

BBC Trust Unit omnibus survey on High Definition TV

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Data and interpretation endorsed by BMRB**

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1 Purpose

On 25 September 2007 the Trust published its provisional conclusions on the proposed BBC HDTV channel and launched a public consultation on its decision.

A particular issue for the Trust concerned issues around launching on Freeview. So as part of the consultation, additional audience research was commissioned to explore the public's views on whether the Trust should approve the launch of a four hour overnight service on Freeview, and the timing of such a launch.

2 Methodology

The Trust commissioned market research agency BMRB to carry out a face to face survey of 1088 adults 15+ across the four nations of the UK. Fieldwork was conducted in respondents' homes in October/November 2007. Data have been weighted to be representative of the UK population in terms of age, sex, working status, social grade and region.

The survey began with a series of contextual questions. Respondents were then read a statement which explained the decision the Trust was considering, along with an explanation of what implications it would have on service provision and purchase of technology (see Appendix).

3 Awareness questions

The survey included a series of questions designed to provide contextual understanding for the Trust.

Eighty-three per cent of all adults in the UK said that they were aware of High Definition TV or HDTV.

Those who were aware of HDTV were asked some more detailed questions, the responses to which are presented overleaf.

	All adults in UK aware of HDTV
Base	N = 855
Unweighted sample size	%
Awareness of the need for certain equipment to watch HDTV	
Aware of the need for an HD –ready set	83
Aware of the need for HD-enabled set-top box	63
Aware of the need for additional monthly subscription	59
Aware of need for all three	49
Currently own or rent an HD-ready set	30
Currently receive any HDTV channels	23
Aware that the BBC is thinking of launching a new HDTV channel	16

The following question was asked in order to identify those who were considering getting access to the new BBC HD TV channel in the future.

And do you think that you would be interested in getting access to this new BBC HD television channel?

	All adults in UK
Base	N = 1088
Unweighted sample size	%
Yes – in the next 12 months	16
Yes – in a year or two	11
Might consider in the next few years	30
Not interested at all at the moment	42
Don't know	1

For analysis purposes the survey combines the first two categories, that is those people who would be interested in accessing BBC HD in the next year or two.

4 MAIN RESEARCH FINDINGS

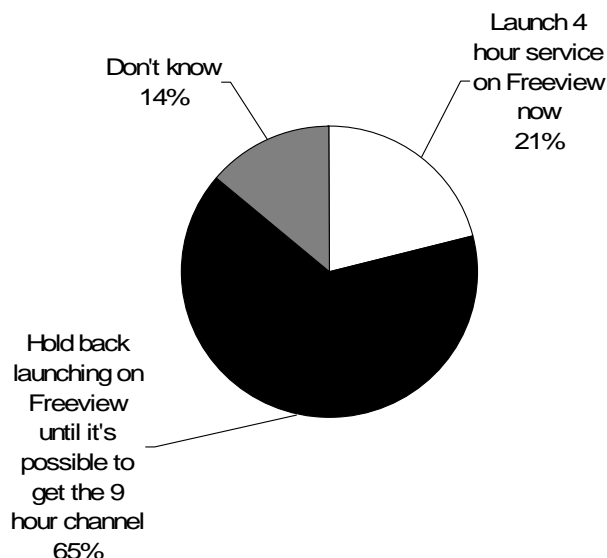
Respondents were asked to choose whether they would prefer the BBC to either:

- Launch the 4 hour BBC HD Freeview channel option now, so that those who want to buy a box now and watch it have the choice, even if there is a risk that they will have to change the box in some way in the future to get the 9 hour channel, or
- Hold back launching the BBC HD Freeview channel until it's possible to get the full 9 hour channel with only one digital box upgrade, even if that means there will be no BBC HD Freeview option for at least 18 months and maybe even longer.

They were also given the option to say they didn't know.

There is a strong preference amongst survey respondents for holding back on the launch of the 4 hour service on Freeview. Almost two-thirds of the total sample thought the BBC should wait, and only a fifth thought they should go ahead. In research terms, there is also quite a high proportion of 14 per cent who "don't know" – although given the complexity of the issue, the fact that it is not higher than 14 per cent suggests that most respondents did understand the question.

Which of these options would you prefer the BBC to do in regard to the HD channel for Freeview? Base: all respondents (n = 1088)



Further analysis then looked just at the views of those people who plan to get the BBC HDTV service in the next year or two. Although not all of this group will necessarily be planning to access it on Freeview, it does give a good idea of those to whom the decision is most likely to be relevant.

There are higher levels of support for launching now amongst those who intend to take up BBC HD, but even amongst this group there is still a clear majority who feel that on balance the BBC should wait.

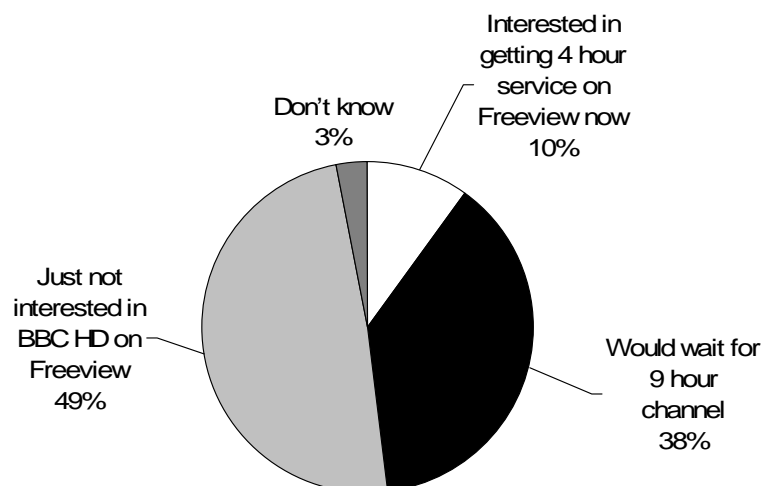
Of the 275 people who fell into this 'early adopter' category, 33 per cent were in favour of launching now and 62 per cent thought the BBC should wait. Only 5 per cent in this group said they didn't know.

5 Predicted behaviour if 4 hour service was launched

If the BBC did launch the 4 hour service on Freeview, 1 in 10 of the total sample say they would take up the service now. Approaching 4 in 10 would rather wait for the 9 hour channel, and the remaining half of the sample would not be interested in either.

And if they did launch the 4 hour BBC HD channel now on Freeview, would you be interested in getting a box to watch it, would you rather wait until the 9 hour channel is available, or are you just not interested in getting a BBC HD channel on Freeview?

Base: all respondents (n = 1088)



Again, analysis looked specifically at the people who told us they were interested in getting BBC HDTV in the next year or two. Of this group, approaching a quarter say they would go for the 4 hour service now but over half would rather wait for the 9 hour channel.

Having considered this information, about 1 in 5 of this group weren't interested in BBC HDTV on Freeview (possibly they intend to access it via another route).

	Those interested in getting BBC HD in next year or two N = 275 %	Those who may consider N = 315 %	Those who are not interested at all N = 485 %
Interested in getting 4 hour service on Freeview now	23	9	2
Would wait for 9 hour channel	57	54	14
Just not interested in BBC HD on Freeview	19	32	82
Don't know	2	5	1

Appendix A – Research questions

1. Are you aware of High Definition Television, or HDTV?

Yes

No

Don't Know

2. Are you aware that at the moment you have to have the following to watch high definition television programmes. So firstly....

A high definition ready television set (labelled 'HD ready')

A new type of HD-enabled set top box, such as for Sky HD or Virgin V+, instead of the existing standard set top box

Pay an additional monthly subscription fee to get the HD capable digital box from Sky or Virgin

3. Do you own or rent an 'HD ready' television set?

Yes

No

Don't Know

4. Do you currently receive any HD television channels? If you do you will be paying a subscription for HD channels and have an HD capable digital box?

Yes

No

Don't Know

The BBC are planning to launch a new HD TV channel that you can watch without paying a subscription. It will be broadcast from 3pm to midnight and show a range of BBC programmes in High Definition quality picture and sound. Like for the HD services at the moment to watch it you will have to buy or rent a new HD receiver, but unlike those at the moment there will be no monthly subscription fee to watch the channel.

5. Were you aware that the BBC were thinking of launching a new HD television channel before today?

Yes

No

Don't Know

6. And do you think that you would be interested in getting access to this new BBC HD television channel?

Yes - in the next 12 months

Yes - in a year or two

Might consider in the next few years

Not at all interested at the moment

Don't Know

On cable and satellite (both Sky and the new Freesat service that will launch next year) the BBC will launch a 9 hour HD channel that will be available to watch straight away if you buy or rent an HD capable box

For Freeview, the situation is a bit more complicated. With the technology that is available at the moment it won't be possible to watch the full 9 hour BBC HD channel on Freeview straightaway. You would have to buy a new kind of digital box which won't be available for at least 18 months and, depending on where you live, it may be as long as 4-5 years before everyone will be able to watch the 9 hour BBC HD channel on Freeview.

What the BBC could do in the meantime is launch a 4 hour HD channel that will have the best of the BBC's HD programming. It would have to broadcast late at night but you would be able to record it to watch the next day if you bought an HD capable Freeview box that was able to record programmes. A Freeview box like this would cost around 200 pounds. When the BBC HD 9 hour Freeview channel launches in the future you would have to adapt or upgrade this box to get the BBC HD 9 hour channel, and other HD channels from other broadcasters, but it will still work to receive and record non HD channels

7. Which of these options would you prefer the BBC to do in regard to the HD channel for Freeview?

Launch the 4 hour BBC HD Freeview channel option now so that those who want to buy a box now and watch it have the choice, even if there is a risk they will have to change the box in some way in the future to get the 9 hour channel

Hold back launching the BBC HD Freeview channel until it's possible to get the full 9 hour channel with only one digital box upgrade, even if that means there will be no BBC HD Freeview option for at least 18 months and maybe even longer

Don't Know

8. And if they did launch the 4 hour BBC HD channel now on Freeview, would you be interested in getting a box to watch it, would you rather wait until the 9 hour channel is available, or are you just not interested in getting a BBC HD channel on Freeview?

Interested in getting 4 hour now

Would wait for 9 hour

Just not interested in BBC HD channel on Freeview

Don't Know