

## OFCOM

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SURVEY NAME: OFCOM VOD SURVEY 2025

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SURVEY FIELDWORK: 17<sup>TH</sup> FEB – 24<sup>TH</sup> FEB 2025

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METHODOLOGY: ONLINE ADHOC

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SURVEY LENGTH: 20 MINUTES

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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

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NATION BOOSTS OF UP TO 150 IN WALES & NORTHERN IRELAND

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JN: 014381

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## 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 (please state – optional) .....
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 18 (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*

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

## [ASK ALL]

### D4. Which one of these bands describes your total household income before tax or any other deductions are made?

Please include any benefits or credits that you or anyone else in your household receives, including housing benefit, as well as any income from employment.

*Please select one option*

	Per week	Per Year
1	Up to £199	Up to £10,399
2	From £200 to £299	From £10,400 to £15,599
3	From £300 to £499	From £15,600 to £25,999
4	From £500 to £699	From £26,000 to £36,399
5	From £700 to £999	From £36,400 to £51,999
6	From £1,000 to £1,499	From £52,000 to £77,999
7	£1,500 and above	£78,000 and above
8	Don't know	
9	Prefer not to say	

**[ASK ALL]**

**D5. Which region do you live in?**

*Please select one option*

<b>North East</b>	1
<b>North West</b>	2
<b>Yorkshire and the Humber</b>	3
<b>West Midlands</b>	4
<b>East Midlands</b>	5
<b>East of England</b>	6
<b>South West</b>	7
<b>South East</b>	8
<b>London</b>	9
<b>Wales</b>	10
<b>Scotland</b>	11
<b>Northern Ireland</b>	12

**[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
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Yes, aged 3-4	2
Yes, aged 5-10	3
Yes, aged 11-12	4
Yes, aged 13-15	5
Yes, aged 16-17	6
No children aged under 18 (SINGLE CODE)	7
Prefer not to say (SINGLE CODE)	8

## DP instructions/ ADD ETHNICITY INTO QDATA SCREEN

[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

## DP instructions/ ADD DISABILITY INTO QDATA SCREEN

### [ALL RESPONDENTS GIVING PERMISSION]

**D9. Which of these – if any – impact or limit your daily activities or the work you can do? These could affect you on an ongoing basis or at particular times.**

*Please select all that apply*

Answer list	Code
Hearing: Partial hearing, having tinnitus or are D/deaf	1
Eyesight: Colour blindness, partial sight, or are blind	2
Speech: Difficulty with speech for example due to a stroke, stutter or stammer	3
Mobility: Cannot walk at all, use a wheelchair or mobility scooter, cannot walk very far or manage stairs or can only do so with difficulty	4
Dexterity: Limited ability to reach, difficulty opening things with your hands, difficulty using a telephone handset, television remote control or computer keyboard	5
Breathing: Breathlessness or chest pains	6
Other physical condition (OPEN TEXT BOX)	7
Memory/cognitive: learning, understanding, concentration, memory, communicating, cognitive loss or deterioration	8
Neurodiversity: such as autism, attention deficit disorder (ADHD), dyslexia	9
Your mental health: such as anxiety, depression, trauma-related conditions	10
Other long-term conditions which impact or limit your daily activities or the work you can do: such as diabetes, epilepsy, cancer, heart condition, auto-immune conditions (OPEN TEXT BOX)	11
Nothing – no conditions that impact or limit your daily activities or the work you can do (SINGLE CODE)	12
Prefer not to say (SINGLE CODE)	13

### [ASK ALL]

**D11. How many hours in a typical week would you say you spend online?**

*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.*

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

### [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?

If you have accessed a particular service by going through another service, e.g. BBC iPlayer through Freely, or ITVX through Apple TV, please think about the service that provided the content, such as BBC iPlayer or ITVX.

### 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) **LOCK WITH CODE 3,4,5**
3. ITVX Premium (formerly known as ITV Hub+) **LOCK WITH CODE 2,4,5**
4. STV Player **LOCK WITH CODE 2,3,5**
5. STV Player VIP **LOCK WITH CODE 2,3,4**
6. Channel 4 streaming (formerly known as All 4 / 4OD)
7. Channel 4+ (paid for service, formerly known as All 4+) **LOCK WITH CODE 6**
8. My5
9. S4C Clic
10. Sky on Demand or Sky Go
11. Virgin TV On Demand / Catch Up or Virgin TV Go
12. U (previously known as UKTV Play)
13. None of these (FIXED AT THE END OF THIS GROUPING)

#### GROUP 2:

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

#### GROUP 3:

29. Acorn TV
30. Pluto TV
31. Rakuten TV (to watch free programmes)
32. Rakuten TV (to rent/buy films) **LOCK WITH CODE 31**
33. Apple Fitness+

34. Crunchyroll
35. Tubi
36. Hayu
37. Shudder
38. MGM+
39. BFI Player
40. TED Talks (not on YouTube)
41. Facebook Watch
42. RTE Player
43. Freeview Play
44. The Roku Channel
45. Viaplay
46. Samsung TV Plus
47. Other, please state (FIXED AT THE END OF THIS GROUPING)
48. None of these (FIXED AT THE END OF THIS GROUPING)

**[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. Channel 4 streaming (formerly known as All 4)
8. Channel 4+ (formerly known as All 4+) LOCK WITH CODE 7

9. Sky Sports via an app/website, including NOW and Sky Go
10. Netflix
11. Amazon Prime Video
12. Apple TV+
13. Premier Sports
14. F1 TV
15. NBA League Pass
16. Twitch
17. Pick TV
18. UFC Fight Pass
19. DAZN
20. Discovery+ (including TNT Sports or Eurosport)
21. YouTube (full event not clips/highlights)
22. Facebook
23. UEFA.TV
24. FA Player
25. WWE Network
26. NFL Gamepass
27. FIFA+
28. Website/app of a team I follow (including via iFollow)
29. Live stream on social media (e.g. TikTok, X)
30. Other, please state (FIX AT END)
31. 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)**

**[PROGRAMMERS: The only people routed out and excluded from this point are those selecting “None of these” at Q1a, all others are to continue]**

## **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 I was aware and I **do** it
2. Yes I was aware but I **don't** do it
3. No I was not aware

**[ASK ALL]**

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

**GRID ROWS - SHOW SERVICES USED IN Q1 (just groups 1 & 2)**

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]**

**Q6b. And, in the last 3 months, which of these services have you watched at home or someone else's home?**

**SINGLE CODE**

**SHOW SERVICES USED IN Q1 & Q2**

1. ....
2. ....
3. ....
4. None of these

**[ASK ALL]**

**Q6c. And, in the last 3 months, which of these services have you watched outside the home, such as on public transport or in a pub or other venue?**

**SINGLE CODE - SHOW SERVICES USED IN Q1 & Q2**

1. ....
2. ....
3. ....
4. None of these

**[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 describes 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. Channel 4 streaming (formerly known as All 4)
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 recent episodes of shows I've missed (DO NOT SHOW FOR CODE 1: TV CHANNELS & CODE 6: NETFLIX, CODE 7: AMAZON & CODE 8: DISNEY+)
3. I catch up on past series of shows
4. I browse/scroll until I find something that catches my eye
5. I look at the 'recommended for you' section on the service [DO NOT SHOW FOR CODE 1: TV CHANNELS]
6. I see shows on these channels/services promoted in trailers or adverts or notifications or the homepage
7. I look in newspapers or magazines for recommendations
8. Friends or family recommend things to me

9. I see mentions on social media of shows on these channels/services
10. Someone else decides
32. Other (FIX AT END)
33. Don't know (FIX AT END)

## Q8 OTHER FOLLOW ON

You mentioned you choose what to watch on [SERVICE] in another 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. YouTube Shorts (short-form videos of 60 seconds or less)
2. YouTube videos up to 15 minutes long (but not YouTube Shorts)
3. YouTube videos longer than 15 minutes (but not full-length programmes or films)
4. Programmes or films (full length not clips/highlights)
5. I have not used YouTube in the past 3 months
6. Don't know

### [ASK those who selected 1 – 4 and 6 AT QX]

**QX.1: What type of content have you watched on YouTube in the past 3 months?**

1. Funny videos/ jokes/ pranks/ challenges
2. "How to" e.g. recipes, DIY
3. Videos uploaded by the general public including friends/family
4. Music
5. Vlogs/other videos uploaded by social media influencers that you follow
6. Programmes or clips of programmes of any genre from TV broadcasters e.g. Channel 4, BBC
7. Videos about video games or other people playing video games
8. Children's programmes or films
9. Trailers or reviews
10. Interviews of documentaries not available to watch for free anywhere else
11. Podcasts
12. Other (please specify)

### [ASK ALL] YouTube gaming

**Q11e Have you played any games offered by YouTube?**

#### SINGLE CODE

1. Yes
2. No
3. 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 **on TV**
4. I prefer to **stream** programmes live at the time they are being broadcast **via streaming services**
5. I would miss video on demand services if I no longer had access to them
6. I find the amount of content available on video on demand services overwhelming
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, compared to broadcast TV channels

## [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. ITVX Premium (formerly known as ITV Hub+)
4. Channel 4 streaming (formerly known as All 4)
5. Channel 4+ (paid for service, formerly known as All 4+)
6. My5
7. Netflix
8. Amazon Prime Video
9. Disney+
10. YouTube (for watching TV programmes /films)
11. Paramount+
12. Discovery+

## GRID ROWS – RANDOMISE ORDER

- A. Range of content
- B. Ease of use, including functions such pause, rewind, fast-forward.
- C. Ease of finding the content I am particularly looking for
- D. Ease of discovering new content
- E. Exclusive content only available through that platform
- F. Personalisation options – it gets to know my tastes
- G. Cost of the service [DO NOT SHOW FOR CODE 6: My5, CODE 4: Channel 4, CODE 2: ITVX, CODE 10: YouTube]
- H. 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, I/we have a Netflix subscription that 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, I/we have a Netflix subscription that is part of the household pay TV service bill
3. Yes, I/we have a Netflix subscription that is part of a bundle with another service (e.g. phone service)
4. Yes, I/we have access as an "extra member" of someone else's account
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?**

*Please be note that Netflix has recently announced a price increase for their subscription plans, effective from March 2025.*

#### SINGLE CODE

1. Standard with adverts (access to 2 screens, watch in full HD, currently £5.99 a month)
2. Standard (access to 2 screens, watch in full HD, ad-free, currently £12.99 a month)
3. Premium (access to 4 screens, watch in 4K/UHD, ad-free, currently £18.99 a month)
4. Don't know

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

**Q11c. Has your household chosen to upgrade or downgrade your Netflix subscription in the past year? Please exclude any changes to your subscription that Netflix automatically made due to the changes to their pricing/tiers.**

*For example, an upgrade could be moving from a standard subscription which allows access to the service via 2 screens (currently £12.99 a month) to a premium subscription which allows access to the service via 4 screens (currently £18.99 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
2. Yes, I have downgraded

3. No, I have neither upgraded or downgraded
4. I don't know

**[ASK ALL THAT PAY NETFLIX DIRECTLY – CODE 1 IN Q11A AND SELECT CODES 1&2 AT Q11c]**

**Q11cNEW: Please select the **upgrade** [Q11c= 1] [OR] **downgrade** [Q11c=2] you made to your Netflix Subscription?**

**SINGLE CODE**

**[If Upgrade Q11c = 1 Show:]**

1. Yes, I have upgraded from Basic to Standard (ad-free)
2. Yes, I have upgraded from Standard (ad-free) to Premium
3. Yes, I have upgraded from Basic to Premium

**[If Downgrade Q11c = 2, Show]**

4. Yes, I have downgraded from Basic ad free to Basic with adverts or Standard with adverts
5. Yes, I have downgraded from Standard (ad-free) to Basic (ad-free)
6. Yes, I have downgraded from Standard (ad-free) to Basic with adverts or Standard with adverts
7. Yes, I have downgraded Premium to Standard (ad-free)
8. Yes, I have downgraded from Premium to Basic with adverts or Standard with adverts
9. Yes, I have downgraded from Premium to Basic (ad-free)

**[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 or Too Hot to Handle 2
3. Netflix Stories e.g. Emily in Paris, Selling Sunset, Love is Blind
4. Money Heist: Ultimate Choice
5. Grand Theft Auto III or San Andreas or Vice City – The Definitive Edition
6. Educational games e.g. This is a True Story, CoComelon: Play with JJ
7. Football Manager 2024
8. Squid Game: Unleashed
9. Arcade e.g. Bowling Ballers Teeter Up, Shooting Hoops, Bloons TD 6, Skies of Chaos, Sonic Prime Dash, World of Goo Remastered
10. Other Netflix games e.g. card games, FashionVerse, OXENFREE, Vikings Valhalla, The Queen's Gambit Chess, Into the Dead 2: Unleashed, Dragon Up, Dungeon Dwarves
11. I knew Netflix offered games but I haven't played any
12. I haven't played any games and didn't know Netflix offered games

## **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?**

**MULTI CODE (ALLOW CODE 5 TO BE SELECTED WITH CODES 1-4, CODE 5 CANNOT BE SELECTED ALONE)**

1. Annual membership (currently £95 per year)
2. Monthly membership (currently £8.99 per month)
3. Student annual membership (currently £47.49 per year)
4. Student monthly membership (currently £4.49 per month)
5. Prime Video Ad-Free option (additional £2.99 per month)
6. Reduced-price trial (e.g. a 1-week trial for £0.99)
7. Free trial
8. 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, Apple TV+, Paramount+).*

**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 or banking service)
4. Yes, I/we have access as an "extra member" of someone else's account
5. I/Household do not subscribe or use Disney+
6. Don't know

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

**[ASK ALL THAT PAY FOR DISNEY + DIRECTLY – CODE 1 IN Q13A]**

**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. Standard monthly membership with Ads (currently £4.99 per month)
2. Standard annual membership without Ads (currently £79.90 per year)
3. Standard monthly membership without Ads (currently £7.99 per month)
4. Premium annual membership (currently £109.90 per year)
5. Premium monthly membership (currently £10.99 per month)
6. 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+)	Discovery+ (paid service)	Channel 4+ (formerly All 4+)	Paramount+
My household does not subscribe to this service								
To get free delivery	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					
To watch a specific programme/ series								
To access a back catalogue of TV programmes or 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)								
For children in my household to use [SHOW TO ALL]								
Other reasons – SPECIFY								
Don't know								

## 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  
Discovery+ (paid service)

#### 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. Channel 4+ (formerly known as All 4+)
8. Apple TV+
9. Paramount+
10. Other – please specify
11. No, I have not unsubscribed from any of the above 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. Too many adverts
7. The service increased its price
8. It didn't have enough content that interests me

9. I've replaced it with one or more different video on demand services
10. I now watch more content on free services such as BBC iPlayer, ITVX, Channel 4 Streaming
11. Other
12. 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 – Please show 5 open ended boxes]

## Section 7 – other

[ASK ALL]

Q20. In the last year have you rented or bought a film or programme/boxset from....

MULTI-CODE FOR CODES 1 & 2

1. Apple TV App
2. Google Play
3. Amazon Prime Video
4. Microsoft Store
5. Other online film/TV store (please specify)
6. Don't know
7. 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, EE 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]**

**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 ALL]**
2. Could not understand what was said due to accent, sound being low etc.
3. To help improve/practice reading or spelling
4. Used subtitling in non-English language
5. Did not use subtitling for English language content
6. Other (please specify)

### [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 - RANDOMISED

1. Netflix
2. Amazon Prime Video
3. Disney+
4. BBC iPlayer
5. ITVX / ITVX Premium
6. Channel 4 streaming / Channel 4 + (formerly known as All 4 / All 4+)
7. My5