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# Our approach

OLSWANG

An abstract graphic consisting of horizontal light trails in various colors (red, blue, yellow, green, orange) against a black background. The trails are blurred and have a slight curve, suggesting motion or data flow.

This report sets out some of the key findings from the Olswang Convergence Consumer Survey 2008 (in association with YouGov). This is our fourth annual survey into consumers' attitudes to convergence.

When we launched the first Olswang Convergence Consumer Survey in 2005, YouTube was only a few months old and the BBC iPlayer (or "iMP" as it was then known) was undertaking its first limited trials. Three years on (and less than a year since its full public launch), the iPlayer has served more than 248 million items of content. In today's "Digital Britain" convergence is finally having a real impact on the consumer.

Our survey approach has moved forward accordingly.

As with previous years' reports, this year's survey again included quantitative online research into the attitudes of UK consumers to convergence<sup>1</sup>. Some of the statistics from this year's quantitative survey are set out in or referred to in this Report - the full results are published in a separate Annex which readers are encouraged to obtain from [www.olswang.com/convergence08/](http://www.olswang.com/convergence08/) (and, in this Report, references to "Figures" are cross-references to the corresponding charts in the Annex).

However, for the first time this year we also commissioned YouGov to undertake a series of online focus groups, in order to explore in more detail the effects of convergence on the activities of distinct types of consumer.

This qualitative focus group research and the quantitative survey results both reference four key demographic segments - "Kids" (13 - 15 year olds) and three distinct technology adoption groups, which take advantage of YouGov's comprehensive screening of its online respondent panel: "Tech Vanguard", "Mainstream" and "Laggards". This segmentation enables us to compare and contrast the experience of convergence in each of these groups and to consider the true impact of convergence on the British population at large.

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<sup>1</sup>Total sample size for this year's quantitative survey was 1162 respondents (235 children between the ages of 13 - 15 and 927 adults were interviewed). Fieldwork was undertaken by YouGov between 25 September and 3 October 2008. The survey was carried out online.

## The four demographic segments

### Kids

Two of our focus groups were dedicated to 13 - 15 year olds (and 235 of our quantitative survey respondents were in this age bracket). These respondents are being brought up in the internet age and we wanted to understand how they are reacting to the opportunities now presented to them.

### Tech Vanguard

While early adopter behaviour cannot in itself be extrapolated into the general population, the "Tech Vanguard" (the subject of another two focus groups and comprising a further 253 of our quantitative respondents) is undoubtedly important, in particular because of this group's role in informing and influencing the attitudes and behaviour of those following behind.

### Mainstream

434 of our quantitative survey respondents fell into the "Mainstream", and we held a further two focus groups for this core segment. How is convergence affecting "Joe the Plumber"? What lessons does our research offer for those trying to extend the reach of new services into this section of society?

### Laggards

Our online methodology meant that our 240 "Laggards" (and the participants in our two final focus groups) at least all had internet access - but how do these "late adopters" approach the concept of convergence?

In this Report we have included a number of quotations from the focus group participants. In some quotes we have corrected obvious grammatical and/or typographical errors, but in others we have retained some of these errors in order to preserve the full "flavour" of the comments as they were made by the focus group participants.

We hope you will find the results of this year's survey both interesting and useful. As always, we will be pleased to answer any specific questions you may have.

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As in previous years, readers are welcome to use any of the data set out in this Report or its separate Annex, so long as they acknowledge as their source the Olswang Convergence Consumer Survey 2008.

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## But what do we mean by convergence?

“Convergence” means different things to different people, so it is important to spell out what we mean by this term. For our purposes, convergence is best defined by reference to its effects: it means the technological developments which result in an end-user having much greater choice and control over his or her consumption of content in the home and/or on the move, such that he or she decides what to watch, when to watch it, and on what device, rather than this being determined by technological constraints.

The extent to which this choice and control can become a reality for consumers in their day to day activities is of course significantly influenced by consumer electronics companies, platform operators and content owners, many of whose business models are themselves being transformed by the effects of “technological” and/or “media” convergence at a commercial level. However, the current pace of technological change means that, for us, convergence is now also increasingly about how well-informed consumers will use the functionality and content which is available to them across the full range of devices, platforms and services they own or receive - *“if we download a film it gets streamed onto my tv - 42” ☺.*”  
(M, Tech Vanguard focus group)