

PHASE 4 QUESTIONNAIRE – FINAL 4
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Capture screen information - automatic:

Date
 Unique ID number
 Start time
 End time
 First name
 Surname
 Cell number
 Email address

SA – Single answer**MA – multiple answer**

All questions are compulsory except where specified

Introduction:

This survey is about television viewing. Please help us to understand your TV viewing habits, the role of TV in your household and how your TV viewing may be enhanced. The survey will take about 15 minutes to complete. All information obtained will be combined into a report and your identity will be kept confidential.

Thanks for your help.

1. a. Screener: Which of the following TV broadcast services do you currently view or subscribe to at home? Select all that apply. **SA**

			Min Quota
1	SABC and eTV (including or excluding OpenView HD - pay no subscription *)	Group 1: FTA	240
3	DStv EasyView	Group 2: Basic DStv package	230
4	DStv Access		
5	DStv Family		
6	DStv Compact	Group 3: Mid-range DStv package	200
7	DStv Compact Plus		
8	DStv Premium	Group 4: Premium DStv package	200
9	StarSat (Top TV)	Group 5: Other subscription	10
10	None of the above		

1. b. Screener: Which of the following online (Over The Top) services do you currently view or subscribe to at home? Select all that apply. **MA**

1	Showmax	Group 6: OTT	120 (OTT only: 20)
2	Netflix		
3	black		
4	DEOD		
5	Amazon Prime Video		
6	None of the above		

Close if 1a and 1b = 'None of the above'

2. Screener: To what extent are you personally involved in the decision to subscribe to these services in your household? **SA**

1	I am the main decision maker	Go to Q3
2	I am involved in the decision	Go to Q3
3	I am not involved in the decision	Close

3. Screener: Please indicate which of the following best describes where you live?

		Quota
1	A metro area (Buffalo City, Cape Town, Johannesburg, Tshwane, Ekurhuleni, eThekweni, Mangaung or Nelson Mandela Bay)	-
2	An urban area or large town (eg Mbombela, Polokwane, Rustenburg or other similar sized town)	-
3	Rural area (all other small towns and villages)	100

4. **Groups 2, 3, 4 and 5.** Do you have one of the following? **SA**

1	An annual contract and pay a monthly subscription
2	Purchase a subscription monthly as you need it

5. Please indicate if you have subscribed to any of the following in the last 3 to 5 years? **MA Display only prompts that were NOT chosen in Q1. If 'None of the above' chosen – go to Q7 / Q8 as applicable.**

1	Not applicable
2	Not applicable
3	DStv EasyView
4	DStv Access
5	DStv Family
6	DStv Compact
7	DStv Compact Plus
8	DStv Premium (including Showmax)#
9	StarSat (Top TV)
10	Showmax (Paid for as an extra service) #
11	Netflix
12	black
13	DEOD
14	Amazon Prime Video
15	None of the above

Cannot choose prompts 8 and 10

6. What was the main reason(s) for cancelling the subscription? **MA**

1	I could no longer afford it
2	It did not represent value for money
3	I do not watch enough TV for it to be worth it
4	I do not want to be tied into a contract
5	I could get the TV content I need from another source
6	I don't have time to watch TV
7	I no longer have the decoder and/or TV
8	I upgraded to a more expensive package

7. **Groups 2, 3, and 4:** Which type of decoder(s) do you have? Select all that apply. **MA**

1	Single view decoder
2	PVR decoder
3	Explora decoder

8. Of the TV sets in your home, how many of them have internet access (smart TVs)? **SA**

1	None
2	One
3	Two
4	Three
5	Four
6	More than four
7	I don't know

9. Do you or your family members ever watch TV on any of the following devices? Select all that apply. **MA**

1	Cellphone/smartphone
2	Tablet or iPad
3	Desktop or laptop
4	Games console/media player
5	None of the above

10. **Those who chose prompt 1 or 2 (cellphone/smartphone/tablet) in Q9:** When you watch TV on a mobile device, where do you watch? Select all that apply. **MA**

1	At home on a fibre connection
2	At home on an ADSL line
3	At home using my mobile data plan
4	Office Wifi
5	Free wifi at coffee shop/church/tavern
6	Other

11. On **average** how many hours do you *personally* watch TV each day on weekdays? **SA**

1	Up to 1 hour
2	1 to 2 hours
3	2 to 4 hours
4	4 to 6 hours
5	More than 6 hours

12. On **average** how many hours do you *personally* watch TV on Saturday and Sunday? **SA**

1	Up to 1 hour
2	1 to 2 hours
3	2 to 4 hours
4	4 to 6 hours
5	6 to 10 hours
6	More than 10 hours

13. On **average**, which of the following types of programmes does your household (all family members) watch per week? Select all that apply. **MA**

1	Sport
2	News
3	Movies
4	Reality shows
5	Children's shows
6	Lifestyle (food and home)
7	Soaps operas/Telenovellas
8	Series/drama/crime
9	Comedy/sitcoms
10	Documentaries
11	Wildlife
12	Quiz programmes/Game shows
13	Actuality programmes
14	Music (eg Mtv)
15	Other

If 3 or less chosen, respondents are routed to Q15. Answers in Q13 carried over to Q14

14. Of these (**Display all responses to Q13**), which three (3) do you *personally* spend most time watching? **Max 3 responses.**

15. Which of the following do you watch **most** often? **SA**

1	Locally produced programmes
2	International programmes

16. **Those who chose prompt 1 (sport) in Q14.** Which of the following sports do you regularly watch on TV? Select all that apply. **MA**

1	Local soccer
2	UK Premier League, LaLiga or similar soccer
3	International soccer, eg SA vs Morocco
4	Rugby
5	Cricket
6	Golf
7	Tennis
8	Athletics
9	Swimming
10	Boxing
11	Wrestling
12	Motorsports
13	Other

17. **Those who chose prompt 2 or 3 in Q7 (PVR/Explora decoder):** Do you regularly record TV programmes on your decoder for later viewing? **SA**

1	Yes
2	No

18. **Those who chose prompt 5, 6 or 7 in Q1a (Premium, Compact and Compact Plus subscribers):** Do you regularly watch TV programmes on Catch Up? **SA**

1	Yes
2	No

Go to Q19

Go to Q20 / Q25 as applicable

19. **Those who chose prompt 1 in Q17 or Q18 (record content and/or use Catch Up):** How many hours would you spend binge watching (ie watch multiple shows in one sitting)? **SA**

1	I do not binge watch
2	1 to 2 hours
3	2 to 4 hours
4	4 to 6 hours
5	6 to 10 hours
6	More than 10 hours

20. **Group 6 from Q1:** When watching TV online, do you usually ... **SA**

1	Download programmes from the Internet to watch later
2	Watch programmes using live streaming
3	Both – download programmes sometimes and stream live sometimes

21. **Group 6 from Q1:** When watching programmes via live streaming or programmes that you have downloaded from the Internet, do you ... **SA**

1	Watch it on a PC or laptop
2	Watch on a TV by connecting the PC/laptop to a TV
3	Watch it on another screen

22. **Group 6 from Q1:** On **average** how many hours do you spend watching downloaded/streamed programmes in an average week? **SA**

1	Up to 1 hour
2	1 to 2 hours
3	2 to 4 hours
4	4 to 6 hours
5	6 to 10 hours
6	More than 10 hours

23. **Group 6 from Q1:** In order to connect to the Internet for online viewing of TV programmes at home, where do you get data from? **SA**

1	Fibre connection to my home
2	ADSL line to my home
3	From the cellular network
4	Other

24. **Group 6 from Q1:** Do you or family members watch free programmes from YouTube online? **SA**

1	Yes
2	No

25. What additional TV programmes/channels would you and your family **ideally** like to get? Select all that apply?

MA

1	More local sport
2	More international sport
3	More 24 hour news channels
4	More movies
5	More reality shows
6	More children's shows
7	More lifestyle programmes
8	More soaps operas/Telenovellas
9	More series/drama
10	More comedy/sitcoms
11	More documentaries
12	More wildlife programmes
13	More quiz programmes/game shows
14	More actuality programmes
15	More music channels
16	None of the above – I am happy with what I currently get

26. Those who chose Prompt 1 or 2 in Q25: How important is it for you to be able to view sport fixtures live? **SA**

1	Very important
2	Quite important
3	Not particularly important
4	Not important at all

27. How satisfied are you with the TV channels/package/programming you currently get? Please indicate your level of satisfaction on a scale of 1 to 10 where 10 is completely satisfied and 1 is completely dissatisfied. You may choose any number between 1 and 10. **Record score**

28. Those who scored 7 or less in Q27: What are the reasons for your dissatisfaction? Which of these apply to you?

MA

1	It does not represent value for money
2	Price is too high
3	I do not get the programmes I really want
4	There are too many repeats
5	The content/shows are old
6	There are not enough movies
7	There is not enough sport
8	There are not enough children's shows
9	There are not enough series
10	The variety used to be better in the past
11	Other specify..... Text box

Group-specific questions – Q29 to Q44

29. **Group 1:** What are the **main reasons** that you do NOT purchase a pay TV option such as DStv or StarSat? Select all that apply. **MA**

1	I am not familiar with what they offer
2	It is too expensive
3	I have got the channels I need
4	It is a waste of money/I do not see the value
5	I do not watch enough TV for it to be worth it
6	I do not want to be tied into a contract
7	The decoder is too expensive
8	I already pay a licence fee
9	I would have to forgo some other expense in order to meet my budget
10	I am used to SABC and eTV and have no reason to change
11	Other specify..... Text box

Go to Q45

30. **Group 2:** What are the **main reasons** that you subscribe to DStv (EasyView, Access or Family package), rather than just receiving the Free-to-Air channels on SABC and eTV? Which of these apply to you? **MA**

1	The DStv is worth the money for the extra channels I receive
2	My family insists on getting the DStv channels
3	I like to keep up with my friends and discuss the DStv shows with them
4	I would miss Mzansi
5	I would miss the live sport
6	I would miss movies
7	I don't like the SABC/eTV soapiers
8	I can afford DStv and it benefits me and my family
9	I am pressurised to get DStv by family and/or friends
10	In order to get a good TV signal
11	I am used to DStv EasyView/Access/Family and have no reason to change
12	Other specify..... Text box

31. **Group 2:** What are the **main reasons** that you do NOT subscribe to DStv Compact, Compact Plus, Premium packages? Select all that apply. **MA**

1	I am not familiar with what they offer
2	It is too expensive
3	I have got the channels I need and have no need for more
4	It is a waste of money
5	I do not watch enough TV for it to be worth it
6	I would have to forgo some other expense in order to meet my budget
7	There is no benefit in it for my family
8	I watch live soccer at a friend/bar/tavern
9	I am used to DStv Easyview/Access/Family and have no reason to change
10	Other specify..... Text box

32. **Group 2:** What are the **main reasons** that you do NOT subscribe to StarSat (Top TV)? Select all that apply. **MA**

1	I have not heard of StarSat or Top TV
2	I do not know what StarSat (Top TV) offers
3	It is too expensive
4	I have got the channels I need

5	It is a waste of money
6	I do not watch enough TV for it to be worth it
7	I would have to buy another decoder
8	I would have to forgo some other expense in order to meet my budget
9	There is not enough local content on StarSat (Top TV)
10	I am used to DStv Easyview/Access/Family and have no reason to change
11	Other specify.....Text box

Go to Q45

33. **Group 3:** What are the **main reasons** that you subscribe to DStv Compact or Compact Plus rather than one of the DStv basic packages (EasyView, Access or Family package)? Which of these apply to you? **MA**

1	It is worth the money for the extra channels I receive
2	My family insists on getting the DStv Compact / Compact Plus package
3	It is affordable and it benefits me and my family
4	My TV time is important for me to relax so I will pay the extra
5	I get CatchUp which enables me to watch what I want, when I want
6	Through XtraView my family members can watch different things at the same time
7	My family members can watch online on a smartphone or tablet using the DStv Now App
8	I can get local and international sport live in HD
9	I can get international movies
10	I am pressurised to get DStv Compact / Compact Plus by family and/or friends
11	I am used to DStv Compact / Compact Plus and have no reason to change
12	Other specify.....Text box

34. **Group 3:** What are the main reasons that you subscribe to DStv Compact or Compact Plus rather than DStv Premium? Select all that apply. **MA**

1	I am not familiar with what the Premium package offers
2	It is too expensive
3	I have got the channels I need and have no need for more
4	It is a waste of money
5	I do not watch enough TV for it to be worth it
6	I would have to forgo some other expense in order to meet my budget
7	It does not represent value to me
8	There is no benefit in it for my family
9	I am used to DStv Compact/Compact Plus and have no reason to change
10	Other specify.....Text box

35. **Group 3 and those who did not choose prompt 10 in Q1:** Why do you NOT subscribe to Showmax in addition to DStv Compact or Compact Plus? Select all that apply. **MA**

1	I have not heard of Showmax
2	I am not familiar with what Showmax offers
3	I cannot afford the extra money
4	I have got the channels I need and have no need for more
5	It is a waste of money
6	I do not watch enough TV for it to be worth it
7	I do not watch many movies and series so it is not of value to me
8	There is no benefit in it for my family
9	Other specify.....Text box

36. **Group 3 and those who did not choose prompt 11 in Q1:** Why do you NOT subscribe to Netflix in addition to DStv Compact or Compact Plus? Select all that apply. **MA**

1	I have not heard of Netflix
2	I am not familiar with what Netflix offers
3	I cannot afford the extra money
4	I have got the channels I need and have no need for more
5	It is a waste of money
6	I do not watch enough TV for it to be worth it
7	I do not watch many movies and series so it is not of value to me
8	There is no benefit in it for my family
9	I do not have an internet fibre connection at home
10	I do not have an ADSL line to my home
11	The cost of data to view Netflix is too high
12	Other specify..... Text box

Go to Q42 / Q45 as applicable

37. **Group 4:** What are the **main reasons** that you subscribe to DStv Premium rather than one of the other DStv packages such as Compact or Compact Plus? Select all that apply. **MA**

1	I am not familiar with what Compact or Compact Plus offers
2	Premium is worth the money for the extra channels I receive
3	My family insists on getting the DStv Premium package
4	It is affordable and it benefits me and my family
5	My TV time is important for me to relax so I will pay the extra
6	I get CatchUp which enables me to watch what I want, when I want
7	Through XtraView my family can watch different things at the same time
8	My family can watch online on smartphone or tablet using the DStv Now App
9	I have access to Showmax for free
10	I can get all the sport channels
11	I can get all the news channels
12	I can get all the children's channels
13	I can get the latest movies
14	I want the maximum offering that Multichoice provides regardless of cost
15	I am used to DStv Premium and have no reason to change
16	Other specify..... Text box

38. **Group 4 and those who did not choose prompt 11 in Q1:** Why do you NOT subscribe to Netflix in addition to DStv Premium? Select all that apply. **MA**

1	I have not heard of Netflix
2	I am not familiar with what Netflix offers
3	I cannot afford the extra cost of Netflix
4	I have got the channels I need and have no need for more
5	It is a waste of money
6	I do not watch enough TV for it to be worth it
7	I do not watch many movies and series so it is not of value to me
8	There is no benefit in it for my family
9	I do not have an internet fibre connection at home
10	I do not have an ADSL line to my home

11	The cost of data to view Netflix is too high
12	Other specify..... Text box

Go to Q42 / Q45 as applicable

39. **Group 5:** What are the **main reasons** that you subscribe to StarSat (Top TV) rather than just receiving the Free-to-Air channels on SABC and eTV? Select all that apply. **MA**

1	StarSat (Top TV) is worth the money for the extra channels I receive
2	My family insists on getting the StarSat (Top TV) channels
3	I like to keep up with my friends and discuss the StarSat (Top TV) shows with them
4	I don't like the SABC/eTV soaps
5	The SABC channels are too limited
6	I can afford StarSat (Top TV) and it benefits me and my family
7	I wish to support an alternative TV programme supplier to Multichoice
8	I am used to StarSat (Top TV) and have no reason to change
9	Other specify..... Text box

40. **Group 5:** What are the **main reasons** that you do NOT subscribe to any of the basic DStv packages (EasyView, Access or Family package)? Select all that apply. **MA**

1	I am not familiar with what they offer
2	They are not good value
3	I prefer the StarSat (Top TV) offering to DStv
4	It is a waste of money
5	There is no benefit in it for my family
6	My family and friends recommended StarSat (Top TV)
7	I would have to buy another decoder
8	I do not wish to support Multichoice (DStv)
9	I am used to StarSat (Top TV) and have no reason to change
10	Other specify..... Text box

41. **Group 5:** What are the **main reasons** that you do NOT subscribe to DStv Compact, Compact Plus, Premium packages? Select all that apply. **MA**

1	I am not familiar with what they offer
2	It is too expensive
3	I have got the channels I need and have no need for more
4	It is a waste of money
5	I do not watch enough TV for it to be worth it
6	I would have to forgo some other expense in order to meet my budget
7	There is no benefit in it for my family
8	I would have to buy another decoder
9	I am used to StarSat (Top TV) and have no reason to change
10	Other specify..... Text box

Go to Q42 / Q45 as applicable

42. **Deleted.....Group 6:** Do you subscribe to a Multichoice DStv packages in addition to the online service you receive?

1	Yes
2	No

Go to Q43

Go to Q44

43. **Those who chose prompt 2 to 8 in Q1a and any of prompts 1 to 6 in Q1b:** What are the **main reasons** you subscribe to an online service in addition to your DStv subscription? **MA**

1	I get access to the latest movies
2	I get access to the latest series
3	I prefer to stream online
4	I can download the content I want and view it offline
5	I get Netflix because everyone is talking about it
6	My family insists I get Netflix/Showmax (or other online offering)
7	It gives me a measure of control over what my children watch
8	It provides greater variety in terms of viewing options
9	I can watch anywhere on my smartphone or tablet
10	I get DStv in addition to online TV purely for the sport
11	I need DStv and online to maximise my viewing options
12	Other specify..... Text box

44. **Those who chose prompt 9 in Q1a and any of prompts 1 to 6 in Q1b:** What are the **main reasons** that you do NOT subscribe to a DStv package? Select all that apply. **MA**

1	I am not familiar with the DStv packages
2	It is too expensive
3	It is a waste of money
4	I do not watch enough TV for it to be worth it
5	I would have to forgo some other expense in order to meet my budget
6	It does not represent value to me
7	There is no benefit in it for my family
8	I prefer to stream online
9	I can download the content I want and view it offline
10	I do not have a TV
11	I get all the content I need online
12	I prefer to watch on my laptop/tablet/smartphone
13	I am used to watching online and have no reason to change
14	Other specify..... Text box

Pricing questions:

The following TV channels are offered free of charge in South Africa:

- SABC News
- SABC Encore
- SABC 1
- SABC 2
- SABC 3
- eTV
- eTV Movies

Let us call this the Basic Package.

We would like your opinion on how appealing you find the following additional options to the Basic Package. The cost you would need to pay for each option is shown at the bottom.

Package 1 - Basic Package plus 10 channels:

- 2 Series channels
- 3 Movie channels
- 2 News channels
- 2 Local live sport
- 1 Children's channel

Price R300

45. Would you switch from your current TV offering to Package 1?

1	Yes
2	No

Package 2 - Basic Package plus 25 channels:

- 5 Series channels
- 3 Reality channels
- 3 Movie channels
- 4 News channels
- 6 Sport channels
- 3 Children's channels
- 1 Comedy channel

Price R600

46. Would you switch from your current TV offering to Package 2?

1	Yes
2	No

Package 3 - Basic Package plus 40 channels:

- 5 Series channels
- 6 Reality channels
- 5 Movie channels
- 5 News channels
- 10 Sport channels
- 5 Children's channels
- 1 Comedy channel
- 3 Documentary channels

Price R900

47. Would you switch from your current TV offering to Package 3?

1	Yes
2	No

48. Gender – refer code list from PSA

49. Age groups – refer code list from PSA

50. Which of the following best describes your level within your company? **SA**

1	Top management / executive
2	Senior management
3	Middle management
4	Junior management
5	Worker
6	Self employed
7	Not applicable

51. What is your monthly household income before tax? **SA**

1	Less than R5,000 per month
2	R5,001 to R8,000
3	R8,001 to R10,000
4	R10,001 to R15,000
5	R15,001 to R20,000
6	R20,001 to R30,000
7	R30,000 to R50,000
8	R50,000 to R75,000
9	R75,000 to R100,000
10	More than R100,000 per month
11	Don't know

52. Which of the following best describes where you live? **SA**

1	Temporary structure / shack
2	Single room in a larger dwelling or backyard
3	A hostel
4	Flat in an apartment building
5	Townhouse / cluster
6	Free standing house
7	Other

Data from PSA panel:

- Gender
- Date of birth
- What is your race
- In which province do you live
- What is your marital status
- What is the highest level of education you personally have achieved
- Which one of these statements best describes your work status