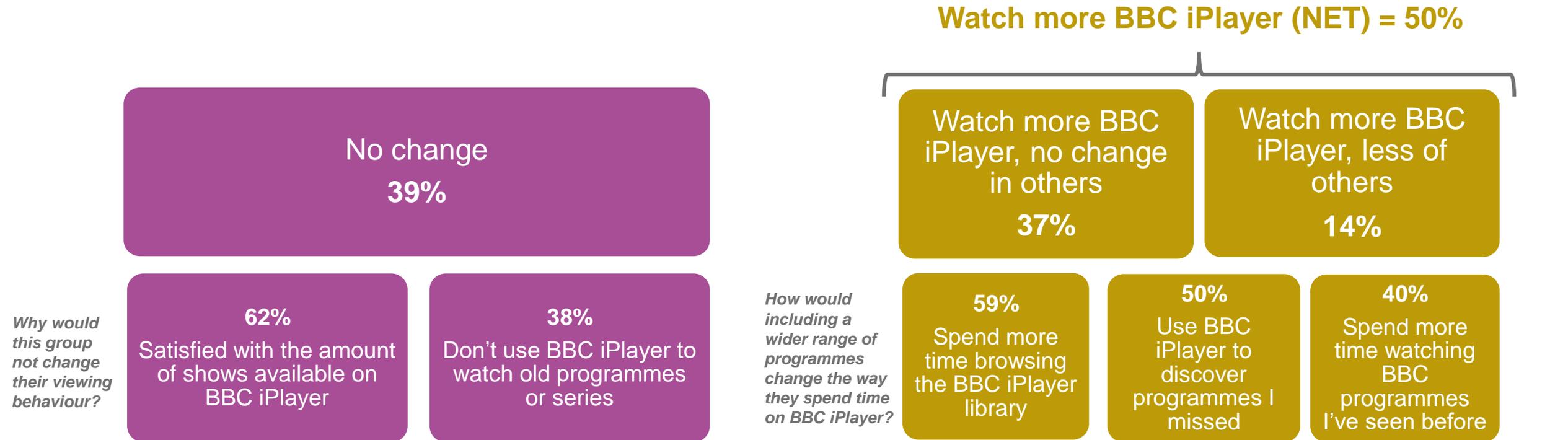
Half of respondents said they would watch more BBC iPlayer as a result of the proposed change with 14% of respondents saying they would watch BBC iPlayer more and other services less



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 2: Including a wider range of existing programmes

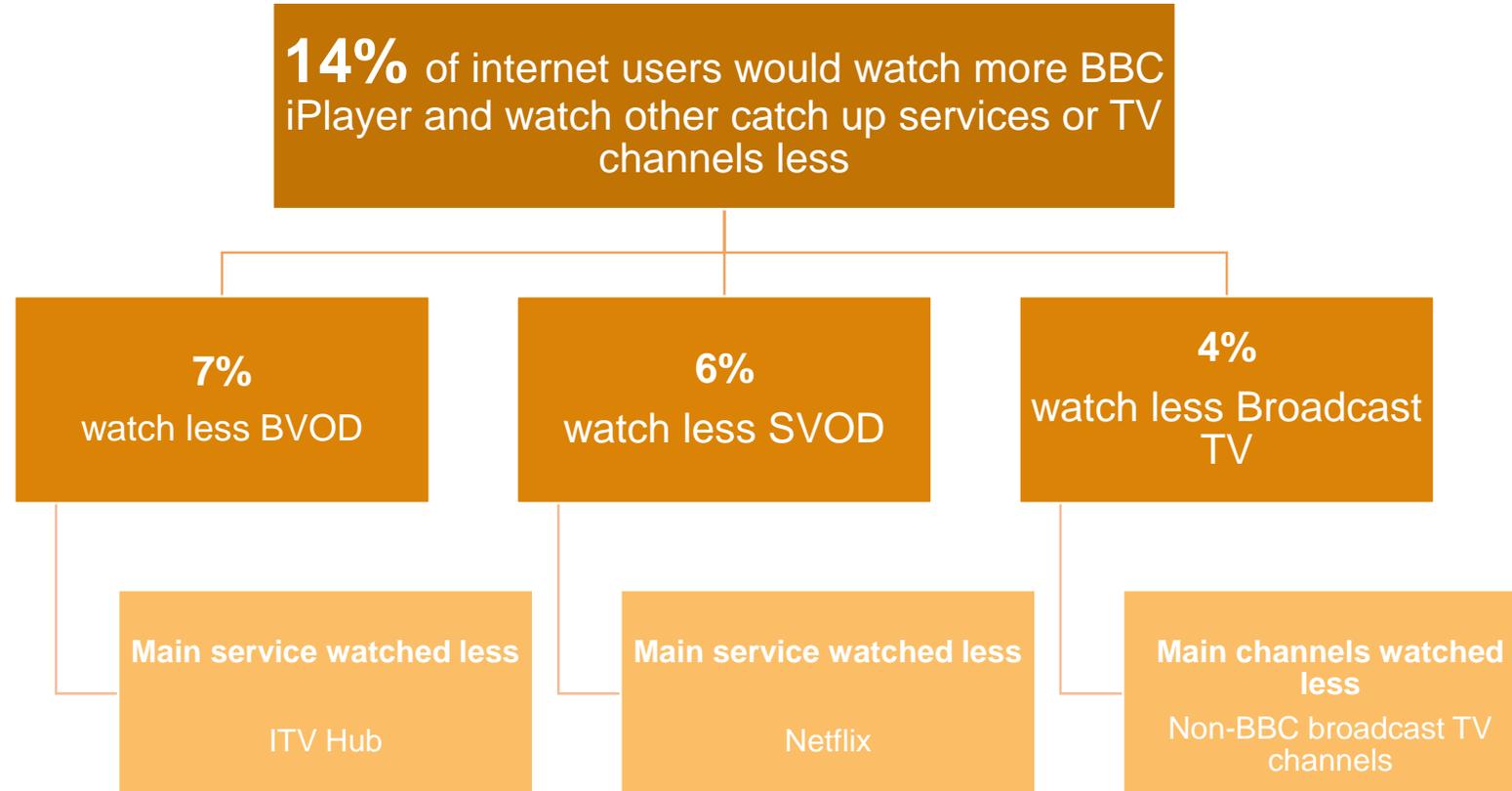
Almost two thirds of those who said they would not change their behaviour as a result of scenario 2 were satisfied with the amount of shows available on BBC iPlayer



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 2: Including a wider range of existing programmes

Those who said they would watch more BBC iPlayer and less of other catch up services or TV channels were most likely to say they would watch less BVOD

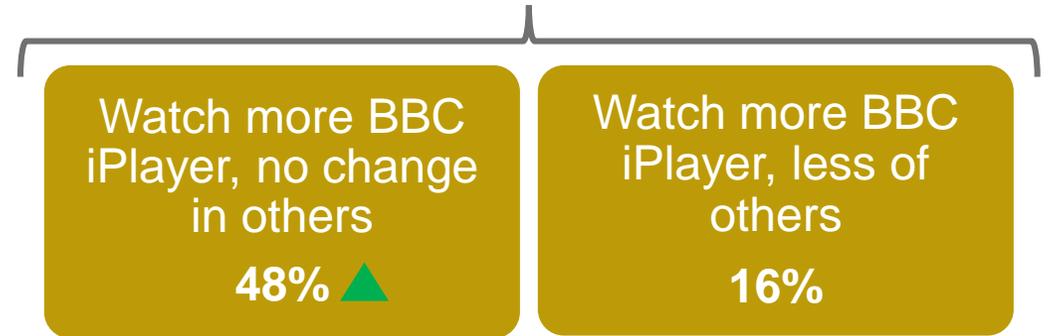


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

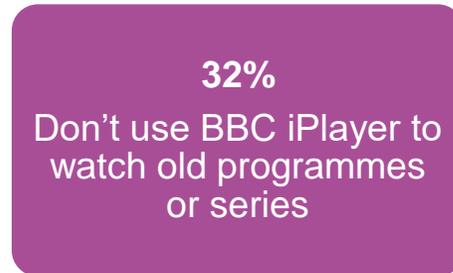
Scenario 2: Including a wider range of existing programmes

16-24s were significantly more likely to say they would watch more BBC iPlayer without impacting how much they view other catch up services or TV channels

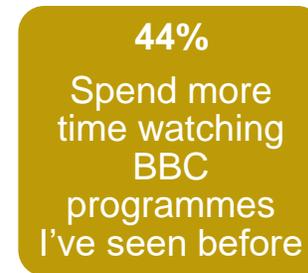
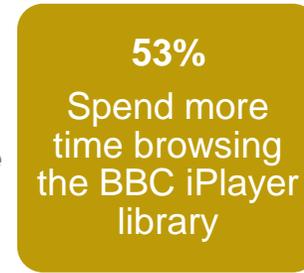
Watch more BBC iPlayer (NET) = 64% ▲



Why would this group not change their viewing behaviour?



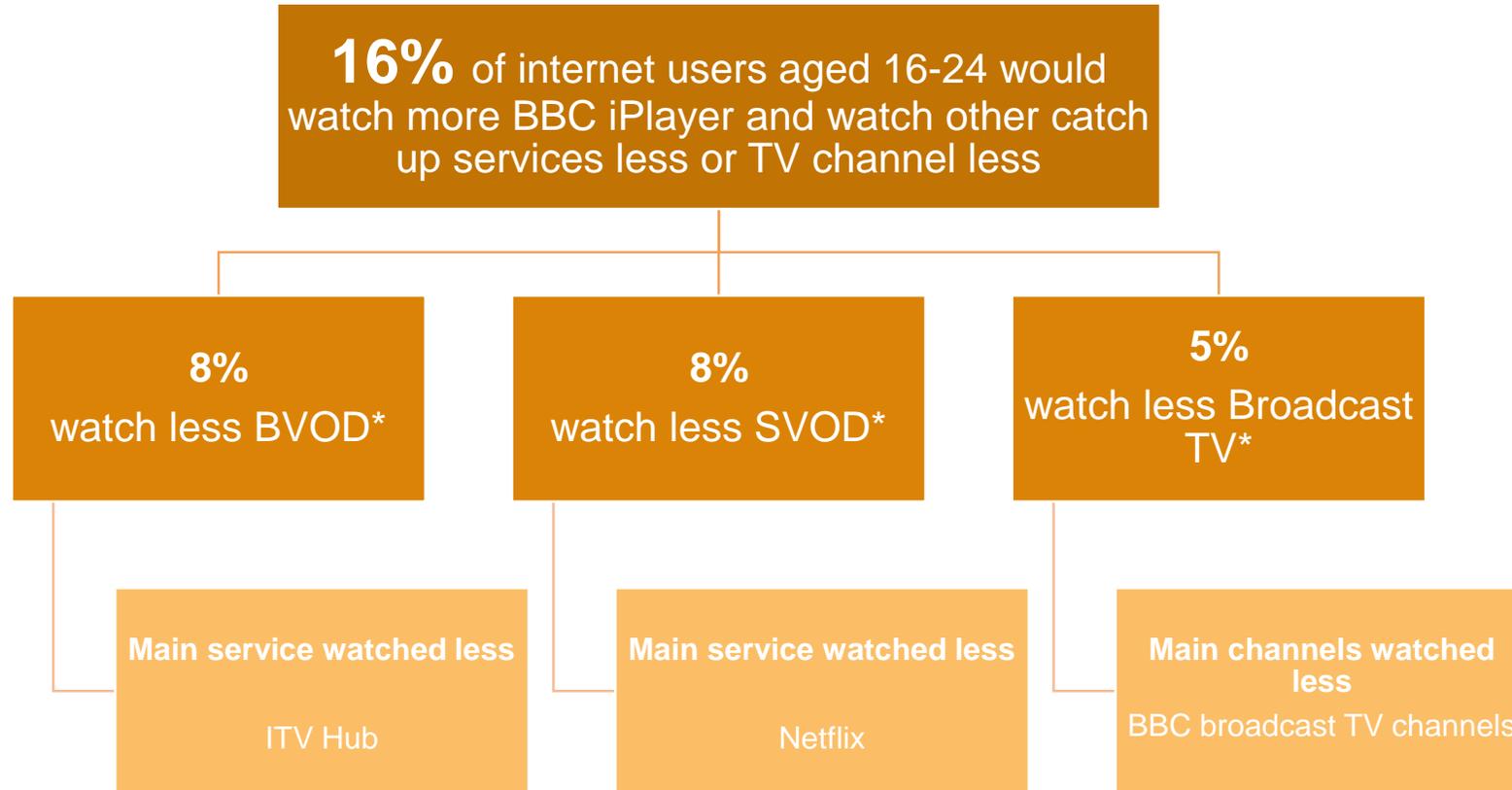
How would extending the catch up window change the way they spend time on BBC iPlayer?



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 2: Including a wider range of existing programmes

16-24s who said they would watch more BBC iPlayer and other catch up services or TV channels less, said they would be least likely to watch less Broadcast TV



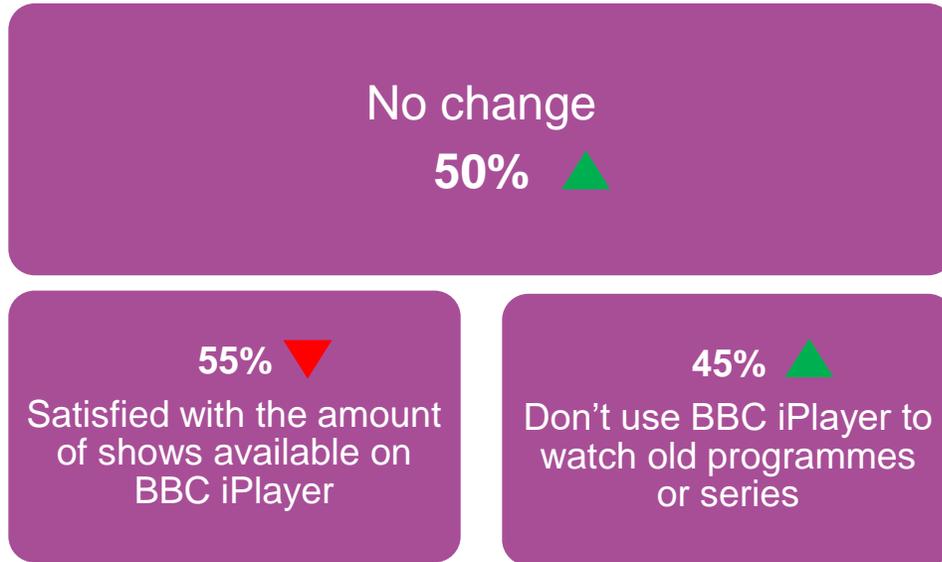
**Caution: Base size is under 100. Results are indicative*

Figures on the slide have been rounded up. NET score is calculated based on whole numbers

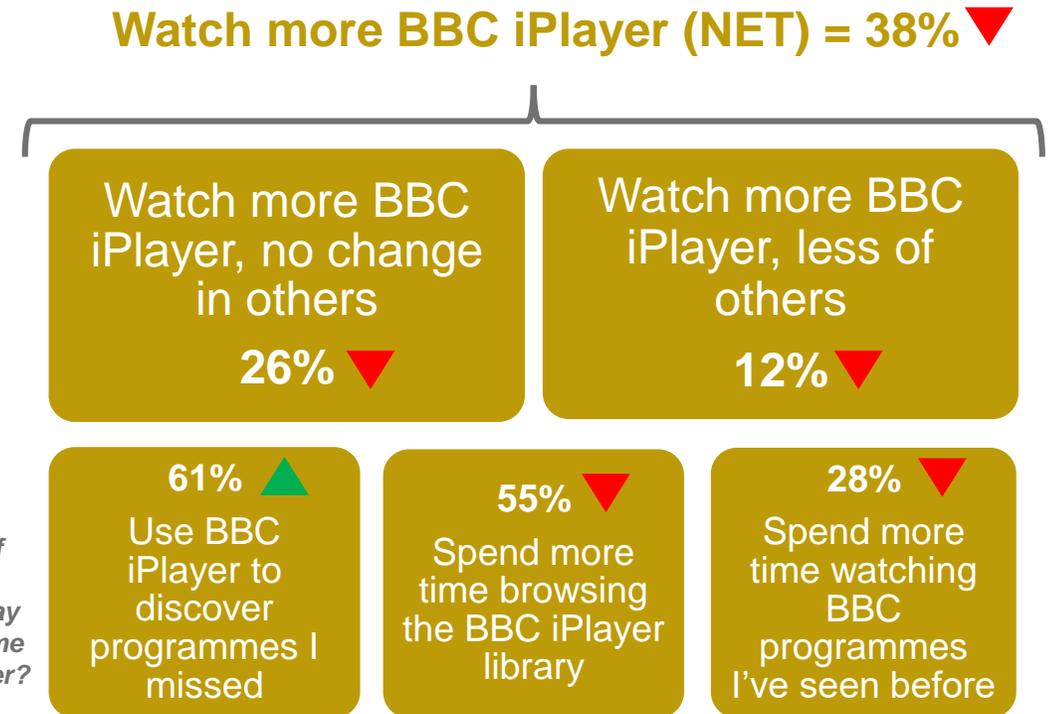
Scenario 2: Including a wider range of existing programmes

Those aged over 55 were significantly more likely to say they would not to change their behaviour as a result of scenario 2

Why would this group not change their viewing behaviour?



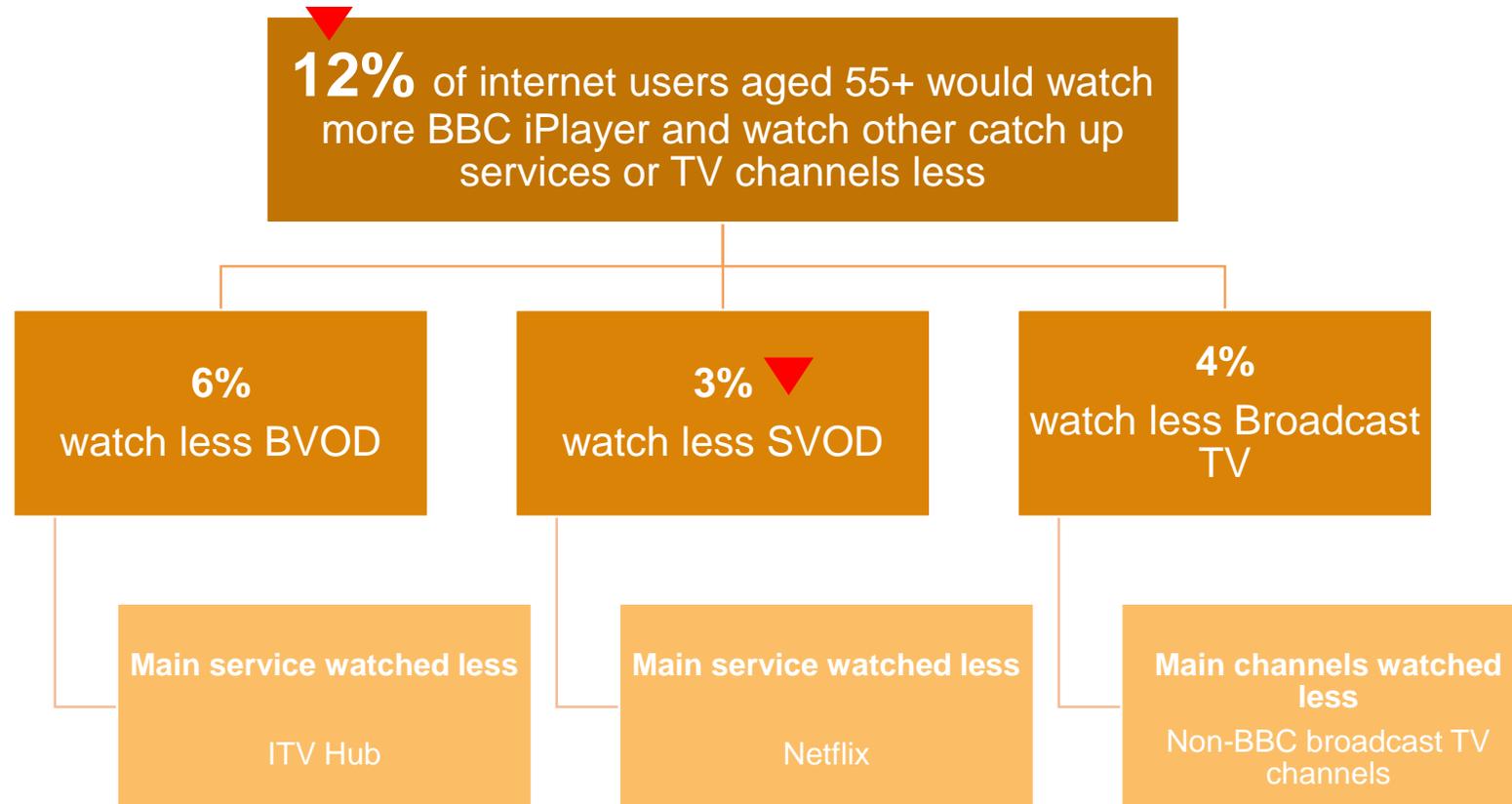
How would including a wider range of programmes change the way they spend time on BBC iPlayer?



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 2: Including a wider range of existing programmes

Those aged over 55 who said they would watch more BBC iPlayer and less of other catch up services or TV channels were most likely to say they would watch less BVOD

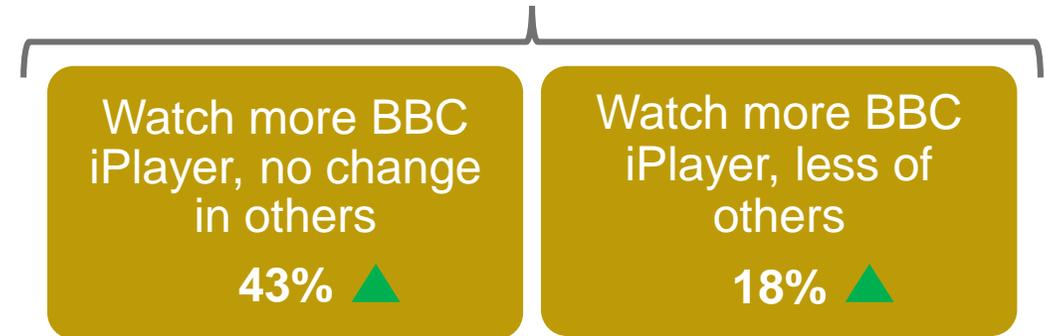
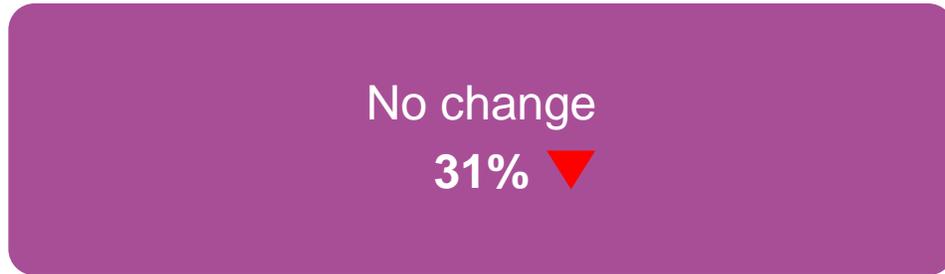


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 2: Including a wider range of existing programmes

ITV Hub/Hub+ users were significantly more likely to say they would watch more BBC iPlayer as a result of scenario 2 with the majority watching more without impacting how much they watch other catch up services or TV channels

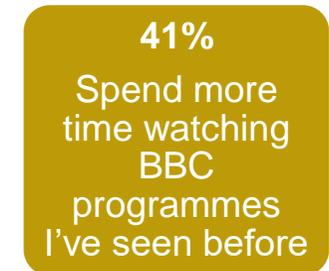
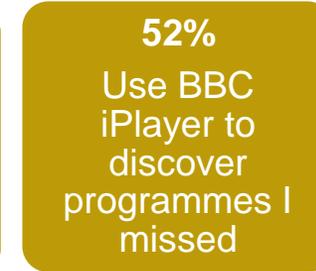
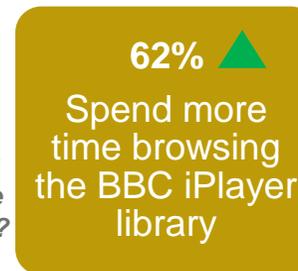
Watch more BBC iPlayer (NET) = 61% ▲



Why would this group not change their viewing behaviour?



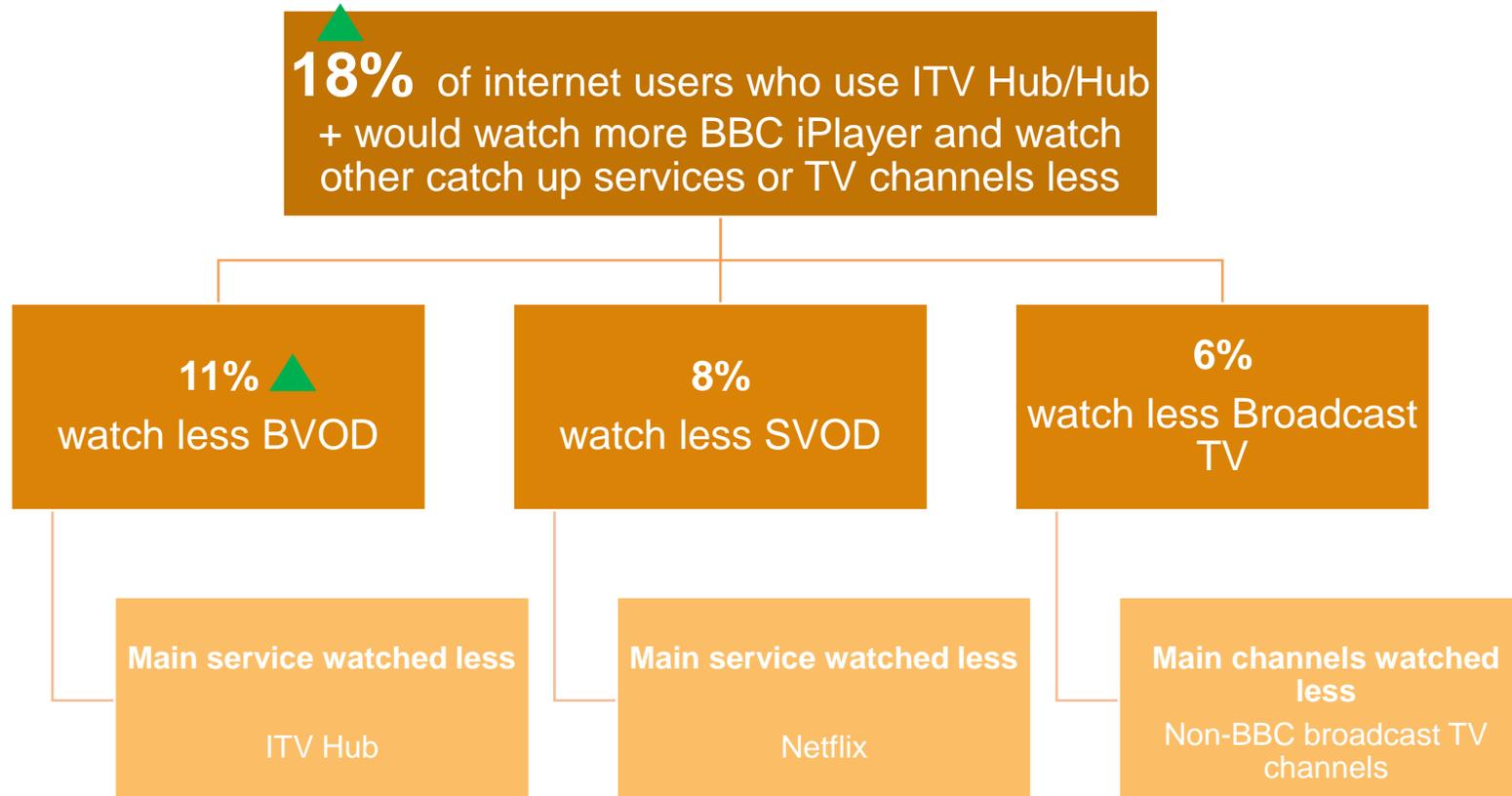
How would including a wider range of programmes change the way they spend time on BBC iPlayer?



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 2: Including a wider range of existing programmes

ITV Hub/Hub+ users are significantly more likely to say they would watch less BVOD services as a result of scenario 2

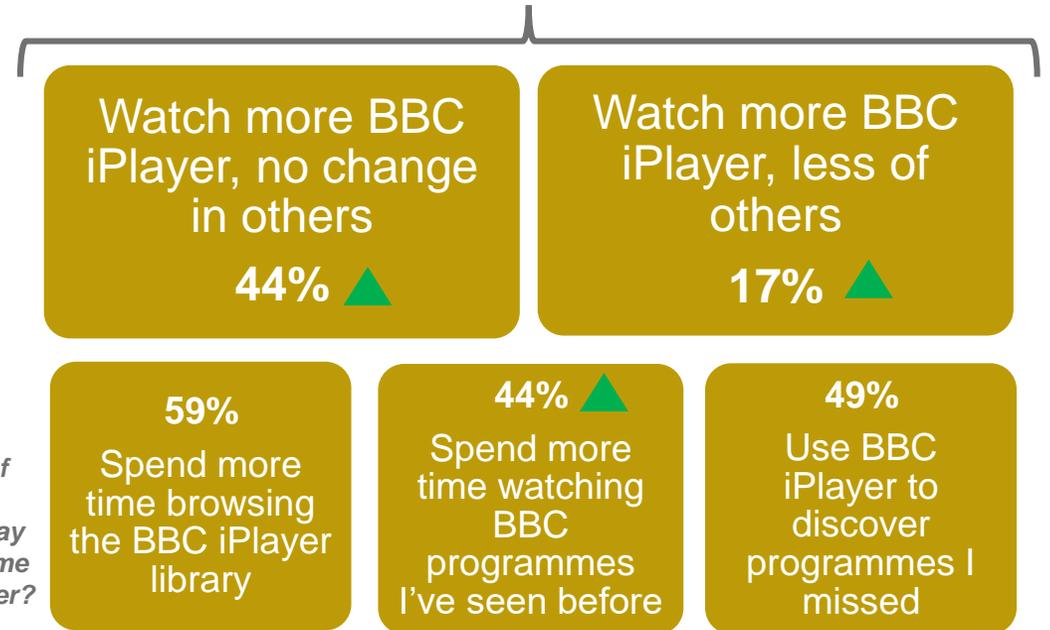
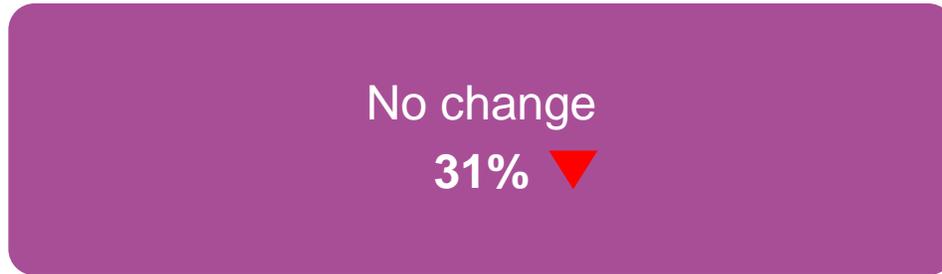


Figures on the slide have been rounded up. NET score is calculated based on whole numbers

Scenario 2: Including a wider range of existing programmes

Netflix users were significantly more likely to say they would watch more BBC iPlayer as a result of scenario 2 with the majority saying they would watch more without impacting how much they watch other catch up services or TV channels

Watch more BBC iPlayer (NET) = 60%▲



How would including a wider range of programmes change the way they spend time on BBC iPlayer?

Figures on the slide have been rounded up. NET score is calculated based on whole numbers

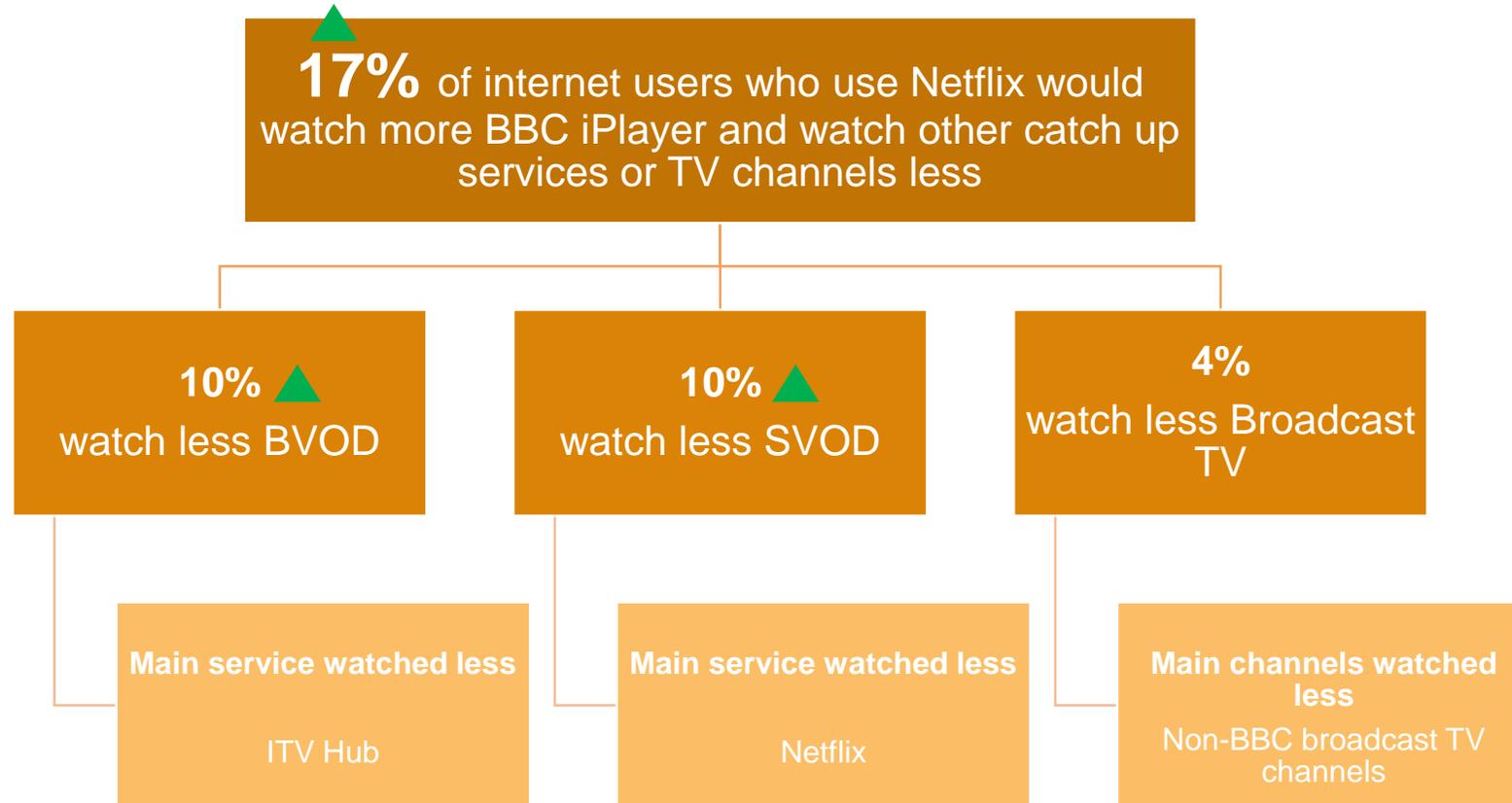
QDQ1: You said earlier that you watch <INSERT GENRES VIEWED FROM A7> programmes. The BBC is planning to include a wider range of existing programmes on its iPlayer service. If this happened, which of the following is most likely for you? (Base: 1651)

QDQ2A: You said that more programmes being available on iPlayer would not change your viewing behaviour. Why not? (Base: 521)

QDQ5: You said that more programmes being available on iPlayer would make you use the iPlayer more. How would this change the way you spend time on the iPlayer? (Base: 996)

Scenario 2: Including a wider range of existing programmes

Netflix users who said they would watch BBC iPlayer more and other catch up services or TV channels less were more likely to say they would consume BVOD and SVOD services less



Figures on the slide have been rounded up. NET score is calculated based on whole numbers

5

Impression of BBC changes

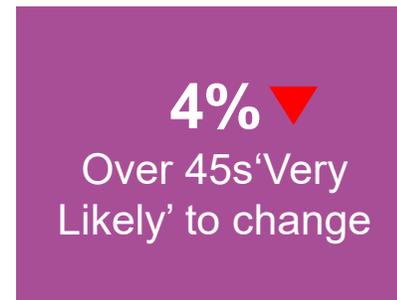
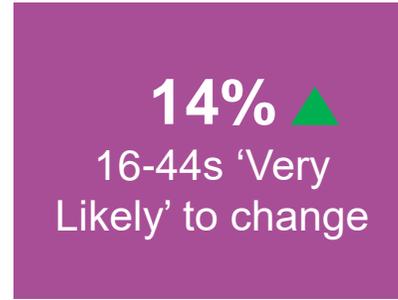
Of the three changes tested, increasing classic programmes was the least popular change being proposed

Users of other VOD services were especially positive about the changes with those aged over 55 rating each change significantly lower than the total sample

	Extending the availability of all programmes to at least 12 months	Providing more complete series box sets for selected titles	Increasing the amount of older 'classic' programmes	
All respondents	7.33	7.1	6.56	
16-24	7.33	7.38 ▲	6.27 ▼	
55+	6.97 ▼	6.39 ▼	6.15 ▼	▲ Significantly higher ▼ Significantly lower
ITV Hub/Hub+ users	7.97 ▲	7.79 ▲	7.05 ▲	
Netflix users	7.76 ▲	7.74 ▲	6.83 ▲	

16-44s were more likely to say they would change their first port of call as a result of the changes

A third of those who said they were 'very likely' to change their first port of call as a result of the proposed changes said BBC iPlayer would become their first port of call



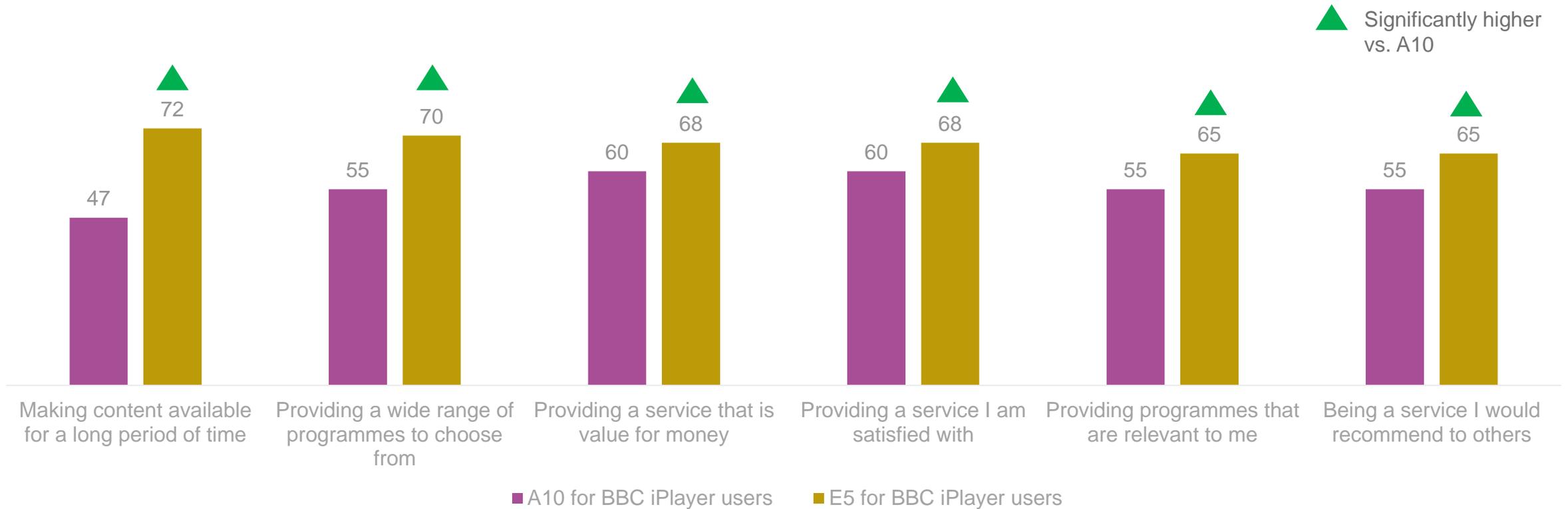
29%
of the 'very likely'
change their first port
of call to BBC iPlayer

▲ Significantly higher
▼ Significantly lower

Once changes were assumed to be going ahead, all statements asked prior to the scenarios see significant improvements amongst BBC iPlayer users

'Making content available for a long period of time' becomes BBC iPlayer's strongest statement with 16-24s also ranking BBC iPlayer the best for this statement

Top 3 Box (NET) amongst BBC iPlayer users: Statements at A10 vs. Statements at E5



Top 3 Box = Those who scored a broadcaster/service 8, 9 or 10 out of 10

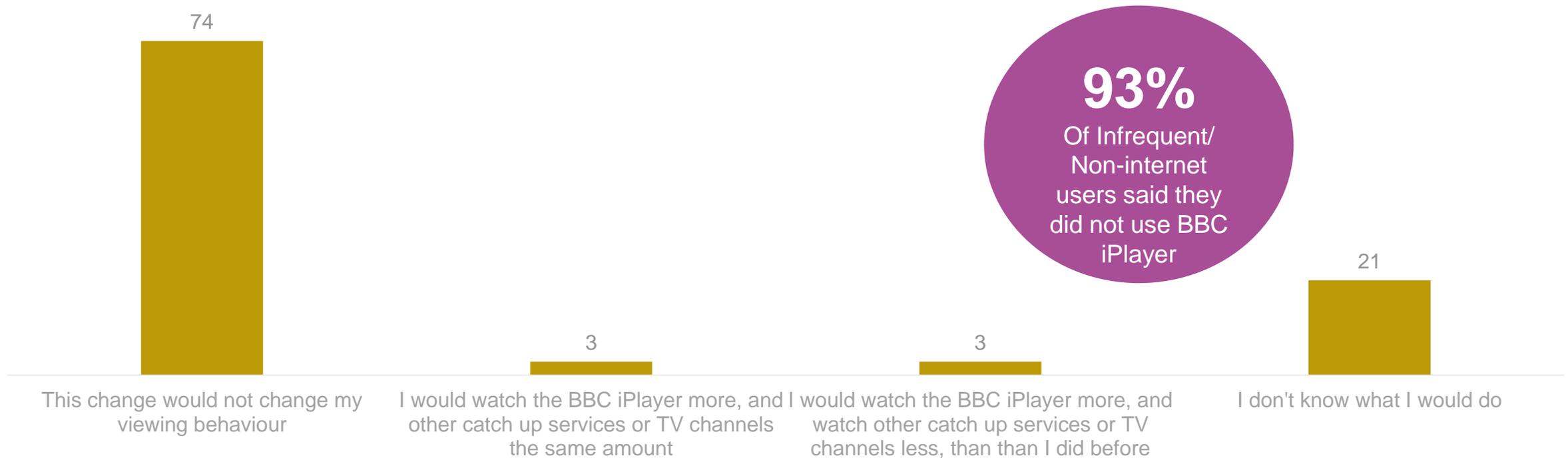
6

Infrequent/Non-internet users

The majority of Infrequent/Non-internet users said they would not change their behaviour as a result of the BBC's proposed changes

When compared to those who use the internet regularly, infrequent/non-internet users were also more likely to say they didn't know what they would do as a result of the proposed changes

Q.4 BBC plans include extended availability, more box sets and increased archive content. If this happened, which of the following is most likely for you? (%)



7

Appendix

Question wording for forced diversion scenario

This question was only asked of those who used the BBC iPlayer in the last 3 months

A lot of BBC programmes are not available on the BBC iPlayer service. This might be because:

- They have not been on TV recently (within the last month)
- They are older programmes that are not being made available on iPlayer at the moment

Thinking about programmes that you have watched on iPlayer recently or in the last three months, if those programmes had not been available on iPlayer, which of these do you think you would likely to have done instead?

1. Found something else to watch on the iPlayer
2. Switched to another catch up or on-demand service to find something to watch
3. Switched to a broadcast TV channel to find something to watch
4. Do something else entirely (not watch TV)
5. Don't know

Question wording for scenario 1 – Extending the catch up window to 12 months

This question was asked of all respondents

CQ1. You said earlier that you watch <INSERT GENRES FROM A7> programmes. BBC iPlayer plans to extend the catch-up window on all programmes to at least 12 months, up from the current 30 days.

Implications:

- This would allow you to watch <INSERT GENRES VIEWED FROM A7> programmes on iPlayer at least one year after their first being broadcast or made available by the BBC
- This would allow you to pick up a series midway through its run on a BBC broadcast TV channel as earlier episodes in the series would still be available (rather than being removed after 30 days)

If this happened, which of the following is most likely for you?

1. This change would not change my viewing behaviour
2. I would watch the BBC iPlayer more, and other catch up services or TV channels the same amount
3. I would watch the BBC iPlayer more, and watch other catch up services or TV channels less, than I did before
4. Don't know

Question wording for scenario 2 – Including a wider range of existing programmes

This question was asked of all respondents

DQ1. You said earlier that you watch <INSERT GENRES VIEWED FROM A7> programmes. The BBC is planning to include a wider range of existing programmes on its iPlayer service. This might include:

- **Complete series box sets for selected titles made up of new returning series and their previous series**
- **Old ‘classic’ shows and other programmes that currently aren’t available on iPlayer**

Implications:

- This would allow you to watch a greater range of <INSERT GENRES VIEWED FROM A7> programmes from the BBC on iPlayer
- This might allow you to catch up on previous series ahead of a new series starting

If this happened, which of the following is most likely for you?

1. This change would not change my viewing behaviour
2. I would watch the BBC iPlayer more, and other catch up services or TV channels the same amount
3. I would watch the BBC iPlayer more, and watch other catch up services or TV channels less, than I did before
4. Don’t know

Question wording for proposed changes for infrequent/non internet users

This question was asked of all respondents

The BBC is planning to make a number of changes to the BBC iPlayer which would expand the content available through the service. These changes include:

- Extending the availability of all programmes on the service to at least 12 months, up from current 30 days
- Providing more complete series box sets for selected titles made up of new returning series and their previous series (e.g. Luther, Line of Duty, Fleabag)
- Increasing the amount of older 'classic' programmes, including classic dramas and comedies, drawn from the BBC archive of programmes. These are programmes which are no longer being made (e.g. Two Pints of lager and a Packet of Crisps, War & Peace, Life, Africa, Bleak House)

If this happened, which of the following is most likely for you?

1: This change would not change my viewing behaviour

2: I would watch the BBC iPlayer more, and other catch up services or TV channels the same amount

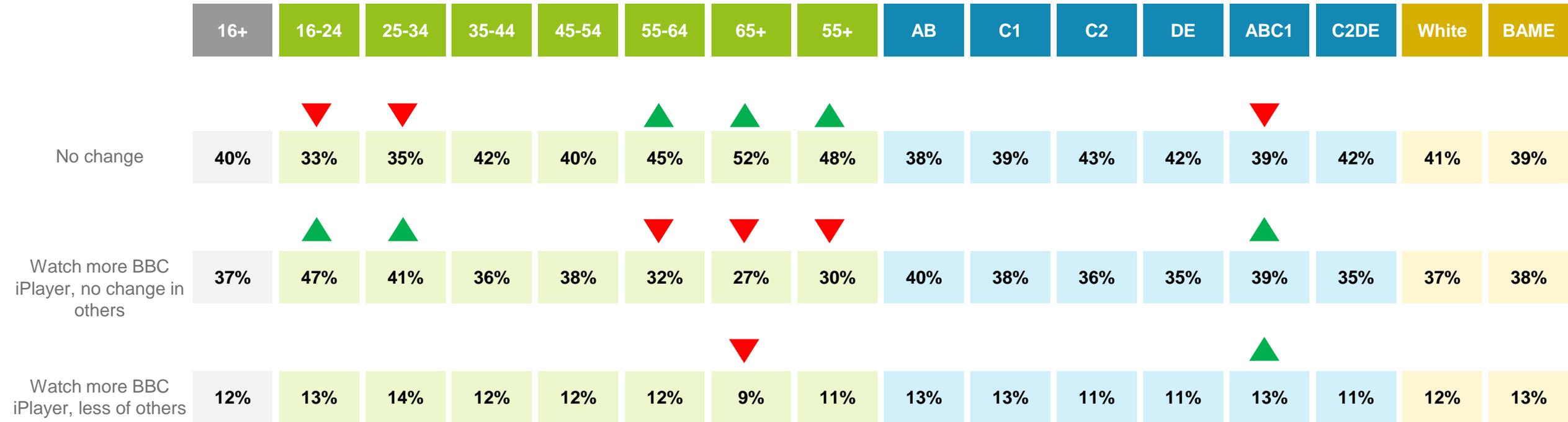
3: I would watch the BBC iPlayer more, and watch other catch up services or TV channels less, than I did before

I don't know what I would do

Forced Diversion Demographic Comparison



Scenario 1 Demographic Comparison



Scenario 2 Demographic Comparison

	16+	16-24	25-34	35-44	45-54	55-64	65+	55+	AB	C1	C2	DE	ABC1	C2DE	White	BAME
No change	39%	25% ▼	32% ▼	40%	40%	48% ▲	53% ▲	50% ▲	37%	37%	39%	42%	37% ▼	41%	39%	35%
Watch more BBC iPlayer, no change in others	37%	48% ▲	42% ▲	38%	36%	29% ▼	24% ▼	26% ▼	38%	37%	36%	35%	38%	36%	36%	42%
Watch more BBC iPlayer, less of others	14%	16%	17% ▲	12%	12%	12%	12%	12% ▼	15%	15%	14%	12% ▼	15% ▲	13%	14%	12%