



**Project Development Workshop
Minutes and Project Plan
06th September 2018**

ICASA RFQ: 004/06/2018

Pulse Research reference: Pulse 838

Attendees: Honey Makola (HK), Lehotla Ramokgopa (LR), Lusanda Kgakololo (LK), Fungai, Sibanda (FS), Malcolm Keevy (MK), Gary Alfonso (GA), Jane Diakakis (JD)

Approved research approach:

- Phase 1: Project Development Workshop
 - Phase 2: Desk research and expert interviews
 - Phase 3: Consumer focus group discussions
 - Phase 4: Quantitative online consumer survey
 - Phase 5: Results analysis and reporting
- **Phase 1: Project Development Workshop** - Complete
- **Phase 2: Desk research and expert interviews:**
- **Objectives:**
 - To identify specific consumer segments based on socioeconomic backgrounds and television viewing habits;
 - To identify the array of television products & services available to South African consumers;
 - To investigate pricing structures of the various television products & services, including the packages available within the subscription television broadcasting offering;
 - To obtain the perspectives of knowledgeable stakeholders on the implications of technology developments.
 - **Methodology:**
 - Desk research: Sourcing information from relevant publications and insightful databases eg TAMS;
 - In-depth individual interviews: Identified experts to provide as broad a perspective as possible of the issues facing the television broadcast industry;
 - **Outcomes:**
 - Respondent profiles for focus group discussions (6 groups)
 - Identification of the discussion guide issues

- **Discussion points raised:**
 - **ICASA to provide discussion documents and research findings** - Responsible: HM – complete.
 - **Development of focus group profiles:** Responsible: MK, GA and JD. Profiles are to include consumers of all broadcast services including the SABC service and OTT. The focus however will be on subscription broadcast services including Multichoice, Netflix and StarSet. It was agreed that the focus group profiles would be driven by: 1. Viewership behavior, and 2. Socioeconomic factors.
 - **Expert interviews** – MK and GA to develop prospect list. 25 - 30 potential interviewees are anticipated of which 50% will be interviewed. These will include technical experts, platform suppliers, government officials and regulators. HM to provide contact details of government officials and regulators. FS requested that a media planner be included to gain input from the advertising sector. The identification of ICASA will not be revealed to interviewees.
 - **Expert interview timeline** – Given the scope of the interviews required, JD suggested that the timeframe for the expert interviews be extended to 27th September and the draft discussion guide for the focus groups be submitted on 28th September. Finalisation of the discussion guide is required by 1st October. This extension will not affect the overall timeline.

➤ **Phase 3: Consumer focus group discussions (FGDs):**

- **Objectives:**
 - To identify the key factors that influence television viewing patterns and behaviours and those that drive choice of television broadcasting products / services;
 - To identify the barriers to switching to alternative television broadcasting products / services;
 - To identify what would motivate consumers to switch to an alternative television broadcasting product / service;
 - To identify the key content sought from television viewing and the motivations behind these choices;
 - To qualitatively explore the degree of price sensitivity associated with the market as a whole and specifically the subscription television broadcasting products / services.
- **Methodology:**
 - Six focus group discussions will be held at Real Life Research Rooms, SunHill Centre, Tana Road, Sunninghill, Sandton;
 - The groups will each target a specific consumer segment defined in terms of television viewing behavior and socioeconomic background including OTT;
 - 6-8 respondents will participate in the group. 8 respondents will be recruited and incentivized with a cash payment;
 - Prior to commencement of the groups, respondents will complete a pre-questionnaire to elicit specific demographic and viewership behavior;

- The group discussion guide and pre-questionnaire will be tabled for review with ICASA management;
- The groups will not exceed 2 hours in duration and will be moderated by a Pulse Research senior executive;
- Audio sound files and video will be made available for all groups
- Viewing facilities are provided.
- **Outcomes:**
 - PowerPoint report;
 - Draft online quantitative questionnaire.
- **Discussion points raised:**
 - **Proposed dates for focus groups:** - From 6pm to 8pm on 2nd, 3rd, 4th, 9th, 10th 11th October. Responsible: JD
 - **ICASA and Evolut management to attend depending on availability**
 - **Definition of 'television products and services':** To include all products and services currently on the market and any that may become available in the near future.

➤ **Phase 4: Quantitative, online consumer survey:**

- **Objectives:**
 - To establish baseline television viewing patterns among television viewers in South Africa and the key content sought from television viewing;
 - To quantify the key factors that influence viewing patterns overall and by socioeconomic grouping;
 - To determine the reasons for using and/or purchasing current television broadcasting products / services, including likes & dislikes and aspirations to upgrade;
 - To assess the awareness of alternative television broadcasting products / services;
 - To measure the relative importance of the barriers to switching to alternative television broadcasting products / services;
 - To quantify what would motivate consumers to switch to an alternative television broadcasting product / service upon payment of a fee;
 - To determine the cross-price demand elasticities between different alternative television broadcasting products / services.
- **Methodology:**
 - Online survey that targets a representative sample of the South African population that are subscribers to pay television but will also include consumers of non-pay television offerings;
 - All socioeconomic groupings will be included and identified;
 - Sample: Option 1: 1,000
 - The questionnaire will be developed in English and will comprise primarily closed-ended questions and a structured format in order to facilitate quantification of the objectives;
 - The questionnaire will not exceed 20 minutes to complete and will be formatted to enable completion on laptop, desktop or mobile phone;
 - The questionnaire will be tabled for review with ICASA management.

- **Outcomes:**
 - Data will be captured in Excel and analysed in Survey Systems;
 - Open-ended questions will be post-coded;
 - Presented as technical tables in Excel for the total survey as well as by socio-economic grouping and specific demographic classification, as required;
- **Discussion points raised:**
 - **Questionnaire development:** - Pulse research to provide an initial draft on 22nd October. A meeting will be held with ICASA and Evolut management on 23rd October to refine and finalise same.

➤ **Phase 5: Analysis and reporting:**

- The data from the pricing and purchase intention questions will be used to calculate the cross-price elasticities between the different television broadcasting services.
- The consumer preference report will be prepared in MS Word detailing the findings of all phases of the project using tables and charts by defined issue;
- Explanations of the results and conclusions will be drawn;
- The consumer preference report will be supported by an Executive Summary.

➤ **Approved time schedule:**

Activity	Due date
● Project Development Workshop (PDW)	6 September
● Minutes of PDW including project plan complete	10 September
● Focus group profiles complete	18 September
● Recruitment brief and questionnaire developed	19 September
● Recruitment commences	20 September
● Expert interviews complete	27 September
● Feedback report from expert interviews submitted	28 September
● Draft FGD pre-questionnaire and discussion guide submitted	28 September
● Finalisation of pre-questionnaire and discussion guide	1 October
● Focus groups	2 – 11 October
● Focus group report presented	22 October
● Draft of online questionnaire submitted	22 October
● Meeting to finalise online questionnaire	23 October
● Questionnaire scripting commences	24 October
● Scripting and testing of questionnaire complete	30 October
● Online survey fieldwork commences	31 October
● Online survey complete	16 November
● Quantitative analysis complete	21 November
● Consumer preference report submitted	30 November