

OFCOM

SURVEY NAME: OFCOM VOD SURVEY 2023

SURVEY FIELDWORK: ONLINE: 22/02/23-28/02/23

CATI: 22/02/23-7/03/23- CONSUMPTION QUESTIONS TO BE ASKED VIA
TELEPHONE OMNIBUS

METHODOLOGY: ONLINE ADHOC & CATI OMNI

SURVEY LENGTH: 20 MINUTES

ONLINE SAMPLE: 2000 UK NATIONALLY REPRESENTATIVE ONLINE SURVEY WITH PEOPLE AGED 13+, WITH BOOSTS TO BRING WALES AND NORTHERN IRELAND TO N=150 EACH. QUOTAS ON AGE, GENDER, REGION, SEG TO CREATE NATIONALLY REPRESENTATIVE QUOTAS

CATI SAMPLE: 1,000 UK 18+, NATION BOOSTS OF UPTO 150 IN WALES & NORTHERN IRELAND

Introduction

Today we have some questions for you about your use of and attitudes towards different types of online TV services, known as 'video on demand' or 'streaming' services. This can include things like BBC iPlayer, Netflix and YouTube and many more. These services can be used via many different types of devices, for example on your TV set or through apps and sites on your smartphone or other internet-connected devices.

This research is being conducted on behalf of Ofcom, the regulator for the UK's communication industry.

Demographics

[ASK ALL]

D1. Which of the following are you?

1. Man
2. Woman
3. Non-Binary
4. Prefer to use another term – Write In
5. Prefer not to say

[ASK ALL]

D2. How old are you?

Please enter your age in years _____

TYPE IN AND AUTO CODE AS:

Under 16 (Close)	x
18-24 years	1
25-34 years	2
35-44 years	3
45-54 years	4
55-64 years	5
65-74 years	6
75 years or over (Up to 85)	7

[ASK ALL]

D3. Which of these best describes the chief income earner in your household?

If you/ they are retired and living on a private pension, please choose your description based on what you/ they did before you/ they retired.

If you/ they have been unemployed for six months or less, please choose your description based on your/ their most recent main job.

Please select one option

		Social Grade
High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headmaster etc.	1	A
Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant etc.	2	B
Supervisor, clerical, junior managerial, administrative or professional - e.g. policeman, nurse, secretary, clerk, self-employed (5+ people) etc.	3	C1
Skilled manual worker - e.g. mechanic, paramedic, cook, fitter, plumber, electrician, lorry driver, train driver, hairdresser, beautician, etc.	4	C2
Semi-skilled or unskilled manual worker - e.g. baggage handler, restaurant server, factory worker, receptionist, labourer, gardener etc.	5	D
Housewife/househusband	6	E
Unemployed	7	E
Student	8	C1
Retired and on state pension ONLY (If retired but not only on state pension, please indicate the occupation just before retirement)	9	E
Don't know	10	X

[ASK ALL]

D4. What is the combined annual income of your household, prior to tax being deducted?

1. Up to £7,000
2. £7,001 to £14,000
3. £14,001 to £21,000
4. £21,001 to £28,000

5. £28,001 to £34,000
6. £34,001 to £41,000
7. £41,001 to £48,000
8. £48,001 to £55,000
9. £55,001 to £62,000
10. £62,001 to £69,000
11. £69,001 to £76,000
12. £76,001 to £83,000
13. £83,001 or more
14. Prefer not to answer

[ASK ALL]

D5. Which region do you live in?

Please select one option

North East and Cumbria (including County Durham, Northumberland, Teesside, Tyne and Wear, Northern Cumbria and the majority of North Yorkshire)	1
North-West (including Cheshire, Greater Manchester, Lancashire, Merseyside, North Yorkshire (western Craven), West Yorkshire (Walsden), Derbyshire (western High Peak), Cumbria (Barrow-in-Furness and South Lakeland) and the Isle of Man)	2
Yorkshire & Lincolnshire (including Leeds, Sheffield and York)	3
West Midlands (including Herefordshire, Shropshire, Staffordshire, Warwickshire, and Worcestershire)	4
East Midlands (including Derbyshire (except High Peak, North East Derbyshire and the northern areas of the Derbyshire Dales), Leicestershire, Nottinghamshire (except Bassetlaw), Rutland and South Kesteven in Lincolnshire)	5
East (including Norfolk, Suffolk, Essex, Cambridgeshire, Northamptonshire, Bedfordshire, Hertfordshire and northern Buckinghamshire)	6
West (including Bristol, the majority of Wiltshire, northern and eastern Somerset, the majority of Gloucestershire and northern Dorset)	7
South (including Hampshire, Isle of Wight, the majority of West Sussex, eastern and central Dorset, eastern Gloucestershire, southern and eastern Oxfordshire, southern Northamptonshire, western Berkshire and parts of Buckinghamshire, Surrey and Wiltshire)	8
South West (including Cornwall, Devon, Isles of Scilly, southern and western Somerset, western Dorset and Channel Islands)	9
South East (including Kent, East Sussex, part of West Sussex and a small part of Surrey)	10
London	11
Wales	12
Scotland	13
Northern Ireland	14

[ASK ALL]

**D6. What is the total number of people in your household, including yourself and any children?
OPEN NUMERIC**

[ASK ALL]

D7. Do any children aged under 16 live in your household?

Please select all that apply

Yes, aged 0-2	1
Yes, aged 3-4	2
Yes, aged 5-10	3
Yes, aged 11-15	4
No children aged under 16 (SINGLE CODE)	5
Don't know (SINGLE CODE)	6
Prefer not to say (SINGLE CODE)	7

[ALL RESPONDENTS GIVING CONSENT]

D8. Which one of these groups best describes your ethnic group or background?

Please select one option

WHITE	
English/ Welsh/ Scottish/ Northern Irish/ British	1
Irish	2
Gypsy, Traveller or Irish Traveller	3
Any other white background	4
MIXED/ MULTIPLE ETHNIC GROUPS	
White and Black Caribbean	5
White and Black African	6
White and Asian	7
Any other mixed/ multiple ethnic background	8
ASIAN AND BRITISH ASIAN	
Indian	9
Pakistani	10
Bangladeshi	11
Chinese	12
Any other Asian background	13

BLACK AND BLACK BRITISH	
Caribbean	14
African	15
Any other black/ African/ Caribbean background	16
OTHER ETHNIC GROUP	
Arab	17
Any other ethnic background	18
Prefer not to say	19

[ALL RESPONDENTS GIVING PERMISSION]

D9. Which of these – if any – impact or limit your daily activities or the work you can do?

Please select all that apply

Hearing? Poor hearing, partial hearing, or are deaf	1
Eyesight? Poor vision, colour blindness, partial sight, or are blind	2
Mobility? Cannot walk at all/ use a wheelchair or mobility scooter etc., or cannot walk very far or manage stairs or can only do so with difficulty	3
Dexterity? Limited ability to reach/ difficulty opening things with your hands/ difficulty using a telephone handset/ television remote control/ computer keyboard etc.	4
Breathing? Breathlessness or chest pains	5
Mental abilities? Such as learning, understanding, concentration, memory, communicating, cognitive loss or deterioration	6
Social/ behavioural? Conditions associated with this such as autism, attention deficit disorder, Asperger's, etc.	7
Your mental health? Anxiety, depression, or trauma-related conditions, for example	8
Other illnesses/ conditions which impact or limit your daily activities or the work you can do	9
Nothing – no impairments or conditions impact or limit your daily activities or the work you can do (SINGLE CODE)	10
Prefer not to say (SINGLE CODE)	11
Don't know (SINGLE CODE)	12

[ASK ALL]

D10. How often do you personally use the internet nowadays either at home or elsewhere?

This includes time using social media and messaging, watching films, TV programmes and videos online, playing games online, on video calls, searching for information online and doing schoolwork.

This could be using a mobile phone, laptop, tablet (like an iPad), computer, games console or Smart TV. Please think about weekdays and weekends, either at home or anywhere else.

SINGLE CODE

1. Several times a day
2. About once a day
3. Several times a week
4. At least once a week
5. Less often
6. Never
7. Don't know

[ASK ALL]

D11. And how many hours in a typical week would you say you spend online?

None	1
Up to 2 hours	2
3 to 5 hours	3
6 to 8 hours	4
9 to 11 hours	5
12 to 15 hours	6
16 to 22 hours	7
Over 22 hours	8
Don't know/ unsure	9

Section 1 – Consumption

CATI AND ONLINE

[ASK ALL]

Q1a. Firstly, can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months?

MULTICODE

RANDOMISE ORDER WITHIN GROUPINGS (CODES 2,3,4,5 TO BE LOCKED TOGETHER IN SAME ORDER AS LISTED HERE)

GROUP 1:

1. BBC iPlayer
2. ITVX (formerly known as ITV Hub)
3. ITVX Premium (formerly known as ITV Hub+) **LOCK WITH CODE 2**
4. STV Player
5. STV Player VIP **LOCK WITH CODE 4**
6. All 4
7. All 4+ **LOCK WITH CODE 6**
8. My5
9. S4C Clic
10. BritBox
11. Sky on Demand or Sky Go
12. Virgin TV On Demand / Catch Up or Virgin TV Go
13. UKTV Play
14. None of these (FIXED AT THE END OF THIS GROUPING)

GROUP 2:

15. Netflix
16. Amazon Prime Video
17. Freevee
18. Disney+
19. NOW Cinema **LOCK CODES 19-21**
20. NOW Entertainment
21. NOW Sports
22. Apple TV+
23. Discovery+
24. Paramount+
25. YouTube (not YouTube premium content) **LOCK WITH CODE 26**
26. YouTube Premium (paid for service for YouTube videos without ads)
27. None of these (FIXED AT THE END OF THIS GROUPING)

GROUP 3:

28. Acorn TV
29. Pluto TV
30. Rakuten TV
31. National Theatre
32. Apple Fitness+
33. Crunchyroll
34. Funimation
35. Hayu
36. Shudder

37. Lionsgate+ (formerly STARZPLAY)
38. BFI Player
39. TED Talks (not on YouTube)
40. MUBI
41. Facebook Watch
42. Snap Originals
43. RTE Player
44. True Royalty TV
45. Freeview Play
46. Roku TV
47. Chili
48. Viaplay TV
49. Samsung TV Plus
50. Other, please state (FIXED AT THE END OF THIS GROUPING)
51. None of these (FIXED AT THE END OF THIS GROUPING)

CATI AND ONLINE

[ASK ALL WHO SELECTED A SERVICE IN Q1A]

Q1b. And how often in the past 3 months, have you used the services below to watch programmes, films or other video content?

[SHOW FOR ALL SERVICES SELECTED IN Q1A]

GRID ROWS – SERVICES USED IN Q1A

GRID COLUMN

SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often

CATI AND ONLINE

[ASK ALL]

Q2a. Which, if any, of these online services have you personally used to watch live or catch-up sports events in the past 3 months?

MULTICODE

RANDOMISE ORDER (CODES 2,3,4,5 TO STAY TOGETHER IN SAME ORDER)

1. BBC iPlayer
2. ITVX (formerly known as ITV Hub)
3. STV Player
4. ITVX Premium (formerly known as ITV Hub+) LOCK WITH CODE 2
5. STV Player VIP
6. S4C
7. All4

8. All 4+ **LOCK WITH CODE 7**
9. Sky Sports via an app/website, including NOW and Sky Go
10. BT Sport app/website and BT TV app/website
11. Amazon Prime Video
12. Apple TV+
13. NBA League Pass
14. Twitch
15. Pick TV
16. UFC Fight Pass
17. DAZN
18. Discovery+ (including Eurosport pass)
19. YouTube (full event not clips/highlights)
20. Facebook
21. UEFA.TV
22. FA Player
23. WWE Network
24. Viaplay
25. NFL Gamepass
26. Other, please state (**FIX AT END**)
27. None of these (**FIX AT END**)

CATI AND ONLINE

[ASK ALL WHO SELECTED A SPORT SERVICE IN Q2A]

Q2b. And how often in the past 3 months, have you used the services below to watch sports live or catch-up sports events? **[SHOW FOR ALL SERVICES SELECTED IN Q3]**

GRID ROWS – SHOW SERVICES USED IN Q2A

GRID COLUMNS

SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often

[ASK ALL]

Q4. Do you generally prefer UK- or USA-made programmes/series?

SINGLE CODE

1. UK-made
2. USA-made
3. I like them both the same
4. Don't know

END SURVEY HERE FOR THOSE WHO DO NOT WATCH ANY VOD SERVICES - REST OF SURVEY FOR VOD USERS ONLY (REGARDLESS OF FREQUENCY)

Section 2 – How services are used

[ASK ALL]

Q5a. Were you aware that you could watch channels or programmes live at the time they are broadcast on online video/streaming services such as BBC iPlayer or ITVX (formerly ITV Hub)?

SINGLE CODE

1. Yes
2. No

[ASK ALL WHO SAID YES IN Q5A– ONLY SHOW SERVICES IF USED IN Q1/Q2]

Q5b. Do you ever watch channels or programmes live at the time they are broadcast on the following services?

SINGLE CODE

GRID ROWS

1. Yes
2. No
3. Don't know

GRID COLUMNS

1. All 4/All 4+ [SHOW IF SELECTED AT Q1a or Q2a]
2. Amazon Prime Video [SHOW IF SELECTED AT Q1a or Q2a]
3. BBC iPlayer [SHOW IF SELECTED AT Q1a or Q2a]
4. BT TV (including BT Sport) [SHOW IF SELECTED CODE 10 at Q2a]
5. Facebook/Facebook Watch [SHOW IF SELECTED AT Q1a or Q2a]
6. ITVX/ITVX Premium (formerly known as ITV Hub/ITV Hub+) [SHOW IF SELECTED AT Q1a or Q2a]
7. STV Player/ STV Player VIP [SHOW IF SELECTED AT Q1a or Q2a]
8. NOW Entertainment [SHOW IF SELECTED AT Q1a]
9. Sky Sports on NOW [SHOW IF SELECTED CODE 9 at Q2a]
10. Virgin Media TV [SHOW IF SELECTED AT Q1a]
11. My5 [SHOW IF SELECTED AT Q1a]
12. Apple TV+ [SHOW IF SELECTED AT Q1a or Q2a]

[ASK ALL]

Q6. Which of these devices do you use to watch the following services?

GRID ROWS - SHOW SERVICES USED IN Q1/Q2

1.
2.
3.
4. Etc.

GRID COLUMNS – MULTICODE

- a. Smartphone

- b. TV set
- c. PC/desktop computer
- d. Laptop
- e. Tablet
- f. Smart speaker with a smart display
- g. Handheld games console

[ASK ALL, SHOW SERVICES USED IN Q1/Q2 BUT EVERYONE SHOWN CODE 1 TV CHANNELS]

Q7. Which of these would you normally go to first if you wanted to watch something, but didn't have a specific programme in mind?

SINGLE CODE

- 1. TV channels (e.g. BBC One, BBC Two, ITV1, Channel 4, Channel 5, Dave)
- 2.
- 3.
- 4.
- 5. Etc.

[ASK ALL, ONLY LIST SERVICES THEY SAID THEY USED IN Q1/Q2, BUT EVERYONE SHOWN CODE 1 TV CHANNELS]

Q8. Which of these reasons best describe how you choose what to watch on the following?

MULTIPLE CHOICE GRID

GRID ROWS - RANDOMISE ORDER

- 1. TV channels/live TV (e.g. BBC One, BBC Two, ITV1, Channel 4 or Channel 5, Dave)
- 2. BBC iPlayer
- 3. ITVX (formerly ITV Hub)
- 4. All4
- 5. My5
- 6. Netflix
- 7. Amazon Prime Video
- 8. Disney+
- 9. YouTube (for watching TV programmes /films)

GRID COLUMNS – RANDOMISE ORDER

- 1. I have specific shows I watch regularly on there
- 2. I catch up on shows I've missed (**DO NOT SHOW FOR CODE 1: TV CHANNELS & CODE 6: NETFLIX, CODE 7: AMAZON & CODE 8: DISNEY+**)
- 3. I browse/scroll until I find something that catches my eye
- 4. I look at the 'recommended for you' section on the service [**DO NOT SHOW FOR CODE 1: TV CHANNELS]**
- 5. I see shows on these channels/services promoted in trailers or adverts or notifications
- 6. I look in newspapers or magazines for recommendations
- 7. Friends or family recommend things to me
- 8. I see mentions on social media of shows on these channels/services

9. Someone else decides
10. I watch the recommended content that is promoted on the homepage
11. Other (WRITE IN)
12. Don't know

Q8 OTHER FOLLOW ON

You mentioned you choose what to watch on [SERVICE] in a other way, how do you choose what to watch?

[ASK ALL]

QX. What form of content have you watched on YouTube in the past 3 months?

MULTICODE

NON-RANDOMISE

1. Programmes or films (full length not clips/highlights) LOCK WITH CODE 2
2. YouTube videos longer than 15 minutes (but not full length programmes or films)
3. YouTube Shorts LOCK WITH CODE 4
4. YouTube videos up to 15 minutes long (but not YouTube Shorts)
5. I have not used YouTube in the past 3 months
6. Don't know

[ASK ALL]

Q9. Which of the following statements do you agree with on a scale of 1 to 10 (where 10 is strongly agree and 1 is strongly disagree)?

(AGREEMENT SCALE 1-10)

SINGLE CODE

RANDOMISE ORDER

1. Video on demand services are the main way I watch programmes and films
2. I like the convenience of being able to watch programmes on different devices
3. I prefer to watch programmes live at the time they are broadcast
4. I would miss video on demand services if I no longer had access to them
5. I find the amount of content available on video on demand services overwhelming
6. I can't keep up with the amount of content on video on demand services
7. Video on demand services allow me to watch a greater variety of content
8. I would miss my normal TV channels (e.g. BBC, ITV, Channel 4, Channel 5) if they weren't available
9. I spend too much time searching for something to watch on video on demand services
10. There are too many video on demand services
11. It is difficult to remember which video on demand service shows the TV programmes/films I want to watch
12. I spend too much money subscribing to video on demand services
13. Video on demand services have more content relevant to me

[ASK ALL]

Q10a. You said you use [SERVICE]. How good or bad is [SERVICE] on each of the following?

ASK FOR EACH OF THE FOLLOWING SERVICE IF USED:

1. BBC iPlayer
2. ITVX (was ITV Hub)
3. All 4
4. My5
5. Netflix
6. Amazon Prime Video
7. Disney+
8. YouTube (for watching TV programmes /films)
9. Apple TV+
10. Don't know

GRID ROWS – RANDOMISE ORDER

- A. Range of content
- B. Ease of use
- C. Ease of navigation
- D. Exclusive content only available through that platform
- E. Personalisation options – it gets to know my tastes
- F. Cost of the service [DO NOT SHOW FOR IF CODE4: My5]
- G. Amount of adverts

GRID COLUMNS – SINGLE CODE

- A. Very good
- B. Quite good
- C. Neither good nor poor
- D. Quite poor
- E. Very poor

Section 3 – Netflix

[ASK ALL]

Q11a. Does your household subscribe to Netflix, if yes how is this service paid for in your household?

SINGLE CODE

1. Yes, the Netflix subscription is paid for directly to Netflix (i.e. straight to Netflix and not via another company as part of a promotion for example)
2. Yes, the Netflix subscription is part of my household pay TV service bill
3. Yes, the Netflix subscription is part of a bundle with another service (e.g. phone service)
4. No, but I/the household use a login from someone I/we don't live with
5. Don't know
6. I/Household do not subscribe or use Netflix

[IF CODE 6 AT Q11a, THEN PROCEED TO Q12a]

[ASK ALL THAT PAY NETFLIX DIRECTLY – CODE 1 IN Q11A]

Q11b. What type of Netflix subscription do you/does your household have?

SINGLE CODE

1. Basic with ads (access to 1 screen, watch in HD, some content not available, currently £4.99 a month)

2. Basic (access to 1 screen, watch in HD, ad-free, currently £6.99 a month)
3. Standard (access to 2 screens, watch in full HD, ad-free, currently £10.99 a month)
4. Premium (access to 4 screens, watch in UHD, ad-free, currently £15.99 a month)
5. Don't know

[ASK ALL THAT PAY NETFLIX DIRECTLY – CODE 1 IN Q11A]

Q11c. Has your household upgraded or downgraded your Netflix subscription in the past year?

For example, an upgrade could be moving from a standard subscription which allows access to the service via 2 screens (currently £10.99 a month) to a premium subscription which allows access to the service via 4 screens (currently £15.99 a month) and a downgrade would be doing the reverse (access via 4 screens to 2 screens)

If you have upgraded/downgraded more than once in the past year, please select your most recent change.

SINGLE CODE

1. Yes, I have upgraded from basic to standard
2. Yes, I have upgraded from standard to premium
3. Yes, I have upgraded from basic to premium
4. Yes, I have downgraded from basic ad free to basic with ads
5. Yes, I have downgraded from standard to basic (ad-free)
6. Yes, I have downgraded from standard to basic with ads
7. Yes, I have downgraded premium to standard
8. Yes, I have downgraded from premium to basic with ads
9. Yes, I have downgraded from premium to basic (ad-free)
10. No, I have not upgraded or downgraded
11. Don't know

[ASK ALL THAT PAY NETFLIX DIRECTLY – CODE 1 IN Q11A]

Q11d. Have you played any games offered by Netflix? If you have, which one(s)?

MULTICODE

1. Stranger Things: 1984 or Stranger Things 3: The Game or Stranger Things: Puzzle Tales
2. Too Hot to Handle: Love is a Game
3. Card games e.g. Arcanium: Rise of Akhan, Exploding Kittens, Card Blast
4. Arcade e.g. Bowling Ballers Teeter Up, Shooting Hoops
5. Other Netflix games e.g. Into the Dead 2: Unleashed, Dragon Up, Dungeon Dwarves
6. I haven't played any games from Netflix
7. I didn't know Netflix offered games

[ASK ALL WHO ANSWERED CODES 6 AND/OR 7 IN Q11d]

Q11e. Do you think you might play a game offered by Netflix in the future?

SINGLE CODE

1. Yes
2. No
3. Don't know

Section 4 – Amazon Prime Video

[ASK ALL]

Q12a. Does your household subscribe to Amazon prime video, if yes how is this service paid for in your household?

SINGLE CODE

1. Yes, the Amazon Prime Video subscription is paid for directly to Amazon (i.e. straight to Amazon and not via another company as part of a promotion for example)
2. Yes, the Amazon Prime Video subscription is part of my household pay TV service bill
3. Yes, the Amazon Prime Video subscription is part of a bundle with another service (e.g. phone service)
4. No, but I/household use a login from someone I/we don't live with
5. Don't know
6. I/Household do not subscribe or use Amazon Prime Video

[IF CODE 6 AT Q12a, THEN PROCEED TO Q13a]

[ASK ALL THAT PAY FOR AMAZON PRIME DIRECTLY – CODE 1 IN Q12A]

Q12b. You said that you use Amazon Prime Video and you or someone else in your household pays for it directly, do you know what type of subscription you/your household pays for?

SINGLE CODE

1. Annual membership (currently £95 per year)
2. Monthly membership (currently £8.99 per year)
3. Student annual membership (currently £47.49 per year)
4. Student monthly membership (currently £4.49 per month)
5. Free trial
6. Don't know

[ASK ALL THAT PAY FOR AMAZON PRIME DIRECTLY – CODE 1 IN Q21A]

Q12c. Do you also subscribe to and access additional branded channels through Amazon Prime Video?

This is where you subscribe to subscription video on demand services through your Amazon Prime subscription rather than paying the subscribed to service directly (e.g., Hayu, BritBox or STARZPLAY).

SINGLE CODE

1. Yes
2. No
3. Don't know

[ASK ALL THAT PAY FOR AMAZON PRIME DIRECTLY – CODE 1 IN Q21A]

Q12d. Have you played any games offered by Prime gaming?

Prime gaming is included in the Prime subscription.

SINGLE CODE

1. Yes
2. No, but I know Amazon Prime offered games
3. Don't know
4. No, I didn't know Amazon Prime offered games **LOCK WITH CODE 2**

Section 5 – Disney+

[ASK ALL]

Q13a. Does your household subscribe to Disney+, if yes how is this service paid for in your household?

SINGLE CODE

1. Yes, the Disney+ subscription is paid for directly to Disney+ (i.e., straight to Disney and not via another company as part of a promotion for example)
2. Yes, the Disney+ subscription is part of my household pay TV service bill
3. Yes, the Disney+ subscription is part of a bundle with another service (e.g. phone service)
4. No, but I/household use a login from someone I/we don't live with
5. Don't know
6. I/Household do not subscribe or use Disney+

[IF CODE 6 AT Q13a, THEN PROCEED TO Q14]

[ASK ALL THAT PAY FOR DISNEY+ DIRECTLY – CODE 1 IN Q12A]

Q13b. You said that you use Disney+ and you or someone else in your household pays for it directly, do you know what type of subscription you/your household pays for?

SINGLE CODE

1. Annual
2. Monthly
3. Don't know

Section 6 – Reasons for subscribing/unsubscribing

[ASK ALL ONLINE RESPONDENTS]

Q14. Why did you/household take out a subscription to the following services?

If you don't personally pay for the subscription/didn't originally take out a subscription to the service, please answer on behalf of the person who pays/took out the subscription if you know the reasons why they subscribed, otherwise, please answer 'don't know'

MULTICODE

	Netflix	Amazon Prime Video	Disney +	NOW	ITVX Premium (formerly ITV Hub+)	BritBox	All4+	Apple TV+
Don't know								
To get free delivery	X		X	X	X	X	X	X
Got it free when I bought an Apple device	X	X	X	X	X	X	X	

To take advantage of a free trial or promotional offer								
To watch exclusive TV content not available elsewhere/ original series made by the provider								
To watch sporting events (not sports related documentaries)	X		X			X		
To watch a specific programme/ series								
To access a back catalogue of TV programmes								
To access a back catalogue of films								
To access new movie releases								
It came with my pay TV package								
To watch multiple episodes in a row/ to watch box sets								
To watch something different to the programmes on main TV/ broadcast TV								
Cheaper than a subscription to pay TV (e.g. Sky, Virgin, BT TV)								
To replace a TV subscription that I/ we cancelled								
I saw it advertised and it looked interesting								
No advertising breaks in the programmes/ shows				X				
Can watch it when I'm away from home/ abroad/ on holiday								
Recommendation from a friend/ family member								
To obtain other services for free (e.g. Deliveroo)								
Got it to watch during lockdowns in 2020/ 2021								
For children in my household to use [SHOW TO ALL]								
Other reasons – SPECIFY								

Q14 OTHER FOLLOW ON

You mentioned you took out a subscription to [SERVICE] for another reason, what is that reason?

ASK ALL ONLINE

Q15. Which of the following applies to you?

MULTI CODE – SHOW AS GRID

1. Currently subscribe and plan to continue for at least the next 3 months
2. Currently subscribe but plan to cancel my subscription in the next 3 months
3. I do not currently subscribe but plan to within the next 3 months
4. I do not currently subscribe as I cancelled my subscription in the past 3 months
5. I do not currently subscribe but I did in the past (I unsubscribed more than 3 months ago)
6. I do not currently subscribe and I never did

CODES:

- a. Netflix
- b. Amazon Prime Video
- c. Disney+
- d. NOW Entertainment or Cinema
- e. Apple TV+

ASK ALL

Q16. Have you unsubscribed from any of the following services in the past 3 months?

MULTICODE

1. Netflix
2. Amazon Prime Video
3. Disney+
4. NOW Entertainment or Cinema
5. Discovery+
6. ITVX Premium
7. All 4+
8. Apple TV+
9. BritBox
10. Other – please specify
11. I have not unsubscribed in the past 3 months [EXCLUSIVE]

[ASK ALL WHO ARE SHOWN Q16 & SHOW ALL SERVICES SELECTED IN Q16]

Q17. Why did you stop subscribing to the services below? Please select all that apply

MULTICODE

GRID ROWS

1. [SHOW SERVICES UNSUBSCRIBED IN Q16]
2.
3.

GRID COLUMNS

1. I didn't use it enough to justify the expense
2. I didn't have time to watch it
3. I subscribed because of a promotional offer which ended
4. I only got it to watch some specific content and have now finished watching it (e.g. a sports event or particular film/ programme)

5. Too expensive
6. My circumstances have changed and needed to save money
7. The service increased its price
8. I used it to watch during lockdown due to Covid-19 and no longer need it
9. It didn't have enough content that interests me
10. I've replaced it with one or more different video on demand services
11. I now watch more content on free services such as BBC iPlayer, ITV Hub, All4
12. Other – please specify
13. Don't know

Q17 OTHER FOLLOW ON

You mentioned you stopped subscribing to [SERVICE] for another reason, what was that reason?

[ASK ALL WHO ALL HAVE SWITCHED TO ANOTHER SERVICE IN Q17 CODE 10 AND 11]

Q18. You said you cancelled a subscription to a video on demand service because you switched to a different one or now watch more content on free services. Which service or services did you switch to /now watch more of?

[WRITE IN – CODED – ALLOW MULTIPLE RESPONSES]

[ASK ALL WHO ARE SHOWN Q16 & SHOW ALL SERVICES SELECTED IN Q16]

Q19. Do you think you will subscribe to the service again?

SINGLE CODE

GRID ROWS

1. [SHOW SERVICES UNSUBSCRIBED IN Q16]
2.
3.

GRID COLUMNS

1. No
2. Yes – if I have more time to watch it
3. Yes – if the service provides films/TV shows which I would like to watch
4. Yes – I like to move around services throughout the year
5. Yes – it is too expensive to subscribe for the whole year, so I cancel my subscription and resubscribe later
6. Yes – other reason

Section 7 – other

[ASK ALL]

Q20. In the last year have you

MULTI-CODE FOR CODES 1 & 2

1. Rented a digital film or programme/boxset
2. Bought a digital film or programme/boxset,
3. Don't know
4. None of the above

[ASK ALL]

Q21. Which of these ways, if any, do you use to watch online content on your TV set(s)?

MULTICODE

1. TV apps or services on your smart TV (often found on the menu or home screen).
2. A set-top box connected to your TV (such as Sky Plus/Q, Virgin Media TiVo/V6, BT TV, YouView) to access streaming services
3. A streaming box or stick (such as Amazon Fire TV, NOW, Google Chromecast, Roku, Apple TV) connected to your TV
4. A laptop/computer connected to your TV
5. A tablet computer connected to your TV
6. A smartphone connected to your TV
7. A games console connected to your TV
8. Other method – please specify
9. Don't use TV
10. I don't have a TV
11. Don't know

[ASK ALL WHO SELECTED ANY OF CODE 1-8 AT Q21]

Q21b. You said you use these ways to watch online content on your TV set(s). How often do you use each of these?

GRID ROWS

1. [SHOW CODES SELECTED AT Q21]
2. ...

GRID COLUMNS

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often

[ASK ALL WHO USE STREAMING BOX/STICK CODE 3 Q21]

Q22. You said you use a streaming box or stick to watch TV, films or other content on your TV set. Which of the following do you use to do this?

MULTICODE

1. Amazon Fire TV (plug in stick, box or cube)
2. Google Chromecast
3. Roku
4. Apple TV 4K/HD box
5. NOW Smart Stick/box
6. Sky Stream
7. Virgin Media Stream

8. Other
9. Don't know

[ASK ALL]

Q23. Do you cast programmes/film/other video content onto your TV set from a laptop/tablet/smartphone? You can do this by selecting the following symbol in an app or site on your



MULTI CODE

1. No – I am not aware of what this is
2. No – I know what this is but I do not do it
3. Yes, I cast YouTube content
4. Yes, I cast content from video on demand services such as Netflix, Disney+, BBC iPlayer etc.
5. Yes, I cast content from other online services e.g. social media
6. Don't know

[ASK ALL WHO ANSWER YES IN Q23]

Q24. You said that you cast programmes/films/YouTube videos onto your TV set from a laptop/tablet/smartphone, how often do you do this?

SINGLE CODE

- a. Several times a day
- b. About once a day
- c. Several times a week
- d. About once a week
- e. Several times a month
- f. About once a month
- g. Less often

[ASK ALL]

Q24a. When you're looking for something new to watch on TV, how often do you use/look at the following:

Grid Rows

1. On-screen channel guide (electronic programme guide, or EPG)
2. A specific TV app (e.g. BBC iPlayer or Netflix)
3. Programme led electronic lists/menus (i.e. lists/menus of individual programmes shown on e.g. smart TV home screen or Amazon fire TV home screen)
4. Search by typing
5. Voice search

Grid Columns

- A. Several times a day
- B. About once a day
- C. Several times a week
- D. About once a week

- E. Several times a month
- F. About once a month
- G. Less often
- H. Never

Section 8 – Audiovisual translation

[ASK ALL]

Q25. Now thinking about all of the video-on-demand services you use, in the last 12 months have you used dubbing or subtitling for films/programmes?

MULTICODE

GRID ROWS

1. Dubbing – (audio) voice translating the original language the film/programme was recorded/filmed in into a different language
2. Subtitling - displaying text on screen which matches or translates what is being voiced (audio)

GRID COLUMNS

1. Yes
2. No
3. Don't know

[SHOW IF SELECTED 'YES' FOR CODE 2 AT Q25]

Q25a. You said you used subtitling to watch films/programmes on video-on-demand service in the last 12 months, when watching English language content did you use subtitling for any of the following reasons?

Please note the next question will ask about non-English language content

MULTICODE

1. Poor hearing, partial hearing, or are deaf **[SHOW IF D9=1]**
2. Could not understand what was said due to accent, sound being low etc.
3. Used subtitling in non-English language
4. Did not use subtitling for English language content

[ASK ALL]

Q26. Have you used any video on demand service to watch non-English language films/programmes in the last 12 months?

For example, some services such as Netflix include content originally recorded in a non-English language (e.g. Squid Game, Money Heist or Lupin). This could include content you have watched where you have used English dubbing.

SINGLE CODE

1. Yes
2. No
3. Don't know

[ASK ALL WATCHING NON-ENGLISH CONTENT IN Q26 CODE 1]

Q27. How did you watch the films/programmes?

MULTICODE

1. I watched with English dubbing
2. I watched with English subtitles
3. I watched with non-English dubbing
4. I watched with non-English subtitles
5. I understood the non-English language (no dubbing/subtitling required)
6. Other

[ASK ALL WHO ANSWERED YES FOR SUBTITLING IN Q25 CODE 2]

Q28. Have you used subtitling on any of the following services while watching films/programmes in the last 12 months? Please select all that apply

MULTICODE

1. Netflix
2. Amazon Prime Video
3. Disney+
4. BBC iPlayer
5. ITVX / ITVX Premium
6. All4/All4+
7. My5