



research report

Consumer expectations in relation to 3 and 6 multiplex digital terrestrial television coverage

prepared for



by

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Contents

Executive Summary.....	i
1. Introduction	1
2. Results in relation to research questions	3
2.1. <i>Consumer expectations of 3 and 6 multiplex DTT coverage</i>	3
2.1.1. Relatively low ranking of 3 and 6 multiplex coverage as an issue	3
2.1.2. Consumer understanding of the impact of different levels of coverage	5
2.1.3. Understanding of the reasons for different levels of DTT coverage	10
2.1.4. Reactions to the official explanation for different levels of coverage.....	15
2.1.5. What are consumer reactions to choice and fairness?.....	17
2.1.6. Consumer reactions to potential future changes	21
2.1.7. Consumer information sources about 3 and 6 multiplex coverage	23
2.1.8. Was there any evidence of a political campaign?	26
2.1.9. Consumer attitudes to information provision	27
2.2. <i>Consumer views of implications of receiving only the 3 PSB multiplexes</i>	28
2.2.1. A reason to choose Sky	29
2.2.2. Concerns about cost of subscription TV services (Sky)	29
2.2.3. Enjoying Sky content, reluctance to lapse	29
2.2.4. Low awareness of Freesat.....	30
2.2.5. Low availability in area of triple play from Sky	30
2.2.6. Cost the key consideration (for non pay-TV households).....	31
2.3. <i>Considerations for appropriate messaging about 3 and 6 multiplex coverage</i>	33
2.3.1. Many formal communications not read or processed	33
2.3.2. Most participants had not researched their options	33
2.3.3. Sky customers' low awareness of DTT availability with switchover	34
2.3.4. Poor understanding of responsibility for switchover	35
2.3.5. Many do not replace their TV products frequently	35
2.3.6. Need for transparency (note risk of angering many)	36
2.3.7. Concise, accurate and simple messaging	36
2.3.8. Recognition that the process can be complex for some	37
2.3.9. Highlight distinction between coverage and reception	37
2.3.10. Clearer distinctions between impartial advice and selling	37
2.3.11. Highlight availability of range of free to view reception options.....	39
3. Summary of results and conclusions	40
3.1. <i>What are the range of consumer expectations in relation to 3 and 6 MUX coverage?</i>	40
3.2. <i>What do consumers consider as implications for them of being predicted able to receive 3 MUX?</i>	40
3.3. <i>In the context of insights relating to the above research questions, what are the important considerations in providing appropriate 3/6 MUX messaging?</i>	41
4. Annex – PowerPoint slides presented at project debriefs	42

Executive Summary

1. This paper reports a qualitative research study conducted by i2 media research, commissioned by Ofcom.
2. The research was conducted in January 2009 in the Selkirk switchover area using three focus groups on the issue of three and six multiplex coverage, with particular emphasis on communications.
3. The main findings are:
 - a. The three and six multiplex coverage issue was not one of the main top-of-mind issues for participants in the wake of DSO, these were:
 - i. Usability, including getting used to two remote controls,
 - ii. Retuning,
 - iii. Concerns about older people.
4. Many were aware of differences in available channels, and cited channels they could receive that others could not, and vice versa. But there was confusion in participants' minds as to the reason why – and in general they did not distinguish between coverage and reception.
5. Participants' reaction to a reduced number of channels was related to their motivation to receive other channels; older participants tended to be only interested in the main 5 channels. For this group, minimising cost was a greater concern than getting more channels.
6. Reaction was linked to the licence fee – generally participants had poor understanding of what the licence fee is and what it pays for.
7. There was very low awareness of Freesat and slightly more but still low awareness of Freesat from Sky as alternatives to digital terrestrial television (Freeview) that provides more free to view channels.
8. Participants felt they had received a lot of information about switchover through the letterbox, but had not read much of it¹. Most reported that they tended to rely on informal sources of information for advice on switchover such as friends, family, and the local paper. Some expressed a preference for receiving more information by television.
9. Participants recognised that a large amount of information has been provided, and advice if needed. Some participants reported difficulty in distinguishing impartial advice from commercial communications and offers.
10. When the reasons for the differences in three and six multiplex coverage were explained in the focus groups, the participants tended to be more rather than less dissatisfied about the situation.

¹ Note that recent quantitative research conducted by Digital UK in the West Country region identified that approximately 40% of respondents reported having read Digital UK's switchover information leaflet in detail. Digital UK is in the process of reviewing its advisory leaflets taking account of the results of the current research and extensive ongoing Digital UK research activities.

1. Introduction

This document reports the results of a research project conducted by i2 media research, for Ofcom, on technical aspects and consumer expectations in relation to 3 and 6 multiplex digital terrestrial television coverage.

After digital television switchover in the UK, the main terrestrial television transmitters (then serving approximately 90% of the population) will transmit all 6 digital terrestrial television (DTT) multiplexes, 3 public service and 3 commercial multiplexes. The 6 multiplexes together provide viewers with over 40 (forty) Freeview television channels. The remaining 10% of the UK population are served by local relays for their terrestrial television signals. These relays will transmit only the 3 public service broadcasting (PSB) multiplexes, carrying around 17 (seventeen) of the most watched free to air television channels available on Freeview. There are two key factors restricting the coverage of the commercial multiplexes, one technical (the limited availability of frequencies on which the commercial multiplexes could be broadcast) the other commercial (it is a business decision for the operators of the commercial multiplexes to evaluate whether the cost of building a transmission network for the commercial multiplexes can be justified).

Because approximately half of households in the Scottish Borders region are served by local relays rather than main transmitters, switchover there in November 2008 provided a useful environment for research to address consumer expectations in relation to digital terrestrial television coverage. In this context, three main objectives were addressed by the current research:

- What are consumer expectations in relation to 3 and 6 MUX coverage?
This included an exploration of the following research questions:
 - Do consumers understand the reasons and impact of different levels of DTT coverage?
 - What are consumer perceptions relating to choice and fairness?
 - What were consumer information sources about 3 and 6 MUX coverage in the Scottish Borders?
- What do consumers consider as implications for them of being predicted able to receive the 3 PSB multiplexes only?
- In the context of insights relating to the above research questions, what

are the important considerations in providing appropriate messaging about 3 and 6 multiplex coverage?

The research comprised 3 focus groups conducted in the Scottish Borders in the week commencing 12th January 2009. One group was conducted in Galashiels, the other two in Jedburgh.

In total 22 members of the public participated in the focus groups. The three groups were recruited to have slightly different characteristics:

- Older DTT group – mix of 3 and 6 MUX, n=8 (Galashiels), average age = 62 years (range: 51-73 years)
- Younger DTT group – mix of 3 and 6 MUX, n=6 (Jedburgh), average age = 41 years (range: 21-58 years)
- Sky (main set), mix of 3 and 6 MUX DTT on other set(s), n=8 (Jedburgh) average age = 50 years (range: 34-66 years)

Participants for the Older DTT group were recruited via a charity in the Scottish Borders called 'Elders First'. In the older DTT group two people in the session had been in close contact with Digital UK and/or Digital Outreach. The responses from these participants were not typical of the responses from the rest of the participants. Caution is noted through this report where quotes were derived from these participants who had close contact with switchover teams.

Participants for groups 2 and 3 were recruited via an agency. The agency scouted the shopping areas in Jedburgh on the weekend prior to the focus group sessions to recruit willing people who met the specifications supplied by i2 media research.

The focus groups were conducted eight weeks after switchover to allow sufficient time for participants to accommodate to changes (e.g., buy and get used to new equipment) and reflect on their experiences leading up to, during and after switchover. The sessions lasted between 90 minutes to two hours, and each participant was paid £35 for their time and participation.

2. Results in relation to research questions

2.1. Consumer expectations of 3 and 6 multiplex DTT coverage

2.1.1. Relatively low ranking of 3 and 6 multiplex coverage as an issue

Eight weeks after switchover, without prompting, reception of 3 or 6 digital terrestrial television multiplexes was not the issue most often raised by participants about switchover. Participants were asked to reflect very generally on what went well and not so well. This elicited various unprompted issues that were top of mind to the participants. Difficulty using two remote controls and difficulties understanding and performing retuning of their equipment were more often cited as unexpected surprises which caused some difficulties. Other issues such as concerns about older residents and general teething problems were also raised.

2.1.1.1 Remote control issues

Switching between two remote controls was reported as problematic by participants in the groups, either because they themselves had the difficulty, or they knew of others (mostly elderly relatives) who had struggled with the concept and use of two remote controls. Some participants reported that they had invested, or planned to invest in integrated digital televisions to overcome this difficulty. Specific issues with the design of set top box remote controls that caused some user problems were also raised (e.g., button size and labels).

“...the remote controls are so small and they’re all different, and that’s the problem with switchover. But also the buttons are small, what’s on them is small, and more difficult for people with bad eyesight. And the fact that there are two – people say ‘oh god which one is it?’ [...] the other thing was that the handsets, you read the instruction in the little booklets. It seemed clear enough. Trying to find that word on your handset, it wasn’t there. The terminology differed.” [e.g., ok, select, enter] (G1: Older DTT, P2, female)

“We had to buy [my mother] a new television because

otherwise we'd have to get her a new box which would lead to another control. She couldn't get the concept of that." (G1: Older DTT, P7, male)

2.1.1.2 Retuning

The process of retuning was raised early in the discussions, particularly in the context of the two-stage switch. The majority of participants who noted this issue did not find it sufficiently problematic to have affected their access to television, except for one lady in Group 1:

"We weren't getting programmes and then about a week after we just happened to say to somebody and they said 'well have you retuned?', 'oh did we have to do that?'" (G1: Older DTT, P4, female)

2.1.1.3 Concerns about older residents

Most participants recognised that whilst their experience had been relatively smooth, they were concerned for elderly people who were more confused by the switchover process, the platform and product options available to them, and becoming familiar with a new television service.

2.1.1.4 Digital terrestrial coverage: 'uncovered' by DTT

A less often heard issue concerned acknowledgement of people in the switchover region who lived in areas deemed 'uncovered' by DTT.

"I think there are very few. We knew about that in the Borders... There are very few but we did know long before the changeover that there were certain areas that wouldn't get it. They were already in difficult areas anyway." (G1: Older DTT, P2, female)

2.1.1.5 General teething problems

There were a few comments from participants that related to getting used to new equipment that operated slightly differently to what they were used to with their analogue terrestrial television equipment. In the younger DTT group, one participant found annoying the delay in loading electronic programme guide (EPG) data when switching on the set top box.

“Why is it when you switch your TV off [sic] you have to wait [...] ten minutes because it’s updating the programmes all the time.” (G2: Younger DTT, P3, male)

2.1.2. Consumer understanding of the impact of different levels of coverage

The impact of different levels of DTT coverage on the consumer varies depending on the consumer’s attitude and disposition towards television in general, whether they had adopted multichannel television in advance of switchover, and their motivation to access specific channels or content.

2.1.2.1. Channel quality versus quantity

The majority of participants welcomed the increased number of channels and choice brought by digital over analogue terrestrial, though others were more interested to receive fewer but higher quality channels.

“The more choice the better.” (G1: Older DTT, P5, male)

“It does give you more choice but there’s still a lot of days where there’s nothing to watch so you stick in a DVD or something.” (G2: Younger DTT, P1, female)

“It’s not the number of channels [that’s important] it’s the quality of what it is on, and it’s just abysmal a lot of the time.” [G1: Older DTT, P3, female]

“We can’t watch everything the whole time, I’m sorry, there’s too much now. It’s ridiculous.” (G3: Sky & DTT, P5, female)

2.1.2.2. Digital terrestrial television (including 3 PSB) ‘better’ than analogue

Some of the younger participants acknowledged that their (even limited, 3PSB) digital terrestrial service was an improvement over their previous analogue television service.

“Oh yeah, it’s been a hundred times [better with digital]. We complain about the bits and pieces but at the end of the day it’s better, it’s more than five channels.” (G2: Younger DTT, P3, male)

To me [switching to digital] is an advantage. Anything is better than five channels.” (G2: Younger DTT, P5, female)

Not all participants were explicitly bothered about whether they get the full range of free-to-air digital terrestrial channels.

2.1.2.3. Participants valued channels on PSB and COM multiplexes

Participants were asked which channels they particularly enjoyed or would like to watch. Most participants reported some disappointment at not being able to receive particular channels from the commercial multiplexes. Younger participants were more disgruntled at being unable to receive channels like Film 4, whilst for older participants, channels like UKTV History were cited. Repeats of serials from the 1970s and 1980s were enjoyed by many.

“I think quite rarely we’re watching BBC1, BBC2, or ITV1. It’s usually the digitals. Very occasionally there’s something on like BBC1, 2, ITV1 that you might want to watch but for 9 times out of 10 I’d say we’d be watching the ITV3s, 4s.. Perhaps there’s a different mix of programmes. I’m not sure what it is.” (G2: Younger DTT, P1, female)

“[the ITV2, 3 etc] tend to do a lot of older programmes like from the 60s, 70s. You can go back and re-live what you’d seen before. Like you saying ‘Minder’ [...] I actually quite like watching the shopping channels [...] not that I’m addicted. A lot of people get addicted to them, you know, QVC or whatever it’s called.” (G2: Younger DTT, P5, female)

Participants in the Sky group were more likely than the DTT groups to name a broad range of commercial channels that appealed to their household (particularly for households with children). Indeed, many participants in this group noted that they selected Sky packages with a selection of, for instance, music, film and sports to meet different household members' genre preferences. Participants with families in the Sky group also valued some PSB channels, such as CBeebies.

"I suppose CBeebies [I really care about getting]. That's about the only one. My daughter's got music channels and my son's got like the cartoon channels, and she's got like 'Trouble' [channel] and things like that, that she watches but she's more kind of teenagers and stuff like that." (G3: Sky & DTT, P8, female)

"I like the Crime channel." (G3: Sky & DTT, P2, female)

"My oldest daughter likes the Health Channels - the Discovery Health and Leisure or something." (G3: Sky & DTT, P3, female)

2.1.2.4. Envy towards those receiving all 6 multiplexes

Some participants receiving only the 3 PSB multiplexes expressed envy towards others in the groups receiving all 6 multiplexes. A few participants indicated that even though they might not value all the channels they missed, on principle, they felt it unfair.

"...and there is this human nature, 'well if he's going to get 10, why haven't I got 10?'. Personally it doesn't bother us; we have what we want anyway – 1 to 5." (G1: Older DTT, P2, female)

2.1.2.5. Tendency for older participants to value the original 4/5 channels

Older compared with younger participants were more happy to maintain access to the channels they had before switchover. The extra channels were often nice to

have, although some extra channels were appreciated more than others by older people (see 2.1.2.5).

“Most of the people that I dealt with, their thing was pure and simple, especially the elderly people I’m dealing with, ‘I want [BBC] one, [BBC] two, three [ITV], four [Channel Four] and I don’t want anything else” (G1: Older DTT, P6, male)

“I go down through them [BBC1, 2, ITV1, Channel 4 and Five] first to see what’s on.” (G3: Sky & DTT, P5, female)

2.1.2.6. Positive and negative perceptions of the ‘+1’ channels

For many particularly older participants the extra ‘+1’ channels and the new ‘Rabbit’ channel were not appealing.

“A lot is duplicated ‘cause you’ve got More 4 and More 4+1.” (G2: Younger DTT, P1, female)

“Some of the ones that they put down as television channels are not television channels. They’re rubbish. Rabbit. Have you looked at Rabbit? It’s idiots texting each other and that is not a television channel but it’s put down as one of the 20 channels we get. It is not a television channel.” (G1: Older DTT, P6, male)

Conversely, others, particularly younger participants reported that they valued the ‘+1’ channels for catching up with programming (particularly the ‘soaps’) they might have narrowly missed or as an alternative to recording. Users of digital television recording equipment were less interested in the ‘+1s’.

“Would you rather not have another quality channel instead? I think if I had a hundred channels I wouldn’t mind if half of them were ‘+1’ but we’re getting half the channels that Selkirk get therefore I don’t want ‘+1’ because I’ve got the recorder to deal with it.” (G1: Older

DTT, P6, male)

“[no need for recording] because there’s always catch-up TV.” (G3: Sky & DTT, P8, female)

2.1.2.7. Uncertainty about number of channels received

All participants were asked to report how many digital terrestrial television channels they thought they had access to. This revealed that many participants could not accurately report the number of channels they received through their digital terrestrial service.

“oh more than 30. I’m not sure” (G1: Older DTT, P5, male)

“20s ish. I don’t know.” (G2: Younger DTT, P1, female)

“probably the 20s. I get more than we used to just on Freeview so that’s got to be a good thing – we definitely pick up more but I don’t think I get any more than in the 20s.” (G2: Younger DTT, P6, female)

“I think there’s only about 20 isn’t there? We’re supposed to get 20 but I don’t think we can get them all.” (G3: Sky & DTT, P7, female)

A few participants surmised or evidenced with anecdotes that terrestrial viewers may be unaware of the channels they’re missing.

“I suppose it will be because the people who now have got Freeview have never had anything other than the 4 channels so what’s extra is now something good to them because it’s extra, they never had it before. So what they’re not getting, they don’t miss because they don’t know it’s there.” (G3: Sky & DTT, P7, female)

2.1.3. Understanding of the reasons for different levels of DTT coverage

Across all groups there was very little unprompted awareness of any reasons for different levels of service across the UK.

2.1.3.1. Scottish Borders location

Unprompted, most participants recognised that their rural location made reception difficulties more likely.

“I know you should [have the same channels] but in real life you don’t but I’d rather have a few less channels and live in the Scottish Borders than have all the channels in the world in a built up area.” (G2: Younger DTT, P1, female)

“It’s always been an area of low income and high expenditure. It’s the price you pay for living in the Borders.” (G3: Sky & DTT, P1, male)

“But it depends on where you live. It’s simple as that. You can’t get reception, sorry that’s it.” (G3: Sky & DTT, P5, female)

Some participants discussed the sense of injustice about their experiences generally relating to their location. They cited difficulties in access to certain services (e.g., broadband) and higher prices they faced for commodities like bread and petrol.

“Like the poll tax. Always first.” (G2: Younger DTT, P3, male)

“It’s discrimination of sorts isn’t it because we live in the back waters of Scotland.” (G2: Younger DTT, P4, male)

“The thing is the Borders are hit hard all the time for everything because of where we’re located. It’s the same with the price of bread because of where we are and it

does affect a lot of everyday issues that people don't even think about, but it does [...] Well, the petrol's always dearer because of where we are situated and how much it costs to get stuff to us. Transport costs and things like that, it's because of where we are situated." (G3: Sky & DTT, P7, female)

"But the cost of living shouldn't be higher. The same lorry that takes the fuel from, is it Falkirk, drops down here and then goes down into England, and if you go into England, the same fuel from the same lorry is cheaper. And it's the same with the bread [...] that's not right [...] and it's the same, they can get away without giving us Freeview, so they do." (G3: Sky & DTT, P4, female)

2.1.3.2. General reception difficulties

Some participants' comments appeared to indicate understanding of the general principles of reception (signal received by television antennae). They recognised that reception may be more difficult for some than others because of the line of sight between their aerial and the direction of the signal. Some also noted how variable reception can be even within the same household.

"It depends where your house... If your aerial's pointing the wrong way, the signal doesn't go round corners [...] if you're unfortunate to be around a corner, it [the signal] will miss you." (G1: Older DTT, P7, male)

"A friend actually got a TV, digital TV for Christmas, plugged it in in her living room. Got, she says sixty but I don't think it is sixty, TV channels, I don't know. But she took it through to her bedroom which is the other side of the house, and she only got 20. So that's in one building, she's getting that much difference." (G2: Younger DTT, P2, female)

2.1.3.3. Poor differentiation between coverage and reception

There was evidence from all the groups that participants' understanding of different levels of DTT coverage were clouded by their difficulties in distinguishing consequences of reception problems from coverage issues. Pixelation, interference from weather, set top box messages like 'bad signal' and problems with intermittent television services were described in the context of the discussions about coverage.

"When you first splash out and buy a digital TV you think you're going to get a really fantastic picture, and then sometimes it does get pixelated, and you're thinking 'I've spent all this money...'" (G2: Younger DTT, P1, female)

"Occasionally I get this thing, if it goes blank, it will come up 'bad signal' [...] You're fiddling with your wires and you're thinking what you've done, or something's fallen out. So you know, you go and push your scart back in, and then my husband said, 'maybe it's something to do with the weather'. [...] A friend told me I had to get a digital aerial to stop that." [Interviewer: Have you pursued it?] No not yet but I will, I mean if it gets too bad." (G2: Younger DTT, P5, female)

"Im Jedburgh transmitter. It's not working properly. I'm waiting on a guy to come out and take a look at it because it's only picking up certain channels at certain times [...]" (G3: Sky & DTT, P2, female)

"I took [set top box] down to [other participant's] house to tune it in (on) hers. I have Freeview and it tuned in and then I took it back up to my house and it lost all the BBC channels again. But I get everything else apart from BBC." (G3: Sky & DTT, P3, female)

Many of the participants described their experiences with indoor aerials ('digital aerials', boosters) in the same context as 3/6 MUX coverage issues.

“My friend bought an expensive indoor aerial. It was like £35 and she’s in Glasgow and you’d think Glasgow, there’s loads of aerials – you don’t get the same problems there as you do here. And she couldn’t pick up a Freeview box with it.” (G3: Sky & DTT, P8, female)

“You had to get an indoor aerial for channel Five well I did anyway, and turn the aerial flat to get a reception rather than have it up like that. It was a different band you see and it was easier if you just flipped your aerial to the side and you’d get it perfect.” (G2: Younger DTT, P3, male)

2.1.3.4. Reception from main transmitters compared with relays

Some participants understood the connection between the level of service received and the transmitters their aerials pointed towards.

“We don’t get that, the History channel, because we are on a relay and don’t get as many channels.” (G1: Older DTT, P6, male)

“Well I heard it was because of the signal in Jedburgh. We get it off the Jedburgh mast which isn’t as strong. If you get it from the Selkirk mast you get all of the channels.” (G2: Younger DTT, P2, female)

“I get quite a lot (of channels) because the telly that I’ve got up the stairs that’s got the built in digital is actually on the Selkirk transmitter because that’s the only way you can pick it up when I first got it so I think I get slightly more than anybody who’s off the Jedburgh transmitter. [...] Aye because the Jedburgh transmitter only ever had 4 channels so you couldn’t pick up channel 5 unless you had Sky.” (G3: Sky & DTT, P3, female)

“The Jedburgh transmitter has always been poor

compared to the Selkirk one.” (G3: Sky & DTT, P1, male)

2.1.3.5. ‘Authorities’ won’t upgrade, ‘boost’, alter or spend money on relays
Some participants appeared more informed than others in understanding the reasons for different levels of DTT coverage. There was variation in how much participants understood. Overall participants were not clear who was responsible for different levels of DTT coverage. In these general discussions about reasons for the differences in coverage, none of the participants were especially aggrieved. Indeed, as the quotes below show (notably from G2 P2 below), the information and source were not particularly memorable.

“Everybody **should** be able [to get the same channels]. They should make the provisions so that the masts are put up so everybody has got the same.” (G3: Sky & DTT, P7, female)

“...maybe I’m wrong but I thought it was a case of maybe they could have; but because they didn’t want to spend money on this relay mast [...] and that’s why people can’t get it.” (G1: Older DTT, P8, male)

“Apparently that one [mast] in Jedburgh can be boosted but they won’t do it. Or it could be boosted to give a better signal but I don’t know whether it’s going to cost. They’ve been talking about this on and off, I did hear about it from somebody but I can’t [remember].” (G2: Younger DTT, P2, female)

The two participants in Group 1 who had close contact with Digital UK and/or Digital Outreach expressed more specific and detailed explanations which were atypical of the others’ understanding. Two examples from these participants are shown below for contrast.

“It’s the Freeview channels that are not public service broadcasting that the relay stations won’t get and they won’t get them unless the people that run the non-public

service broadcasting broadcasts pay to upgrade the relays, and they're not prepared to do that because they don't think they'll get the money back and that's it. The Government decided that because these channels belong to non-public service broadcast channels it's up to them as to whether they'll pay for it." (G1: Older DTT, P6, male)

"You can't have everything you want in this life and if it's not financially viable. I mean we're not talking about a service here, we're not talking about the health service or care of older people or anything of that nature. We're talking about business and although we know that there are going to be a lot of extra airwaves or whatever – it's technical – and they're going to have a lot of extra areas where they are going to make money. The government's going to make money out of them. They're selling them off for telephone lines and all this kind of thing. That's not what we are talking about. We're talking about these commercial companies. And if it's not going to pay them, I really can't blame them for not doing it." (G1: Older DTT, P2, female)

2.1.4. Reactions to the official explanation for different levels of coverage

2.1.4.1. Annoyance, with poor understanding of who is responsible

Some respondents became quickly annoyed when the group moderator provided the official explanation for different levels of DTT coverage. As noted elsewhere, there was confusion about who is responsible.

[Interrupts interviewer] "They take our money though. They take our money, they should pay [for upgrading] them. We pay them. They should make the effort."
[Interviewer: Who should?] "Whoever's in charge." (G2: Younger DTT, P4, male)

2.1.4.2. Acceptance, by participants who understood the business case

For several participants, the explanation supplied was considered reasonable and accepted as a commercial decision.

“...if they can’t afford to do it – I don’t know whether they can afford to do it or not, but it’s a business and if you’re running a business you’re going to put outlay. If you’re not going to get money back to carry that out then you’re not going to do it are you?” (G1: Older DTT, P2, female)

“It’s a commercial decision [...] it makes sense to me. As long as I’m getting the channels that my licence fee goes towards then I’m happy. I’m getting more than I used to get. I’m not a massive TV viewer. [...] but no I’m quite happy with it, we had a big build up to it. The actual day sort of passed me by.” (G2: Younger DTT, P6, female)

2.1.4.3. Surprise at the explanation, evidencing high expectations of digital

Some participants expected digital technology to offer improved television coverage, reception and service and in this context expressed surprise at the explanation of different levels of coverage.

“I can’t see how a few hills and bumps and things get in the way of technology.” (G2: Younger DTT, P3, male)

2.1.4.4. Optimistic expectation that coverage will improve

A few participants were unconcerned about any current inequalities with digital television coverage, citing that they expected these issues would be ‘ironed out’ with time.

“Aye. It’s got to get better hasn’t it. It’s never gonna be perfect overnight. [...] “You will get it. You’ll get everything eventually.” [Interviewer: Say if you don’t get everything eventually?] “then it’s been a failure hasn’t it.” (G2: Younger DTT, P4, male)

“Well we’re the first people to try it. By the time they get to two or three years on, it should be perfect by then.” (G2: Younger DTT, P5, female)

2.1.4.5. Disappointment – switchover should have made coverage equal

Some participants assumed that switchover would be fair and make access equal for everybody, even if it took some time to get it right. Indeed, many assumed that Government would not have set about switchover knowing there were going to be inequalities built in.

“Surely, digital, everybody should be able to get everything. [Interviewer: Is that what you expected?]. [...] You’d have thought the whole point in going digital, was that everybody would get the same transmission. [...] Otherwise what’s the point in all the expense?” (G2: Younger DTT, P1, female)

2.1.5. What are consumer reactions to choice and fairness?

2.1.5.1. Not fair, pay the same TV licence

The ‘unfairness’ of everyone having to pay the same television licence fee regardless of whether they received 3 or 6 multiplexes was raised in each of the focus groups. Overall, there was low understanding of and confusion about what the TV licence pays for. Many participants felt their TV licence payment entitled them to receive all available channels.

“We’ve got an integrated TV and on the box it says you’ll get 40 channels. You look through them and you get half of them. I don’t think it’s very fair because we’re paying the same TV licence as everybody else who’s got to switchover in the city and they’re gonna get all these channels and we’re not.” (G2: Younger DTT, P2, female)

“Well I think it’s unfair because everybody has to spend

the same amount for their TV licence. Why should somebody who's just picking up 20 channels pay the same as someone who's getting 40 channels? [...] I think everybody knows it just pays for the BBC channels." (G3: Sky & DTT, P3, female)

"Everybody's paying the same for a TV licence, why not the same for the channels." (G3: Sky & DTT, P2, female)

Others were more aware of the range of BBC channels and services available (through TV, radio and online) and valued them sufficiently to consider them worthy of their TV licence fee payment.

"...and of course they do Foreign Service broadcasting, they make programmes, buy in programmes. So I'm not too bad about the licence fee. [...] and you can watch or listen to radio programmes – last week or the week before." (G3, Sky & DTT, P4, female)

2.1.5.2. Mixed reaction to subsidising upgrades of relays

Some participants felt strongly that the upgrade of relays should be subsidised at the taxpayers' expense, whilst others felt there was sufficient strain on the public purse and felt that subsidising relays was not the best use of public money.

[P4, male: "Aye, [government should subsidise] Well we all pay tax"] [Interviewer: "so you reckon it would be worth it from taxpayers' money?"] [P6, female: "That's taking away the money from something else which in the scheme of things..."] [P4, male: "What a war in Iraq?"] [P3, male: Aye, that's what's taking away the money – a lost cause in Afghanistan] [P4, male: That's a different night. If they can find the money for that, they can find the money for us, surely."] (Group 2: Younger DTT)

"Increase the [TV] licence, that's what they do anyway." (G2: Younger DTT, P5, female)

“The commercial [channels] I think they should be available on all platforms because you’re asking people to pay for the extra ones to subsidise them not pulling their fingers out. Seventy-five quid a household is a lot of money. Who gets the money for that? Some of that must be going back to them.” (G2: Younger DTT, P1, female)

2.1.5.3. Not fair, no control, that’s life

Some participants showed passive acceptance of the inequality in channel choice.

“In the ideal world, yes you should get everything but there’s no such thing as an ideal world and it comes back to where you live and you’ll never get the ideal world so even if you were to think about it from dusk ‘til dawn, it’s never gonna happen so people probably just don’t think about it because it’s where we are and what we’re getting.” (G3: Sky & DTT, P7, female)

2.1.5.4. Low interest in some channels on the commercial multiplexes

Reaction to the question of fairness of receiving only the 3 PSB multiplexes was somewhat dependent on participants’ motivation to the channels on the commercial multiplexes. As noted in earlier sections, a range of channels from both the public service and commercial multiplexes were valued. Older participants were more likely than their younger counterparts to report only being bothered about getting what they had before (BBC1, BBC2, ITV1, Channel 4, (and Five)). In this context, not having access to the channels on the commercial multiplexes was not important to them.

“... eventually as the Digital UK website got better and better, I could see what we were missing. And to be honest I looked at them and I thought ‘well I don’t really want them.’” (G1: Older DTT, P6, male) Note: awareness of the Digital UK website was very unusual; this participant

had previously had contact with Digital UK and Digital Outreach.

2.1.5.5. May be interested in channels which could be on commercial multiplexes in future

Some participants recognised that whilst they were not interested in receiving the channels currently available on the commercial multiplexes, future channels that might be carried on the commercial multiplexes could be of interest. They recognised that not addressing the issue of different levels of coverage in the short term could have more meaningful implications for some viewers in the future.

“...perhaps in five year’s time there could be decent channels that were worth watching, but because they haven’t upgraded the systems here we won’t get to see it.”
(G1: Older DTT, P8, male)

2.1.5.6. Concerns about certainty of coverage predictions

A general theme observed among the research participants was low awareness and reported use of coverage checking tools, such as the Digital UK postcode checker, as a guide to their purchase of digital television equipment. There was some implicit acceptance that a ‘trial and error’ approach to finding the most suitable television equipment was inevitable because there was no sense that coverage could be perfectly predicted. One participant raised this point explicitly:

“... a lot of it seems to be trial and error. You had to buy the digibox and you take it home, expecting something and you don’t get what you expect or the Freesat – how would you know 100% you weren’t in that little area who couldn’t get it? So, there’s no ‘assurity’ [sic] is there?” (G2: Younger DTT, P1, female)

2.1.5.7. Insufficient information to judge fairness

There some was evidence that without knowing the cost of upgrading a relay to

support the transmission of the commercial multiplexes it was difficult to judge the fairness of the decision by the commercial multiplex operators not to upgrade the relays.

“Why do they not know how much it’s going to cost to get all the channels?” (G1: Older DTT, P1, female)

2.1.5.8. Requirement to upgrade relays as a licence condition

One participant from Group 2 (Younger DTT) considered that the commercial multiplex operators should not be in a position to decide whether or not to broadcast to smaller communities through relays, and that it should be an obligation or condition of their licence.

“Presumably they’re paying the government some money for the licence or monopoly or whatever, so basically the government should say you can have this bandwidth for whatever but you have to provide it to all [Interviewer: a licence condition?] [...] They shouldn’t be able to cherry pick who they can provide to because it’s most lucrative to them. I’m sorry but you should be providing the service for everybody and then they’ll be getting money out of it come hell or high water.” (G2: Younger DTT, P1, female)

[P4, male: “If the programmes are good enough, they’ll be watched.”] [P1, female: “Yeah, exactly. And they’ll be reaching more people.”] (G2: Younger DTT)

2.1.6. Consumer reactions to potential future changes

As part of the discussion, participants were asked to reflect on the possibility of new services (e.g., new HD content for Freeview) being introduced to digital terrestrial broadcasts that might result in consumers having to buy extra digital television equipment to receive the new services.

2.1.6.1. Incredulity at potential future changes to terrestrial services

Some participants expressed surprised, relatively heated reactions and a sense

of being exploited, particularly at the prospect of losing access to anything their switchover related purchases had given them access.

“You’ll have a revolution on your hands [others laugh]”
(G1: Older DTT, P2, female)

“...you don’t think in another six months down the line, they’ll have another thing coming out? [...] We’re just getting fleeced!” (G2: Younger DTT, P3, male)

2.1.6.2. Low to moderate interest expressed in HDTV

On the topic of new high definition television content, participants were not overly eager to access it even if they had already purchased an ‘HD ready’ television set. When probed to explore whether other household members might be a driver for adoption of new equipment (e.g., pester power from children), respondents reported it unlikely.

“it’s a gimmick, because after a while you wouldn’t notice any difference anyway.” (G3: Sky & DTT, P7, female)

“I don’t think I would upgrade to HD because of the kids.”
(G3: Sky & DTT, P8, female)

2.1.6.3. TV purchases driven by perceived best-value deals

Many participants in fact reported that new features (such as those to access HD content) were not a consideration in their purchase of television equipment, so much as incidental accompaniments to the best deals available from retailers.

“The TV that I bought, it came with a docking station for an iPod on it and you sort of think ‘oh my god, what next’ but I wouldn’t go out and buy a TV with an iPod docking station on it. It’s just because it was the best deal in the shop at the time.” (G3: Sky & DTT, P7, female)

2.1.7. Consumer information sources about 3 and 6 multiplex coverage

The majority of participants with DTT as their only source of TV did not feel well informed about 3 and 6 multiplex digital terrestrial television coverage. Many reported finding out that they were affected by a reduced channel service through various informal sources, accidental experience or hearsay.

2.1.7.1. TV listings magazines

For some participants, awareness of the different levels of DTT service was raised through TV listings magazine showing services (in the Freeview section) that those receiving 3PSB could not receive.

“I can’t get UKTV History or something like that. I can’t get those. [...] You just tend to know the ones that you can’t get cause you tend to look in the Radio Times at what’s on on the Freeview and there’s never anything on the telly, and the one you want to watch is the one you can’t get.”
(G2: Younger DTT, P1, female)

“My TV guide tells me what [channels I should get]. It’s like my bible.” (G2: Younger DTT, P5, female)

2.1.7.2. Comparisons with neighbours, friends and family

There were several reports of participants discovering that either they or someone they knew received fewer channels than those their neighbours were able to receive. A participant from Group 2 provided one of several such anecdotes.

“when I went to my next door neighbours, they were thinking about getting a new TV so I said ‘I check it first’ and they didn’t get the same channels as I got either, so how’s that?” (G2: Younger DTT, P3, male)

2.1.7.3. Word-of-mouth

Some of the comments that were raised during the focus groups implied that

understanding of 3 and 6 multiplex coverage had been via word of mouth. To verify that this was indeed the case and that participants had talked about coverage issues with others prior to the meeting, it was probed explicitly in the discussion.

[Interviewer: Have you talked about [coverage issues] with others? Or are you just mentioning it because we're here?] "No I've spoke to other people like this. Family members I've spoken to like." [Interviewer: On what sort of angle?] It's not really fair that we only get 20 channels or whatever, and there's other areas where... 'cause we're the first region to be switched over so it will be interesting to see what other regions get when they switch." (G2: Younger DTT, P2, female)

2.1.7.4. Noticing unavailability of specific channels

Some participants found out indirectly about 3 and 6 multiplex coverage differences when they found that they were unable to receive channels which had been recommended to them (or by them to others).

"I noticed it. He [father] watches racing, he likes sport, so I said go to Sky Sports News, it's perfect. Number 83 is the channel eh. Well 83 on his was nothing. Nothing at all, and I thought 'that's strange'. So when I went through it he had nay UK History, 'cause that's channel 12." (G2: Younger DTT, P3, male)

2.1.7.5. Product packaging

Product packaging was raised as a source of information about Freeview in the focus groups. Some participants reported either that they felt the information on packaging was misleading and did not represent the service for viewers receiving only the 3 PSB multiplexes, or that it provided no information against which to compare received television service.

"Well it tells you on the box what [channels] you're to get.

But you didn't get it aye. 'Cause it's got loads on the box. When you're looking at your digibox to buy and you look at what you're getting eh. [Interviewer: Do you?] Of course you do that. Look at what's on offer and they're pretty much all the same; except you don't get it all. It's as simple as that. They should have it 'you *might* get these channels instead of saying 'you've got these channels' because you've not got them. I should have them for false advertising." (G2: Younger DTT, P3, male)

"I found with the Freeview box, we got it, and you get all your channels but it didn't tell you. You had to sort of work your way through to get the lot. I could never find a list of what they were" (G3: Sky & DTT, P6, female)

2.1.7.6. Retailers

There were several reports across the groups that participants had been told by retailers that they would be unable to receive DTT if they were unable to receive (channel) 'Five'. Whilst this was the case prior to switchover (as the relays did not carry Five), these participants were not made aware by retailers that the 3 PSB DTT service would become available after switchover.

"Switchover itself seemed to go quite well. What I felt about the build up to the switchover. Certainly in Galashiels. There was like two groups of people: people who could get channel Five who were going to have no difficulty at all. I was in that category. I've been using my little digital box for ages and ages. And there was another group of people who could not get channel five who really didn't know what was going to happen. Because when they went into the shop to buy digital box the people in the shop said to them, ask them, 'can you get channel five?' and you'd say 'no' and they'd say 'well in that case there's no point getting one because it won't work.'" (G1: Older DTT, P8, male)

2.1.7.7. Local press

Several participants referred to the local press (e.g., Southern Reporter) as a source of information that raised awareness that some viewers would only be able to receive the 3 PSB multiplexes (e.g., through editorials, readers' letters).

“The most recent big one I saw was a letter to the Southern Reporter [local newspaper] to say surprise surprise we're not getting all the channels” (G1: Older DTT, P6, male)

2.1.8. Was there any evidence of a political campaign?

2.1.8.1. Low unprompted awareness of local MP Michael Moore's campaign

There was no unprompted awareness of a political campaign headed by local MP Michael Moore, lobbying for 6 multiplex coverage from the relay transmitters (and for rural broadband, and which questioned the future use of released frequencies). When prompted, most were vaguely aware of the campaign although there was little evidence of active support from the participants.

[Interviewer: Has anyone heard of Michael Moore's campaign?] “About the post offices?” (G2: Younger DTT, P5, female)

[Interviewer: Do you support his campaign?] “Well it's his job isn't it” (G3: Sky & DTT, P5, female)

2.1.8.1.1 Atypical prompted awareness from Group 1

More clear awareness of Michael Moore's campaign was evident from Group 1 when prompted.

“But this is one of the things that Michael Moore is working on. That some areas are going to get a lot of programmes, and this area is going to have fewer...” (G1: Older DTT, P2, female)

“But Michael Moore's point was what if that shopping

channel doesn't make money, what if it's taken off and something is put in its place, which is something you might want to see. Are you going to feel aggrieved then? Yeah, well you would do. And that was Michael Moore's point. It's part of our Freeview service and we're not getting it all. And whilst at the moment I wouldn't be interested in any of these channels, although some people might, if they suddenly put in 24 hours of rugby and you had to be on Selkirk to watch it, then I would start to be [interested]..."
(G1: Older DTT, P6, male)

2.1.9. Consumer attitudes to information provision

2.1.9.1. Low awareness of Digital UK web site

Only one participant (from Group 1, who had previously had contact with Digital UK) reported unprompted awareness of the Digital UK web site. Participants cited issues with access (e.g., no PC and some reports of slow broadband in the Scottish Borders) as barriers to their ability to access web site based communications.

[Interviewer describes the Digital UK postcode checker]
[P6, female: "why didn't we know about that."]
[Interviewer: Why didn't you know about it? You all remember getting leaflets?]
[P7, female: "because we didn't read it properly."]
[P8, female: "because it's always down in the corner somewhere, www dot, whatever, and if you've not got a computer now you kinda discard that bit of information and just read the leaflet."]
(G3: Sky & DTT)

2.1.9.2. Evidence that formal communications are not read

There was evidence from each of the three groups that printed switchover communications materials were often unread. Explanations and other comments raised to justify the materials not being read referred to overwhelming volume, difficulty distinguishing important material from other promotional material (with all being printed with magenta covers) and the material not being dated (thus making

it more difficult to see at a glance whether there is new information), and low perceived need.

[P5, female: “Did you not get something through the post recently? ‘Cause I binned it”] [laugh] [P1, male: “Do you file your things the way I do?”] [P5, female: “F under Fire”] [...] [P1, male: “I’m recycling mine [communications materials].” (G3: Sky & DTT)

“And there’s been a lot [of communications]. If you wanted to know, there’s loads of times you could have asked somebody if you were bothered. But I think the majority of people are just happy they got more than five channels, and you’ll not get any complaints. And if you think ‘agh! I cant get ITV3, oh damn, I just go to ITV4’. Nae t’bother. ‘Cause you’re still better off than 5 channels.” (G2: Younger DTT, P3, male)

2.1.9.3. Misleading product packaging

Others reported feeling that information on Freeview product packaging was misleading.

“Yeah false advertising. It’s like going into a shop and buying six cans but only getting 2. Ken what I mean, it’s the same here.” (G2: Younger DTT, P3: male)

2.2. Consumer views of implications of receiving only the 3 PSB multiplexes

Participants’ views of the implications of their being predicted able to receive only the 3 PSB multiplexes were somewhat dependent on their disposition to accessing more (commercial) channels. Participants described the choices they made or felt they should make in response to being predicted to receive the 3 PSB multiplexes.

2.2.1. A reason to choose Sky

The participants in Group 3 (Sky & DTT) described their experiences. Most participants reported that (usually long) before switchover they had wished to access more channels or improve their terrestrial television reception. Some had been informed by retailers that they were unable to receive Freeview prior to switchover so had been advised to choose Sky. There was evidence that not all participants who had made this decision were aware that the 3 PSB multiplex Freeview service had become available at switchover in their area.

“Well when I had the sky in, I knew the switchover was coming and since I couldn’t get a Freeview reception I decided to go for Sky then rather than wait. I think a lot of people did.” (G3: Sky & DTT, P1, male)

“those in difficult areas who were told, if they went Sky, that would solve the problem. So only if they had difficulties, you go to Sky.” (G1: Older DTT, P2, female)

2.2.2. Concerns about cost of subscription TV services (Sky)

Some participants who subscribed to Sky indicated some reservations about having it, either because of the cost or because they felt they had had no alternative, whilst others reported they could not justify the expense of pay TV.

“I can’t justify the cost of Sky because it’s so expensive.”
(G2: Younger DTT, Melanie, Group 2)

“I resent paying [*company providing premium TV services*] [you’re] held to ransom really. That’s blackmail in a way.”
(G3: Sky & DTT, P6, female)

2.2.3. Enjoying Sky content, reluctance to lapse

Where Sky had been the only option for multi-channel (pre-switchover), almost all of the participants with Sky indicated that their Sky service met their content preferences and that they would be reluctant to change it.

“...but I do like the choice of programmes. I can watch Sky news from America, Russia, France, the whole lot” (G3: Sky & DTT, P4, female)

“I think once you’ve had something, especially if you’ve got kids, older, and it would be too hard to readjust again back to being without it and just having like your basic channels.” (G3: Sky & DTT, P8, female)

2.2.4. Low awareness of Freesat

Several participants in each group reported awareness of being able to receive free-to-view satellite channels when a Sky subscription is cancelled. However, the term ‘Freesat’ was most often used for FreesatfromSky or to describe lapsed Sky subscriptions. There was very low awareness of Freesat (from BBC/ITV).

“Well I had the Sky dish and Sky box and the card that I had, I just got the basic, it’s the freesat channels [Interviewer: from Sky?] yeah.” (G3: Sky & DTT, P3, female)

“I don’t know [what Freesat I’m talking about]... the TV and digital magazine, if you pick a channel it will tell you the number you get it on Freeview, the number you get it on Virgin, and the number you get it on Sky, and now it’s got Freesat and has come up with a number. But I don’t know what it is.” (G3: Sky & DT, P1, male)

“This freesat is new to me, I’ve never heard of it. Does that mean you don’t need an aerial?” (G2: Younger DTT, P5, female)

2.2.5. Low availability in area of triple play from Sky

Some of the participants in Group 2 (younger DTT) explained that one reason they had not opted for Sky was because they felt they missed out on the better value, phone, broadband and TV, triple play from Sky.

“We’ve got broadband but I don’t think we can get the Sky broadband, telephone.” (G2: Younger DTT, P1, female)

“It’s just regular Sky but it’s all, [sales staff] kind of offer you the phone and the broadband as well and only for £17 a month. I was like ‘oh that’s actually good, can you get the broadband?’ ‘Oh no you’ve got to pay an extra £10 if you want the broadband’. (G2: Younger DTT, P2, female)

2.2.6. Cost the key consideration (for non pay-TV households)

Minimising cost was a bigger concern than channel choice for households who needed to update their televisions because of switchover (i.e., who had not previously adopted digital TV services).

“The other thing about the channels is the fact that I think a lot of people didn’t say ‘well I’m going to go for Sky because I get all these channels’. They’re gonna say, wait a minute I’ve got to change this, and the cheapest option was to go for a digibox [Freeview] than buying all this material. A big change. I think that was an influence, not you saying, what programmes were you looking for. I don’t think people thought about that at all. They thought about what expense am I going to incur in exchange and went for the digibox.” (G1: Older DTT, P2, female)

Many Sky participants and DTT participants had spent relatively little on switchover. Sky participants often reported having invested in Sky for many years, and DTT participants had converted with Freeview set top boxes from as little as £15. Nevertheless there were examples of some participants having made large investments in digital terrestrial television equipment, purchased for switchover, including those receiving only the 3 PSB multiplexes. The highest expenditure reported from a 3 PSB participant was around two thousand pounds. One participant in the Sky group decided to buy an integrated digital TV because the Freeview box on a non-main set was not “picking up”.

Among the DTT only participants, some digital television purchases were well in advance of switchover and were not specific switchover purchases. This included replacement of broken analogue sets with new integrated digital televisions.

One participant believed copper scart leads were better for connecting the set top box to the television after retail sales staff had recommended them. Several purchases described by participants as made because of switchover related to different indoor, 'booster' and 'digital' aerials. There were instances where multiple aerial purchases had offered no reception improvements, and participants would have spent less overall had they installed a new roof aerial initially.

"He could nae get his digibox working for his daughter so I tell him you have to get a 'digital aerial' if you're going to have it in your rooms if it's not on the mains," (G2: Younger DTT, P3, male)

[P1, female "Would you still need the booster with the digital?"] [P2, female: "I was advised not but our TV didn't get a proper signal without it. I couldn't get it working on the day of the proper switchover and I went to this help place. So I went down and they said if you got a booster take it off, you don't need it so I took it off and did what they said and got no signal so I followed all the instructions and I phoned the helpline [...] and then boyfriend came home, plugged it in and it worked. The booster worked as well. I still don't get 100% signal but it's better with the booster." (G2: Younger DTT)

[P3: "You'll need an aerial to pick up your Freeview."] [P8: "They don't work, I've tried every angle." (G3: Sky & DTT)

It was revealing to note that whilst the group 3 participants claimed they would be reluctant to exchange this service for DTT, between 50-75% of their viewing was on the main (old analogue terrestrial) channels, which are on the 3 PSB multiplexes.

“About 75% old stations and 25% for later on, for half past eight onwards.” (G3: Sky & DTT, P5, female)

“Probably 50,50 because through the day, there’s usually the Sky channels that we watch and it’s just at night for that hour and a half, two hours on BBC1 in Border.” (G3: Sky & DTT, P3, female)

“[I watch old channels relative to new ones] about half and half.” (G3: Sky & DTT, P2, female)

2.3. Considerations for appropriate messaging about 3 and 6 multiplex coverage

2.3.1. Many formal communications not read or processed

As noted in section (XX), participants reported that they had not read or could not recall the formal communications distributed by Digital UK. There was an overall view that too much formal information was provided.

Some participants suggested that television could be an information source to which they felt they might attend more (citing infomercials as a good idea) and there was evidence that local news sources were read.

2.3.2. Most participants had not researched their options

The interviewers asked participants what research they had done prior to purchasing digital television related equipment. Most participants reported very little, if any, research.

“I did no research whatsoever because I’m quite happy with my BT telephone, I don’t have a computer so all I needed was a Freeview box.” (G2: Younger DTT, P5, female)

“Well nothing really [researched] because we wanted a

new television. We'd been 'umming and ahing' about Sky for a while but I can't justify the ongoing subscription but it's not long since Sky's done the broadband and TV packages. As I say I don't think we can get it in our area. It's not really an option." (G2: Younger DTT, P1, female)

[Interviewer: what research did you do to get ready?] "Me [shrugs], just 'digi'. My terrestrial aerial was knackered – it had a big hole in it and I could only get two channels before I got the digibox. Two fuzzy channels. And I had to get it very early 'cause then I says to them 'are you got to fix the aerial', 'it'll cost you 80 quid'. I went [shrug] 'nae chance' and I thought it would be [someone else's] problem but no not, mine so I says 'nah'. So I got a digi [used with an indoor aerial] very early cause I only had two channels." (G2: Younger DTT, P3, male)

[Interviewer: any research?] "None, just what I heard on telly, on the radio, and him [pointing to P3] he keeps me informed. He's an electrical genius." (G3: Younger DTT, P4, male)

"No [research], not really, to be honest I think the Sky was one of those ones you have every few months and I've never had Sky and it comes up every few months, 'shall we have sky?' 'nah, we don't really need it do we?' and it'll come up again a few months later. So not really anything. Just what we saw on TV." (G2: Younger DTT, P6, female)

2.3.3. Sky customers' low awareness of DTT availability with switchover

As noted elsewhere, there was lower awareness than expected of changes in the availability of DTT as a result of switchover. Some participants in group 3 were not aware that access to Freeview had been made possible by switchover for viewers of local relays. Nevertheless, most of the participants with Sky did not wish to switch to digital terrestrial now that it was available. There was one reported use of the postcode checker (three years earlier).

“[Had Sky] About 3 years. But we knew [switchover] was coming anyway. I was fed up with just getting the four channels so I just thought when switchover comes I’m never gonna get a signal for that television anyway so I might as well just get a Sky package. Got a better choice, can watch what you want.” (G3: Sky & DTT, P1, male)

2.3.4. Poor understanding of responsibility for switchover

Throughout the discussions, participants found it difficult to identify who was responsible for switchover. Participants talked about various agencies as ‘them’ but were unable to be specific.

“I think it’s the government. It’s the broadcasters. Nah I just think broadcasters.” (G2: Younger DTT, P3, male)

“It’s just progress isn’t it. It’s across the board. I would have thought everybody [is responsible].” (G2: Younger DTT, P4, male)

[on the distinction between PSB and the COM multiplexes and what’s covered by the licence fee] “It would be interesting if that knowledge was public knowledge then how many people would be writing in to complain to... who do you complain to? The public service broadcasting people or the commercial people? I think they would be absolutely inundated with people complaining.” (G2: Younger DTT, P1, female)

2.3.5. Many do not replace their TV products frequently

Whilst some participants recognised the speed of technology progress citing realistic life cycles for television equipment in the region of 3-4 years, in practice, most participants reported that they bought new only when their existing equipment ceased to work. A ‘try before you buy’ approach was suggested by one participant to enable an exploration of new digital services and features.

“I would want to see what the new services were first before I did anything.” (G1: Older DTT, P3, female)

2.3.6. Need for transparency (note risk of angering many)

Some participants felt that the formal explanation for the different levels of DTT coverage should be provided to consumers to allow consumers to make an informed choice of purchase. Note, however, that providing the explanation resulted in some angry outbursts.

“I think they should be a lot more open because I personally felt I had to drag the information out as opposed to ‘the reason you’re not getting these channels is’.. it weren’t stated. Some people were told you’ll get 40 channels which is not true you will get up to 40 channels, we were told we would get 20 channels but I’m telling you some of them are not channels, they’re not even television, they’re just pictures of text going past. So I think they should be telling you very very accurately what you are gonna get and what somebody from a main transmitter’s getting. I do think it was not well laid out [...]”
(G1: Older DTT, P6, male)

2.3.7. Concise, accurate and simple messaging

Some participants reported that some communications materials were too complex to be useful.

“I think one of the problems we had here was that there was so much information. We were swamped with repeated [information] and it was badly presented actually. [...] Be clear cut, simple, short.” (G1: Older DTT, P2, female)

2.3.8. Recognition that the process can be complex for some

Several participants in the DTT groups noted the discrepancy they perceived between the communications message that 'switchover is easy' and their actual switchover experiences which were more complex.

"One of the difficulties here was that there were definitely two groups of people: people who were going to have no difficulty and another group of people to whom this wouldn't apply. They started off by saying this is dead easy, then it was this or this or this." (G1: Older DTT, P8, male)

"It was always going to be simple, so straightforward" (G1: Younger DTT, P3, female)

2.3.9. Highlight distinction between coverage and reception

In each of the group discussions, participants appeared to sometimes discuss implications of 3 and 6 multiplex coverage in the same context as reporting reception issues (e.g., such as occasional pixelation). Some participants indicated they would be interested in simple advice about options that may be available to them as a result of switchover (e.g., to advise those who could get 6 multiplexes from a main transmitter as a result of power increases even if they were previously viewing a local relay, how to do so).

2.3.10. Clearer distinctions between impartial advice and selling

There was considerable confusion and wariness about who provided impartial information and who was selling services. In many ways, the confusion about DTT reception gave one-stop shops, such as Sky, an advantage.

"I've got Sky and had it for about 10 years because we live in a very poor reception [...] just splurged out on Sky + [...] Sky generally just I find wonderful from top to bottom."
(G3: Sky & DTT, P6, female)

However, some participants described sales staff as 'pushy', and numerous

anecdotes from participants indicated that the deals on offer were changeable or were not entirely desirable.

“I still don’t want to take [up a Sky offer] on my front door but they had a van up at the Co-op and ‘can I speak to somebody’ ‘oh no it’s only for doorstep offers that you get it’. You weren’t given the chance of thinking about it...”
(G2: Younger DTT, P2, female)

[P3, female: “I think that’s what was catching a lot of folk out of that. ‘Cause it caught me out, ‘cause you were signing up for this deal for sixty pounds [...] You were signing up for it at the Co-op in Jedburgh for 60 pound and then the day after they changed it to forty pound. They were stressing it was for new customers only. Not existing customers”] [P7, female: “I asked about this ‘plus box’, just for new customers he said wait til after Christmas] [P3, female: “I had to cancel it because I was going to be charged the full price for it because I was an existing customer.” (G3: Sky & DTT)

“They [Sky sales staff] told me to wait til after Christmas. Once everybody has the time to settle down, he said the price [for Sky] will probably come down. The offer will probably go to nearly everybody” (G3: Sky & DTT, P7, female)

Participants were wary of trusting different organisations (even the Switchover Help Scheme) because the distinction between agencies offering sales and those offering impartial advice was perceived to be blurred.

“They’ll claim they pick up a super duper whatever they are, but they dinnae work and the TV boys will tell you they’re rubbish and dinnae work. So that’s another scam for the shops to sell.” (G3: Sky & DTT, P7, female)

“They need to advertise as a non-commercial site. You know, just like [participant cited a commercial price comparison web site], somebody said. Just on the BBC, however many times a week. The first time it goes past you, but the second time you might just write it down.”
(G3: Sky & DTT, P4, female)

“I’d also warn people about these vans that sit there trying to sell people things which people honestly I think was not understood.” (G3: Sky & DTT, P6, female)

2.3.11. Highlight availability of range of free to view reception options

Increased awareness that the most valued channels available via 6 multiplex digital terrestrial television (Freeview) are also available to viewers on subscription-free satellite services (Freesat, Freesatfromsky) could lessen any frustration that viewers who will only receive the 3 PSB multiplexes via digital terrestrial broadcasts might express.

3. Summary of results and conclusions

3.1. *What are the range of consumer expectations in relation to 3 and 6 MUX coverage?*

- For most participants the 3/6 MUX issue was not the top of mind unprompted issue of concern for them during digital television switchover. More commonly raised issues included difficulty using two remote controls and the process of re-tuning.
- Whilst many participants were aware that there were differences in the channels available on Freeview in their switchover area, most had found out via informal communication routes. Formal information materials were mostly ignored.
- There was mixed, but generally poor, understanding of the reasons for 3 multiplex television services. Distinctions between reception and coverage issues were blurred. Participants had a general understanding that level of service depended on the transmitter (main or relay) they used.
- Providing the official explanation for why some viewers only receive 3 multiplex terrestrial television services generally irked participants. Overall, participants considered it unfair that those receiving television from a relay could receive only a limited Freeview service. Discussions around fairness raised questions about what the TV licence fee covers.
- For many participants there was an expectation that 6 multiplex coverage will improve with time and the progress of technology.

3.2. *What do consumers consider as implications for them of being predicted able to receive 3 MUX?*

- The implications of being predicted as able to receive the 3 PSB multiplexes differed depending on motivation to receive the channels carried on the 3 commercial DTT multiplexes.
- Some participants with Sky cited the unavailability of a digital terrestrial service pre-switchover as a driver for adopting Sky; other participants with Sky were motivated by multi-channel up to several years prior to switchover.
- Participants in the DTT only groups reported that minimising cost had been

a greater concern than channel choice, even though there was evidence of spending money (potentially needlessly) on indoor aerials and investing in high end integrated digital televisions.

- Subscription based services (e.g., Sky) were generally perceived as the only solution to accessing channels on the commercial multiplexes for viewers in 3 PSB multiplex areas. There was very low awareness of Freesat.
- Participants with Sky were reluctant to switch to Freeview now that a digital terrestrial service was now available. They reported watching at least half of their television viewing to the main 5 channels (BBC 1, BBC 2, ITV1, Channel 4, Five).

3.3. *In the context of insights relating to the above research questions, what are the important considerations in providing appropriate 3/6 MUX messaging?*

- There was evidence that formal paper based information was not being absorbed, and Digital UK's internet based postcode checker was not known about. Participants reported that television based communications might be more noticeable.
- Participants reported that it was difficult to know who to trust for advice. Sales staff had become indistinguishable from impartial information sources. We might conclude that consumers would benefit from a higher profile for the Digital UK brand as an independent source of impartial advice.
- Improved awareness that the most valued Freeview channels are also available to viewers via subscription-free satellite services (Freesat, FreesatfromSky) could lessen any frustration that viewers who will only receive the 3 PSB multiplexes via DTT might express.
- Availability of information about what services the television licence fee funds may be useful in consumer messaging about different levels of DTT service.

4. Annex – PowerPoint slides presented at project debriefs

consumer expectations in relation to 3 and 6 MUX DTT coverage

Thursday 5th February 2009

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scope

- What are the range of consumer expectations in relation to 3 and 6 MUX coverage?
 - Do consumer understand the reasons and impact of levels of different levels of DTT coverage?
 - What are consumer perceptions of choice and fairness?
 - What were consumer information sources about 3 and 6 MUX coverage in the Scottish Borders?
- What do consumers consider as implications for them of being predicted able to receive 3 PSB only?
- In the context of insights relating to the above research questions, what are the important considerations in providing appropriate messaging about 3 and 6 MUX coverage?

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Focus groups in Scottish Borders

- 22 participants over 3 groups:
 - Group 1* (Galashiels): Older DTT group – mix of 3 & 6 MUX, n=8
 - Group 2 (Jedburgh): Younger DTT group – mix of 3 & 6 MUX, n=6
 - Group 3 (Jedburgh): Sky (main set), mix of 3 & 6 MUX DTT on other set(s), n=8
- * NB group included 2 participants who had been in close contact with DUK/Digital Outreach
- Fieldwork conducted week commencing 12th January 2009
 - 8 weeks after DSO

“...the people who now have got Freeview have never had anything other than the 4 channels so what’s extra is now something good to them because it’s extra - they never had it before. So what they’re not getting, they don’t miss because they don’t know it’s there.” (Sky & DTT, P7, female)

Q1. Was the 3/6 MUX experience important to consumers in the wider scheme of switchover?

- Reception of 3PSB only was not the most burning issue for participants
- Other 'surprises' were raised more often and unprompted, e.g.,
 - Difficulties switching between two remote controls
 - Retuning
 - Areas considered 'uncovered' by DTT
 - Concerns about older residents
 - General teething problems e.g., delays in loading EPG data when switching on set top box

Q2. Do consumers understand the impact of different levels of DTT coverage? (1/3)

- 'Impact' of receiving 3PSB depends on attitude/disposition to TV, multi-channel, specific channels, and specific content
"the more choice the better" (G1: Older DTT, P5, male)
- Participants valued channels from both PSB and COM MUXs
- Participants discussed channel quality vs. quantity
"It's not the number of channels [that's important] it's the quality of what it is on, and it's just abysmal a lot of the time." (G1: Older DTT, P3, female)



Q2. Do consumers understand the impact of different levels of DTT coverage? (2/3)

- Tendency observed for older participants to value the original 4/5 channels

*"...and there is this human nature, 'well if he's going to get 10, why haven't I got 10?'. Personally it doesn't bother us; we have what we want anyway – 1 to 5."
(G1: Older DTT, P2, female)*

- Participants evidenced positive and negative perceptions of the '+1' channels

"[no need for recording] because there's always catch-up TV" (G3: Sky & DTT, P8, female)



Q2. Do consumers understand the impact of different levels of DTT coverage? (3/3)

- Participants recognised benefits of increased choice from digital terrestrial (including 3PSB) over analogue terrestrial

*"Oh yeah, it's been a hundred time [better with digital]. We complain about the bits and pieces but at the end of the day it's better, it's more than 5 channels."
(G2: Younger DTT, P3, male)*

- Some participants receiving 3PSB expressed envy

- Many participants were unsure of the number of channels they receive

"oh more than 30. I'm not sure" (G1: Older DTT, P5, male)

"20s ish. I don't know." (G2: Younger DTT, P1, female)



Q3. Do consumers understand the reason(s) for different levels (3/6 MUX) of DTT coverage? (1/3)

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- Participants discussed sense of injustice about their experiences generally, relating them to their location

"I know you should [have the same channels] but in real life you don't but I'd rather have a few less channels and live in the Scottish Borders than have all the channels in the world in a built up area." (G2: Younger DTT, P1, female)

"Like the poll tax. Always first" (G2: Younger DTT, P3, male)

"...they can get away without giving us Freeview, so they do." (G3: Sky & DTT, P4, female)

Q3. Do consumers understand the reason(s) for different levels (3/6 MUX) of DTT coverage? (2/3)

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- Participants discussed general reception difficulties

"It depends where your house... If your aerial's pointing the wrong way, the signal doesn't go round corners [...] if you're unfortunate to be around a corner, it [the signal] will miss you." (G1: Older DTT, P7, male)

- Understanding of different levels of DTT coverage clouded by poor differentiation between coverage and reception

- Pixelation
- Interference from weather
- 'Bad signal'
- Intermittent service

"I'm Jedburgh transmitter. It's not working properly. I'm waiting on a guy to come out and take a look at it because it's only picking up certain channels at certain times" (G3: Sky & DTT, P2, female)

Q3. Do consumers understand the reason(s) for different levels (3/6 MUX) of DTT coverage? (3/3)

- Some understood difference between reception from main transmitters and from relays

"Well I heard it was because of the signal in Jedburgh. We get it off the Jedburgh mast which isn't as strong. If you get it from the Selkirk mast you get all of the channels." (G2: Younger DTT, P2, female)

- Informed participants reported that authorities ('They') won't upgrade/'boost'/alter or spend money on relay masts

"...maybe I'm wrong but I thought it was a case of maybe they could have; but because they didn't want to spend money on this relay mast [...] and that's why people can't get it. (G1: Older DTT, P8, male)

"Apparently that one [mast] in Jedburgh can be boosted but they won't do it. Or it could be boosted to give a better signal but I don't know whether it's going to cost. They've been talking about this on and off, I did hear about it from somebody but I can't [remember]." (G2: Younger DTT, P2, female)

- Note: At least two G1 participants were sufficiently informed to be able to provide a comprehensive explanation of the 3/6 MUX issue (2 participants had substantial contact with DUK and Digital Outreach)



Q4. How did participants react to being provided with an explanation for the 3/6 MUX issue? (1/3)

- Annoyance at explanation, with poor understanding of who is responsible

[Interrupts interviewer] "they take our money though. They take our money, they should pay [for upgrading] them. We pay them. They should make the effort." [Interviewer: Who should?] "Whoever's in charge." (G2: Younger DTT, P4, male)

- Accepting of explanation – if they understood the business case

"It's a commercial decision [...] it makes sense to me. As long as I'm getting the channels that my licence fee goes towards then I'm happy. I'm getting more than I used to get. I'm not a massive TV viewer. [...] but no I'm quite happy with it. We had a big build up to it. The actual day sort of passed me by." (G2: Younger DTT, P6, female)



Q4. How did participants react to being provided with an explanation for the 3/6 MUX issue? (2/3)

- Surprise at the explanation, evidencing high expectations of digital

"I can't see how a few hills and bumps and things get in the way of technology." (G2: Younger DTT, P3, male)

- Relatively laid back – expectation that coverage will improve

"Aye. It's got to get better hasn't it. It's never gonna be perfect overnight. [...] "You will get it. You'll get everything eventually." [Interviewer: Say if you don't get everything eventually?] "then it's been a failure hasn't it." (G2: younger DTT, P4, male)

"Well we're the first people to try it. By the time they get to two or three years on, it should be perfect by then." (G2: Younger DTT, P5, female)

Q4. How did participants react to being provided with an explanation for the 3/6 MUX issue? (3/3)

- Disappointment at explanation – assumption that Govt. decision to switch made TV coverage more equal

"Surely, digital, everybody should be able to get everything. [Interviewer: Is that what you expected?]. [...] You'd have thought the whole point in going digital, was that everybody would get the same transmission. [...] Otherwise what's the point in all the expense?" (G2: Younger DTT, P1, female)

Q5. What are consumer reactions to fairness and choice? (1/5)

- Not fair - pay the same TV licence

"Well I think it's unfair because everybody has to spend the same amount for their TV licence. Why should somebody who's just picking up 20 channels pay the same as someone who's getting 40 channels? [...] I think everybody knows it just pays for the BBC channels." (G3: Sky & DTT, P3, female)

"We've got an integrated TV and on the box it says you'll get 40 channels. You look through them and you get half of them. I don't think it's very fair because we're paying the same TV licence as everybody else who's got to switchover in the city and they're gonna get all these channels and we're not." (G2: Younger DTT, P2, female)

Q5. What are consumer reactions to fairness and choice? (2/5)

- Mixed reaction to subsidising upgrades of relays

[P4, male: "Aye, [government should subsidise] Well we all pay tax"]
[Interviewer: "so you reckon it would be worth it from taxpayers' money?"] *[P6, female: "That's taking away the money from something else which in the scheme of things..."]* *[P4, male: "What a war in Iraq?"]*
[P3, male: Aye, that's what's taking away the money – a lost cause in Afghanistan] *[P4, male: That's a different night. If they can find the money for that, they can find the money for us, surely.]* (G2: Younger DTT)

"The commercial [channels] I think they should be available on all platforms because you're asking people to pay for the extra ones to subsidise them not pulling their fingers out. Seventy-five quid a household [for freesat from Sky] is a lot of money. Who gets the money for that? Some of that must be going back to them" (G2: Younger DTT, P1, female)

Q5. What are consumer reactions to fairness and choice? (3/5)

- Not fair, no control, that's life

"In the ideal world, yes you should get everything but there's no such thing as an ideal world and it comes back to where you live and you'll never get the ideal world. So even if you were to think about it from dusk 'til dawn, it's never gonna happen. So people probably just don't think about it because it's where we are and what we're getting." (G3: Sky & DTT, P7, female)

- Low interest in the current COM channels

"...eventually as the Digital UK website got better and better, I could see what we were missing. And to be honest I looked at them and I thought 'well I don't really want them'. (G1: Older DTT, P6, male)"*

- May be interested in future COM channels

"...perhaps in five year's time there could be decent channels that were worth watching, but because they haven't upgraded the systems here we won't get to see it." (G1: Older DTT, P8, male)

**note that majority of participants were not aware of the Digital UK website; this is an atypical response from Group 1*



Q5. What are consumer reactions to fairness and choice? (4/5)

- Concerns about coverage prediction certainty

"...a lot of it seems to be trial and error. You had to buy the 'digibox' and you take it home, expecting something and you don't get what you expect or the Freesat – how would you know 100% you weren't in that little area who couldn't get it? So, there's no 'assurity' is there?" (G2: Younger DTT, P1, female)

- Difficulty judging fairness – no information on what it would cost to upgrade a relay

"Why do they not know how much it's going to cost to get all the channels?" (G1: Older DTT, P1, female)



Q5. What are consumer reactions to fairness and choice? (5/5)

- Suggestion that relay upgrades could be a licence condition

"Presumably they're paying the government some money for the licence or monopoly or whatever, so basically the government should say you can have this bandwidth for whatever but you have to provide it to all [Interviewer: a licence condition?] [...] They shouldn't be able to cherry pick who they can provide to because it's most lucrative to them. I'm sorry but you should be providing the service for everybody and then they'll be getting money out of it come hell or high water." (G2: Younger DTT, P1, female)

[P4, male: "If the programmes are good enough, they'll be watched."] *[P1, female: "Yeah, exactly. And they'll be reaching more people."]* (G2 Younger DTT)

Q6. What are consumer reactions to future changes? (1/1)

- Incredulity

"You'll have a revolution on your hands [others laugh]" (G1: Older DTT, P2, female)

"...you don't think in another six months down the line, they'll have another thing coming out? [...] We're just getting fleeced!" (G2: Younger DTT, P3, male)

- Relatively low interest in HD, even if own HD ready sets

"I don't think I would upgrade to HD because of the kids" (G3: Sky & DTT, P8, female)

- TV purchases are not specifically to access novel features

"The TV that I bought, it came with a docking station for an iPod on it and you sort of think 'oh my god, what next?' but I wouldn't go out and buy a TV with an iPod docking station on it. It's just because it was the best deal in the shop at the time" (G3: Sky & DTT, P7, female)

Q7. From where do/did consumers get information, if any, on 3/6 MUX? (1/4)

- Not well informed from formal sources, rather, informal, accidental experience or hearsay
- Awareness raised through TV listings magazines showing services that those receiving 3PSB cannot receive

"I can't get UKTV History or something like that. [...] You just tend to know the ones that you can't get cause you tend to look in the Radio Times at what's on on the Freeview and there's never anything on the telly, and the one you want to watch is the one you can't get." (G2: Younger DTT, P1, female)

Q7. From where do/did consumers get information, if any, on 3/6 MUX? (2/4)

- Neighbourly comparisons

"...when I went to my next door neighbours, they were thinking about getting a new TV so I said 'I check it first' and they didn't get the same channels as I got either, so how's that?" (G2: Younger DTT, P3, male)

- General word of mouth

[Interviewer: Have you talked about [coverage issues] with others? Or are you just mentioning it because we're here?] "No I've spoke to other people like this. Family members I've spoken to like." [Interviewer: On what sort of angle?] It's not really fair that we only get 20 channels or whatever, and there's other areas where... 'cause we're the first region to be switched over so it will be interesting to see what other regions get when they switch." (G2: Younger DTT, P2, female)

Q7. From where do/did consumers get information, if any, on 3/6 MUX? (3/4)

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- Noticing unavailability of specific channels

"I noticed it. He [father] watches racing, he likes sport, so I said go to Sky Sports News, it's perfect. Number 83 is the channel eh. Well 83 on his was nothing. Nothing at all, and I thought 'that's strange'. So when I went through it he had nay UK History, 'cause that's channel 12." (G2: Younger DTT, P3, male)

- Product packaging

*"Well it tells you on the box what [channels] you're to get. [...] They should have it 'you *might* get these channels instead of saying 'you've got these channels' because you've not got them. I should have them for false advertising."* (G2: Younger DTT, P3, male)

Q7. From where do/did consumers get information, if any, on 3/6 MUX? (4/4)

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- Retailers (advising no DTT available if could not receive Five pre-DSO)

"There was like two groups of people: people who could get channel five who were going to have no difficulty at all. [...] And there was another group of people who could not get channel five who really didn't know what was going to happen. Because when they went into the shop to buy digital box the people in the shop said to them, ask them, 'can you get channel five?' and you'd say 'no' and they'd say 'well in that case there's no point getting one because it won't work.'" (G1: Older DTT only group, P8, male)

- Local press (e.g., Southern Reporter)

Q8. Any evidence of a political campaign? (1/1)

- Low unprompted awareness of campaign
 - Clear but atypical prompted awareness from members of Group 1

"But Michael Moore's point was what if that shopping channel doesn't make money, what if it's taken off and something is put in its place, which is something you might want to see. Are you going to feel aggrieved then? Yeah, well you would do. And that was Michael Moore's point. It's part of our Freeview service and we're not getting it all. And whilst at the moment I wouldn't be interested in any of these channels, although some people might, if they suddenly put in 24 hours of rugby and you had to be on Selkirk to watch it, then I would start to be ..." (G1: Older DTT, P6, male)

- Much lower awareness from Groups 2 and 3

[Interviewer: Has anyone heard of Michael Moore's campaign?] "About the post offices?" (G2: Younger DTT, P5, female)

[Interviewer: Do you support the campaign?] "well it's his job isn't it" (G3: Sky & DTT, P5, female)

"And there's been a lot [of communications]. If you wanted to know, there's loads of times you could have asked somebody if you were bothered. But I think the majority of people are just happy they got more than five channels, and you'll not get any complaints. And if you think 'agh! I can't get ITV3, oh damn, I just go to ITV4'. Nae t'bother. 'Cause you're still better off than five channels." (G2: Younger DTT, P3, male)

Q9. Do consumers consider the information they received to be sufficient? (1/1)

- Evidence within each of the 3 groups of low awareness of Digital UK website, and formal communications not read
 - Overwhelming volume
 - Indistinguishable, undated material
 - Low perceived need
 - Accessibility (no PC)
 - Slow broadband connection
 - 'Misleading' product packaging

[P5, female: "Did you not get something through the post recently? Cause I binned it"] [laugh] [P1, male: "Do you file your things the way I do?"] [P5, female: "F' under Fire"] (G3: Sky & DTT)

"Yeah false advertising [on product packaging]. It's like going into a shop and buying six cans but only getting 2. Ken what I mean, it's the same here." (G2: Younger DTT, P3, male)

Q10. What do consumers consider as implications for them of being predicted able to receive 3 MUX? (1/4)

- Depends on motivation to receiving more (/the COM) channels
- A reason to choose Sky

"Well when I had the Sky in, I knew the switchover was coming and since I couldn't get a Freeview reception I decided to go for Sky then rather than wait. I think a lot of people did." (G3: Sky & DTT, P1, male)

"except those in difficult areas who were told, if they went Sky, that would solve the problem. So only if they had difficulties, you go to Sky" (G1: Older DTT, P2, female)

- Personal concerns about cost and politics of choosing Sky

"I can't justify the cost of Sky because it's so expensive." (Melanie, Group 2)

"I resent paying Rupert Murdoch [...] [you're] held to ransom really. That's blackmail in a way" (G3: Sky & DTT, P6, female)

Q10. What do consumers consider as implications for them of being predicted able to receive 3 MUX? (2/4)

- Where Sky was the only option for multichannel (pre-DSO), reluctance to lapse from Sky subscription

"I think once you've had something, especially if you've got kids, older, and it would be too hard to readjust again back to being without it and just having like your basic channels." (G3: Sky & DTT, P8, female)

- Feel that Sky is only alternative, low awareness of Freesat
 - FreesatfromSky vs. lapsed Sky subscription vs. Freesat

"Well I had the Sky dish and Sky box and the card that I had, I just got the basic, it's the freesat channels [Interviewer: from Sky?] yeah." (G3: Sky & DTT, P3, female)

"I don't know [what Freesat I'm talking about].. the TV and digital magazine, if you pick a channel it will tell you the number you get it on Freeview, the number you get it on Virgin, and the number you get it on Sky, and now it's got Freesat and has come up with a number. But I don't know what it is." (G3: Sky & DTT, P1, male)

Q10. What do consumers consider as implications for them of being predicted able to receive 3 MUX? (3/4)

- Feel hard done by, as no triple play from Sky in area – concerns about value for money

"It's just regular Sky but it's all, [sales staff] kind of offer you the phone and the broadband as well and only for £17 a month. I was like 'oh that's actually good, can you get the broadband' 'Oh no you've got to pay an extra £10 if you want the broadband'. And there was no time scale as to when they were gonna be [able to access Sky broadband]" (G2: Younger DTT, P2, female)

Q10. What do consumers consider as implications for them of being predicted able to receive 3 MUX? (4/4)

- For many, cost key for platform choice
 - Minimising cost more important than channel choice (for participants choosing DTT, where analogue terrestrial pre-DSO)
 - Some 3 MUX DTT participants invested in expensive DTT products

“The other thing about the channels is the fact that I think a lot of people didn’t say ‘well I’m going to go for Sky because I get all these channels. They’re gonna say wait a minute I’ve got to change this, and the cheapest option was to go for a digibox [Freeview] than buying all this material. A big change. I think that was an influence, not you saying, ‘what programmes were you looking for?’. I don’t think people thought about that at all. They thought about what expense am I going to incur in exchange and went for the digibox.” (G1: Older DTT, P2, female)

Q11. What are the important considerations in providing appropriate 3/6 MUX messaging? (1/6)

- Many formal comms not read or processed (volume)
 - Potential for infomercials/local news sources
- Most participants had not researched their options

[Interviewer: any research?] “None, just what I heard on telly, on the radio, and him [pointing to P3] he keeps me informed. He’s an electrical genius.” (G2: Younger DTT, P4, male)

“No [research], not really, to be honest I think the Sky was one of those ones you have every few months and I’ve never had Sky and it comes up every few months, ‘shall we have sky?’ ‘nah, we don’t really need it do we?’ and it’ll come up again a few months later. So not really anything. Just what we saw on TV.” (G2: Younger DTT, P6, female)

Q11. What are the important considerations in providing appropriate 3/6 MUX messaging? (2/6)

- For Sky customers, lower awareness of availability of DTT with DSO
 - Very low awareness of Digital UK website
- Responsibility for switchover is not well understood

"I think it's the government. It's the broadcasters. Nah I just think broadcasters." (G2: Younger DTT, P3, male)

"It's just progress isn't it. It's across the board. I would have thought everybody [is responsible]" (G2: Younger DTT, P4, male)

"It would be interesting if that knowledge was public knowledge then how many people would be writing in to complain to... who do you complain to.. the public service broadcasting people or the commercial people? I think they would be absolutely inundated with people complaining." (G2: Younger DTT, P1, female)

Q11. What are the important considerations in providing appropriate 3/6 MUX messaging? (3/6)

- Many do not replace their TV products frequently
 - Importance of getting the right equipment for their needs (e.g., 'try before you buy')
- Need for transparency*

"I think they should be a lot more open because I personally felt I had to drag the information out as opposed to 'the reason you're not getting these channels is'.. it weren't stated. Some people were told you'll get 40 channels which is not true you will get up to 40 channels, we were told we would get 20 channels but I'm telling you some of them are not channels, they're not even television, they're just pictures of text going past. So I think they should be telling you very very accurately what you are gonna get and what somebody from a main transmitter's getting. I do think it was not well laid out [...]" (G1: Older DTT, P6, male)

* risk of angering many

Q11. What are the important considerations in providing appropriate 3/6 MUX messaging? (4/6)

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- Concise, accurate and simple messaging

"I think one of the problems we had here was that there was so much information. We were swamped with repeated [information] and it was badly presented actually [...] Be clear cut, simple, short." (G1: Older DTT, P2, female)

- Recognition that the process can be complex for some

"One of the difficulties here was that there were definitely two groups of people: people who were going to have no difficulty and another group of people to whom this wouldn't apply. They started off by saying this is dead easy, then it was this or this or this." (G1: Older DTT, P8, male)

"It was always going to be simple, so straightforward" (G1: Older DTT, P3, female)

Q11. What are the important considerations in providing appropriate 3/6 MUX messaging? (5/6)

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- Highlight distinction between coverage and reception
 - e.g., to inform people who can get 6MUX from a main transmitter how they could do so
- Clearer distinctions between impartial advice and selling
 - Confusion gave one-stop shops an advantage
 - Pushy, changeable 'deals' and 'offers'
 - Need for trusted information sources
 - Higher awareness needed for impartial branded information sources

"They need to advertise as a non-commercial site. You know, just like [named a commercial price comparison website!], somebody said. Just on the BBC, however many times a week. The first time it goes past you, but the second time you might just write it down." (G3: Sky & DTT, P4, female)

Q11. What are the important considerations in providing appropriate 3/6 MUX messaging? (6/6)

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- Platform neutrality vs. neutrality within payment methods
 - DSO is switching off of free to air analogue terrestrial TV
 - Potential to highlight that most valued channels are available on at least one subscription-free service (Freeview, Freesat, FreesatfromSky)
 - And that other premium content and services available via subscription (Sky, Virgin, BT Vision, Tiscali...)

“Freesat does that mean it’s free? Absolutely free?” (G2: Younger DTT, P3, male)

“Why is it called Freeview when it’s not free!” (G3: Sky & DTT, P5, female)

37



conclusions

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- What are the range of consumer expectations in relation to 3 and 6 MUX coverage?
 - Mixed, generally poor, understanding of the reasons for 3MUX
 - General perception of unfairness, though not the main issue with DSO
 - Questions about the License Fee
 - Informal information sources most likely, formal information often ignored
 - Expectation that situation will improve
- What do consumers consider as implications for them of being predicted able to receive 3 MUX?
 - Reactions to receiving 3PSB dependent on motivation to COM channels
 - Lack of DTT pre-DSO cited as a reason for having got Sky
 - Minimising cost a bigger concern (for households who were not previously digital and who went for DTT) than channel choice
 - General perception of pay TV being only solution to get channels on COM MUXs (low awareness of Freesat)
 - But note that even Sky group reported 50-75% of their viewing was to 'main 5' channels
- In the context of insights relating to the above research questions, what are the important considerations in providing appropriate 3/6 MUX messaging?
 - Evidence of formal information not being absorbed
 - Potential for more TV based communications
 - Expressions of not knowing who to trust for advice – sales vs. information
 - Need a higher profile for DUK as source of independent, impartial advice
 - Simple message needed regarding payment options (like DUK website now uses)
 - Payment method neutrality (e.g., nearly all free services available either via Freeview, Freesat or FreesatfromSky, which you get via a one-off payment; additional services via pay services)
 - Potential for better understanding of what the License Fee covers

38

