



Digital Terrestrial Television Quantitative Results

Establishment Survey

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Introduction



Project Background

- The DTT pilot is currently being built and is planned to be operational in the second half of 2006. The pilot will run over a two-year timeframe, during which time broadcasts will transmit from the Three Rock site in Dublin and the Clermont Cairn site in County Louth. The pilot hinterland will be Dublin and North Leinster. The trial provides the opportunity for technical testing of services, both of existing and new broadcast channels and services, while allowing for viewers to experience the new service at user level. Broadcasts will be initially across three multiplexes with the option of adding a fourth multiplex.
- BT Communications (Ireland) will provide a multiplexing and distribution service to the DTT Pilot. Multiplexing enables compression of television signals resulting in higher quality reception and more efficient use of broadcast spectrum. NEC (UK) Limited will supply and install the transmission and combining systems required for the DTT Pilot. RTÉ Transmission Network Limited, which maintains Ireland's international co-coordinated high-power broadcast sites, will assist the Minister and his Department in the development and operation of the pilot project.

Project Background

- In announcing the pilot the Minister for Communications, Marine and Natural Resources, Noel Dempsey TD, argued that the pilot was an important and exciting development in Ireland's long-term broadcasting strategy.
- *"The Pilot should be seen as a precursor to a national rollout of DTT, which is a prerequisite for analogue switch-off and good spectrum planning for the future. The European Commission is proposing 2012 as a switch-off date across Europe. We should set our sights on 2012 as a date for completing the transition to digital television."*

Objectives

The key objectives of the trial are specified in the project brief, and include:

- To introduce the concept of DTT to Ireland
- To test the feasibility of developing a national DTT platform in Ireland and to test the attractiveness of services that could be provided.
- To assess the impact of DTT on Users
- To provide opportunities for new and novel content provision
- To show how content could be enhanced for added user benefit
- To explore content that can be used across a range of other digital broadcasting platforms, not just DTT
- To evaluate technology issues associated with DTT, including reception quality, indoor and outdoor reception, spectrum planning and coverage, HDTV and receiver technologies.
- To explore issues surrounding a progression towards analogue switch off.

Methodology

- The panel establishment phase of this project was conducted face to face in home among 500 respondents in the two trial areas of Dublin and Dundalk.
- Each interview was conducted by an Amárach trained interviewer.
- Quotas were set on the overall sample of 500 on social class, TV reception and gender of the panel member.



Findings



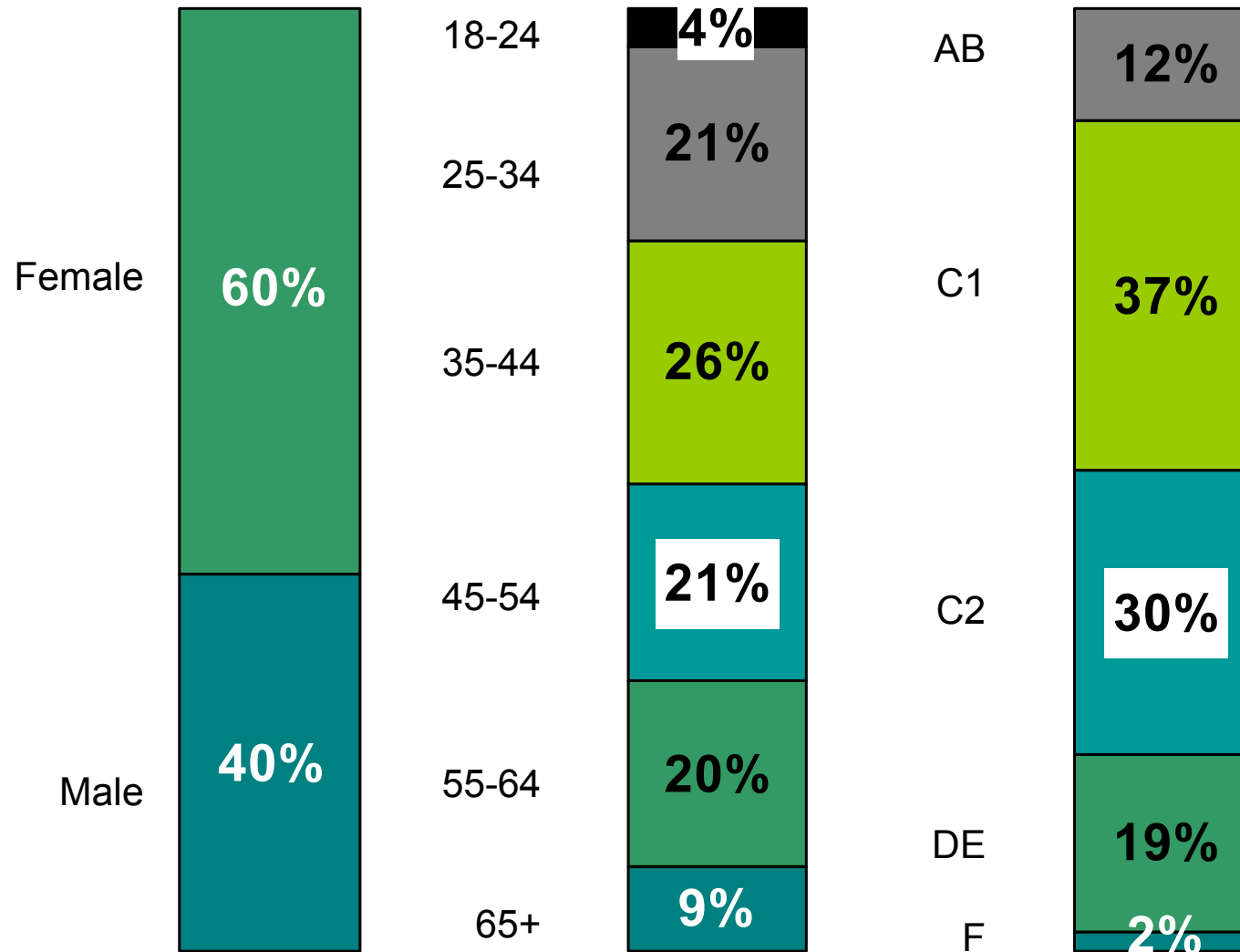


Panelists



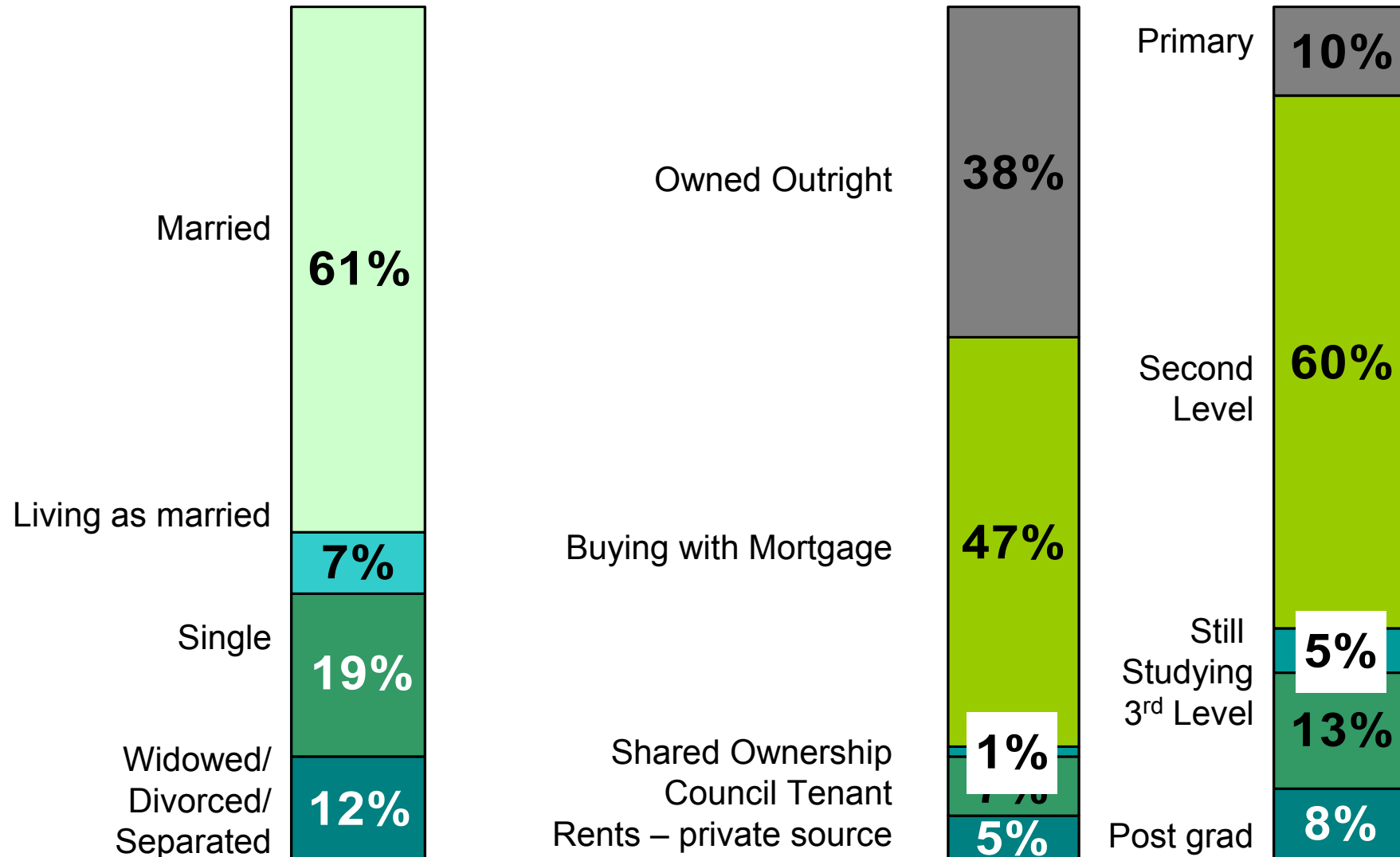
Profile of Panelists

Base: All Panelists N= 500



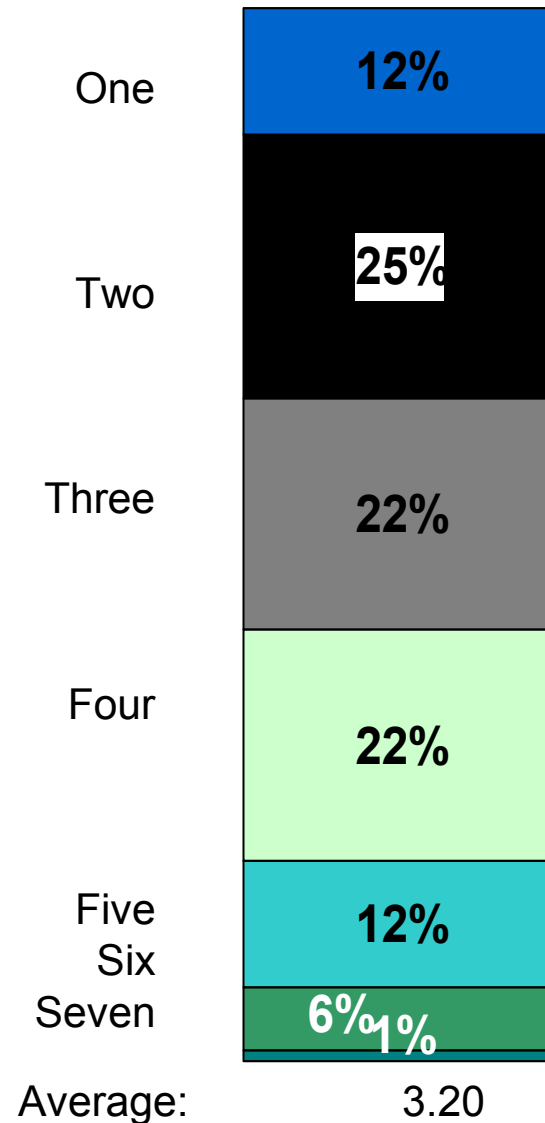
Profile of Panelists

Base: All Panelists N= 500



Number of People Resident in Household

Base: All Panelists N= 500



Household size is greater in Dublin (3.45) than Dundalk (2.96)

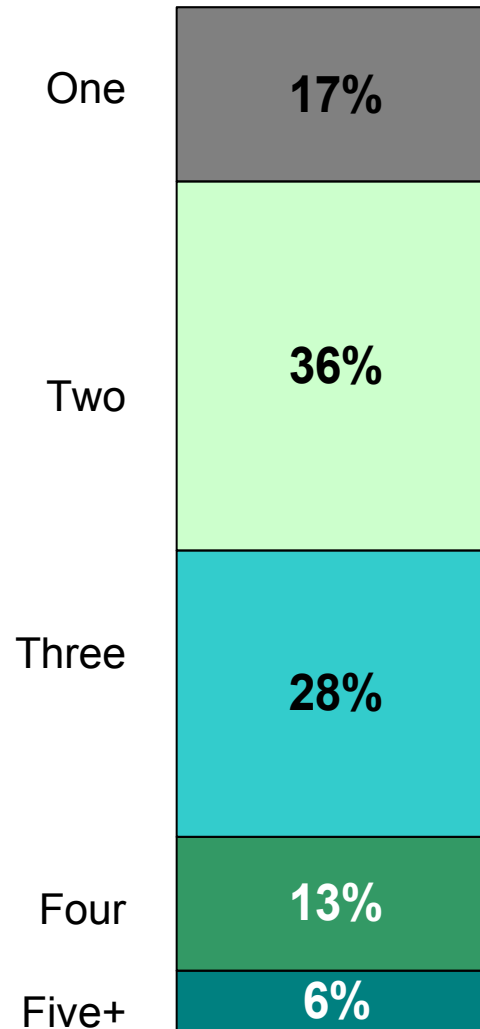


Television in the Home



Number of Sets in Household

Base: All Panelists N= 500



Average: 2.59



Region Average
Dublin 2.81
Dundalk 2.38

Children in Home
Under 12 2.77
13-18 3.03

Profile of Household TV Sets

Set No	Total %	Gender		Age					
		Male %	Female %	15-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %
One	17	20	14	11	26	14	6	14	31
Two	36	35	37	58	45	33	29	31	40
Three	27	29	26	16	18	32	32	32	22
Four	13	10	16	11	9	14	20	17	2
Five	4	4	5	-	2	7	6	4	2
Six	1	1	1	5	-	-	2	2	2
Seven	1	1	1	-	-	1	2	-	-



= higher than average



= Lower than average

Profile of Household TV Sets

Set No	Total %	Social Class		Children		Region	
		ABC1 %	C2DE %	U12 %	13-18 %	Dublin %	Dundalk %
One	17	17	16	12	9	9	24
Two	36	38	33	36	25	34	38
Three	27	28	27	29	35	33	22
Four	13	13	14	13	21	15	11
Five	4	4	5	7	9	5	4
Six	1	-	3	1	1	2	1
Seven	1	1	-	1	-	1	-



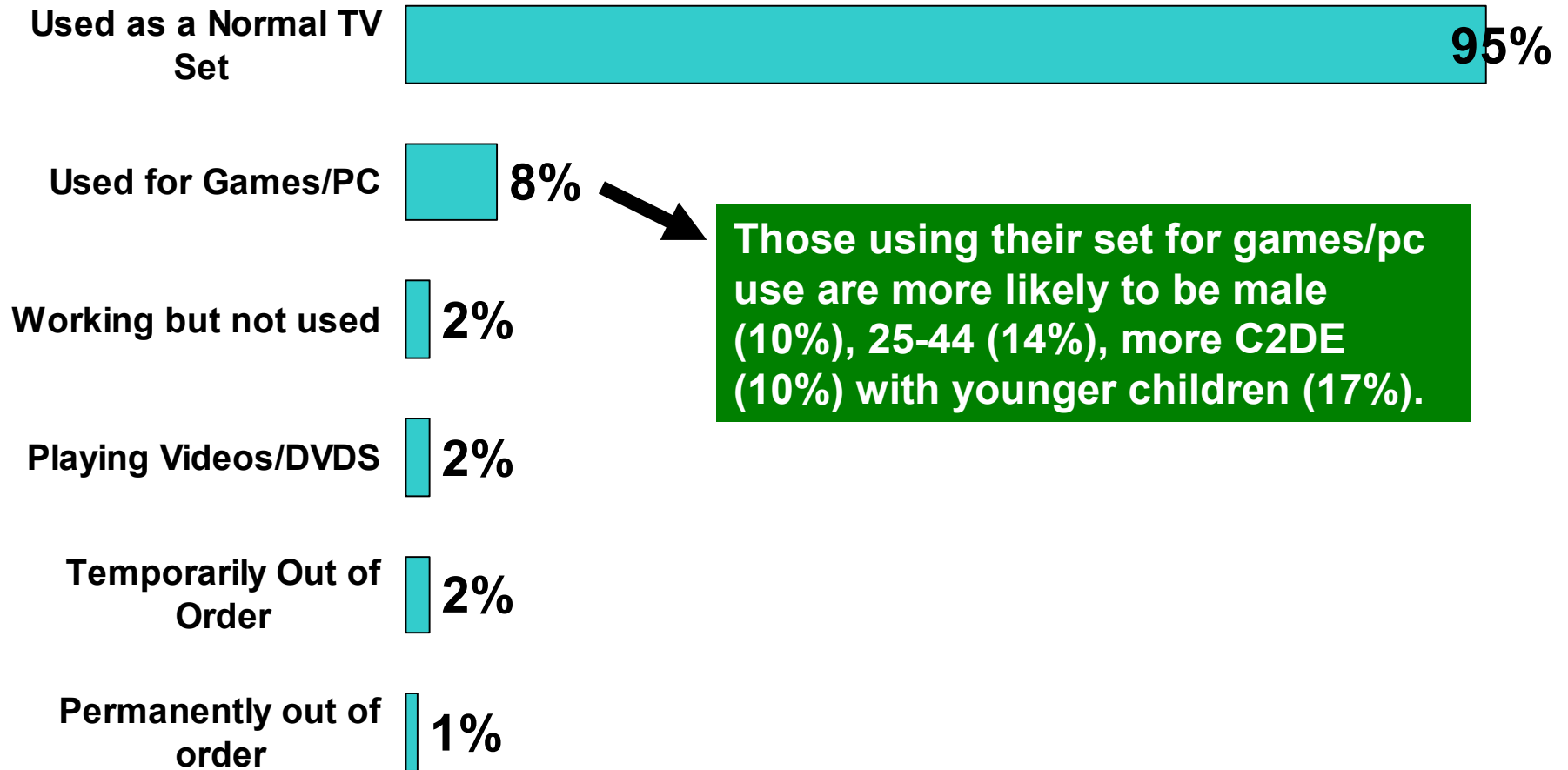
= higher than average



= Lower than average

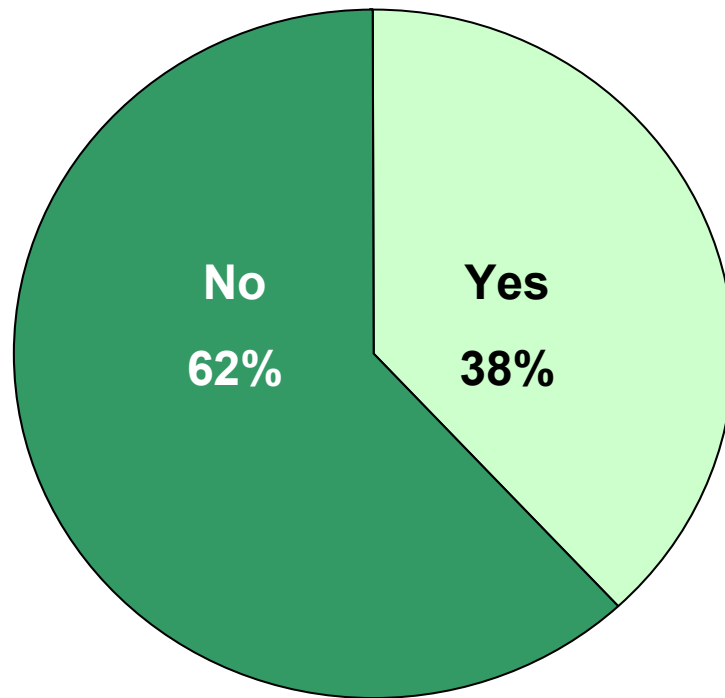
TV Set Usage

Base: All Panelists N= 500



Incidence of Portable Ownership

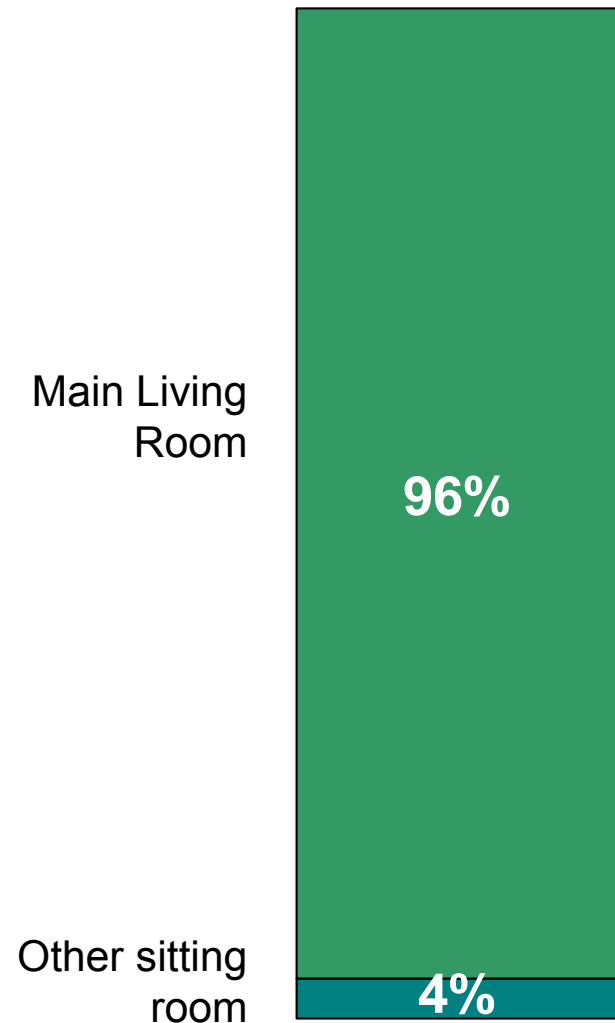
Base: All Panelists N= 500



Those with a portable TV set have no gender bias, are more likely to be 45-54 (46%), living in Dublin (45%). They are also marginally more likely to have a home internet connection (42%)

Location of Main TV Set in Home

Base: All Panelists N= 500

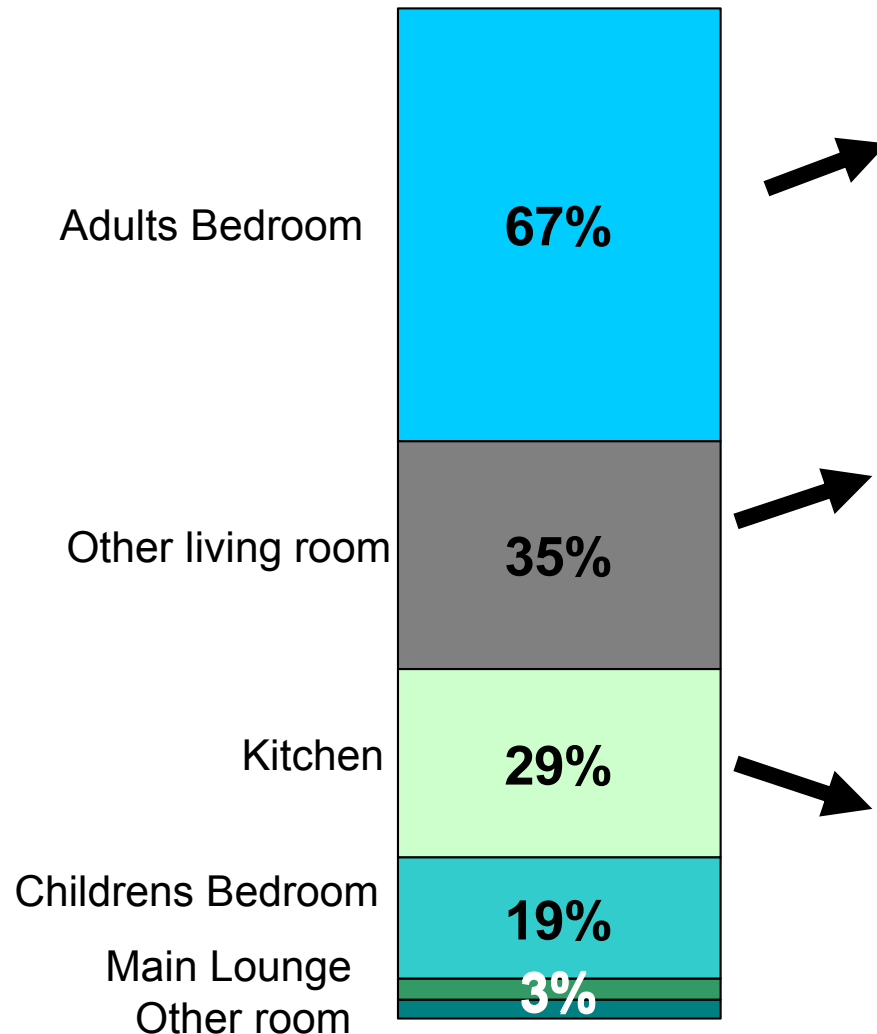


Those who place their main TV set in another sitting room are more likely to be male (6%), younger 15-24 (11%), living in rented accommodation (9%), and are marginally more likely to live in Dundalk (6%).

Location of Other TV Set in Home

Base: All Panelists N= 500

Other Set



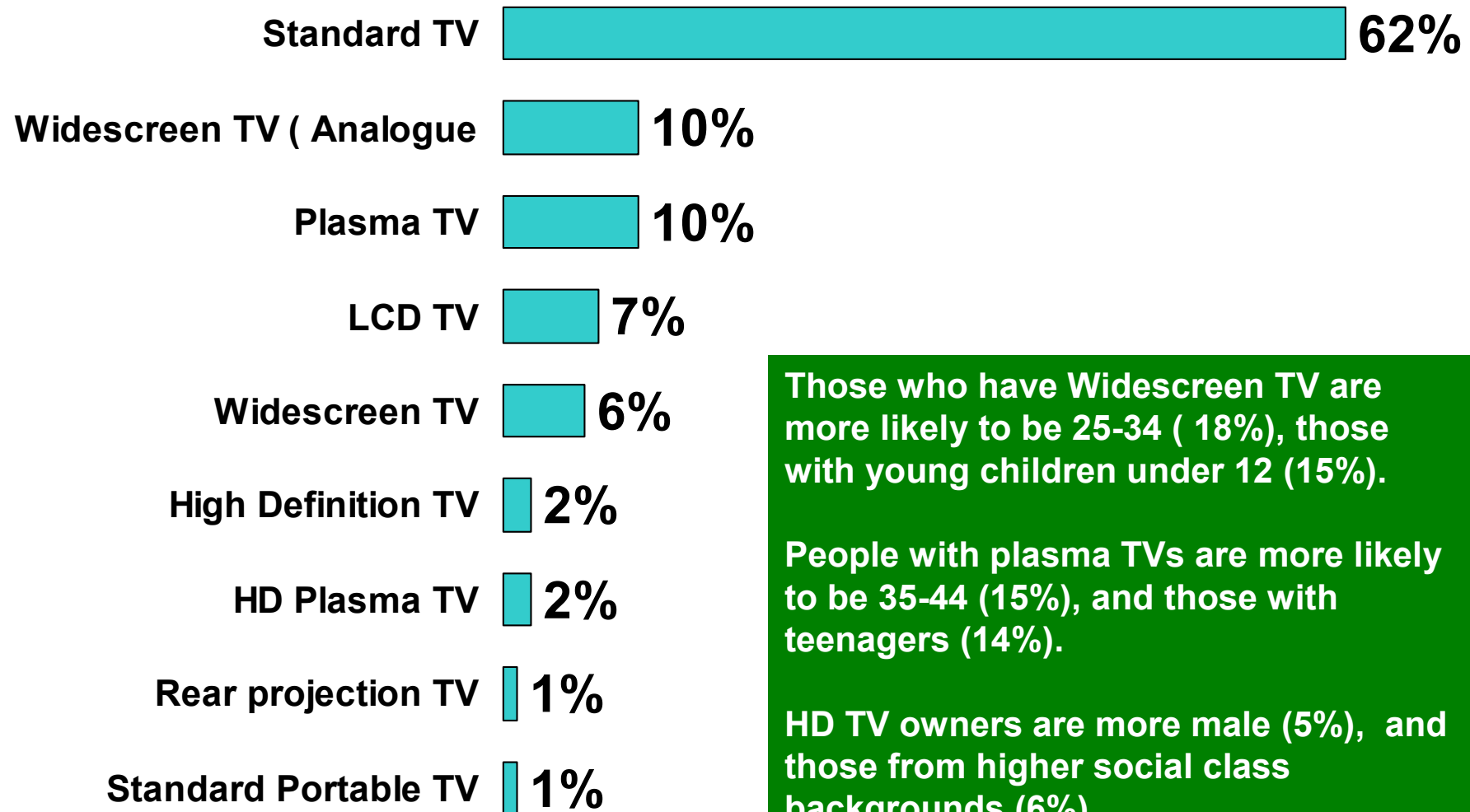
Those who have a TV set in their bedroom are marginally more likely to be female (70%), younger 15-24 (82%), from a more middle to lower social class background (71%), living in council accommodation (80%) who are more likely to be situated in Dublin (77%)

Panelists who have an additional television in another living room are more male (40%), 55-64 (46%), from a higher social class background (41%), who own their own homes (39%).

Televisions in kitchens are more prevalent among 45-54 year olds (43%), from a mid – lower social class background (33%) who have younger children under 12 (33%) and live in Dundalk (36%)

Main TV Set Type in Household (Base: All Panelists N= 500)

Main



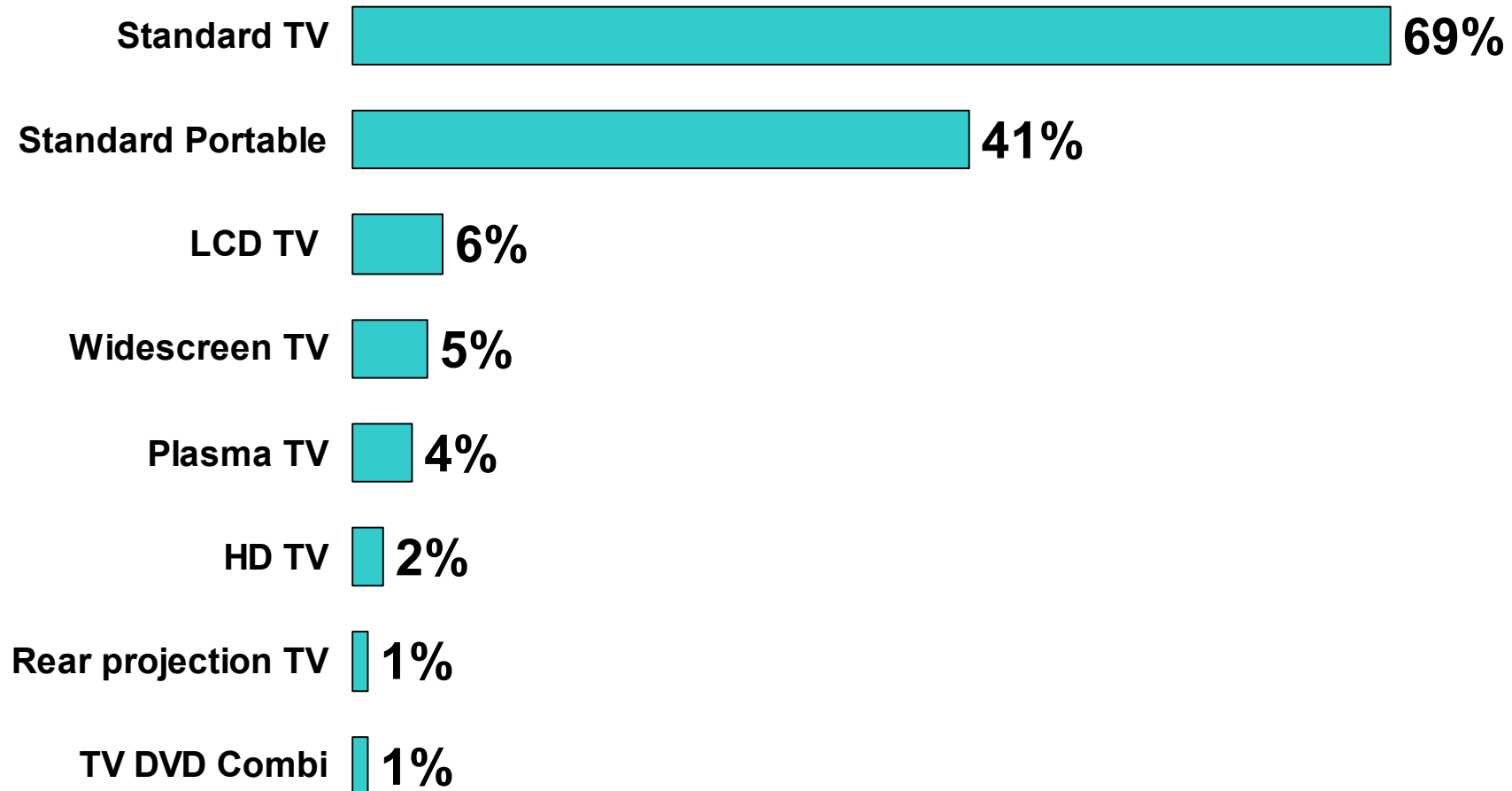
Those who have Widescreen TV are more likely to be 25-34 (18%), those with young children under 12 (15%).

People with plasma TVs are more likely to be 35-44 (15%), and those with teenagers (14%).

HD TV owners are more male (5%), and those from higher social class backgrounds (6%),

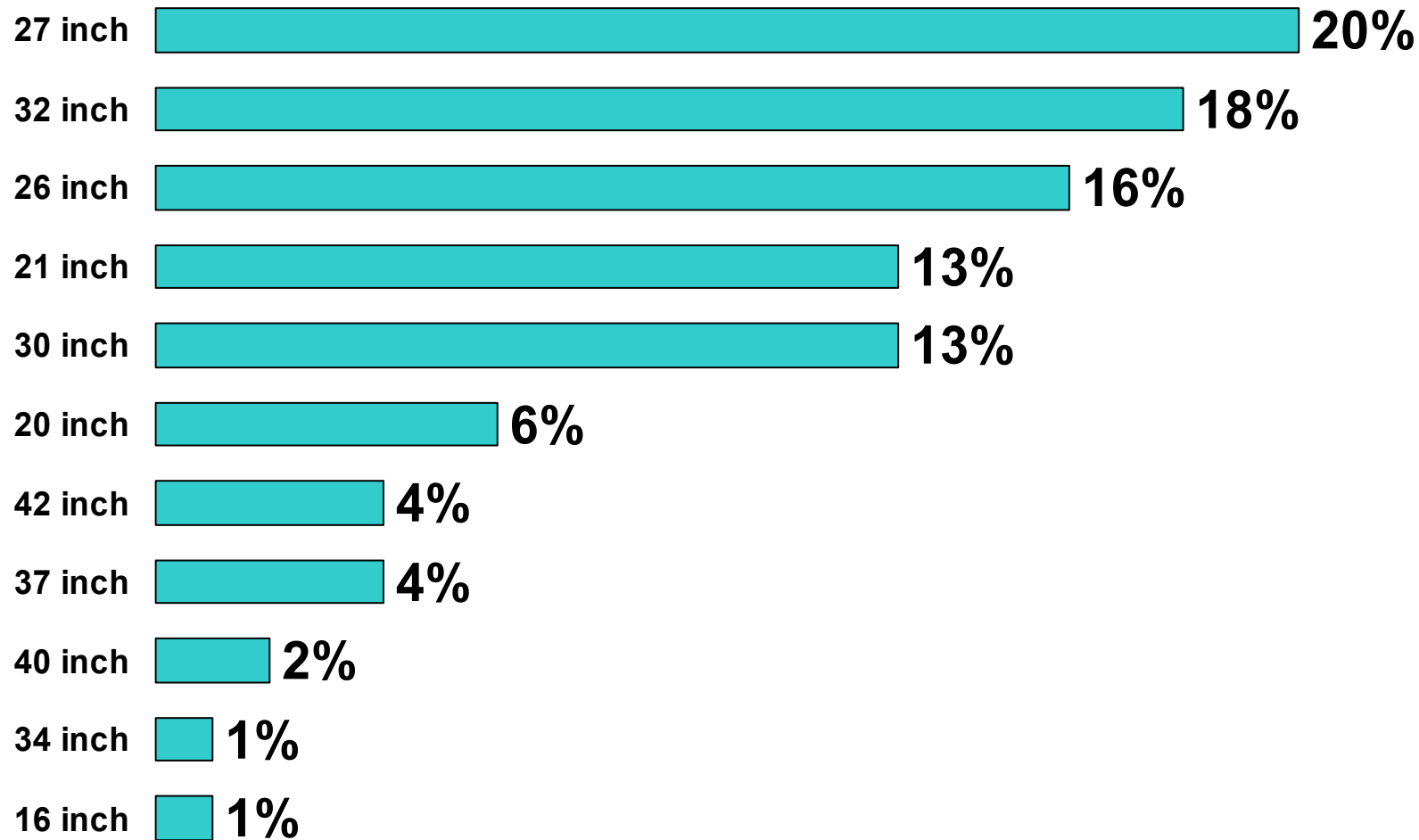
TV Set Type in Household

(Base: All Panelists With an Additional TV N= 392)



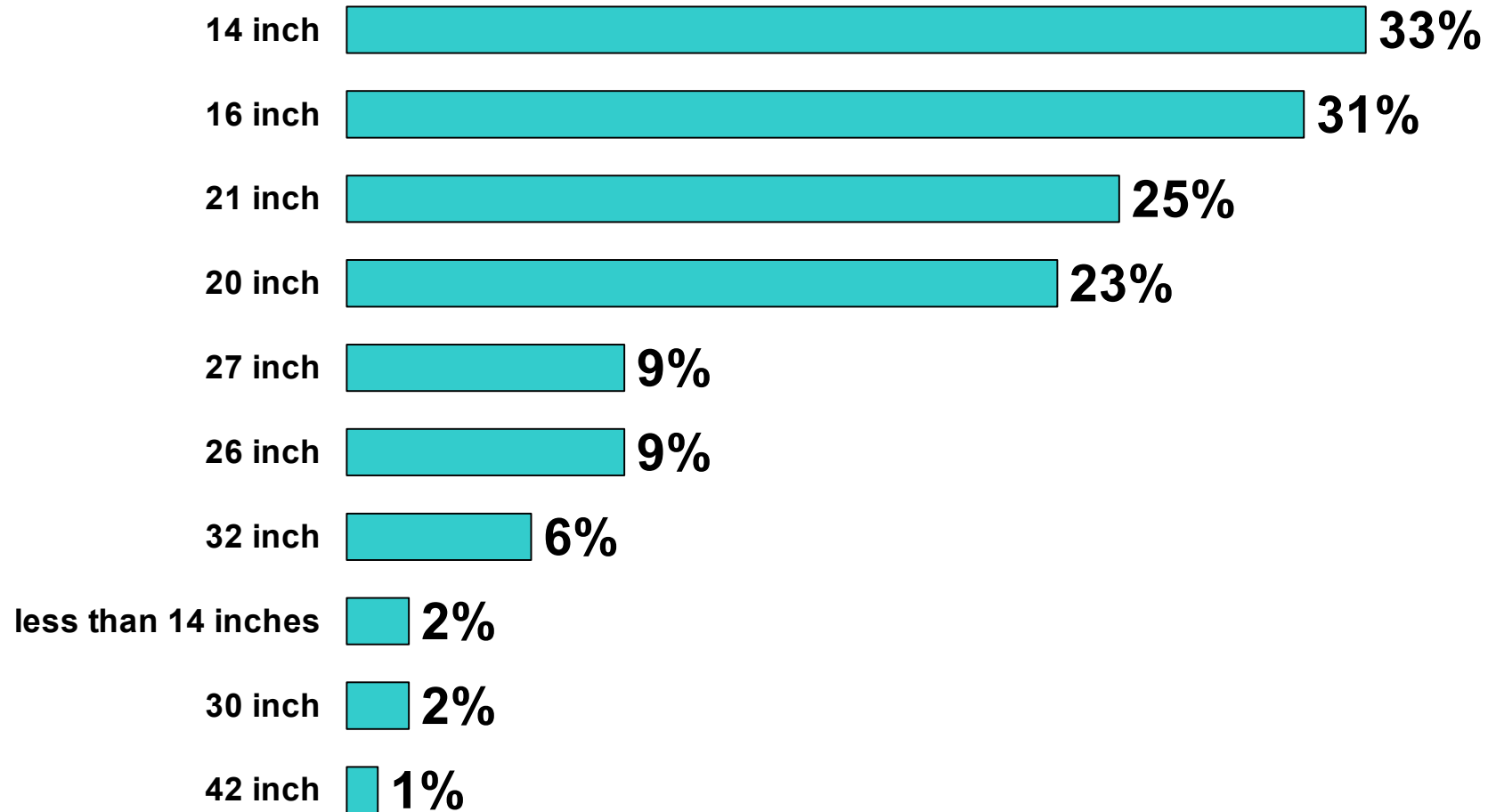
Size of Main TV in Household

Base: All Panelists N= 500



Size of Other TV in Household

Base: All Panelists N= 500



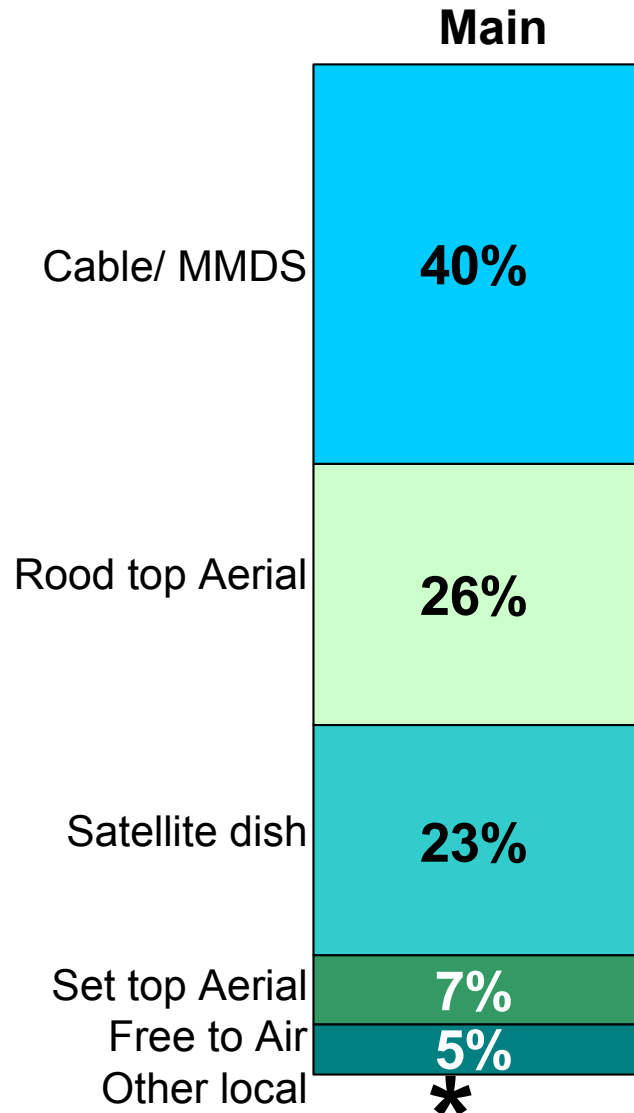


Television Reception



Main TV Reception Format

Base: All Panelists N= 500



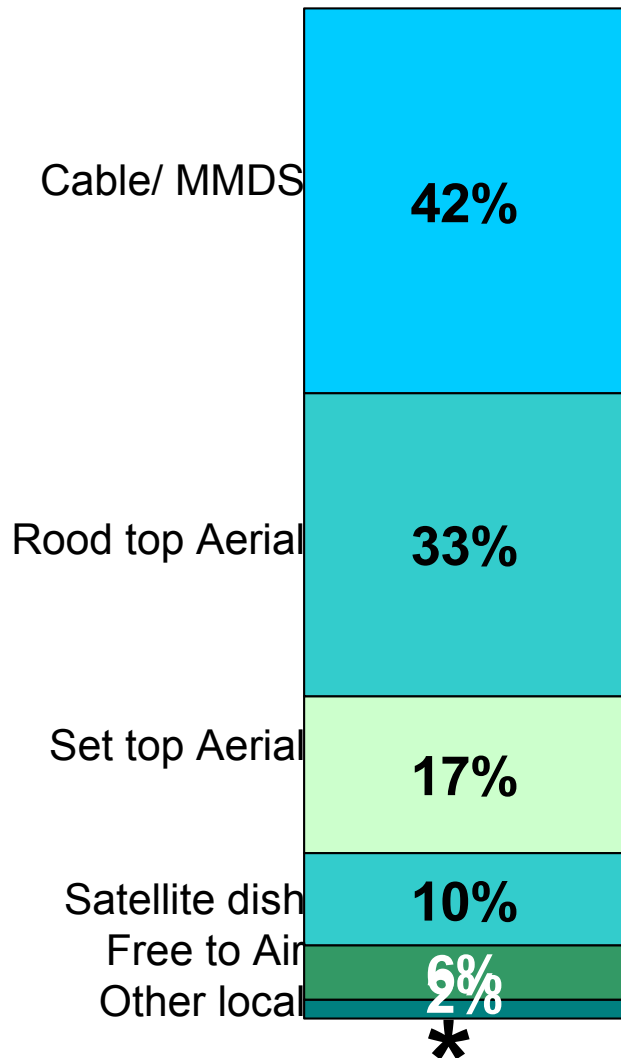
Those who cable/mmds are more likely to be female (45%), 35-44 year olds (47%), from a higher social class background (46%), with teenage children (53%), who live in Dublin (78%)

Individuals with analogue aerials are more male (35%), 65+ (39%), living in Dundalk (49%).

Satellite viewers are more likely to be from a lower social class background (27%), have younger children under 12 (26%), and live in Dundalk (28%)

Other TV Reception Format

Base: All Panelists With An Additional TV N= 392



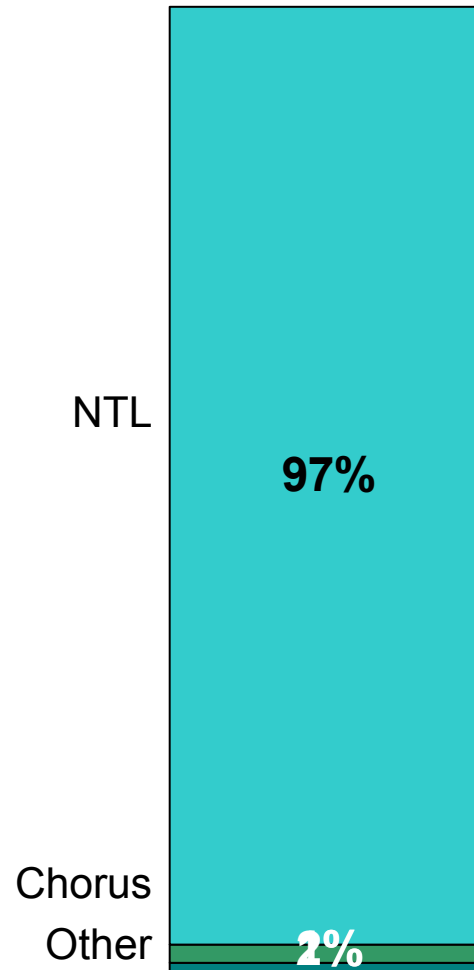
Those who cable/mmnds on another set are more likely to be female (46%), 35-44 year olds (57%), from a higher social class background (49%), with teenage children (59%), who live in Dublin (77%)

Individuals with analogue aerials are more male (39%), 65+ (48%), living in Dundalk (70%).

Set top aerial users are more likely to be 25-34 year olds (32%), those with children under 12 (21%), those in rented accommodation (29%).

Cable MMDS Supplier

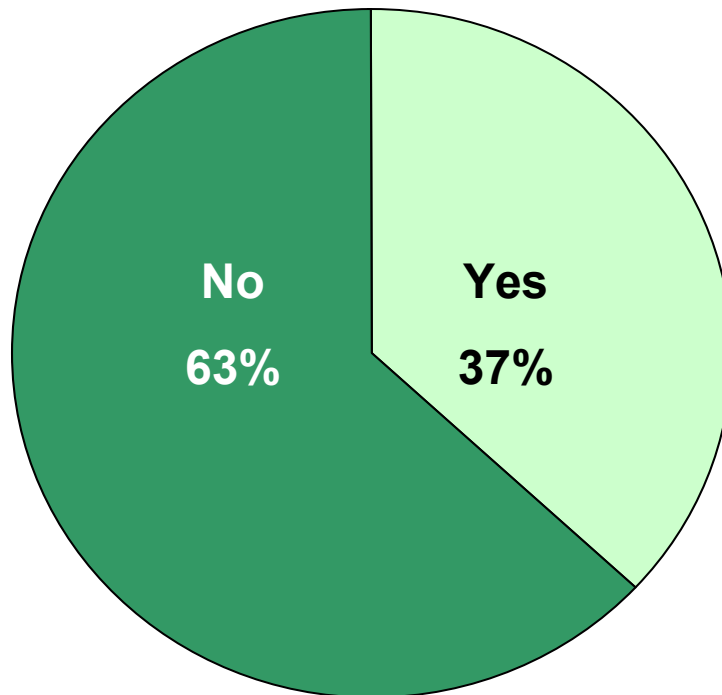
Base: All Panelists with Cable MMDS N= 210



NTL customers are marginally more likely to be female (99%), 55-64 year olds (100%), those from a lower social class background (99%), and those living Dublin (99%).

Incidence of Having Digital TV

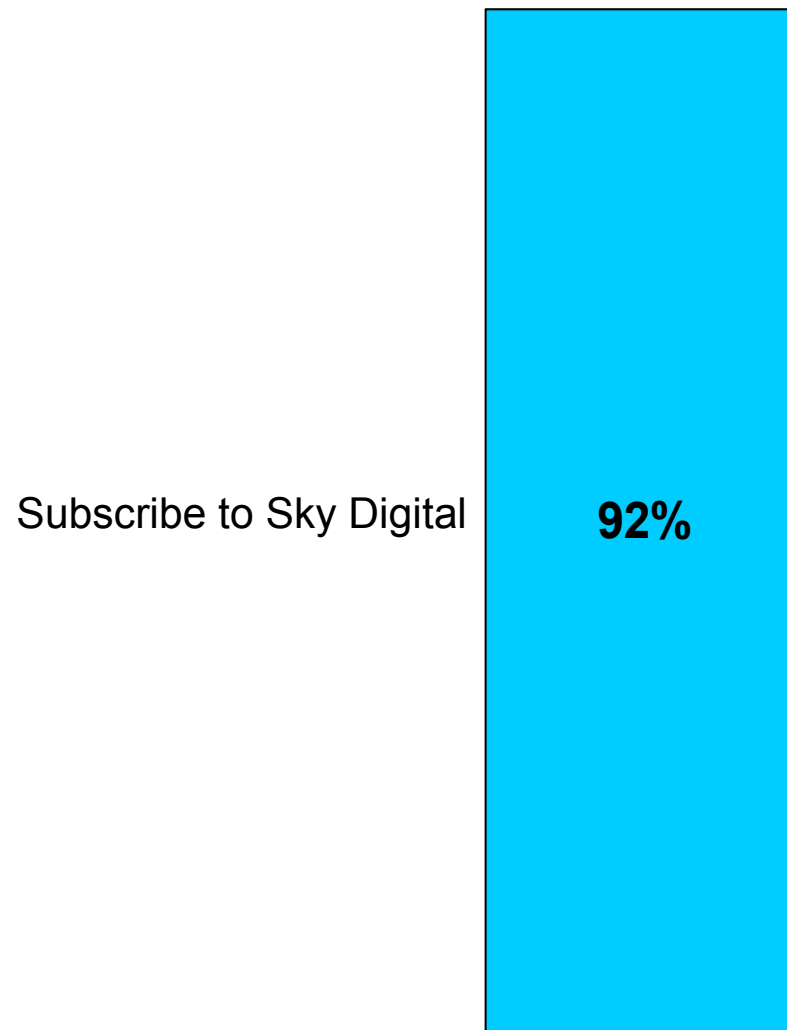
Base: All Panelists with Cable MMDS N= 210



Those cable viewers who have digital TV access are females (40%), 35-44year olds (44%), those from a higher social class background (42%), and those living in Dublin – just one panelist in Dundalk claims to have cable and digital access.

Satellite Supplier

Base: All Panelists with Satellite N= 110



Sky subscribers are more likely to be 45-54 year olds (96%), from a higher social class background (99%), and those living in Dublin (95%).

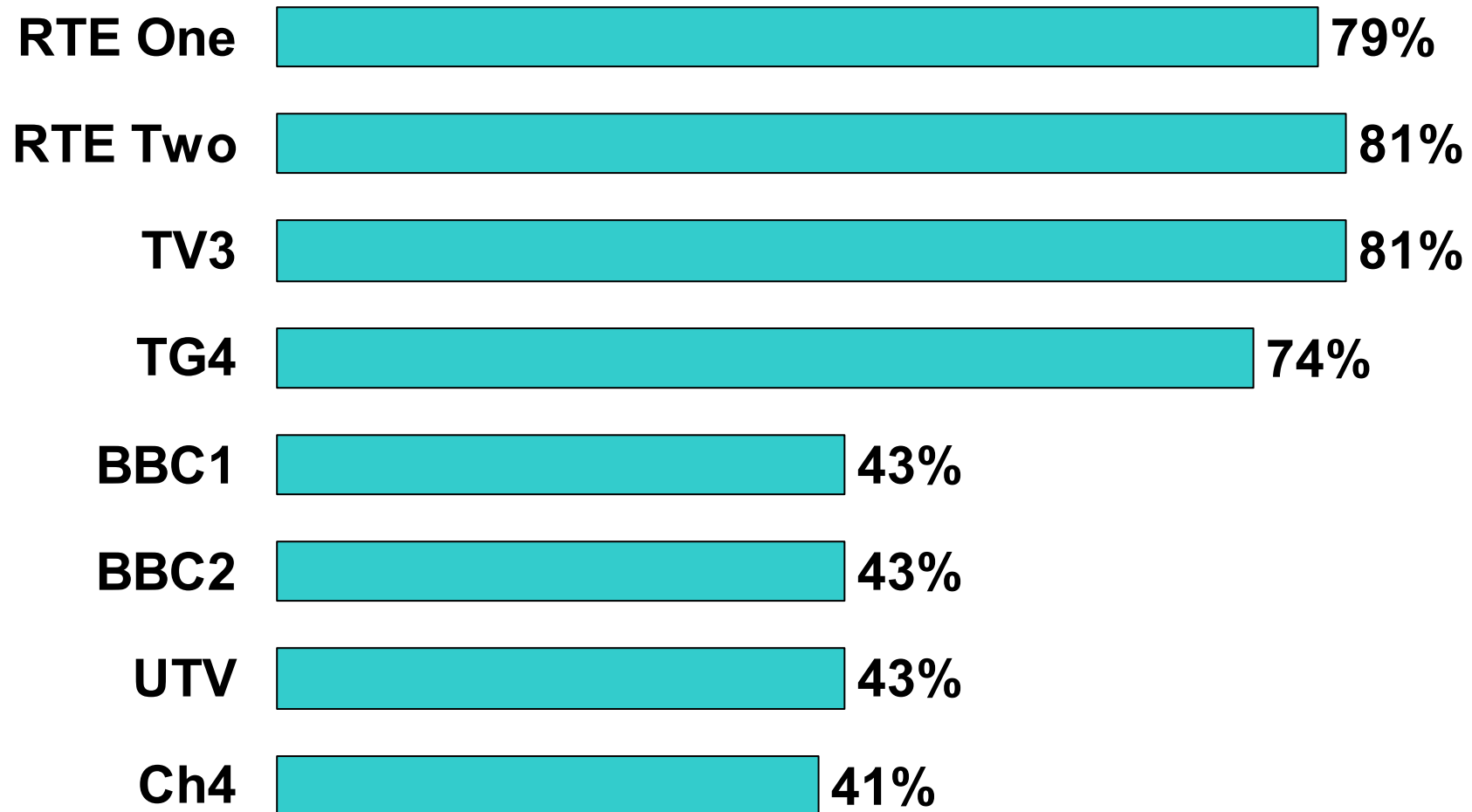
Lapsed subscribers tend to be younger 25-34 (8%).

Free to air users are older 55+ (11%), and are marginally more likely to live in Dundalk.

- Lapsed Sky Subscriber: 3%
- Have a digital dish to receive the BBC Free to Air service and other UK channels 2%
- Have dish to receive specific foreign channels 2%

Channel Repertoire for Free to Air

Base: All Panelists with Free to Air N = 58



Pen Pictures of Free to Air Viewers By Channel

RTE One

- Viewers of RTE One via free to air are more likely to be male (83%), middle aged 45-54 (83%), from a lower social class background (90%), and those living in Dundalk (91%).

RTE Two

- These viewers are more likely to be younger 25-34 (84%), lower social class background (90%), living in Dundalk (94%)

TV3

- Viewers of this channel are more likely to be male (87%), 25-34 (84%), lower social class background (86%), and living in Dundalk (94%).

TG4

- These viewers mirror closely those of TV3 as such they are male (83%), 25-34 (79%), from lower social class background (83%) and living in Dundalk.

Pen Pictures of Free to Air Viewers By Channel

BBC1

- Viewers of BBC1 are more male (52%), 25-44 (57%), lower social class background (48%), and those living in Dundalk (76%).

BBC 2

- Again these viewers are similar to BBC1 viewers as such they are male (52%), 25-44 (57%), lower social class background (48%), and living in Dundalk (76%).

UTV

- Viewers of this channel are more likely to be male (48%), 25-34 (58%), lower social class background (52%), and living in Dundalk (76%).

Channel 4

- These viewers are also male (48%), 25-34 (58%), lower social class background (48%) and living in Dundalk (73%)

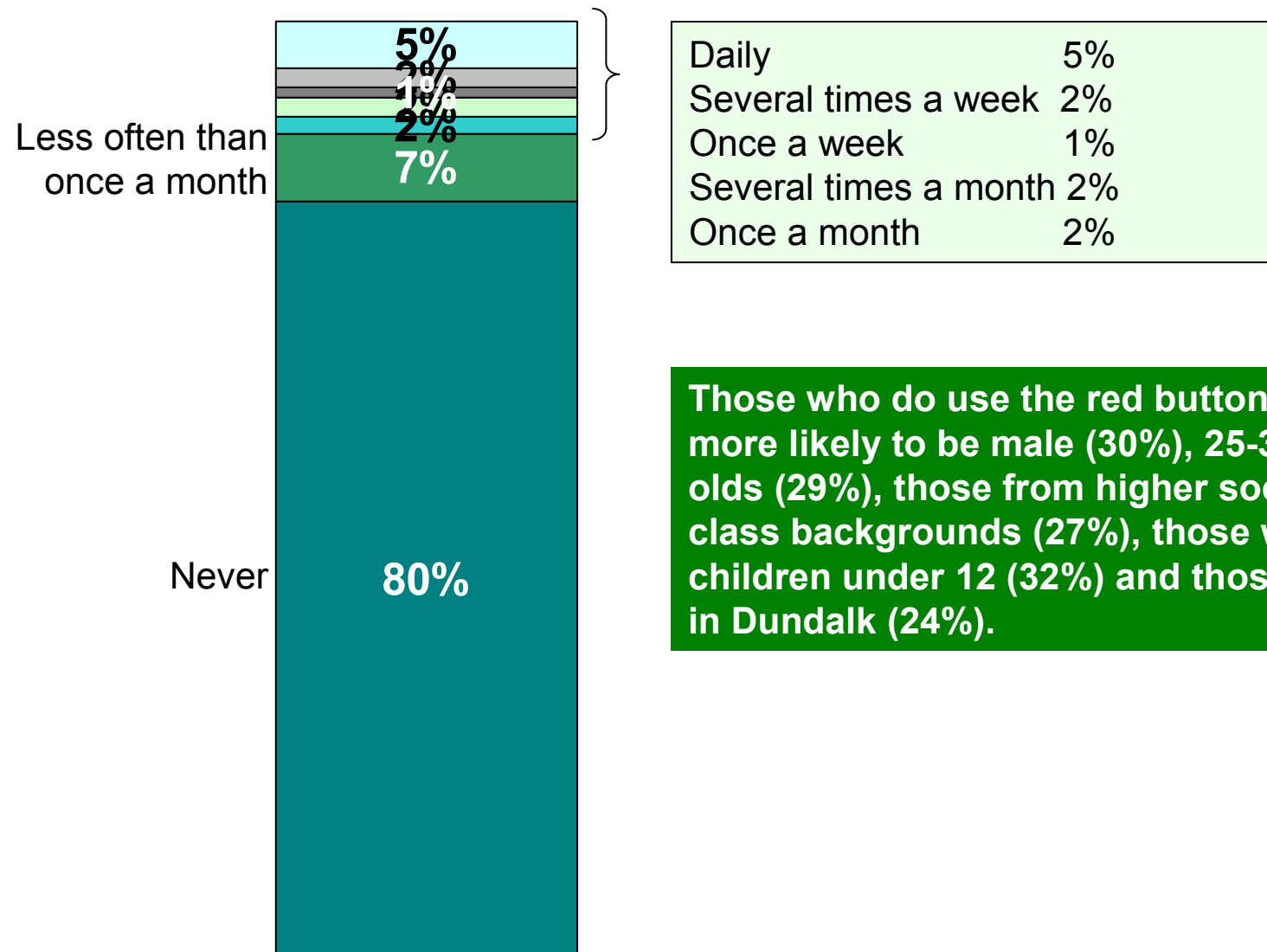


Television Interactivity



Frequency of Using Interactivity

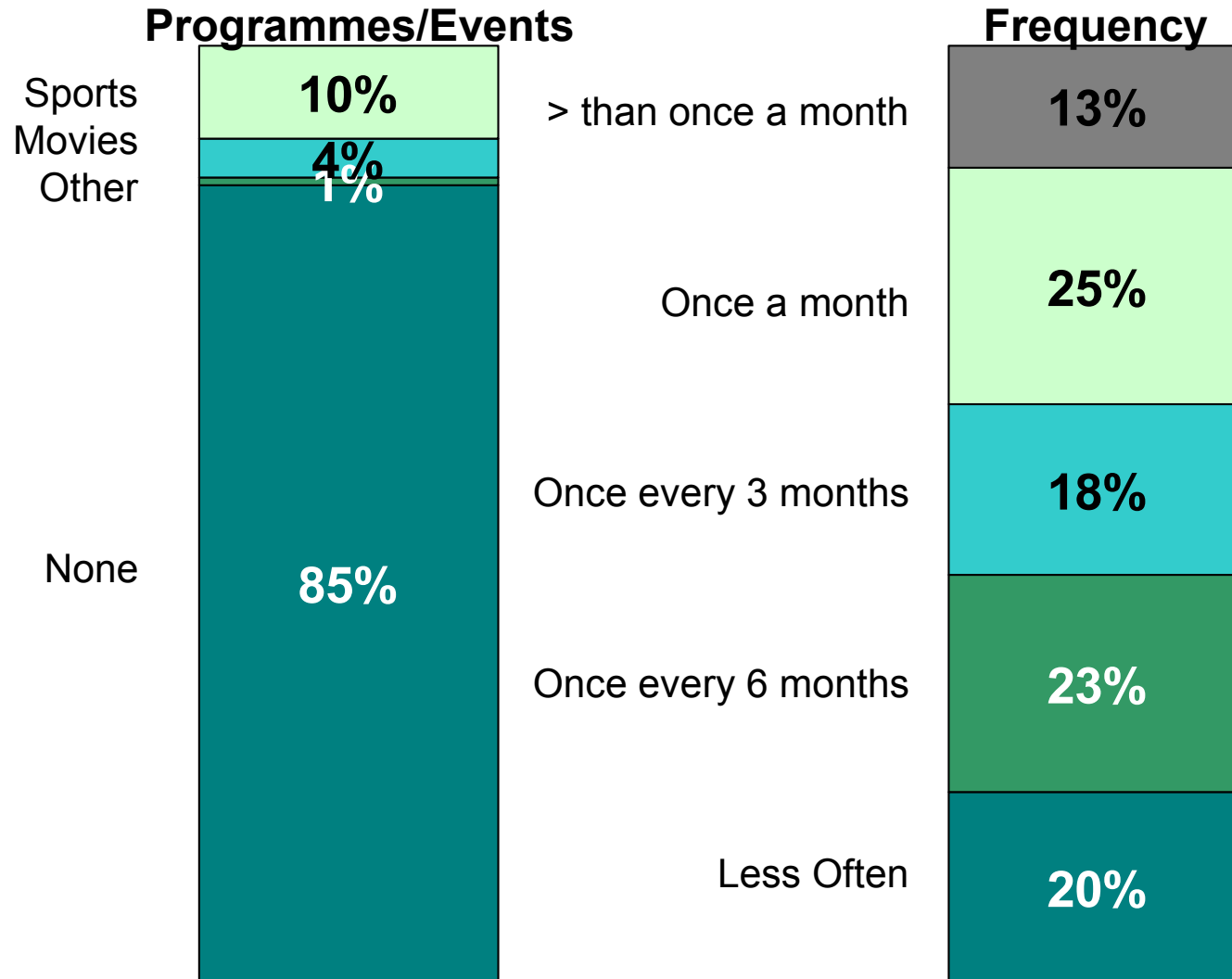
Base: All Cable/Satellite/ Free to Air Panelists N= 340



Those who do use the red button are more likely to be male (30%), 25-34 year olds (29%), those from higher social class backgrounds (27%), those with children under 12 (32%) and those living in Dundalk (24%).

Incidence of Availing of Pay Per View

Base: All Cable/Satellite/Free to Air Panelists N=340



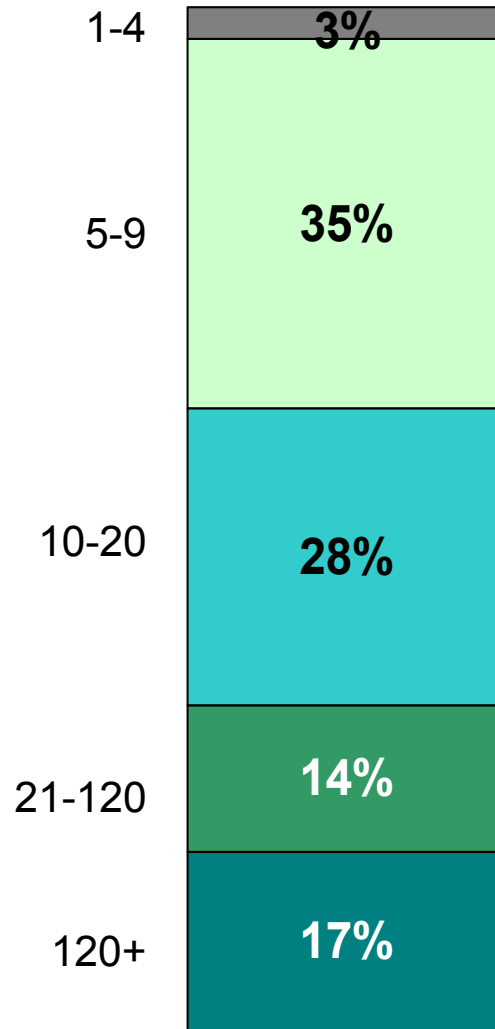


Television Channels



Number of Channels Received in Household

Base: All Panelists N= 500



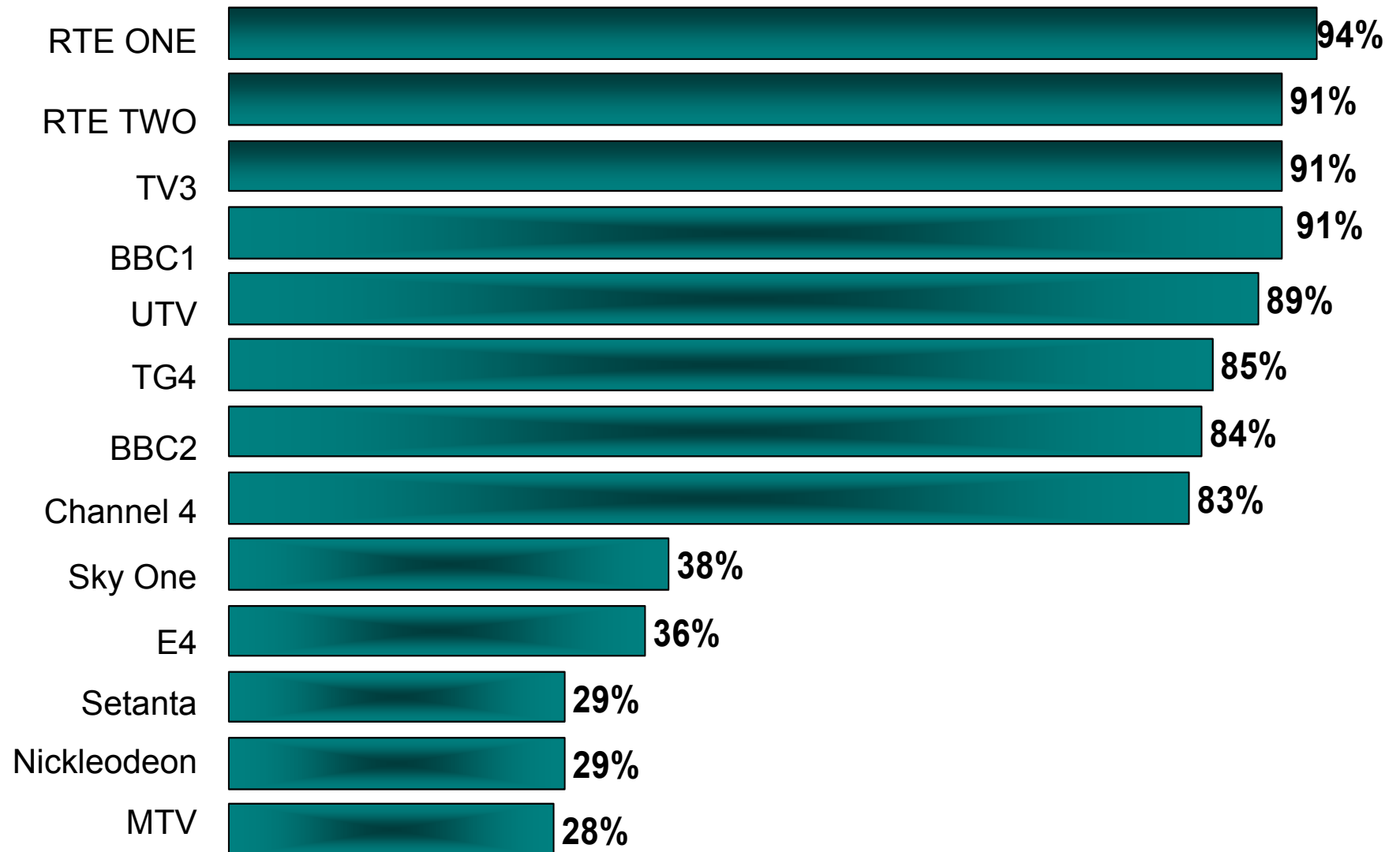
Households with less than 10 channels (38%) are more likely to be male (45%), those younger 15-24 (53%) and those older 65+ (47%), those from Dundalk (65%).

Households with 10-20 channels (28%) are more female (32%), 55-65 (34%), and those living in Dublin (52%).

Those with 20 or more channels (31%) are marginally more likely to be female (36%), those with children under 12 (41%), and those living in Dublin

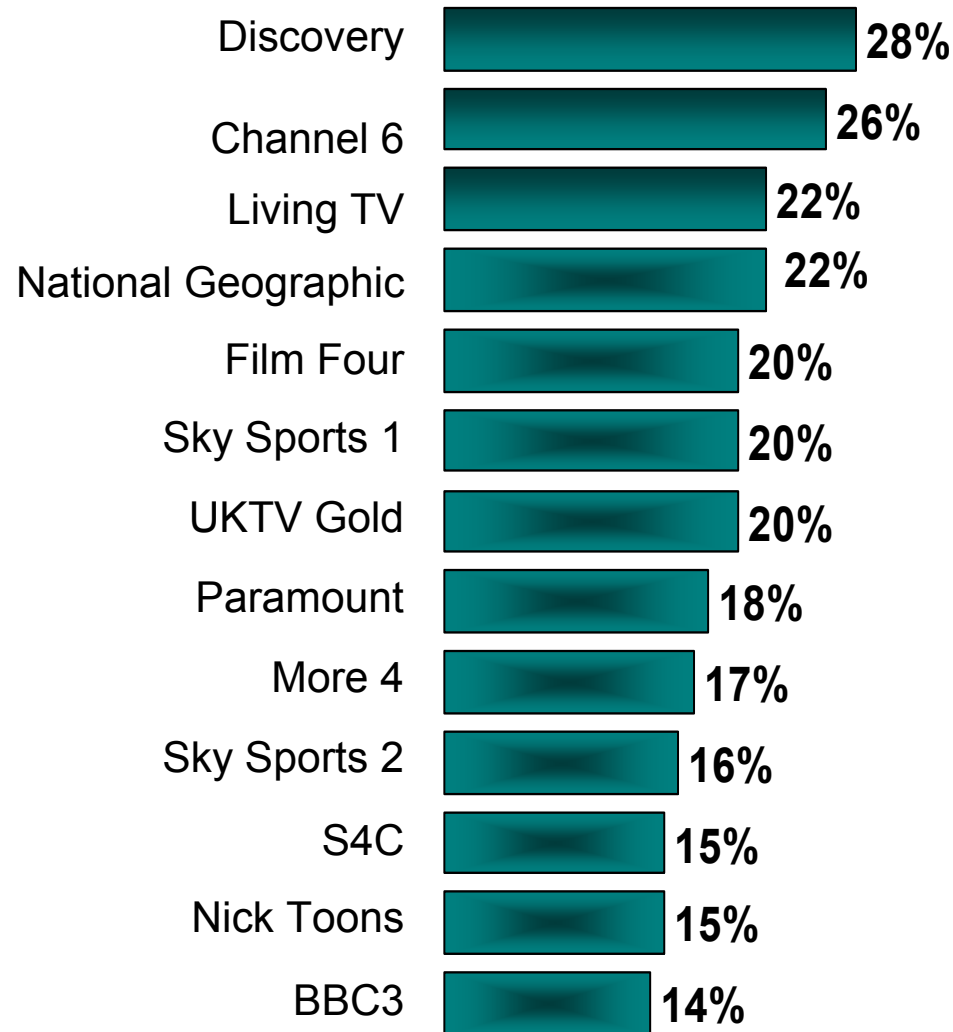
Repertoire of Channels Watched

Base: All Panelists N= 500



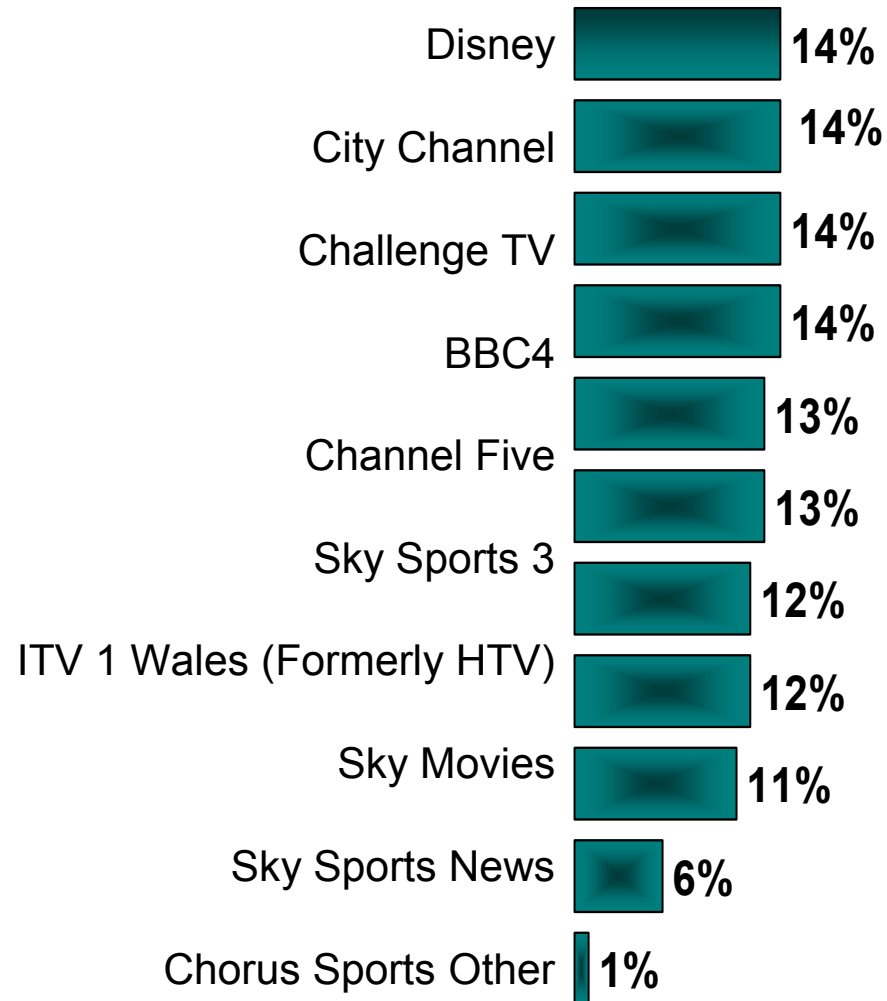
Repertoire of Channels Watched

Base: All Panelists N= 500



Repertoire of Channels Watched

Base: All Panelists N= 500



Pen Pictures of Channels in Home Top 12 Channels

- RTE One, RTE Two, TV3, BBC1, UTV, TG4, BBC2, Channel 4
- Viewing is prolific to all panelists for these channels. Those more likely to claim it is normally viewed in home are 45-54 year olds, and those living in Dundalk.
- Sky One
- Viewers are more likely to be female (42%), 25-34 year olds (45%), with a higher social class background (43%), who have children under 12 (44%) and live in Dublin (52%).
- E4
- Also has a more female bias (42%), 25-54 year olds (41%), and those with children (46%), along with those living in Dublin (52%).
- Setanta Sports
- Has no gender bias but is older 55-64 year olds (36%), from a higher social class background (34%) who have children at home (36%).
- Nickleodeon
- Has a more female bias(34%), 35-44 year old (38%), who have children (42%) and those living in Dublin (42%).

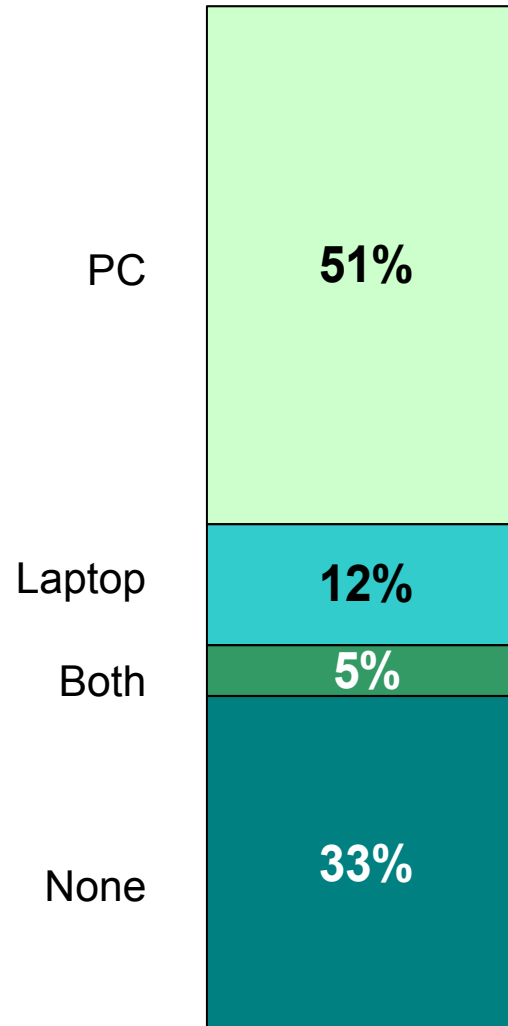


Internet & Connectivity



Incidence of Having Personal Computer at Home

Base: All Panelists N= 500



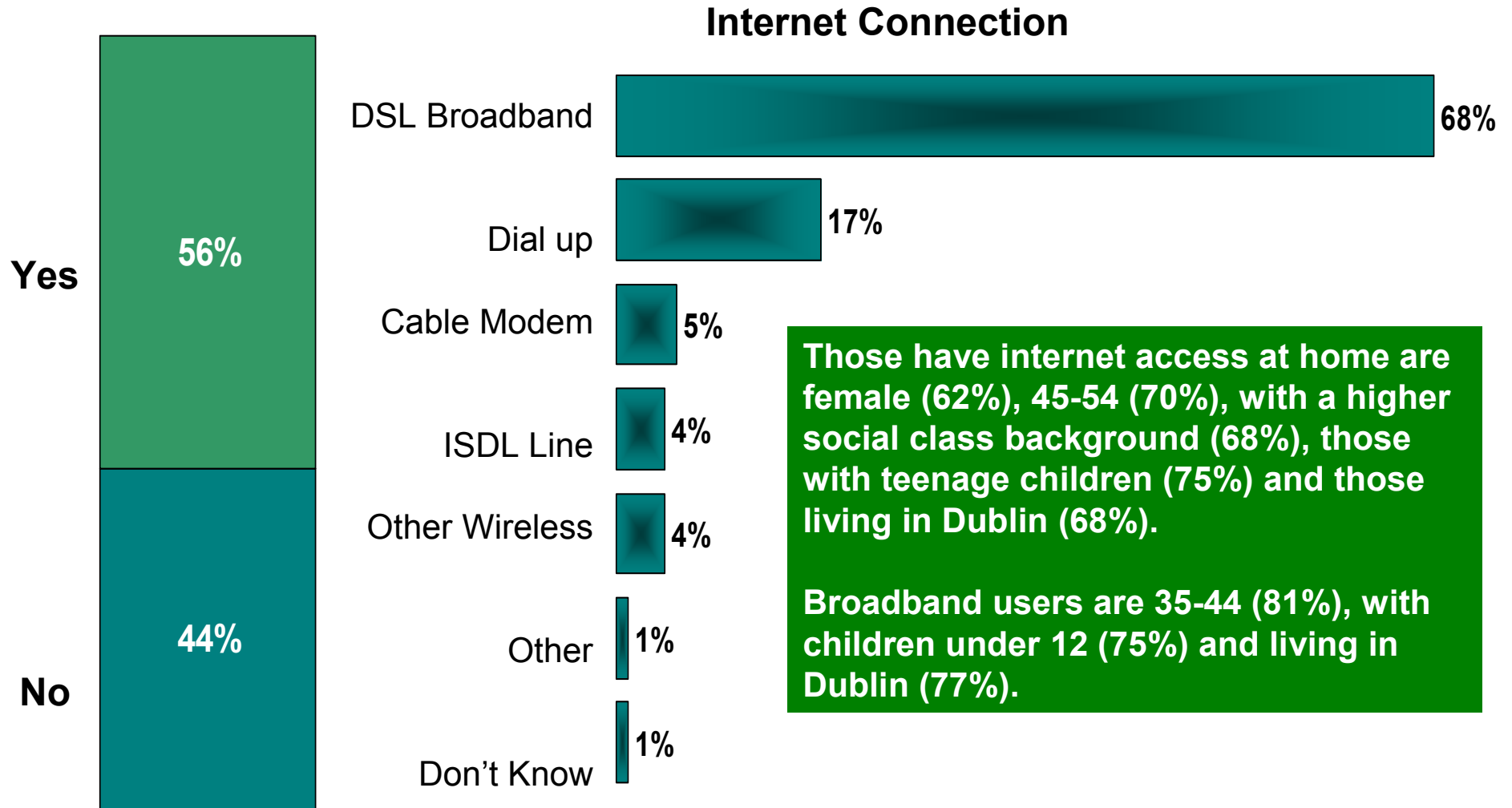
Those with a PC in home are more likely to be female (52%), 35-54 (65%), from a higher social class background (55%), and those who have teenage children in the home (73%) and living in Dundalk (52%)

Those who have a laptop are more likely to be male (15%), and those who are younger 15-24 (63%).

Individuals who do not have any PC in home are either 25-34 (37%), or over 65 (69%), from a lower social class background (42%), and living in Dundalk (38%).

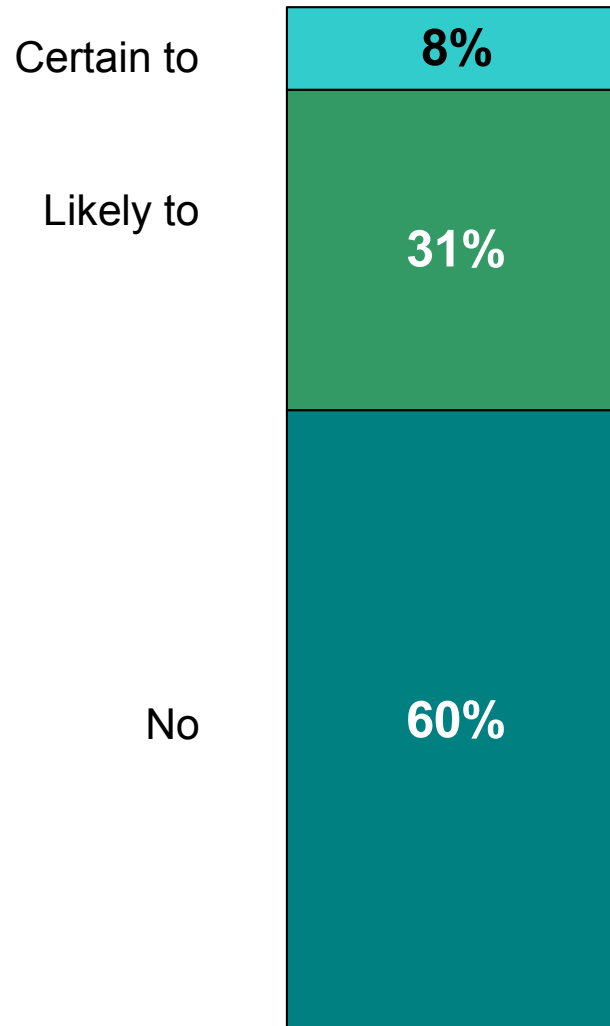
Incidence of Having Internet at Home

Base: All Panelists N=500



Intention to get Internet in the Future

Base: All Panelists without at home internet N=220



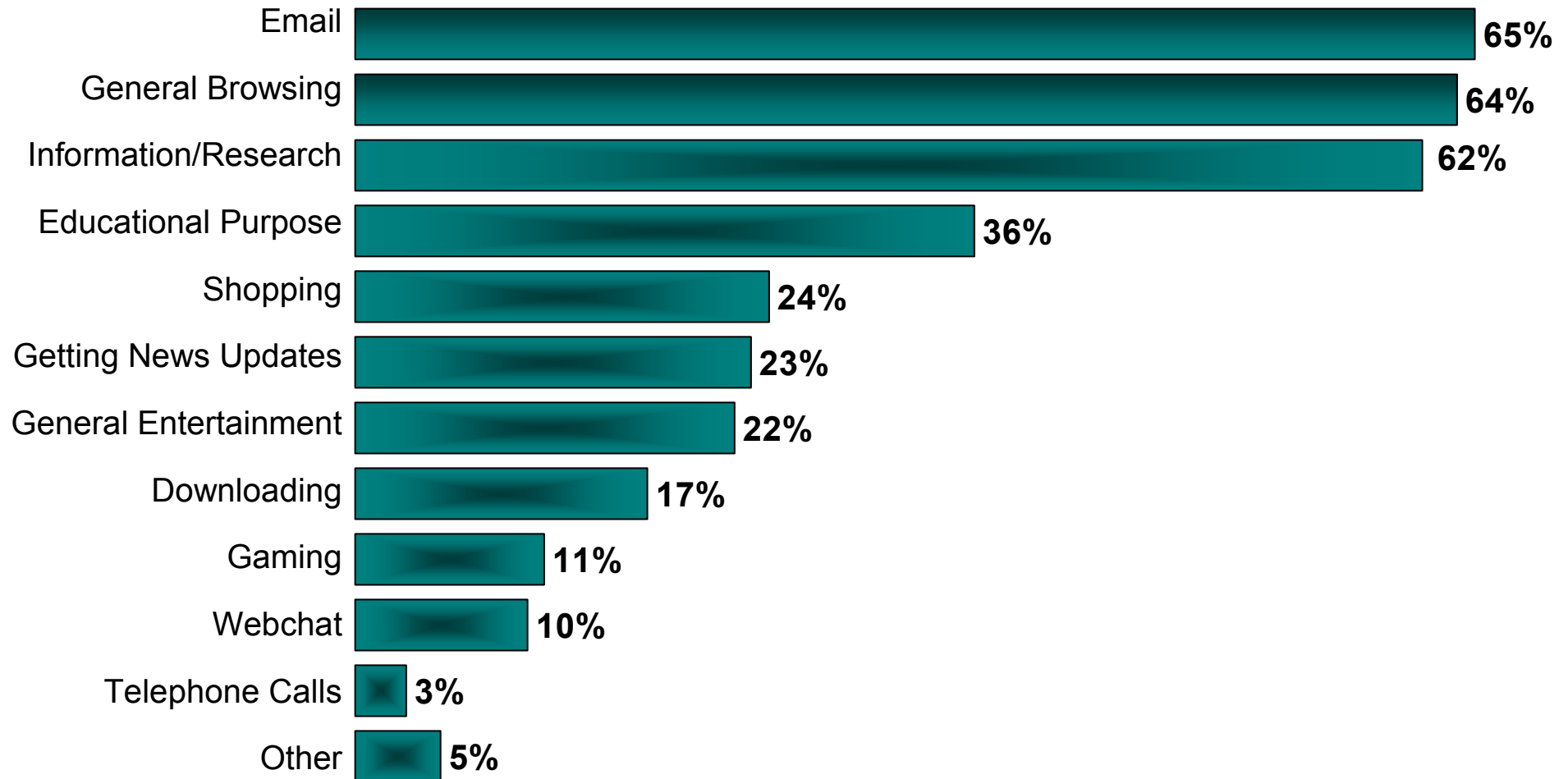
Those certain to get internet in future are 15-24 (22%).

Those likely to get internet in the future are 25-44 (43%), from a higher social class background (43%) who have children under 12 (46%) and those living in Dublin (39%).

Those not intending to get the internet are more likely to be those who are over 55 (86%) and those living in Dundalk (65%).

Familial Usage of At Home Internet

Base: All Panelists with at home internet N =280





Digital Terrestrial Television Quantitative Results Wave 1

Thank You