

Public Value Assessment Cable Video on Demand Quantitative Research

February 2006

Redacted for Publication

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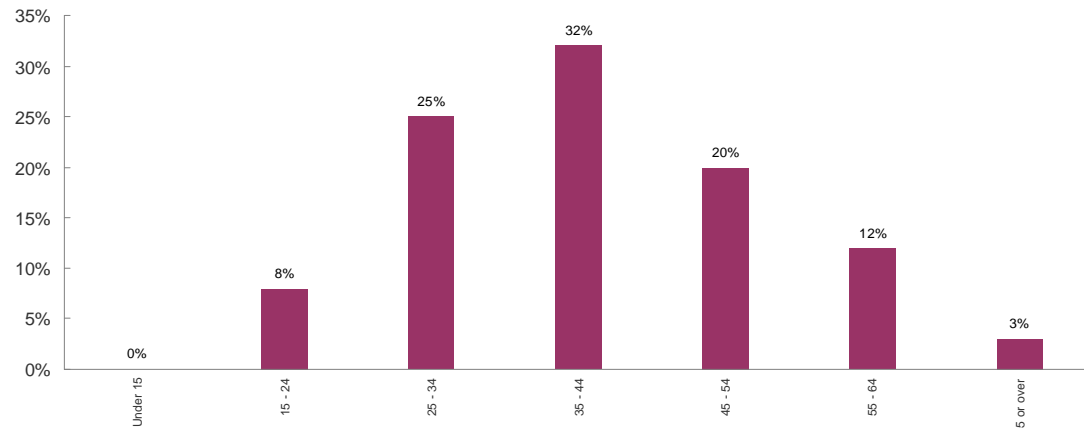
Demographic Profile of Video on Demand Users

The profile of video on demand users was relatively evenly distributed over the 25-54 age-bands. There was lower use among 55+ and low response from 16-24's.

No respondents were aged under 16.

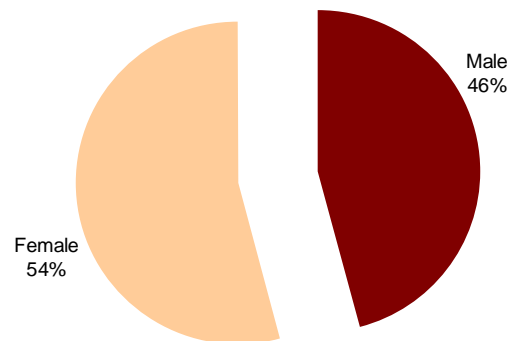
The sample was skewed slightly more female (54%). This represents TV viewing in general.

Age range of users



Sample size: 1,004 users

Gender of users



Sample size: 1,004 users aged 16+

Location and working status

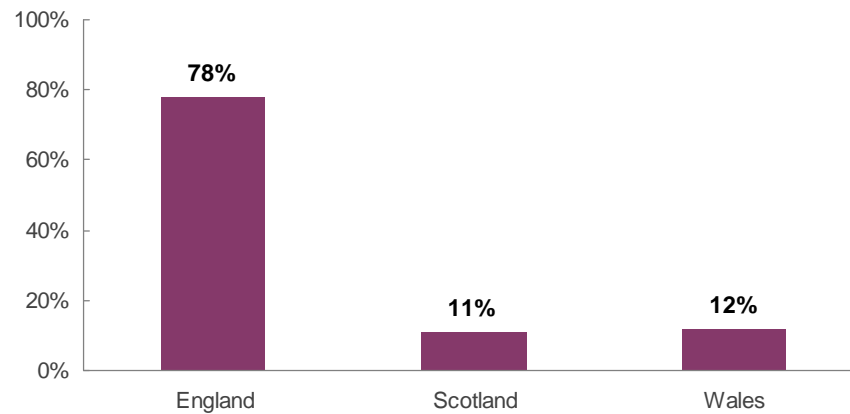
The majority of responses were from users in England (78%). The remaining responses were obtained from Wales and Scotland.

At the time of the survey the service was unavailable outside of England, Wales and Scotland.

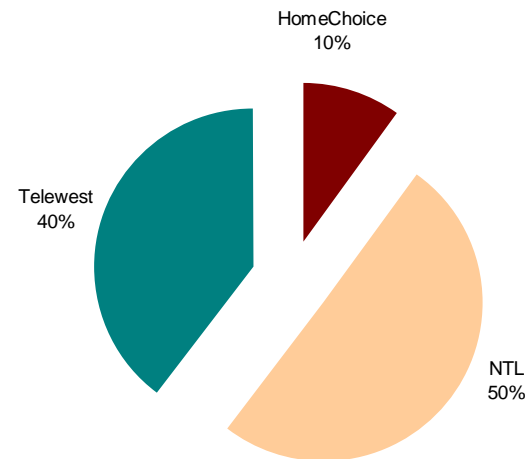
Sample was split across all three operators conducting the 7-day catch up trial. At the time of the survey NTL were taking 20hrs of BBC programmes every week and both Telewest and HomeChoice 50hrs of BBC programmes.

NTL also carried BBC programmes which are series stacked – available for up to seven weeks after transmission

Where do you live?



Split by operator



Sample: 1,004 users aged 16+

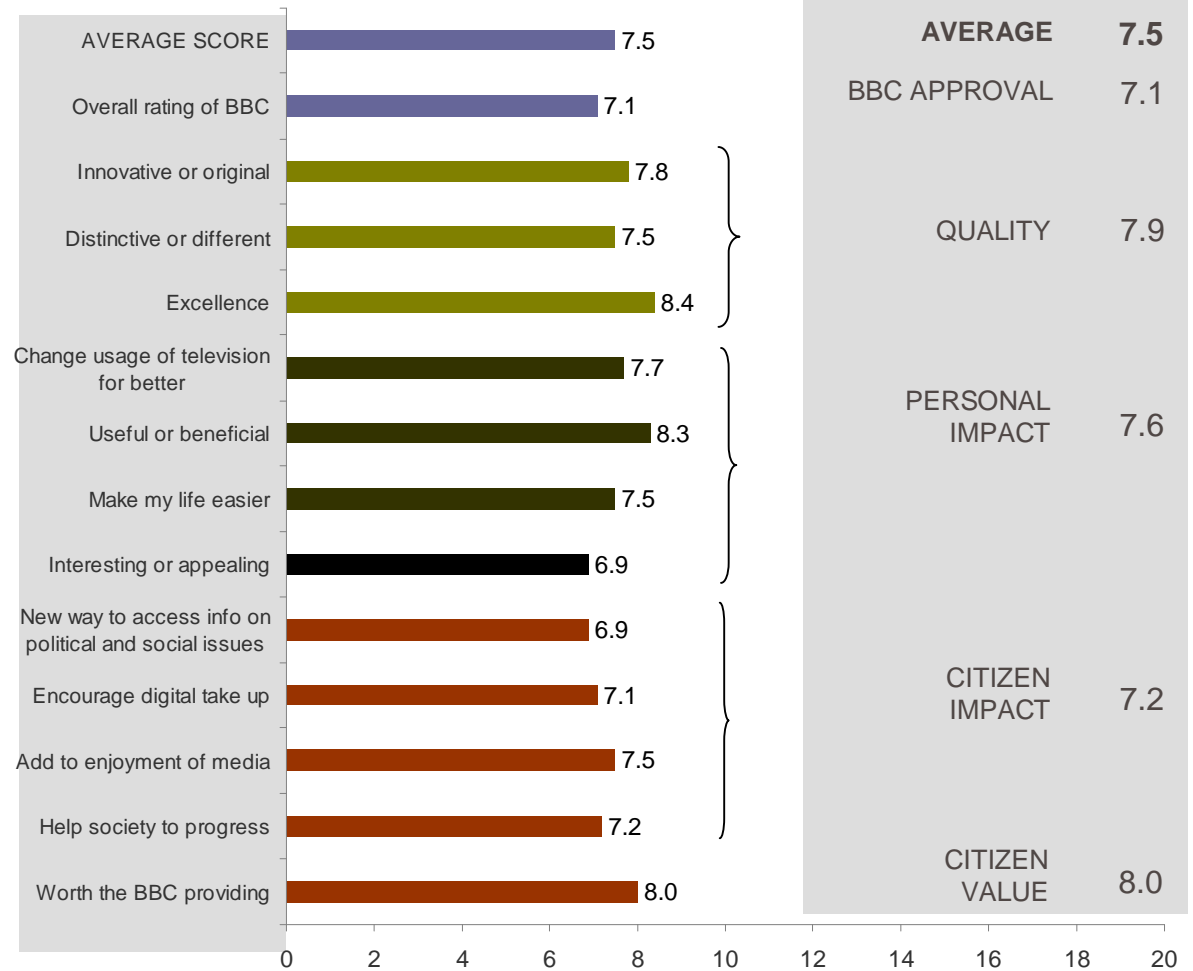
Sample size: 1,004 users aged 16+

Summary of PVA Scores

The overall average for the service of 7.5 out of 10 is reflected fairly consistently across all the questions asked.

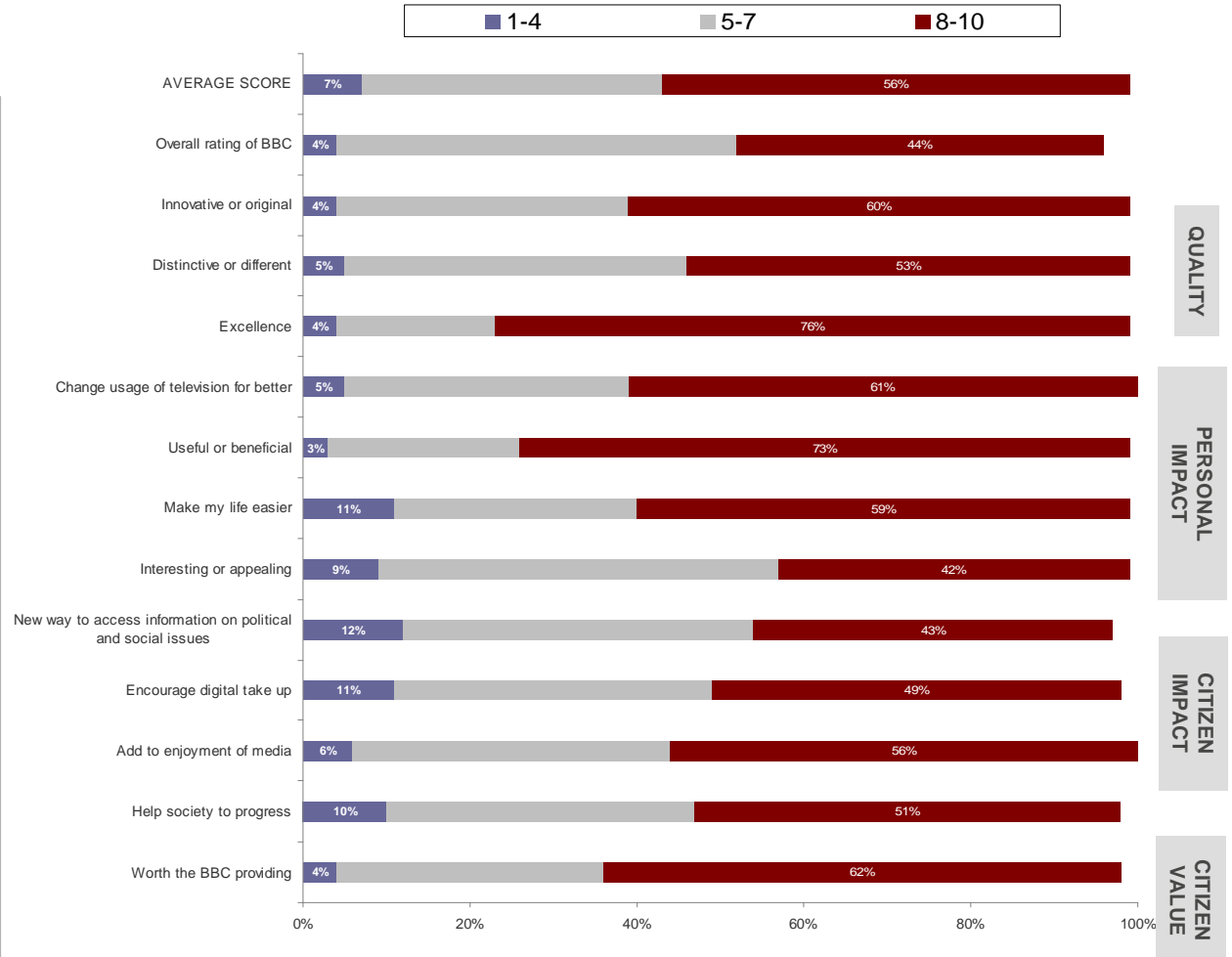
Strongest endorsement for the BBC providing this sort of service comes from the measures of quality and personal impact.

Citizen impact was less valued and this may be because respondents were aware that as yet the penetration of video on demand is still niche as a proportion of the whole of the UK.



sample: 1,004 users aged 16+

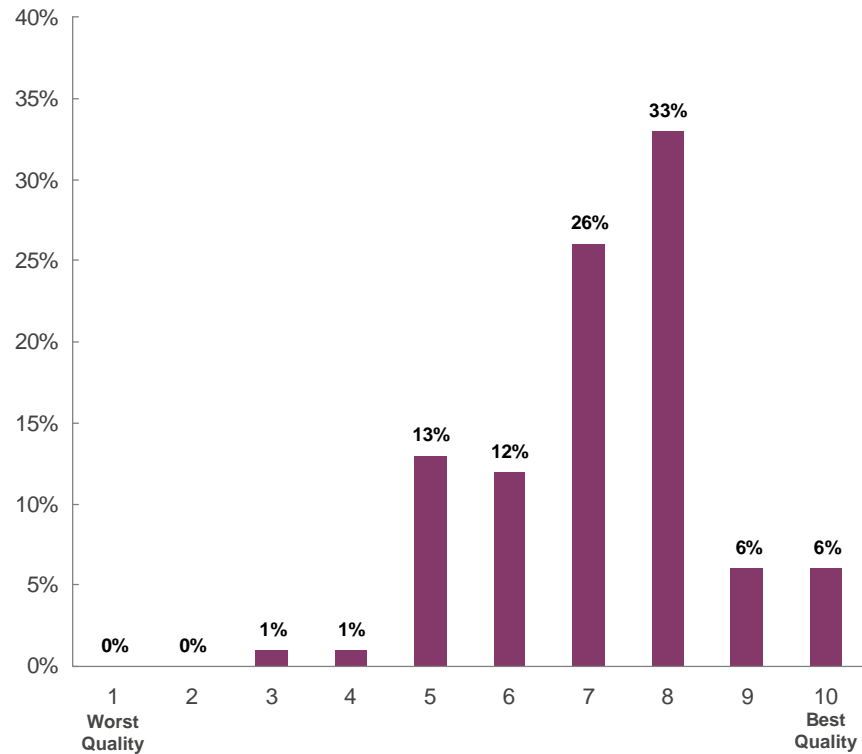
Distribution of PVA Scores



	Scored 1-4	Scored 5-7	Scored 8-10
BBC approval	4	48	44
Quality	4	32	63
Personal impact	7	34	59
Citizen impact	10	39	50
Citizen value	4	32	62
Overall average	7	36	56

Overall Rating of the BBC

How would you rate BBC channels overall in terms of the quality of the programmes that the BBC broadcasts?



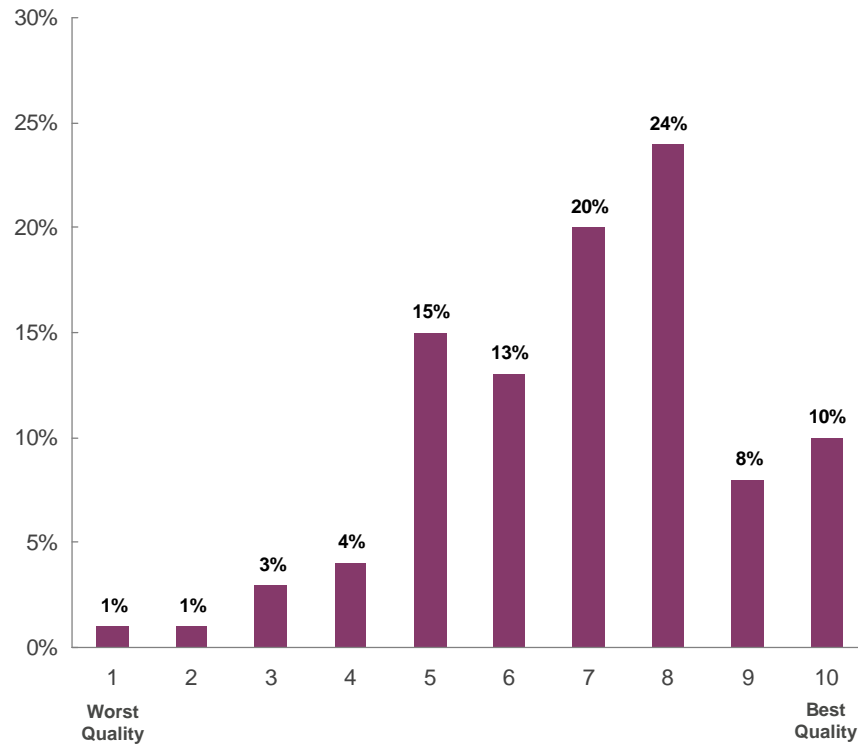
Average Score:	7.1
Total % scored 1-4:	4%
Total % scored 8-10:	44%

sample: 1,004 users aged 16+

BBC APPROVAL

How “interesting or appealing” users considered video on demand

Please tell me how “interesting or appealing” you, and members of your household, find being able to access BBC programmes via this video on demand service.



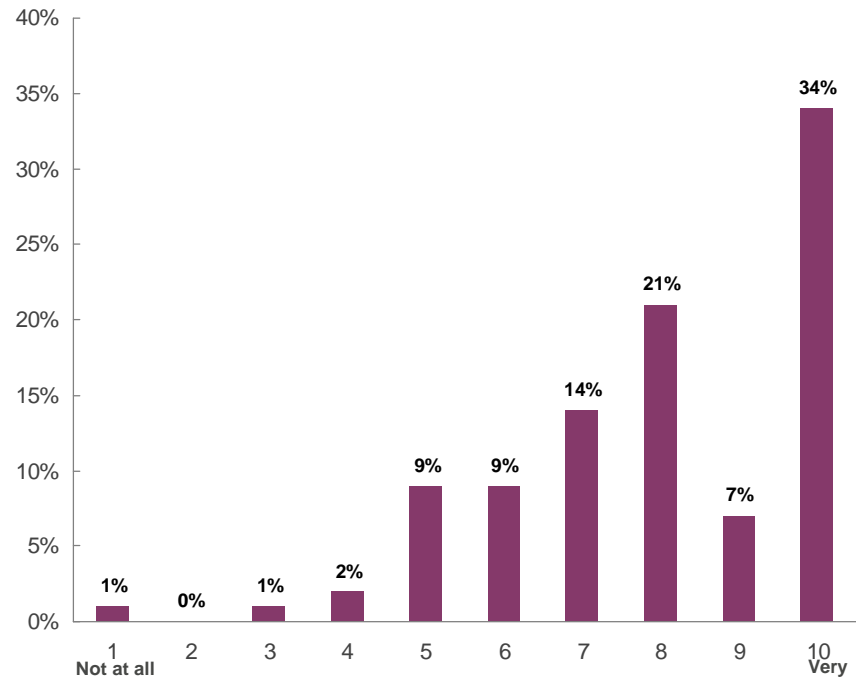
Average Score:	6.9
Total % scored 1-4:	9%
Total % scored 8-10:	42%

sample: 1,004 users aged 16+

PERSONAL IMPACT

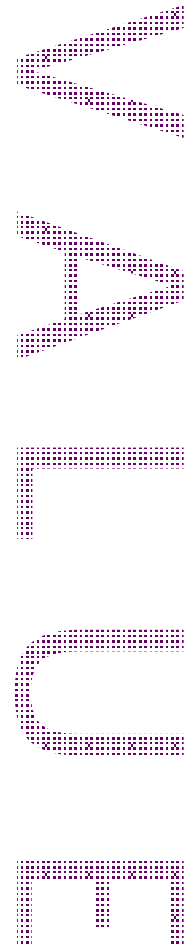
Whether Video on Demand should be provided by the BBC

Bearing in mind that the BBC has to cater for a wide variety of audiences, to what extent do you think BBC Programmes should be available via this on-demand service for the benefit of others and society as a whole?



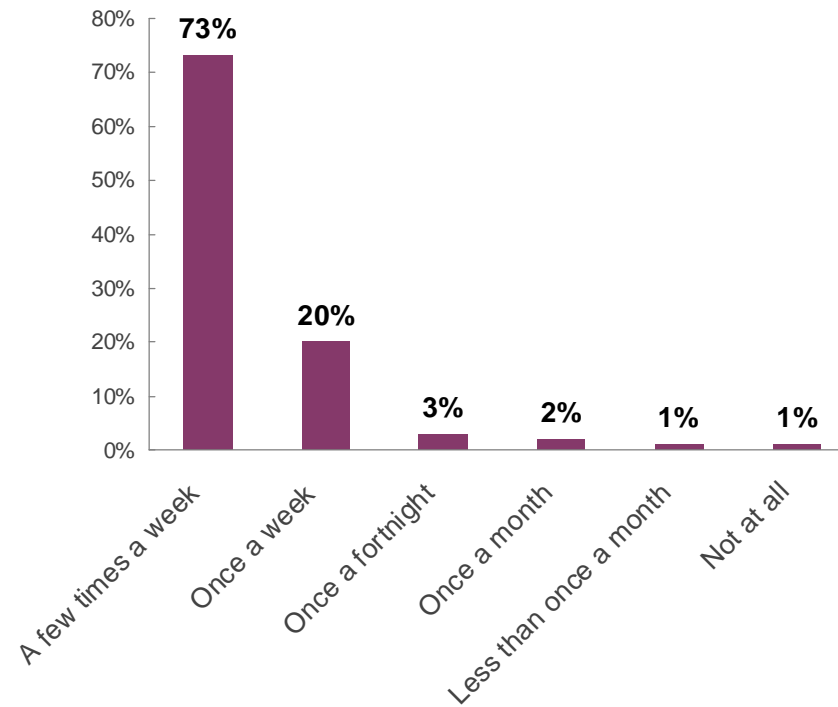
Average Score:	8.0
Total % scored 1-4:	4%
Total % scored 8-10:	62%

sample: 1,004 users aged 16+

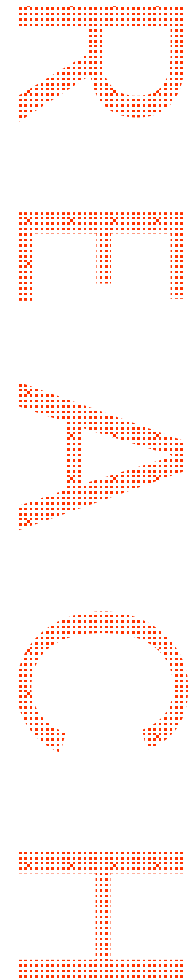


Frequency of usage of Video on Demand

How often do you think you (personally), or members of your household would access BBC programmes via this on-demand service in the next 12 months, assuming it remains free to use?

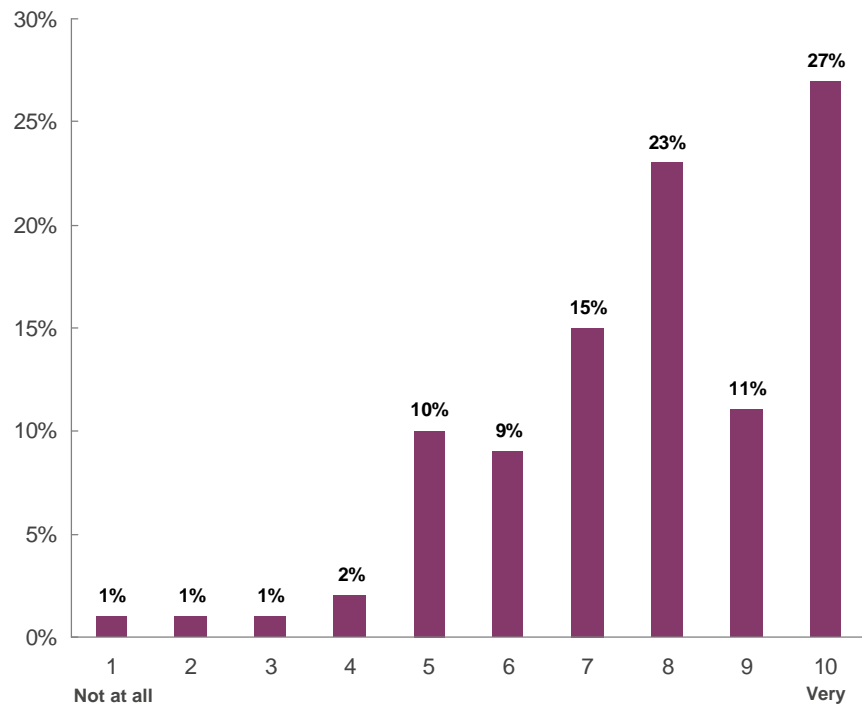


sample: 1,004 users aged 16+



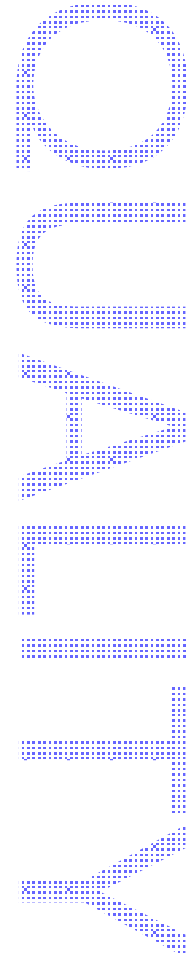
Originality of Video on Demand

To what extent do you feel being able to access BBC programmes on-demand via this on-demand service is "innovative" or "original"?



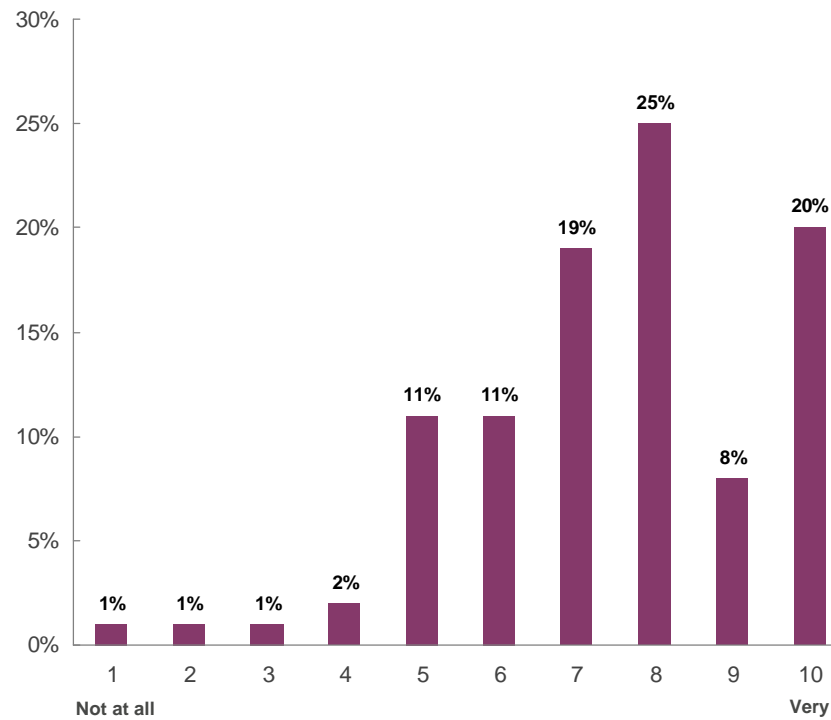
Average Score:	7.8
Total % scored 1-4:	4%
Total % scored 8-10:	60%

sample: 1,004 users aged 16+



Distinctiveness of Video on Demand

To what extent do you feel being able to access BBC programmes via this on-demand service is "distinctive" and "different"?



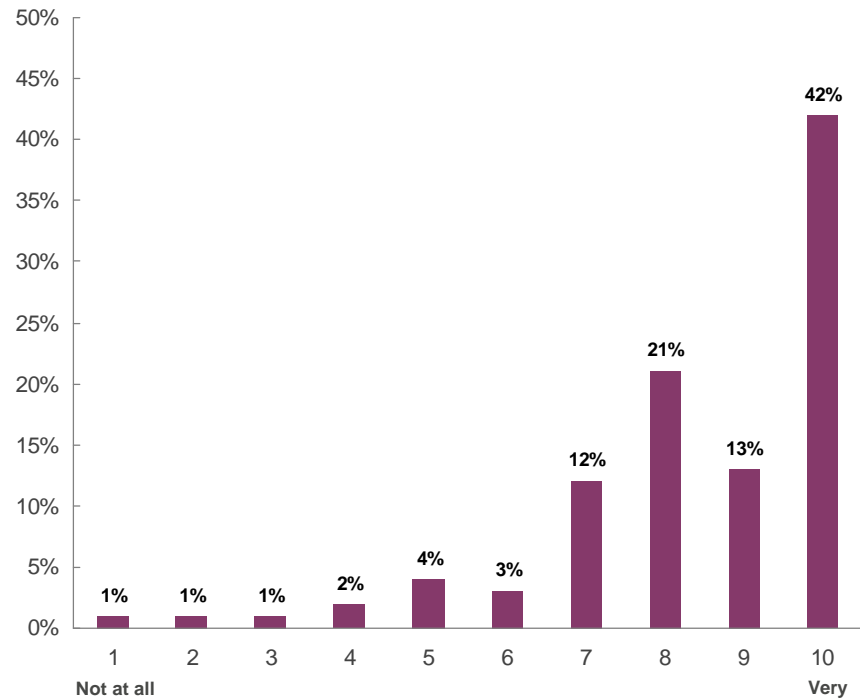
Average Score:	7.5
Total % scored 1-4:	5%
Total % scored 8-10:	53%

sample: 1,004 users aged 16+



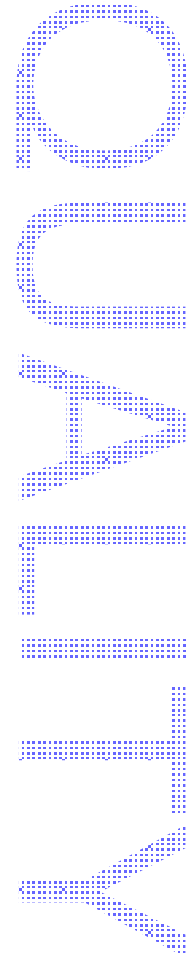
Excellence of Video on Demand

To what extent do you feel being able to access BBC programmes via this on-demand service is "excellent"?



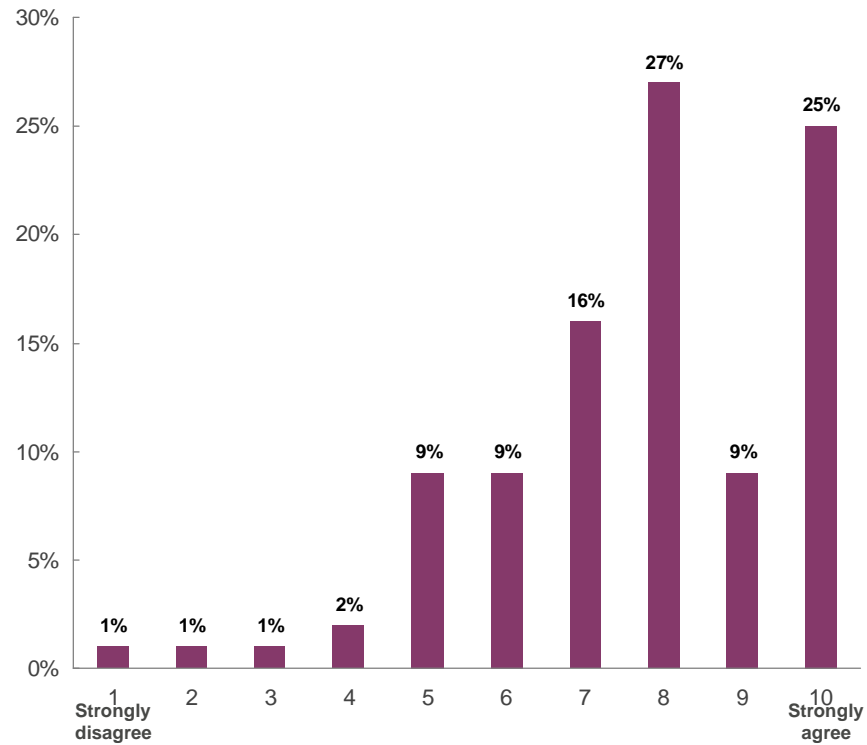
Average Score:	8.4
Total % scored 1-4:	4%
Total % scored 8-10:	76%

sample: 1,004 users aged 16+



Whether Video on Demand will change the way television is used

Having access to BBC Programmes via this on-demand service could change for the better the way I use television



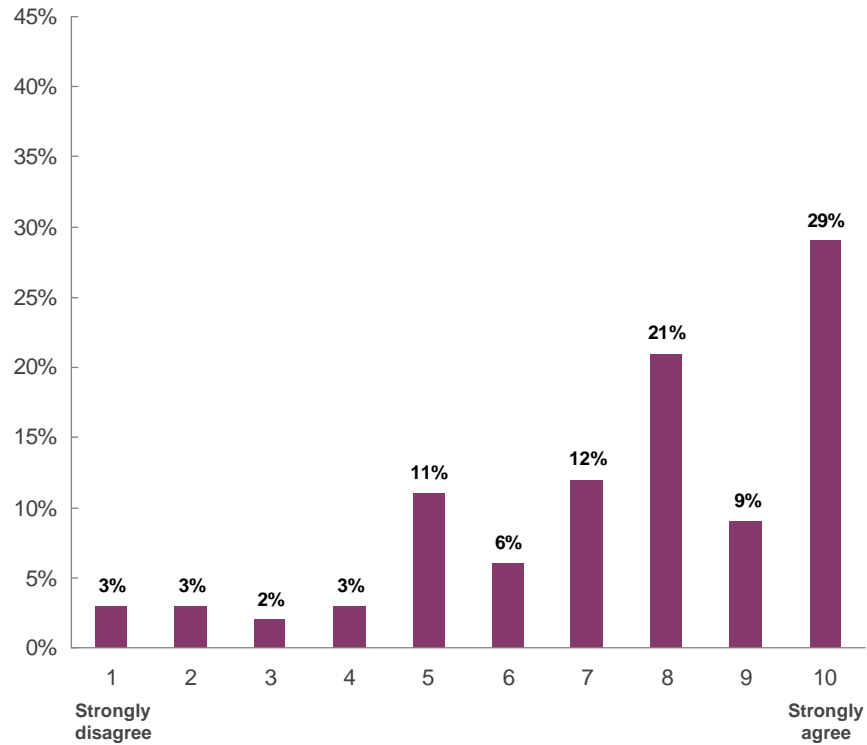
Average Score:	7.7
Total % scored 1-4:	5%
Total % scored 8-10:	61%

sample: 1,004 users aged 16+

PERSONAL IMPACT

Whether Video on Demand could make lives easier

Having access to BBC Programmes via this on-demand service could make my life easier



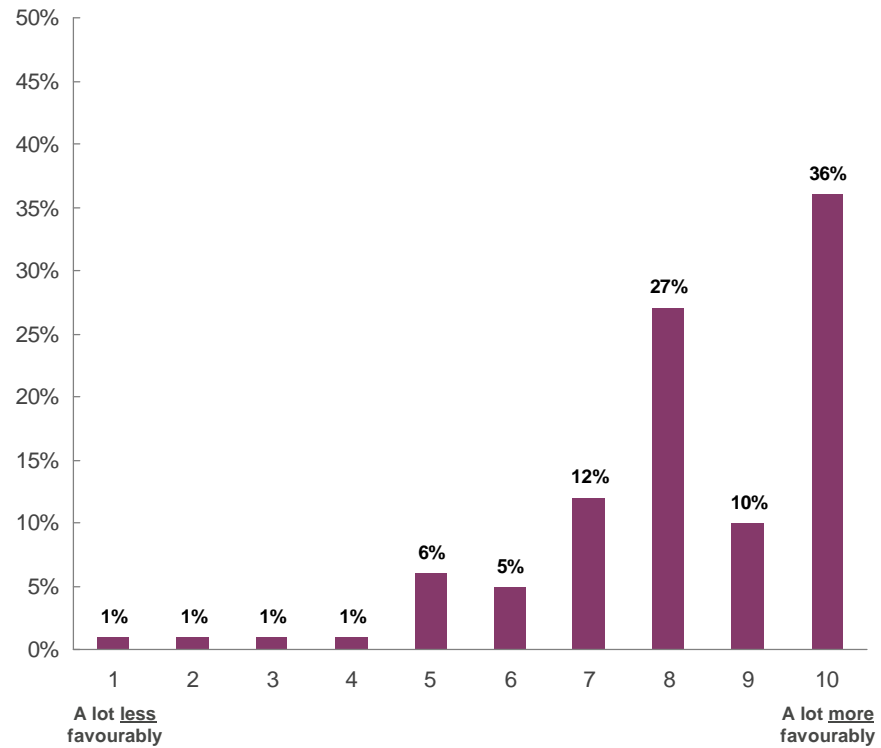
Average Score:	7.5
Total % scored 1-4:	11%
Total % scored 8-10:	59%

sample: 1,004 users aged 16+

PERSONAL IMPACT

Usefulness of Video on Demand

Having access to BBC programmes via this on-demand service is likely to be useful or beneficial



Average Score:	8.3
Total % scored 1-4:	3%
Total % scored 8-10:	73%

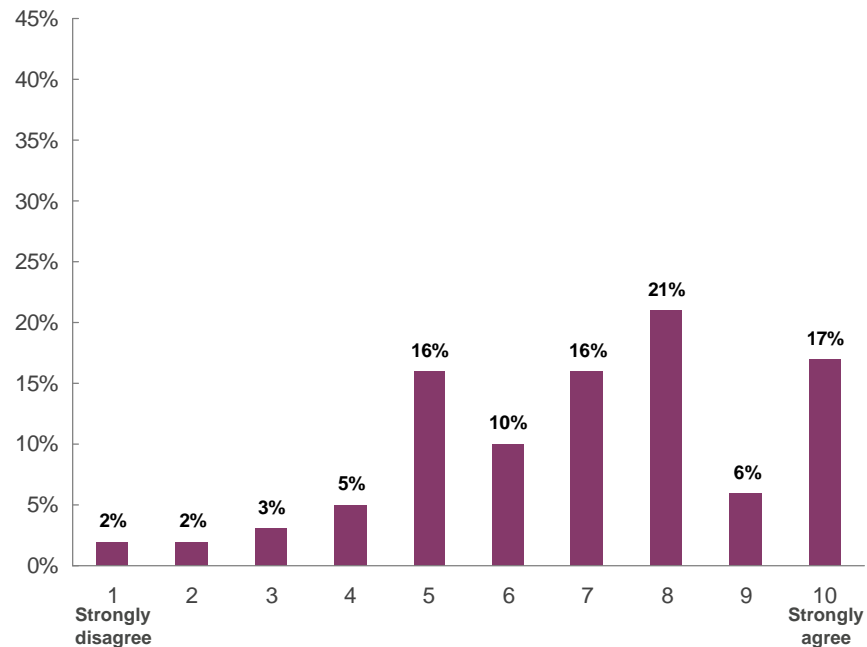
sample: 1,004 users aged 16+

PERSONAL IMPACT

Whether Video on Demand has an impact on democratic value

Thinking particularly about how people in general may feel about accessing BBC programmes via this video on demand service, how much do you agree or disagree with the following statement?

“This service will provide a new way to access news, information and analysis about social and political issues and other current affairs”



Average Score:	6.9
Total % scored 1-4:	12%
Total % scored 8-10:	43%

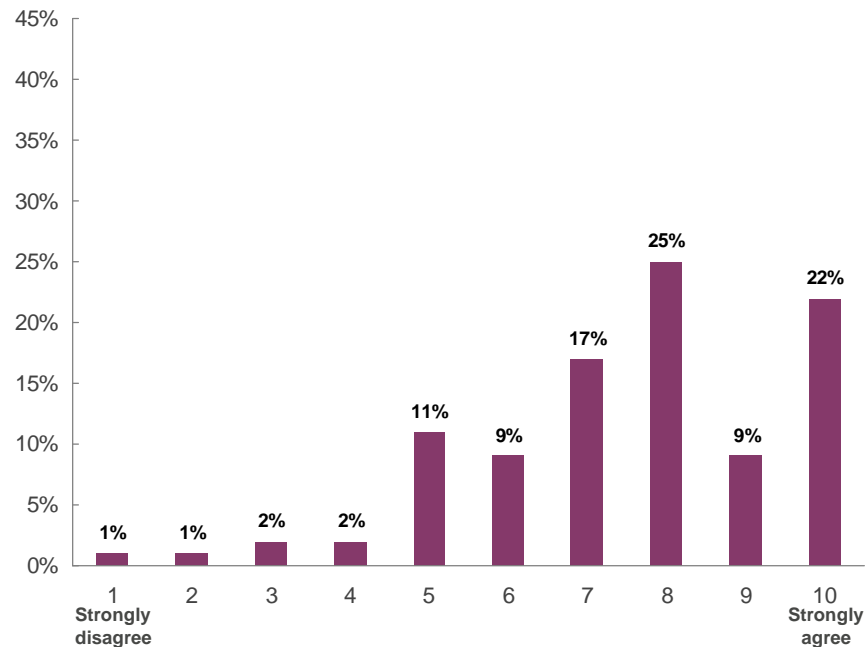
sample: 1,004 users aged 16+

OUTREACH
IMPACT

Whether Video on Demand will add to the enjoyment people get out of the media

Thinking particularly about how people in general may feel about accessing BBC programmes on this on-demand service, how much do you agree or disagree with the following statement?

“This is the kind of service that will add to the use and enjoyment people get out of the media”



Average Score:	7.5
Total % scored 1-4:	6%
Total % scored 8-10:	56%

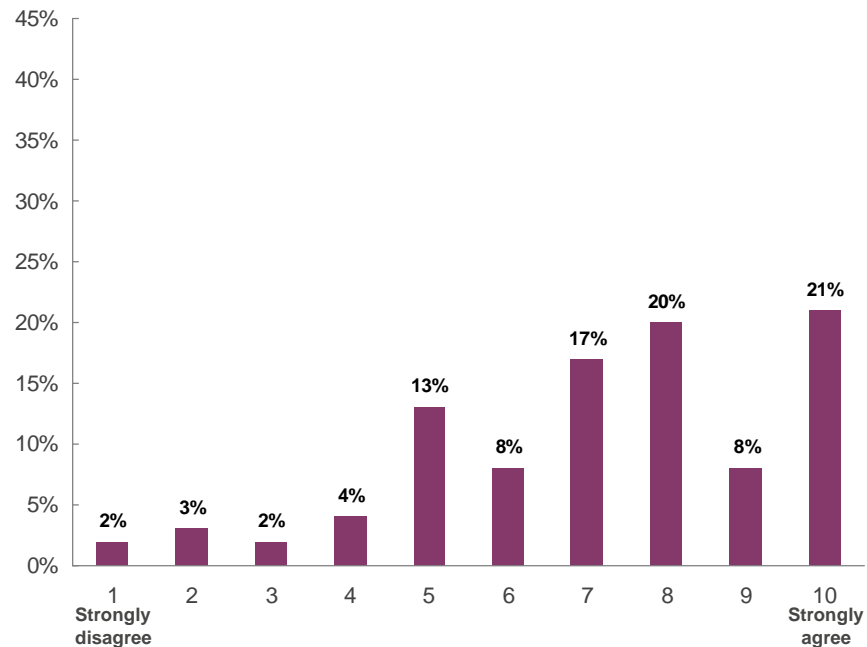
sample: 1,004 users aged 16+

CITIZEN IMPACT

Whether Video on Demand will encourage people to take up digital TV

Thinking particularly about how people in general may feel about accessing BBC programming via this on-demand service, how much do you agree or disagree with the following statement?

“Having BBC television programmes available on demand will encourage people to take up digital television”



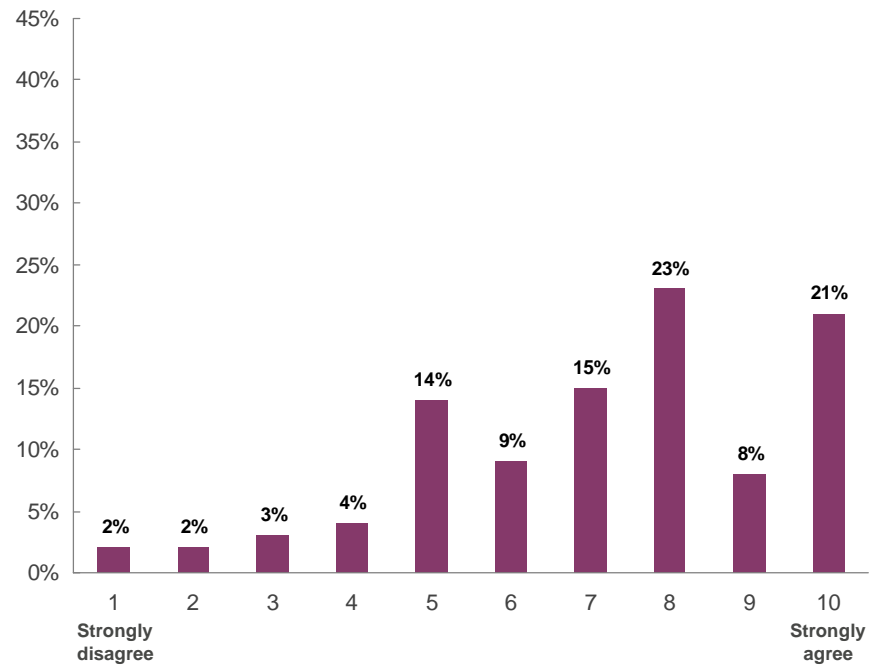
Average Score:	7.1
Total % scored 1-4:	11%
Total % scored 8-10:	49%

sample: 1,004 users aged 16+

CITIZEN IMPACT

Impact on helping society progress with technology:

Thinking particularly about how people in general may feel about accessing BBC programming via this on-demand service, how much do you agree or disagree with the following statement?
“This service helps British society to progress and stay up to date with new technology”



Average Score:	7.2
Total % scored 1-4:	10%
Total % scored 8-10:	51%

sample: 1,004 users aged 16+

CITIZEN IMPACT

How much the BBC services are worth – summary of scores

This graph shows the summary of scores excluding suggestions over £70, taken from the graphs on the next two pages.

Video on Demand was valued slightly more amongst respondents than they perceived the service to be valued by society as a whole.

Generally, asking about value to society all BBC channels and radio stations produced slightly higher results than when asking about value to individuals with the exclusion of video on demand.

This is potentially because respondents were aware that the service is as yet unavailable to everyone across the UK.

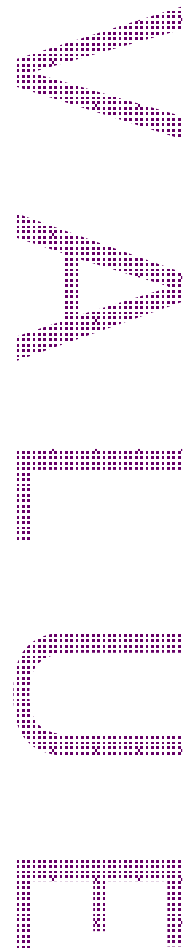
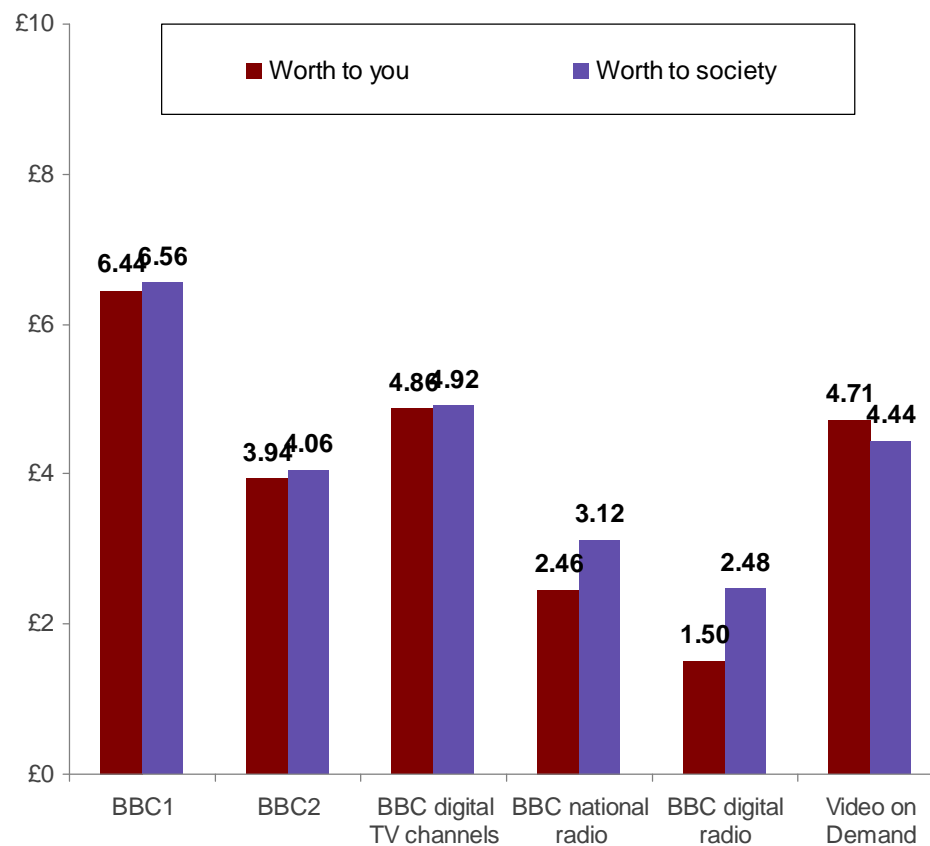
It is interesting to note the relatively high value that respondents placed on the BBC's digital television channels in comparison to other services. This may be a result of a higher than average affinity to BBC television content.

Full question descriptions (shortened for brevity on right):

- BBC1
- BBC2
- BBC digital TV channels – BBC3, BBC4, CBBC, CBeebies, BBC News 24, BBC Parliament
- BBC national radio stations – Radio 1, Radio 2, Radio 3, Radio 4, Radio 5 Live
- BBC digital radio stations – 1Xtra, 6 Music, BBC 7, The Asian Network, BBC 5 Live Sports Extra
- BBC programmes available on demand

Imagine you no longer had to pay the BBC licence fee. How much would the following BBC services be worth to you personally / society as a whole. Please tell us what you think in the nearest pound per month?

EXCLUDES all suggestions of over £70; half of respondents were asked each question.



How much the BBC services are worth to YOU – distribution of scores

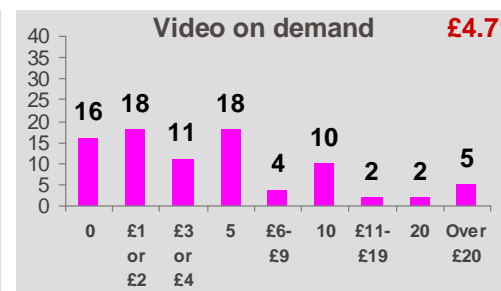
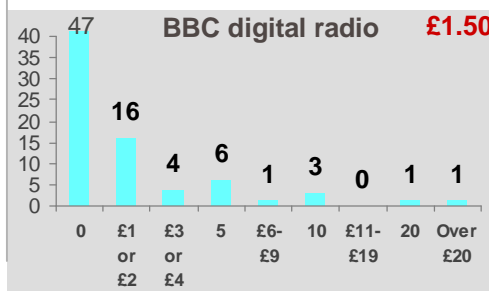
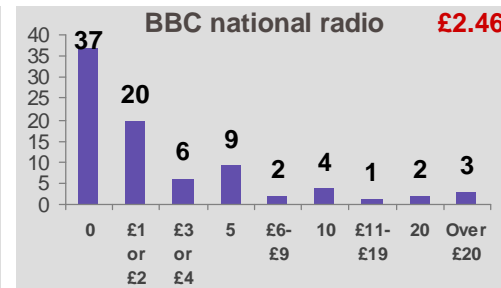
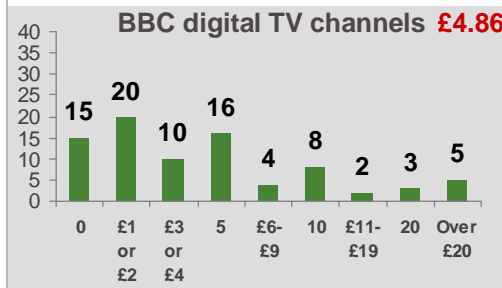
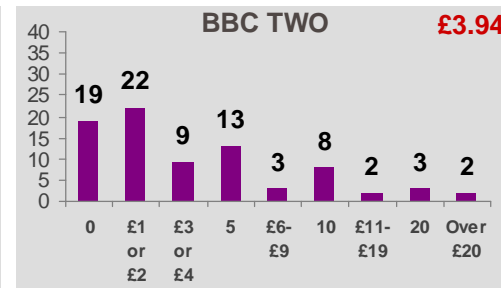
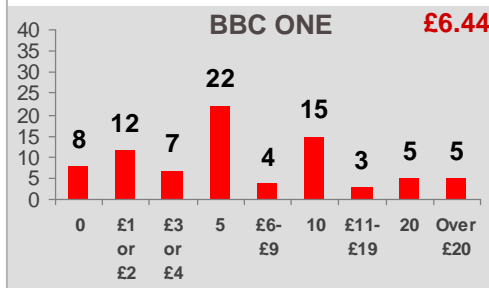
The graphs on the right show the number of people who offered a response for each value-band, expressed as a percentage of all responses.

16% of all responses felt video on demand was not worth any money at all. However almost the same response was received for BBC Two (19%) and BBC digital channels (15%). The BBC's radio stations hold much less value.

Interestingly just under a fifth of all respondents failed to give an answer to this question. Perhaps it is difficult for them to comprehend.

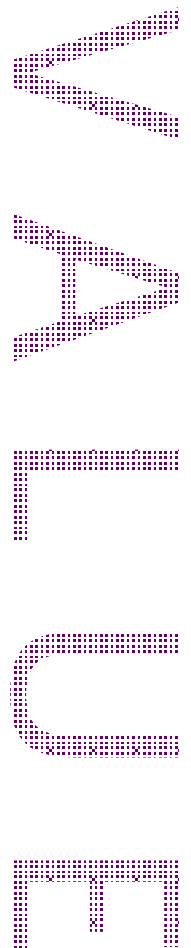
Imagine you no longer had to pay the BBC licence fee. How much would the following BBC services be worth to you personally, Please tell us what you think each of these is worth to the nearest pound per month?

PERCENTAGE OF RESPONSES WHICH FELL INTO EACH VALUE-BAND



Full question descriptions (shortened for brevity on right):

- BBC1
- BBC2
- BBC digital TV channels – BBC3, BBC4, CBBC, CBeebies, BBC News 24, BBC Parliament
- BBC national radio stations – Radio 1, Radio 2, Radio 3, Radio 4, Radio 5 Live
- BBC digital radio stations – 1Xtra, 6 Music, BBC 7, The Asian Network, BBC 5 Live Sports Extra
- The BBC Open News Archive – the service we are testing



How much the BBC services are worth to SOCIETY – distribution of scores

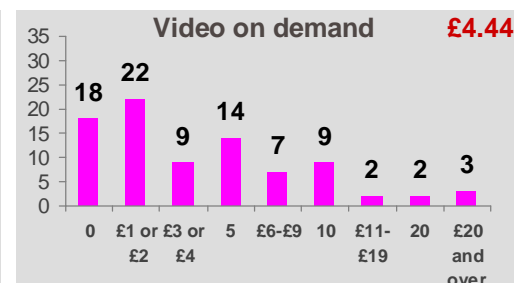
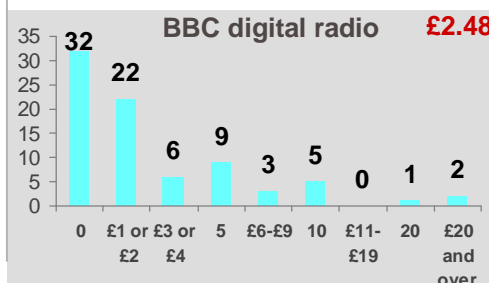
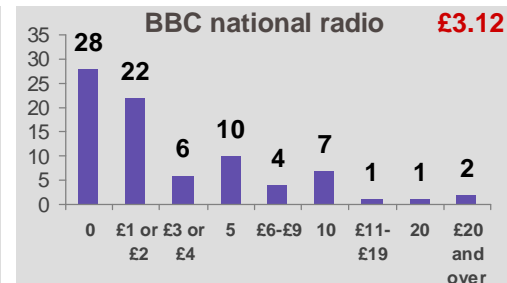
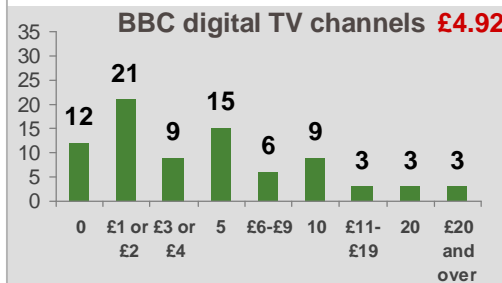
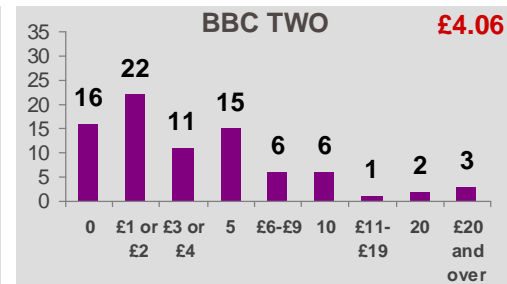
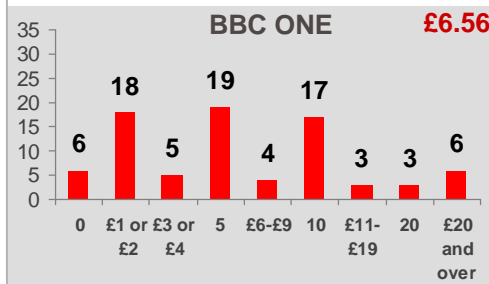
The graphs on the right show the number of people who offered a response for each value-band, expressed as a percentage of all responses.

In line with the responses for individuals, video on demand was felt to be of no value to 18% of society. This is higher than the BBC TV channels but much lower than those claiming that BBC radio stations have no / limited value.

Few people felt video on demand had a high value to society, with only limited responses in the higher bands (especially above £10). More people suggested amounts in the range up to £2.

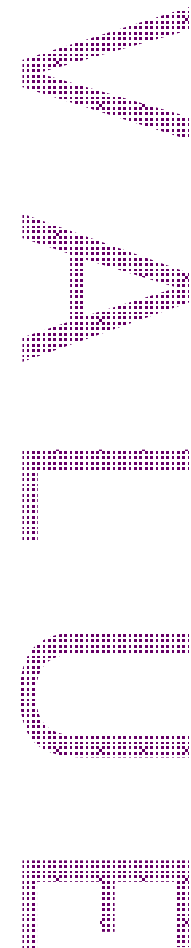
Imagine you no longer had to pay the BBC licence fee. We would like to know what you think the following BBC services are worth to society as a whole. To help us understand this, please could you tell us what you think each of the services might be worth to the average person, to the nearest pound per month?

PERCENTAGE OF RESPONSES WHICH FELL INTO EACH VALUE-BAND



Full question descriptions (shortened for brevity on right):

- BBC1
- BBC2
- BBC digital TV channels – BBC3, BBC4, CBBC, CBeebies, BBC News 24, BBC Parliament
- BBC national radio stations – Radio 1, Radio 2, Radio 3, Radio 4, Radio 5 Live
- BBC digital radio stations – 1Xtra, 6 Music, BBC 7, The Asian Network, BBC 5 Live Sports Extra
- The BBC Open News Archive – the service we are testing



Notes and Methodology

- **NTL, Telewest and HomeChoice customers who had used the Pick of The Week, Teleport Replay or HomeChoice Replay service were interviewed between 10th and 17th of February 2006.**
- **1,004 customers were interviewed; 504 NTL, 400 Telewest and 100 HomeChoice. The interviews lasted just under 10 minutes on average and were conducted over the telephone using contact names and numbers supplied by NTL, Telewest and HomeChoice.**

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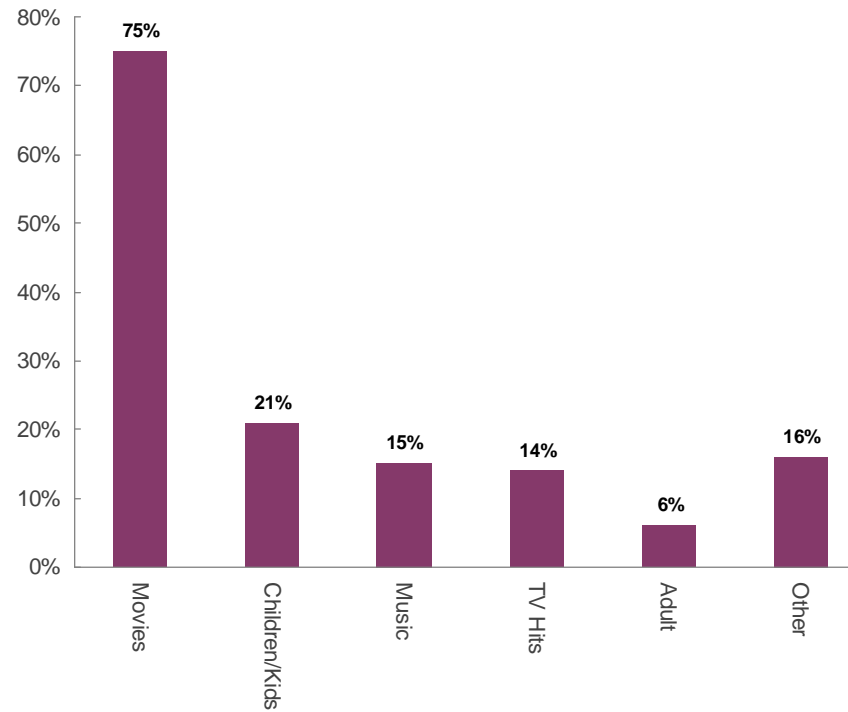
sample: 186 users aged 16+

Public Value Assessment Video on Demand Quantitative Research - Appendix

February 2006

Other non BBC programmes watched via NTL

Which other types of programmes do you watch on-demand?

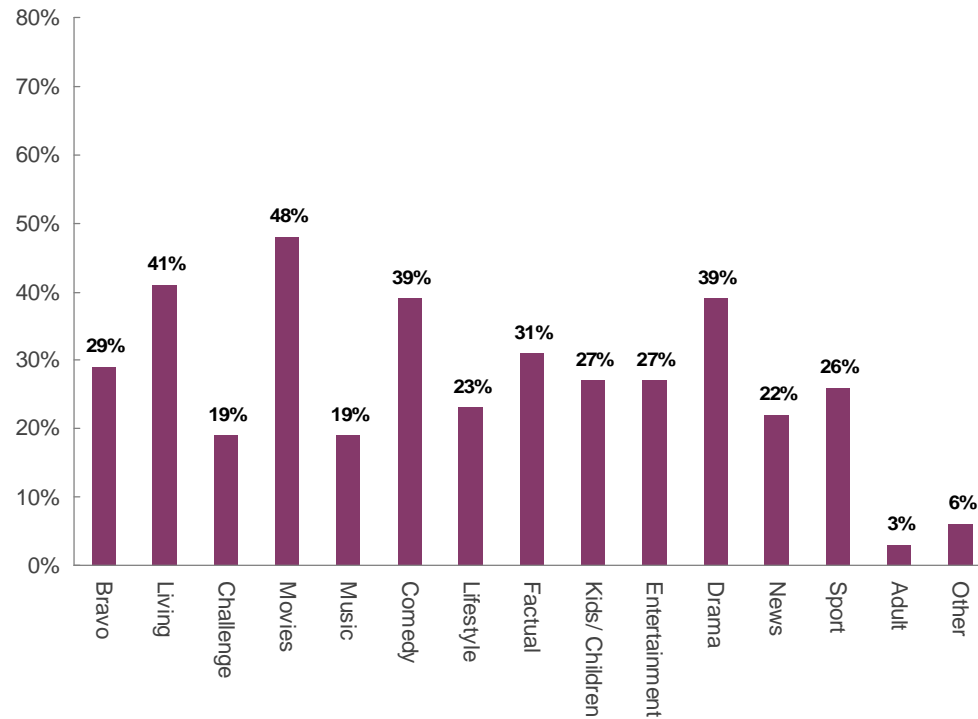


sample: 186 users aged 16+

MARKETIMPACT

Other non BBC programmes watched via Telewest

Which other types of programmes do you watch on-demand?

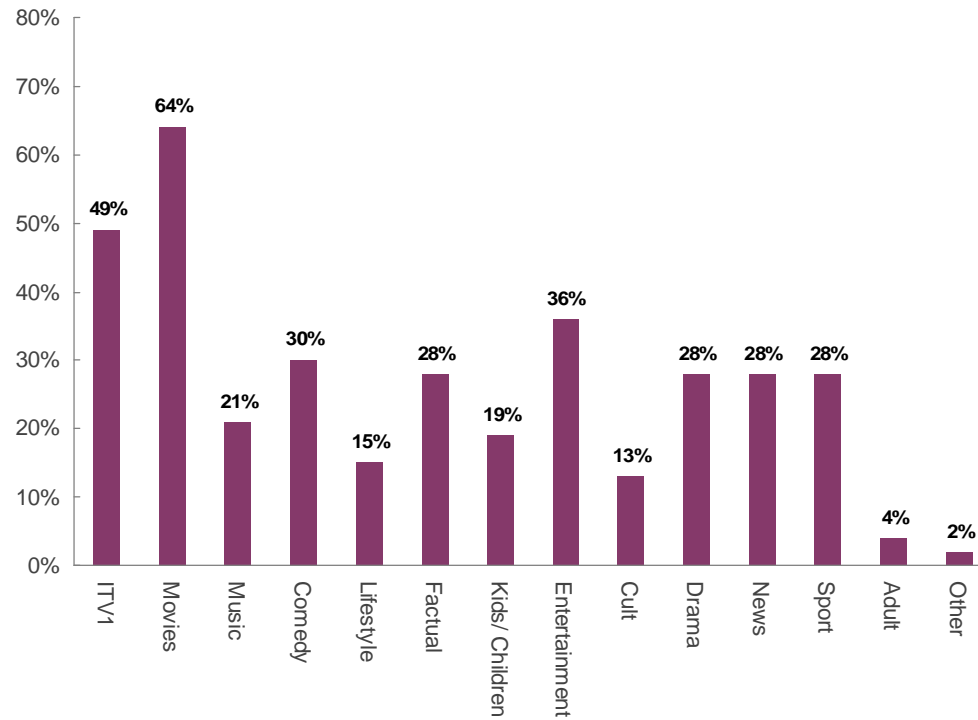


sample: 155 users aged 16+

MARKET IMPACT

Other non BBC programmes watched via HomeChoice

Which other types of programmes do you watch on-demand?



sample: 47 users aged 16+

MARKETIMPACT