



Digital Terrestrial Television Quantitative Results

Wave 2 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 second 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 Amáarach trained interviewer.
- Quotas were set on the overall sample of 500 on social class, TV reception and gender of the panel member.

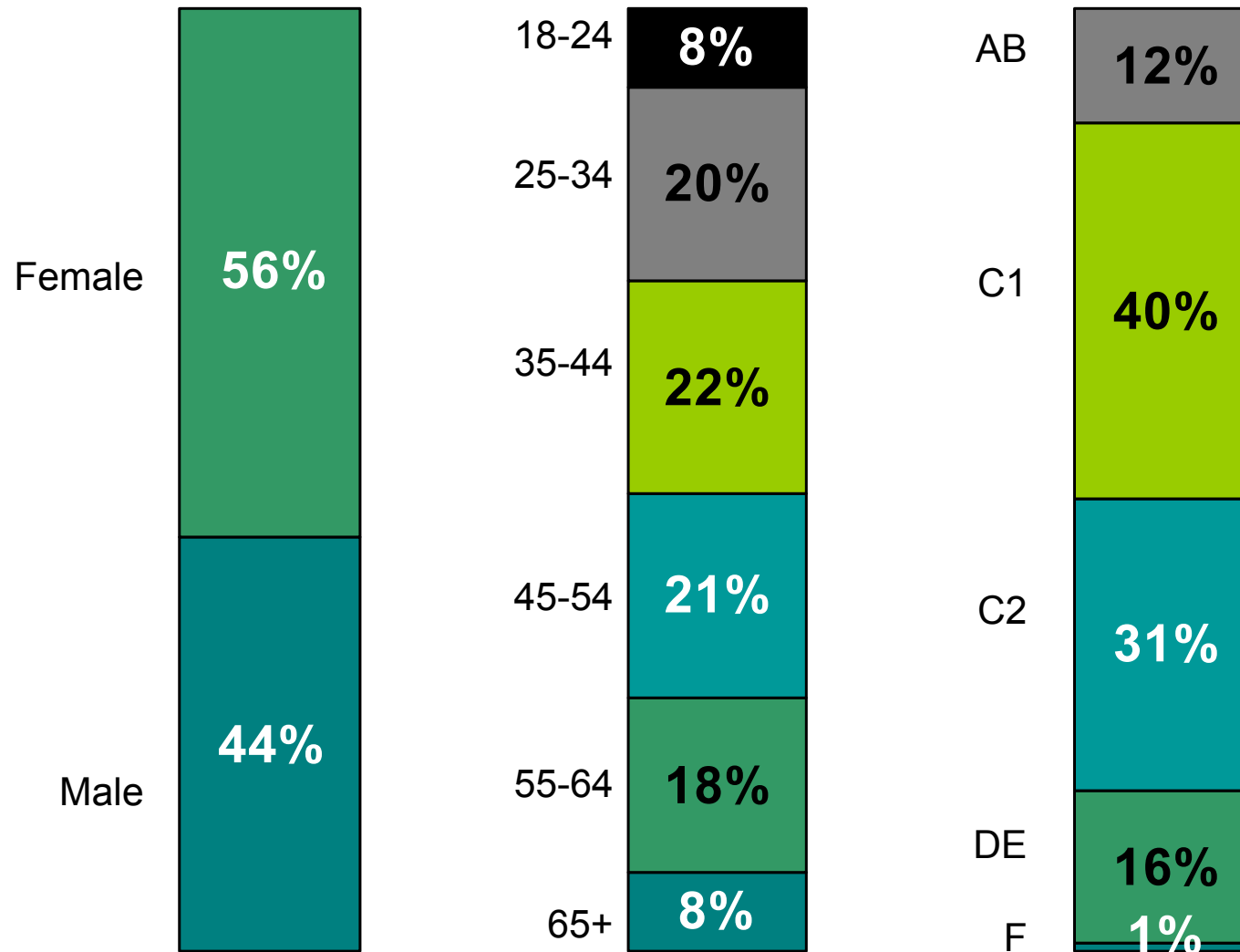


Findings



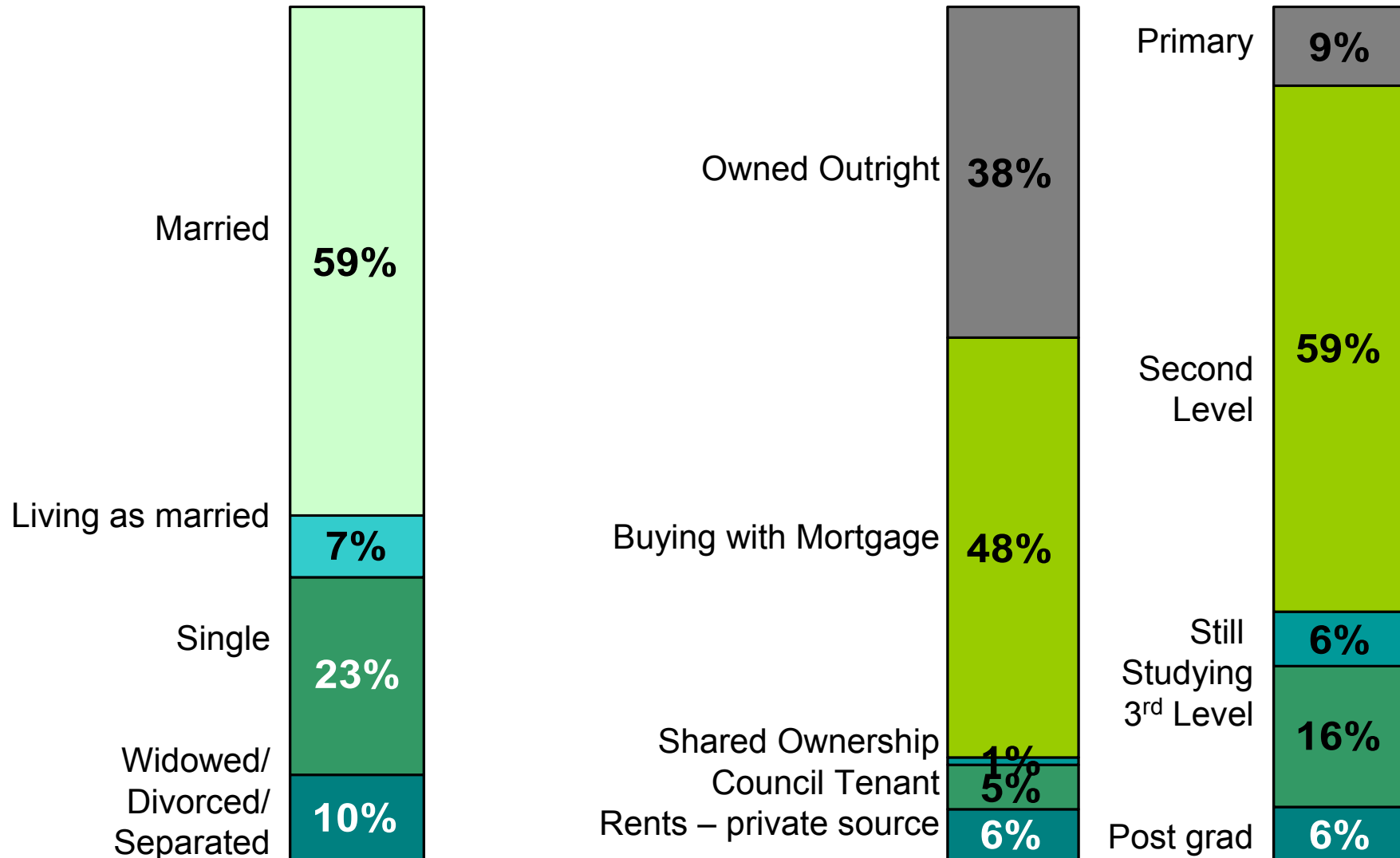
Profile of panellists

Base: All panellists N= 501



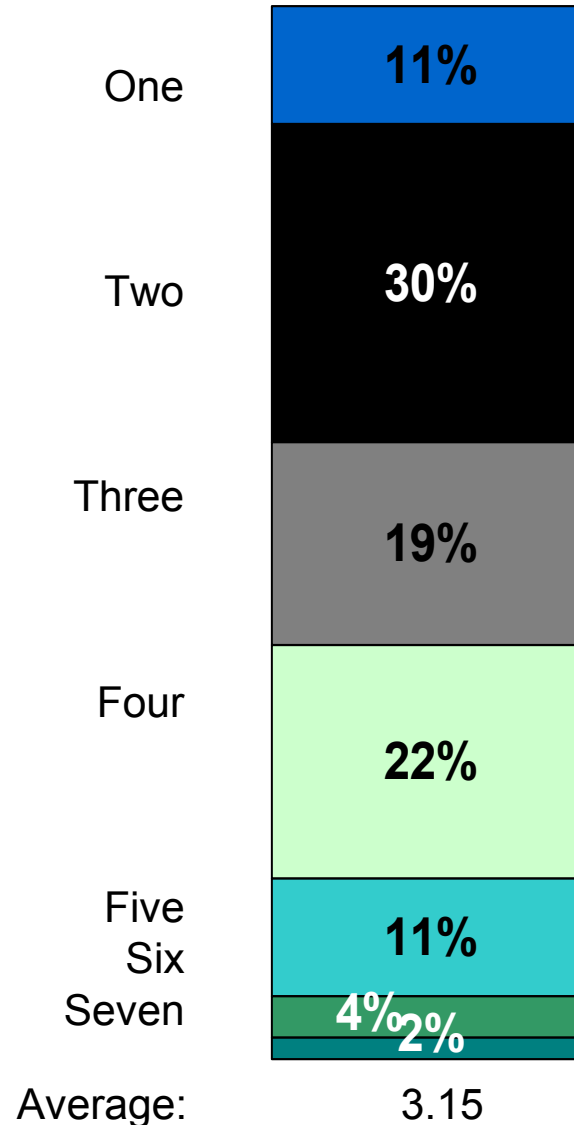
Profile of panellists

Base: All panellists N= 501



Number of People Resident in Household

Base: All panellists N= 501



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

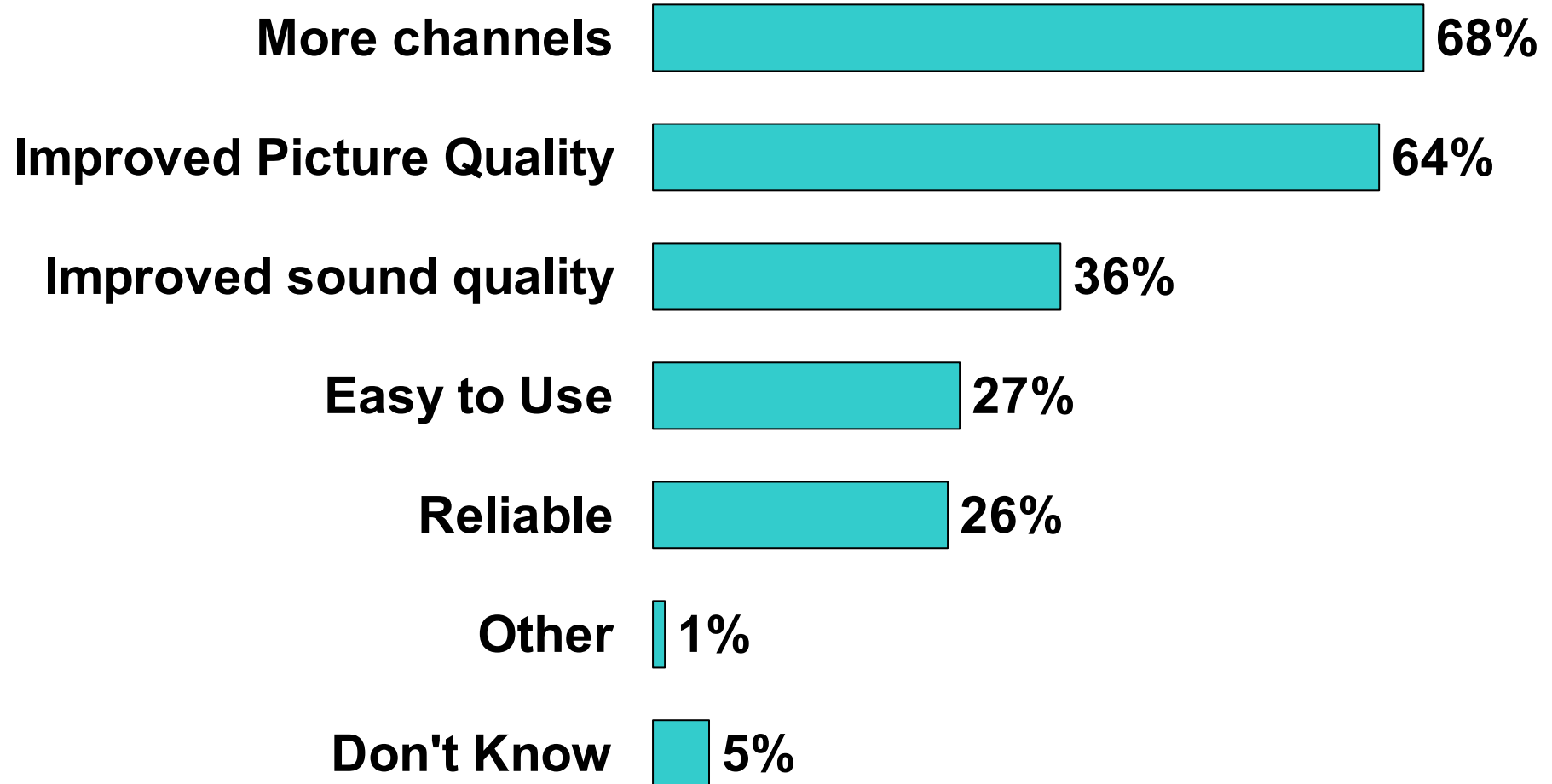


DTT Trial Expectations



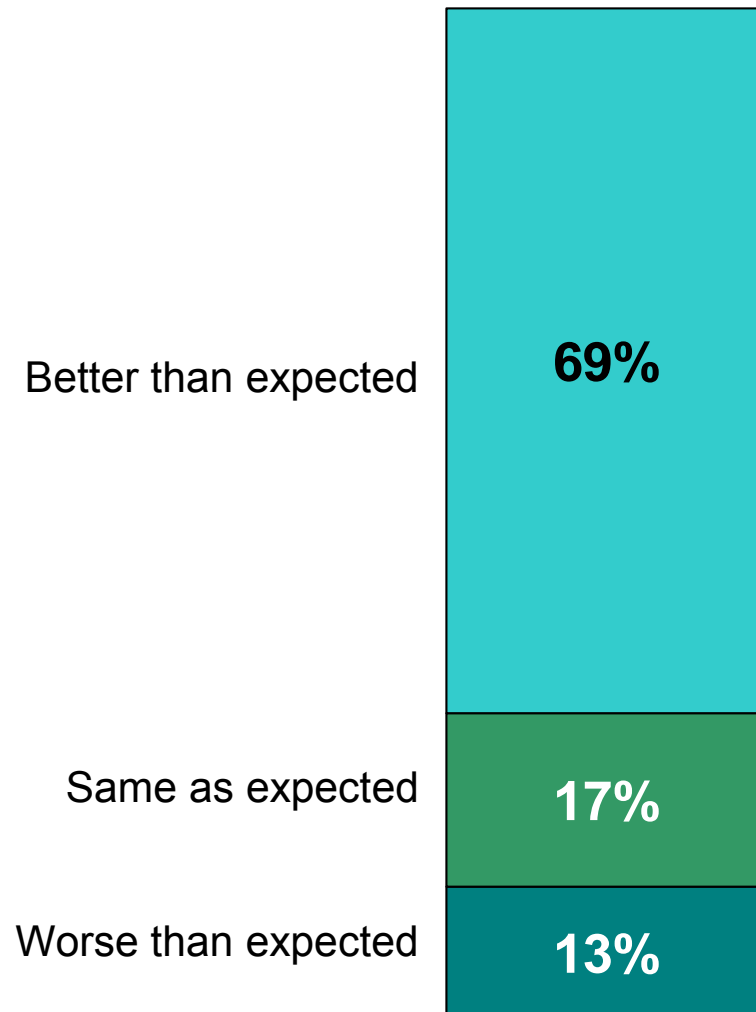
Trial Expectations

Base: All panellists N=501



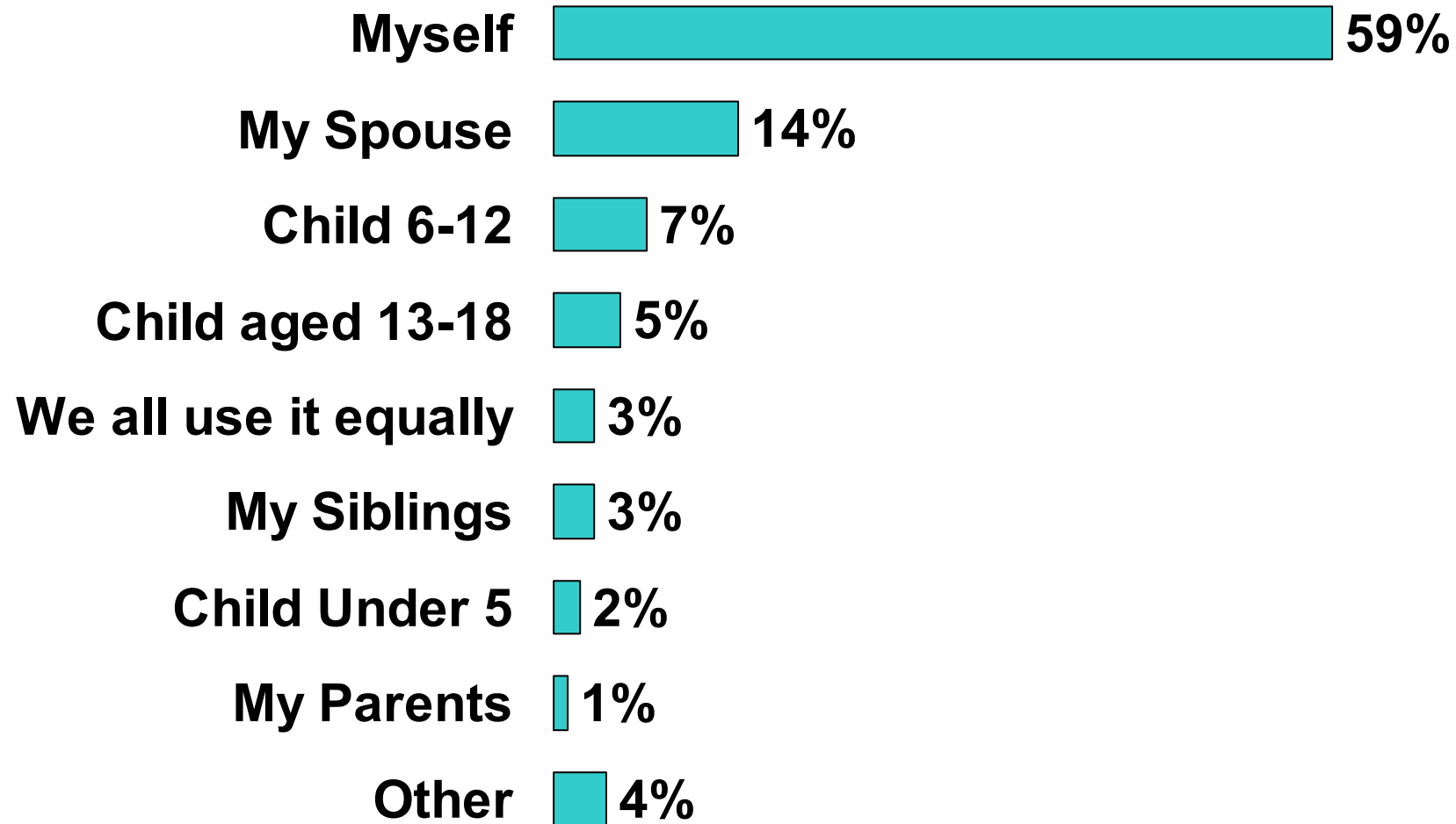
DTT Trials Ability to Meet Expectations

Base: All panellists N=501



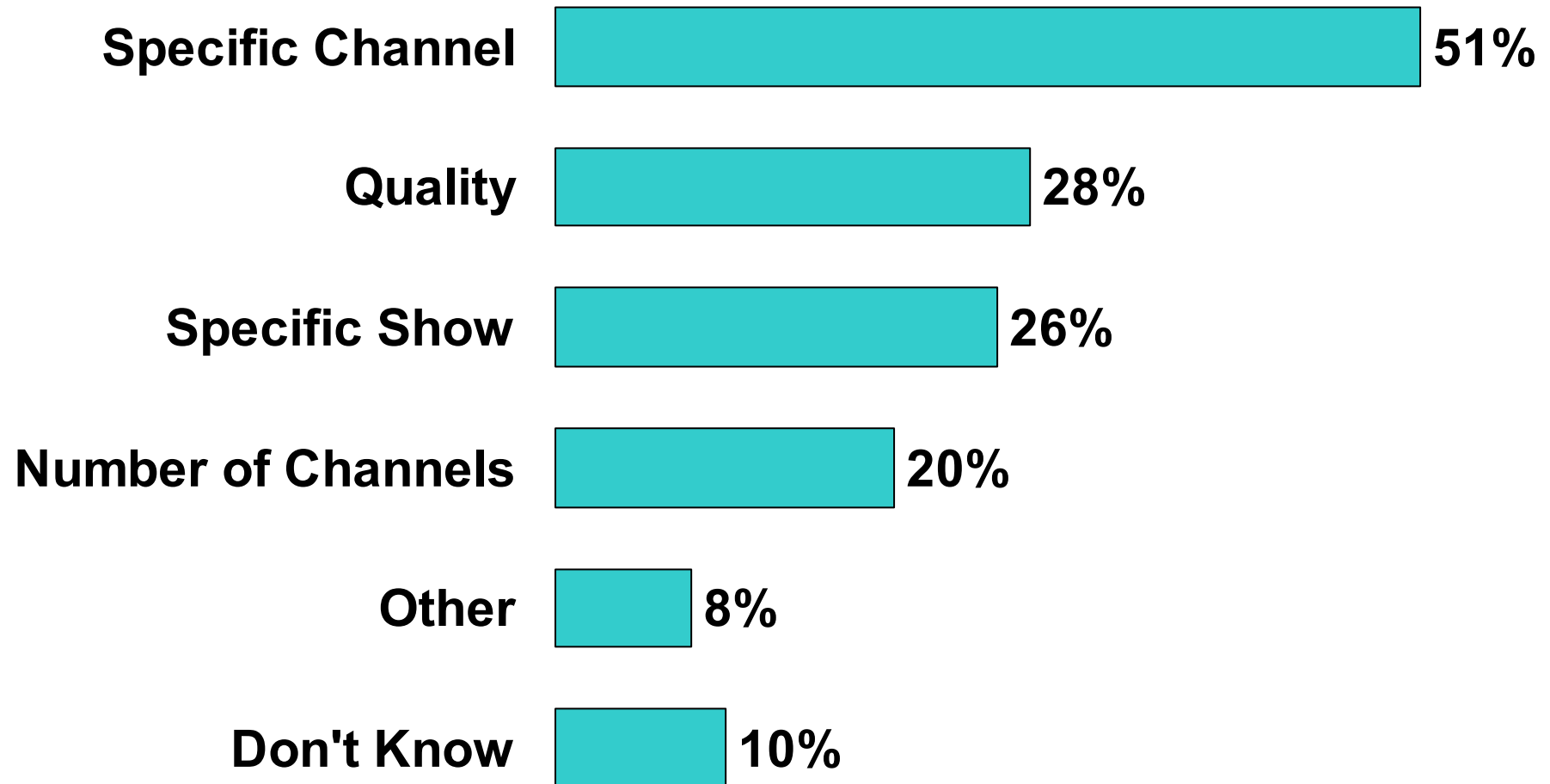
Individual Using DTT Trial Most

Base: All panellists N=501



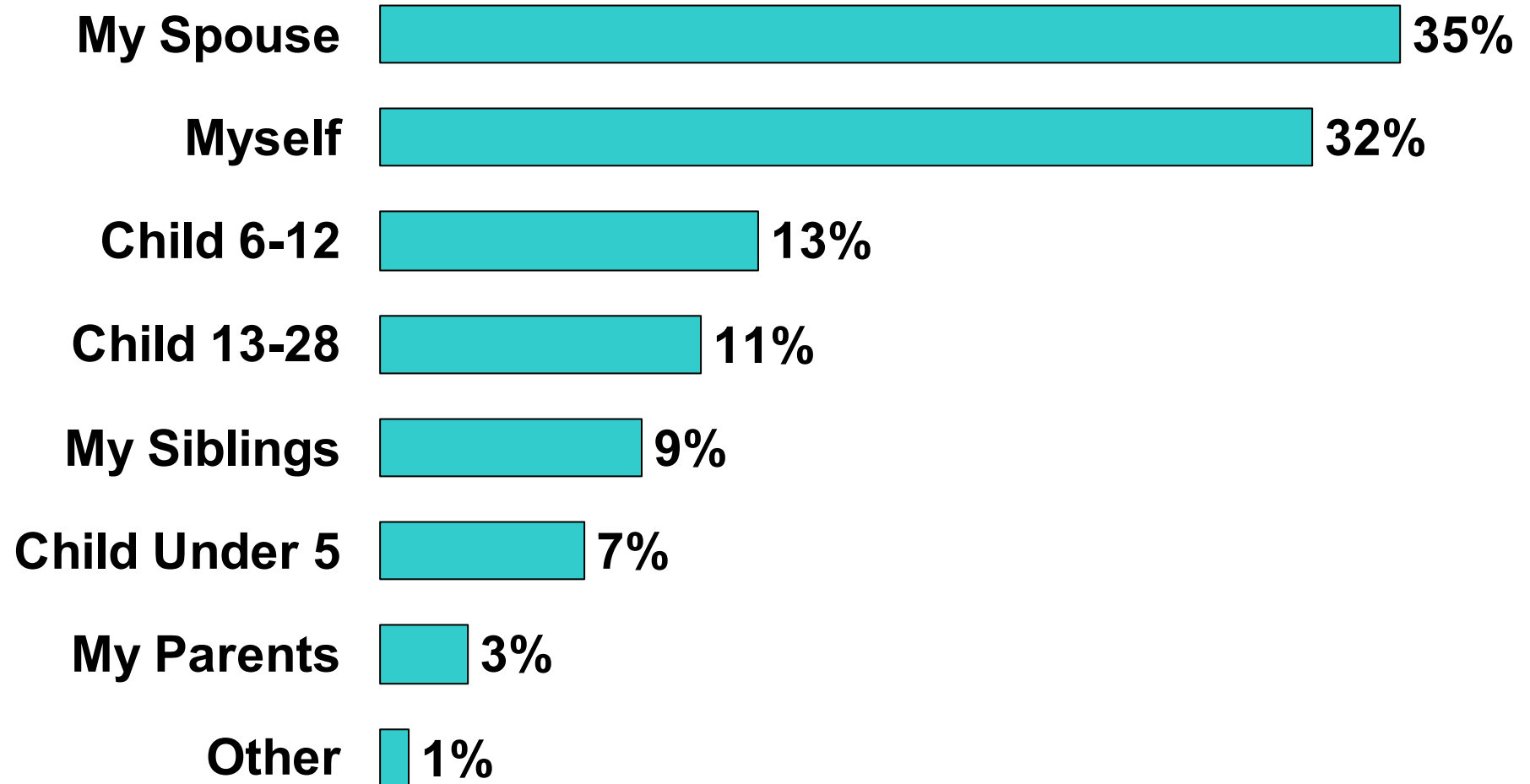
Rationale for Individual Watching DTT Trial

Base: All panellists N=501



Other Watching The Trial

Base: All panellists N=501



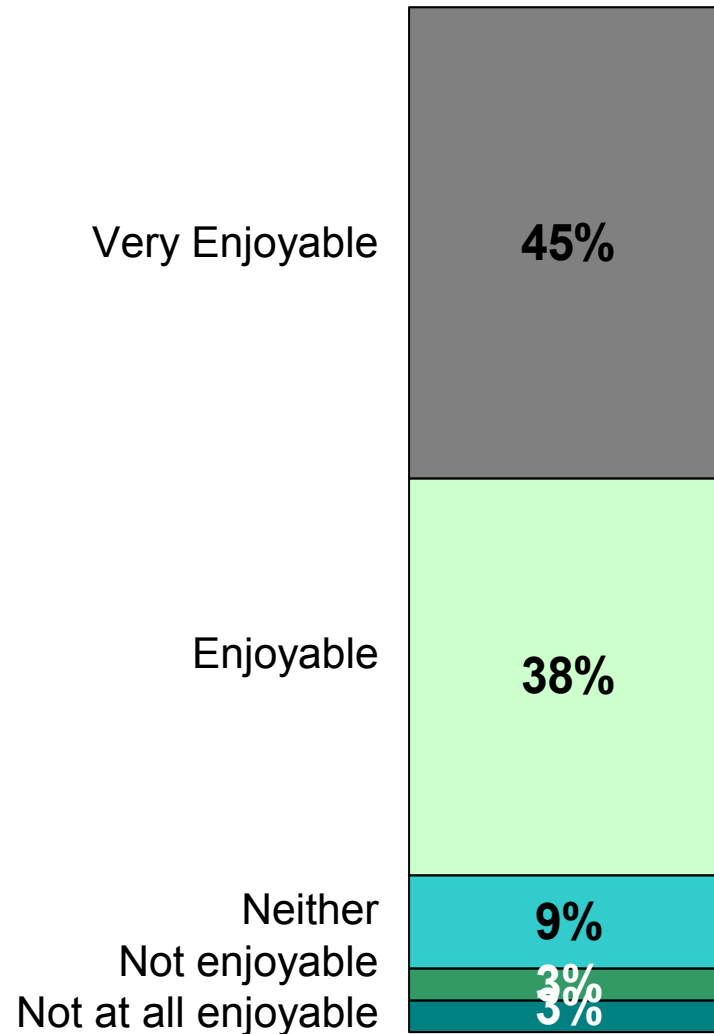


Enjoyment of the Trial to Date



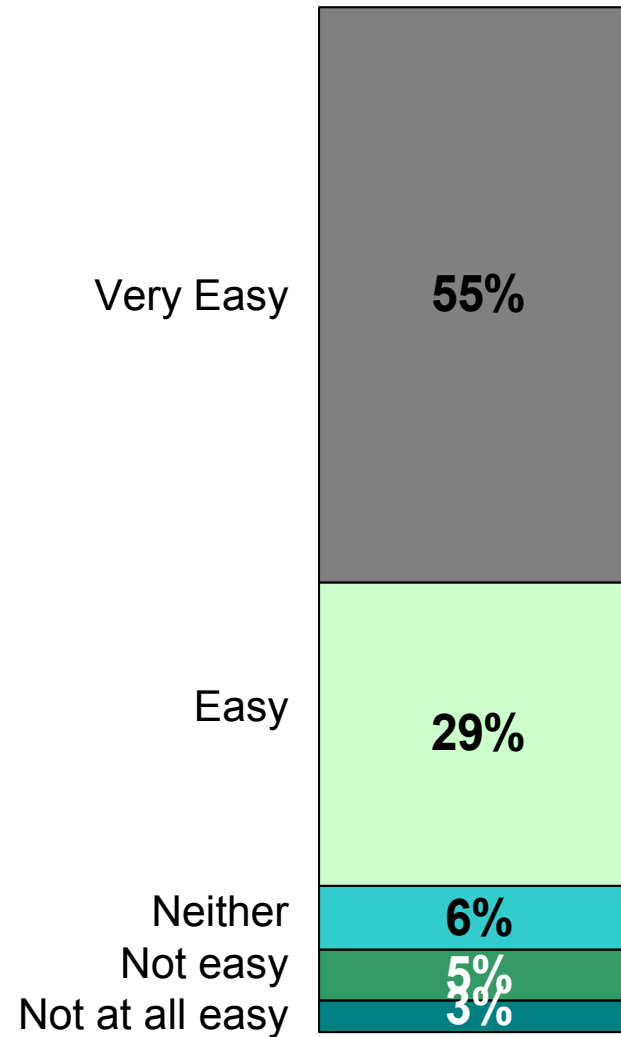
DTT Trial Enjoyment

Base: All panellists N= 501



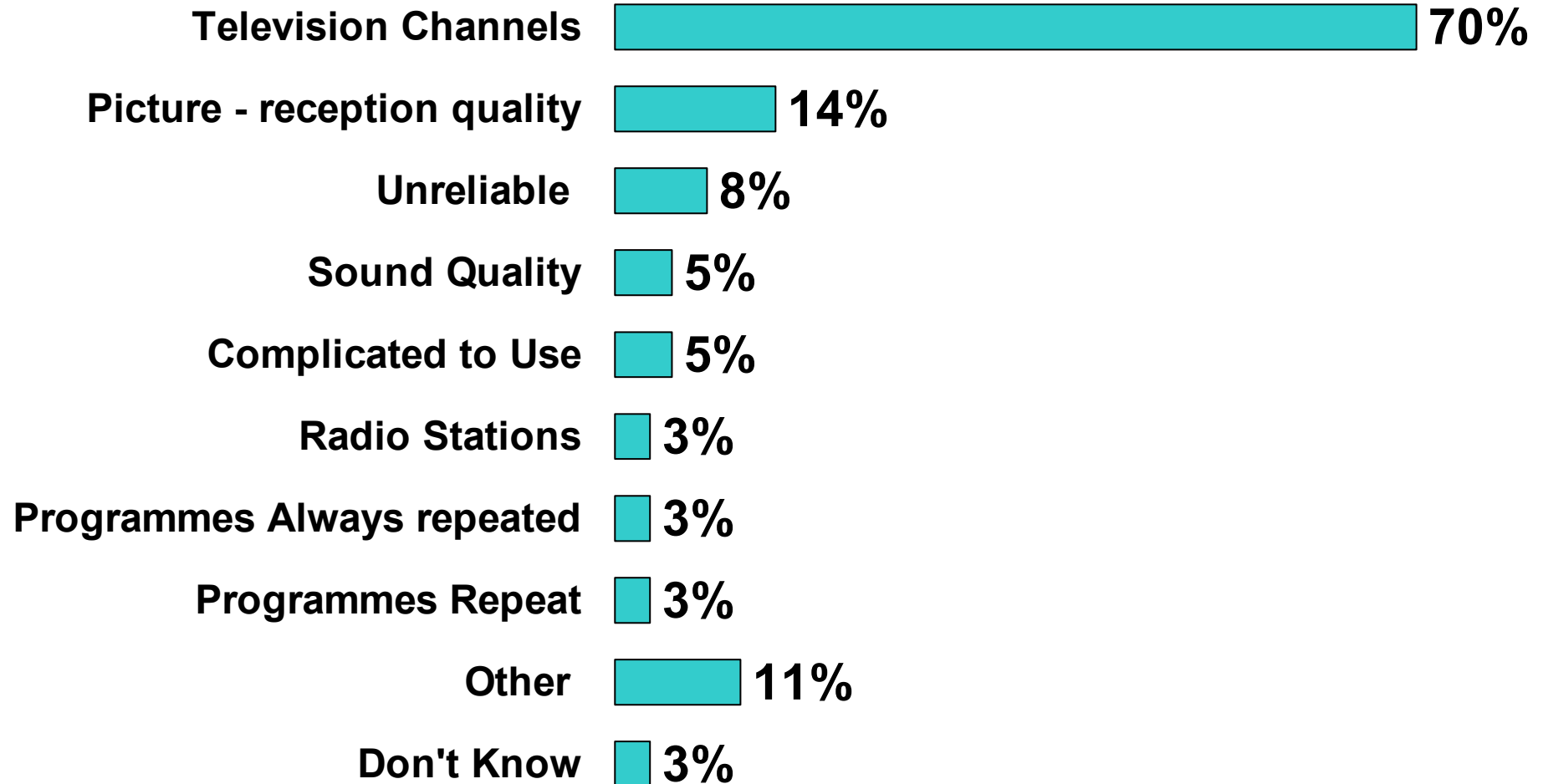
DTT Trial Installation

Base: All panellists N= 501



Rationale for Dissatisfaction

Base: All panellists Dissatisfied With Trial N=37



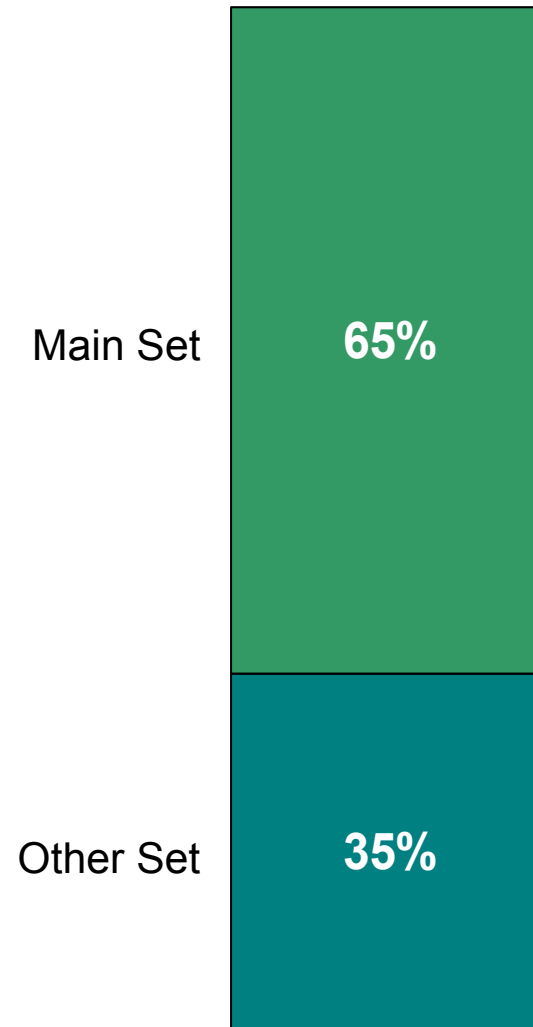


DTT Trial Television Attributes



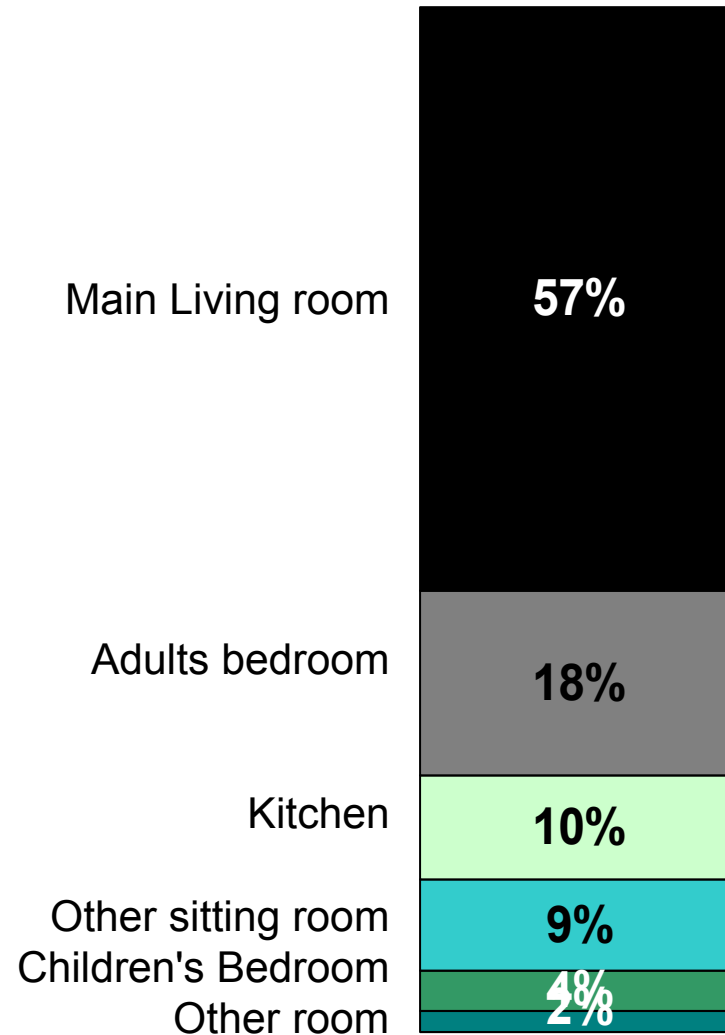
TV Set Used for DTT Trial

Base: All panellists N= 501



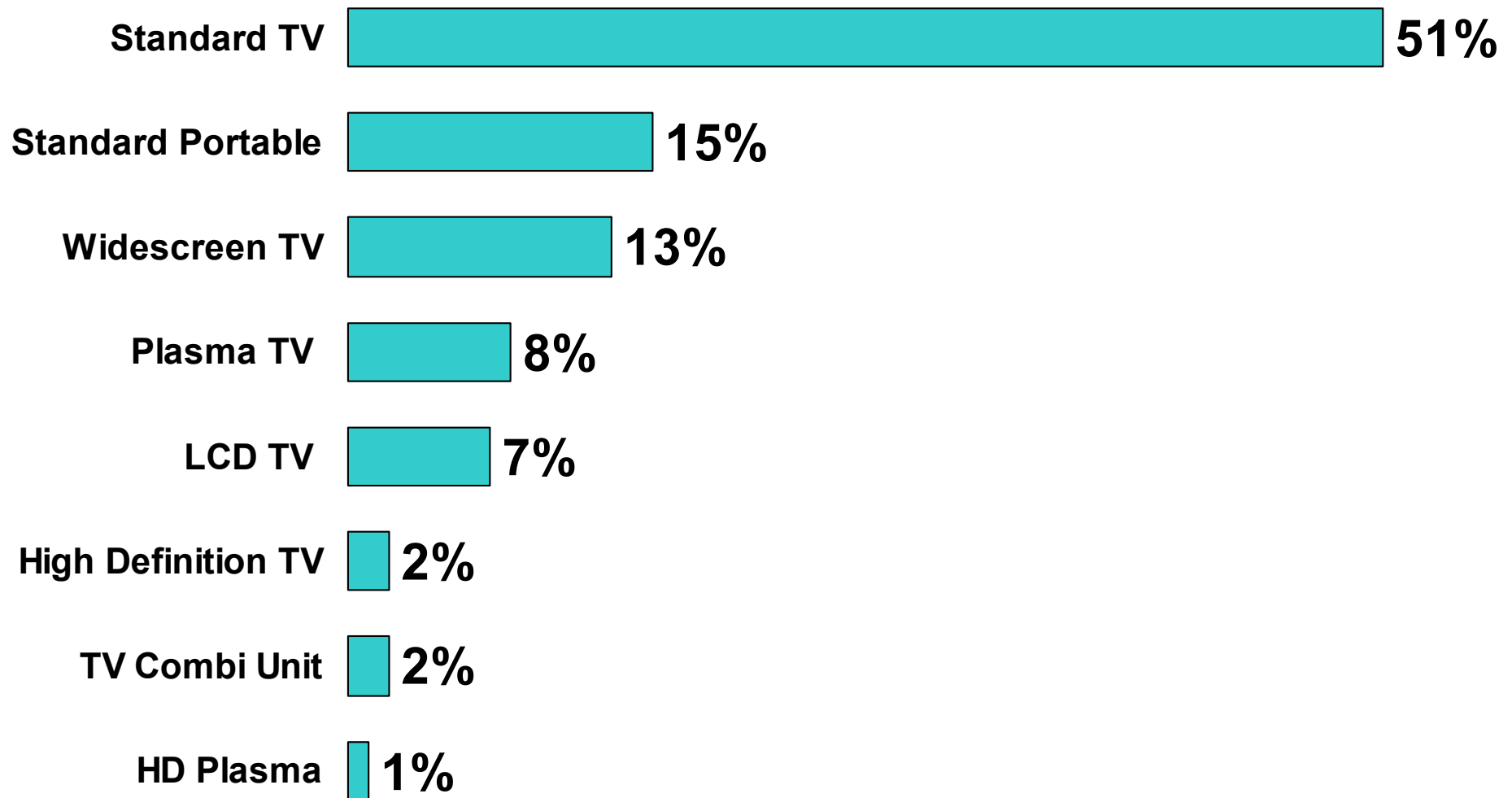
Location of TV Set Used for DTT Trial

Base: All panellists N= 501



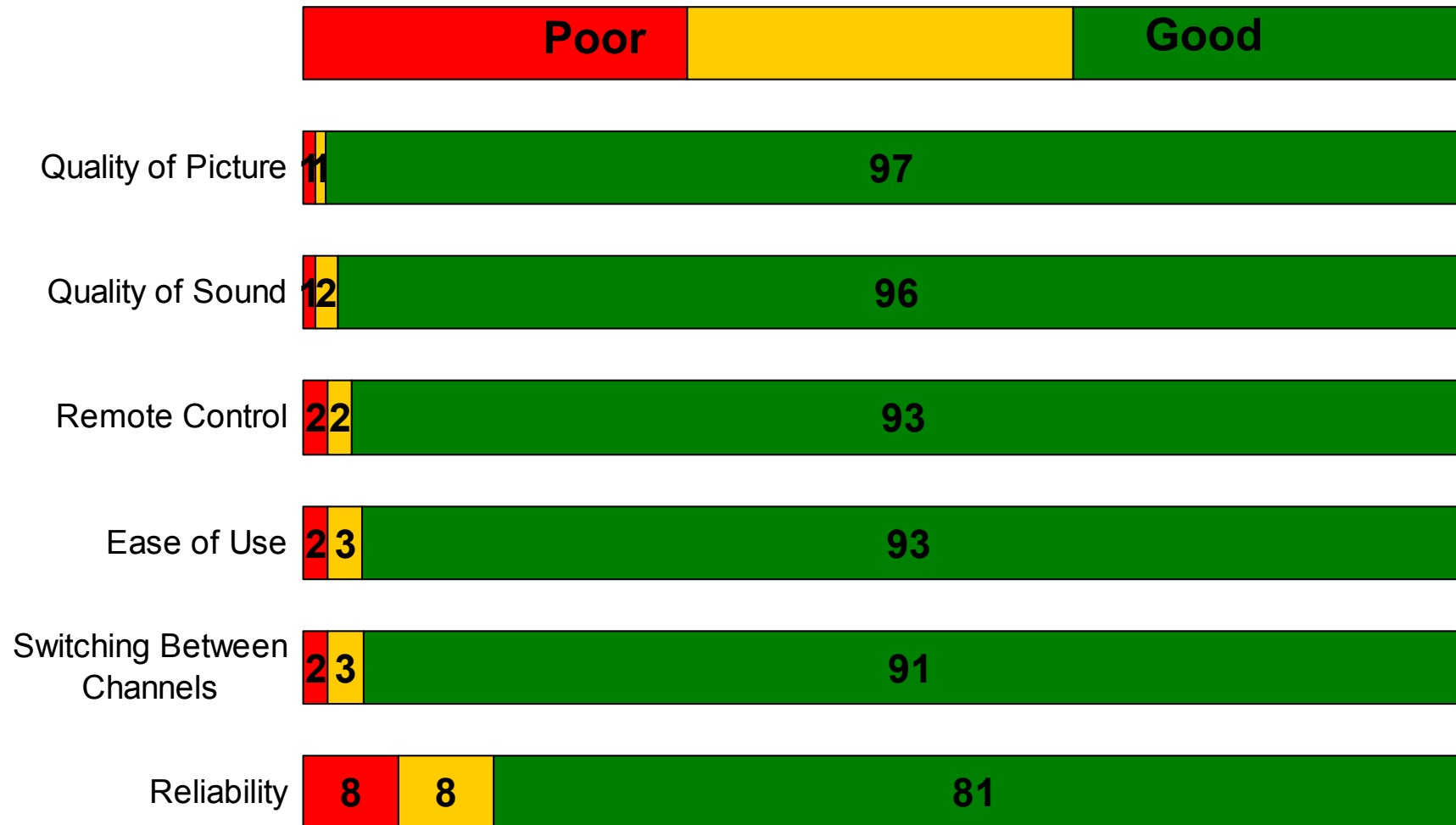
Type of TV Set Used for DTT Trial

(Base: All panellists N= 501)



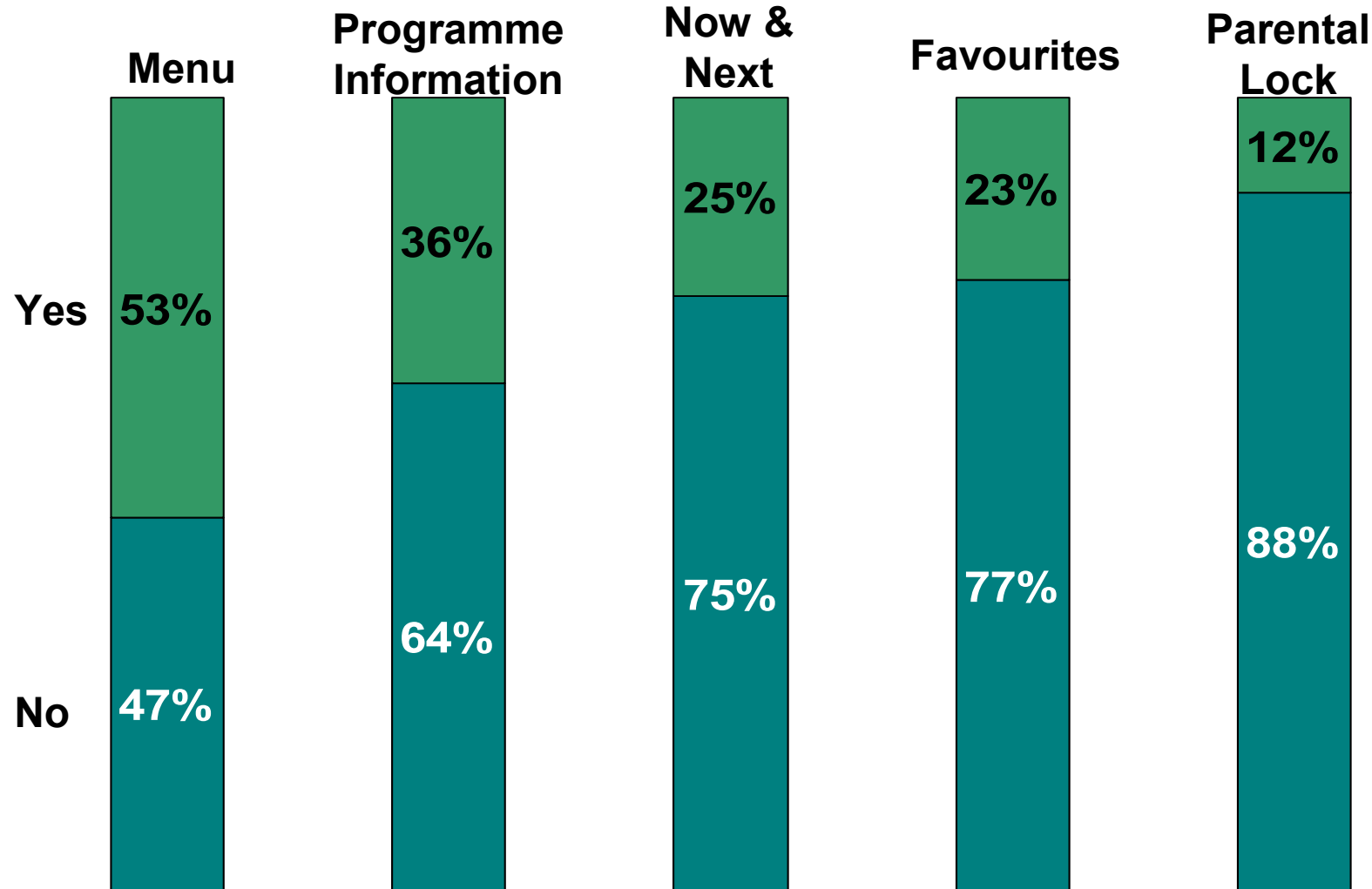
Attributes of DTT Trial

Base: All panellists = N 501



Usage of Available Functions

Base: All panellists N= 501



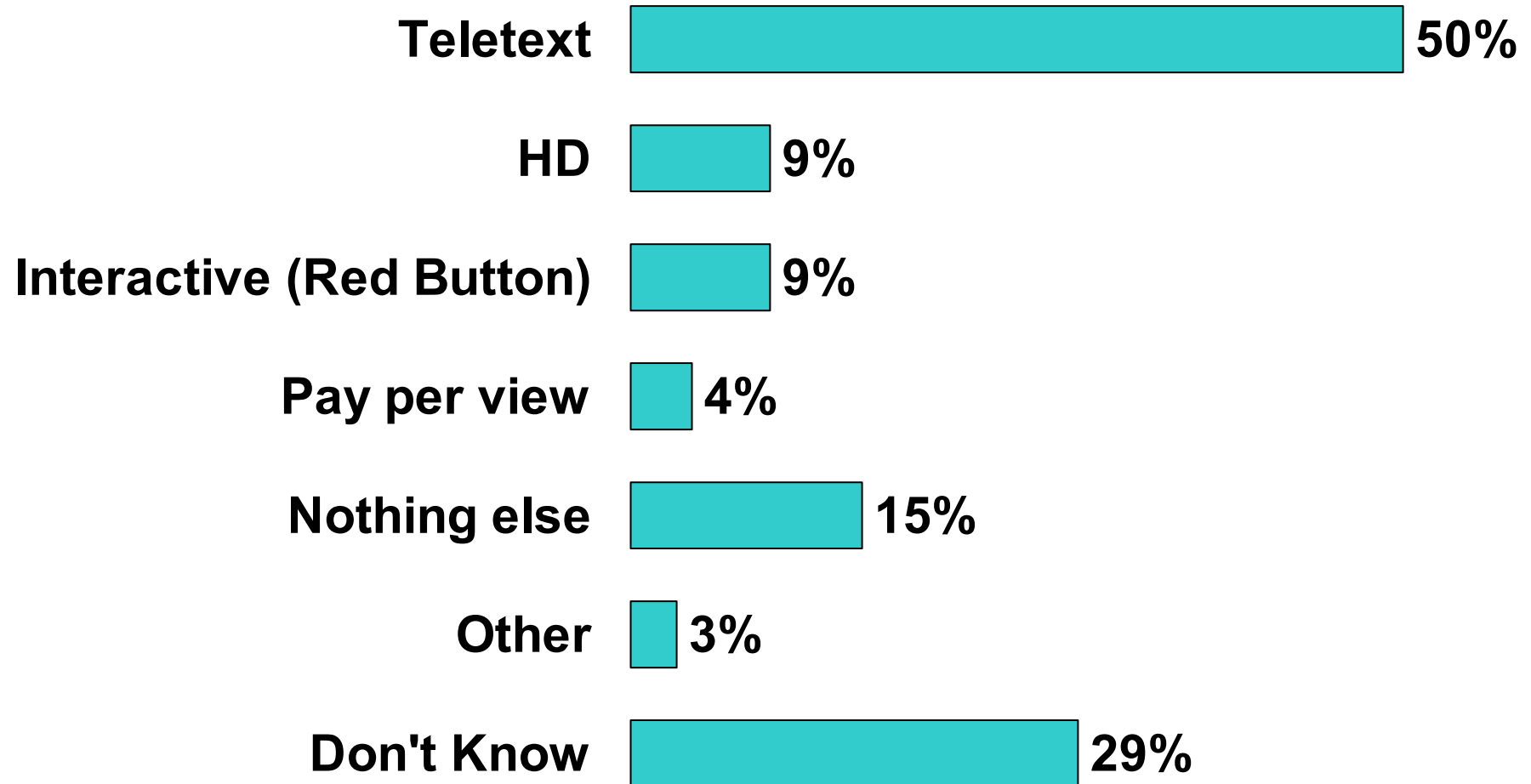
Attributes of DTT Trial Functions

Base: All who use each function



Functions Desired On DTT Trial

Base: All panellists N=501



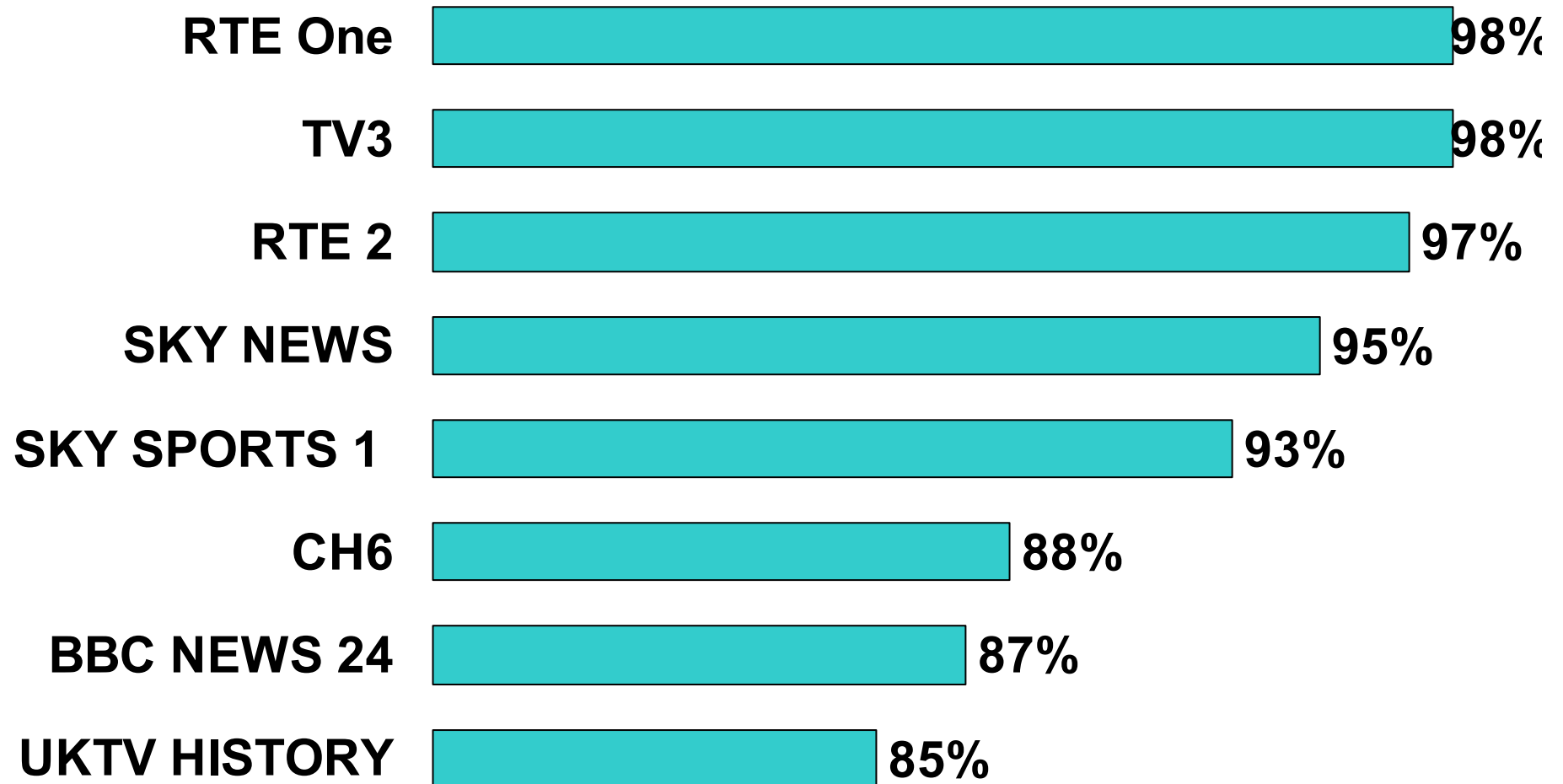


DTT Trial Viewing



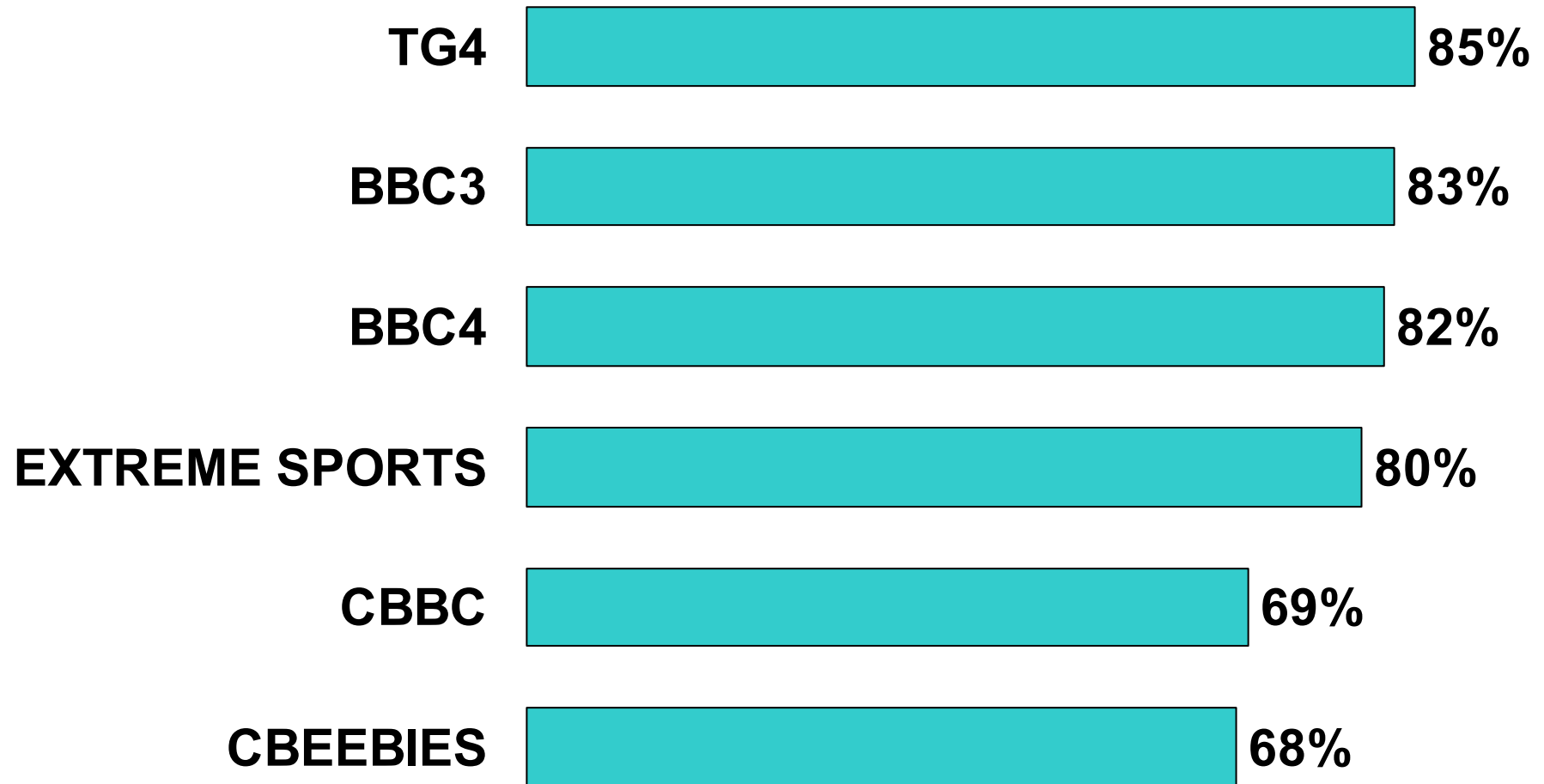
Viewing Repertoire – Ever Viewed

Base: All panellists N=501



Viewing Repertoire – Ever Viewed

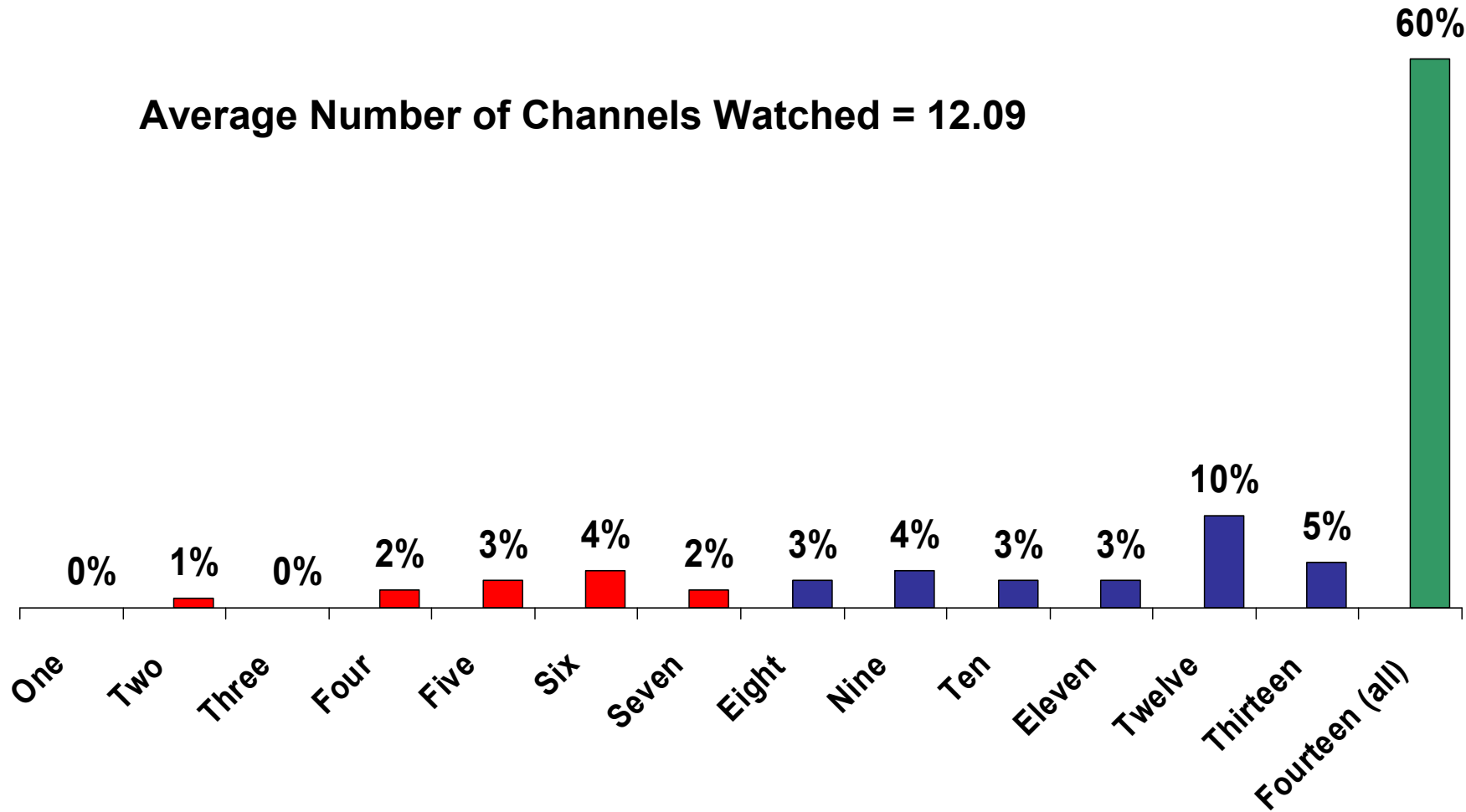
Base: All panellists N=501



Number of Channels Watched Since Start of Trial

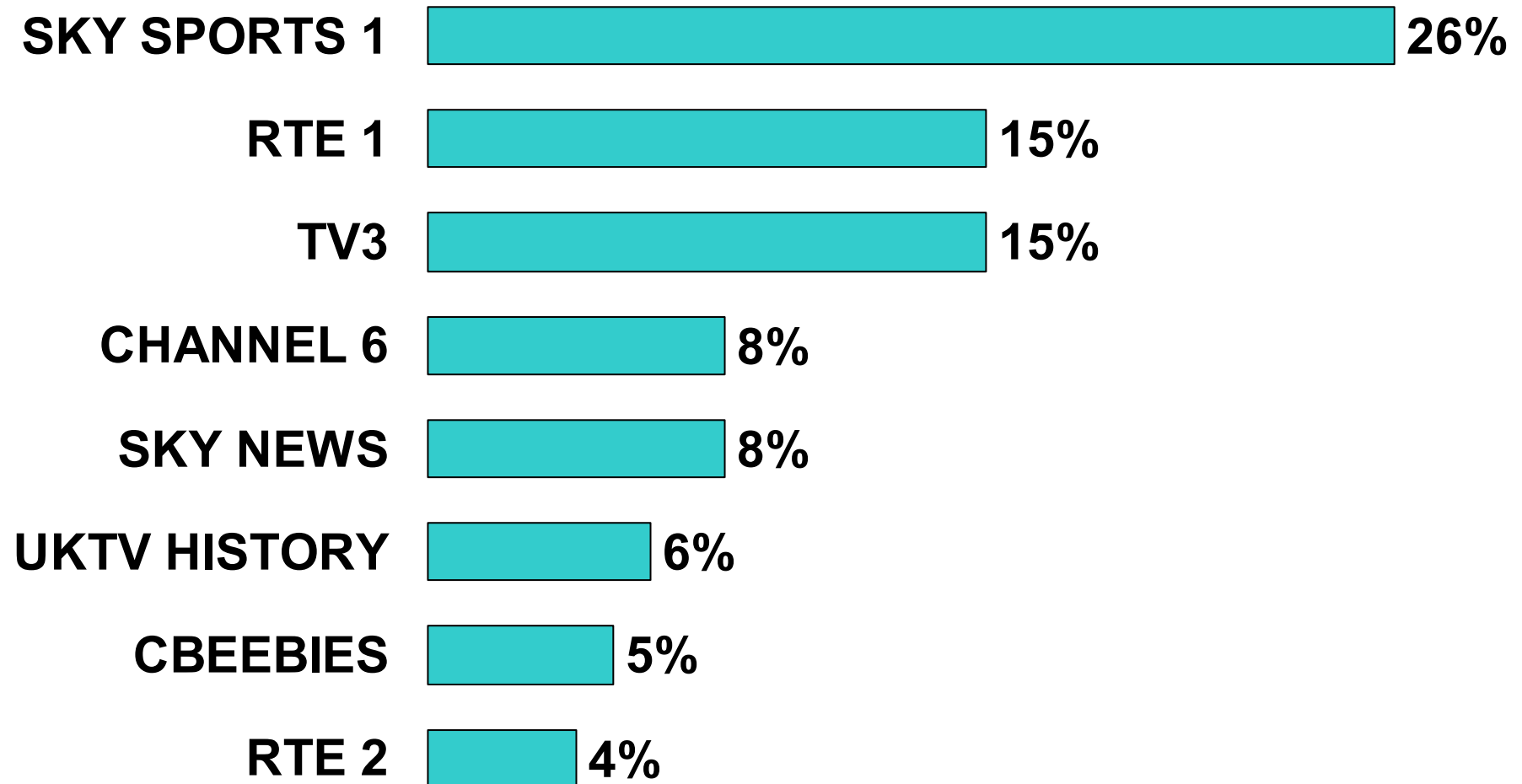
Base: All panellists N=501

Average Number of Channels Watched = 12.09



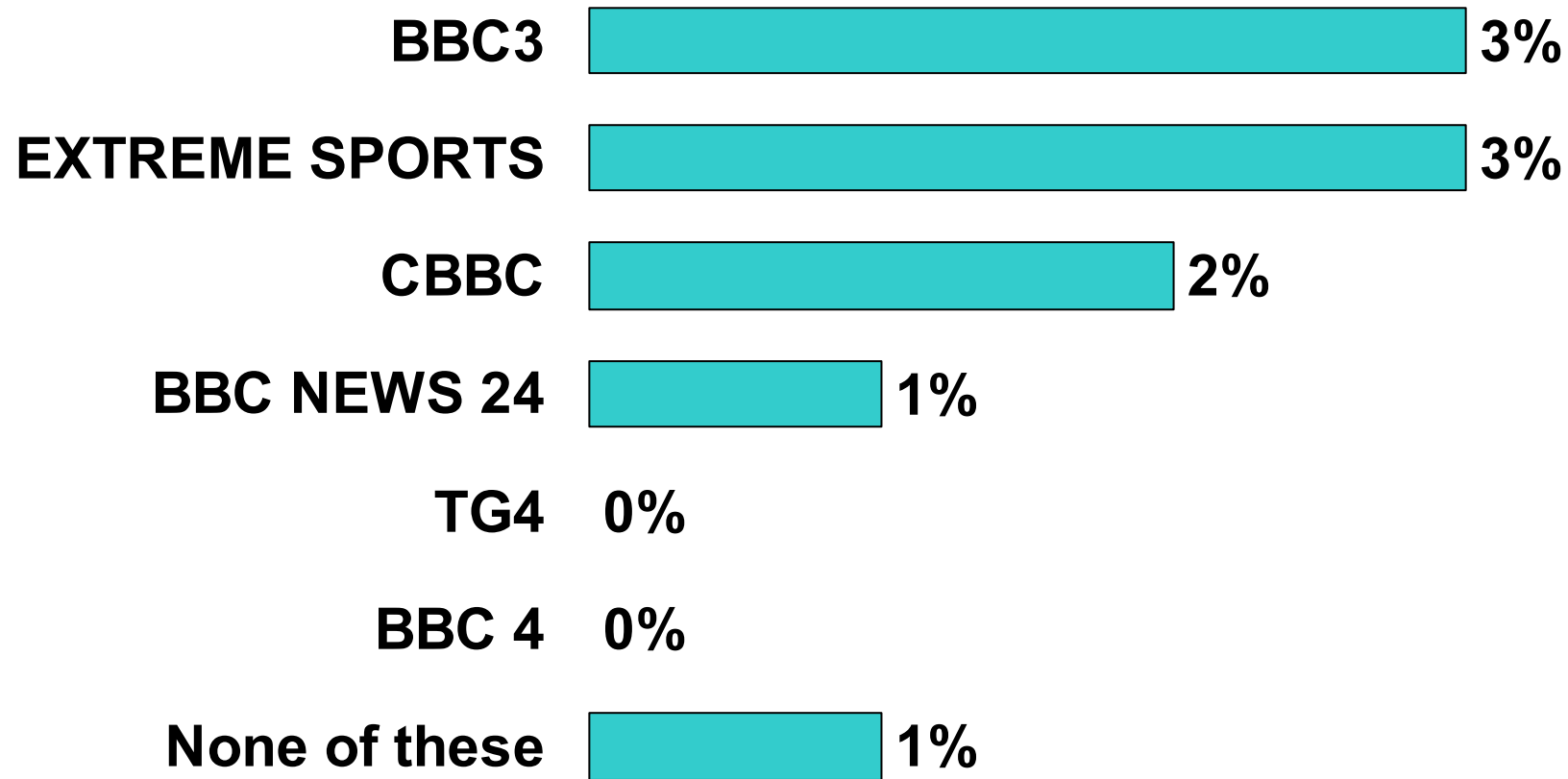
Viewing Repertoire – Most Watched Channel

Base: All panellists N=501



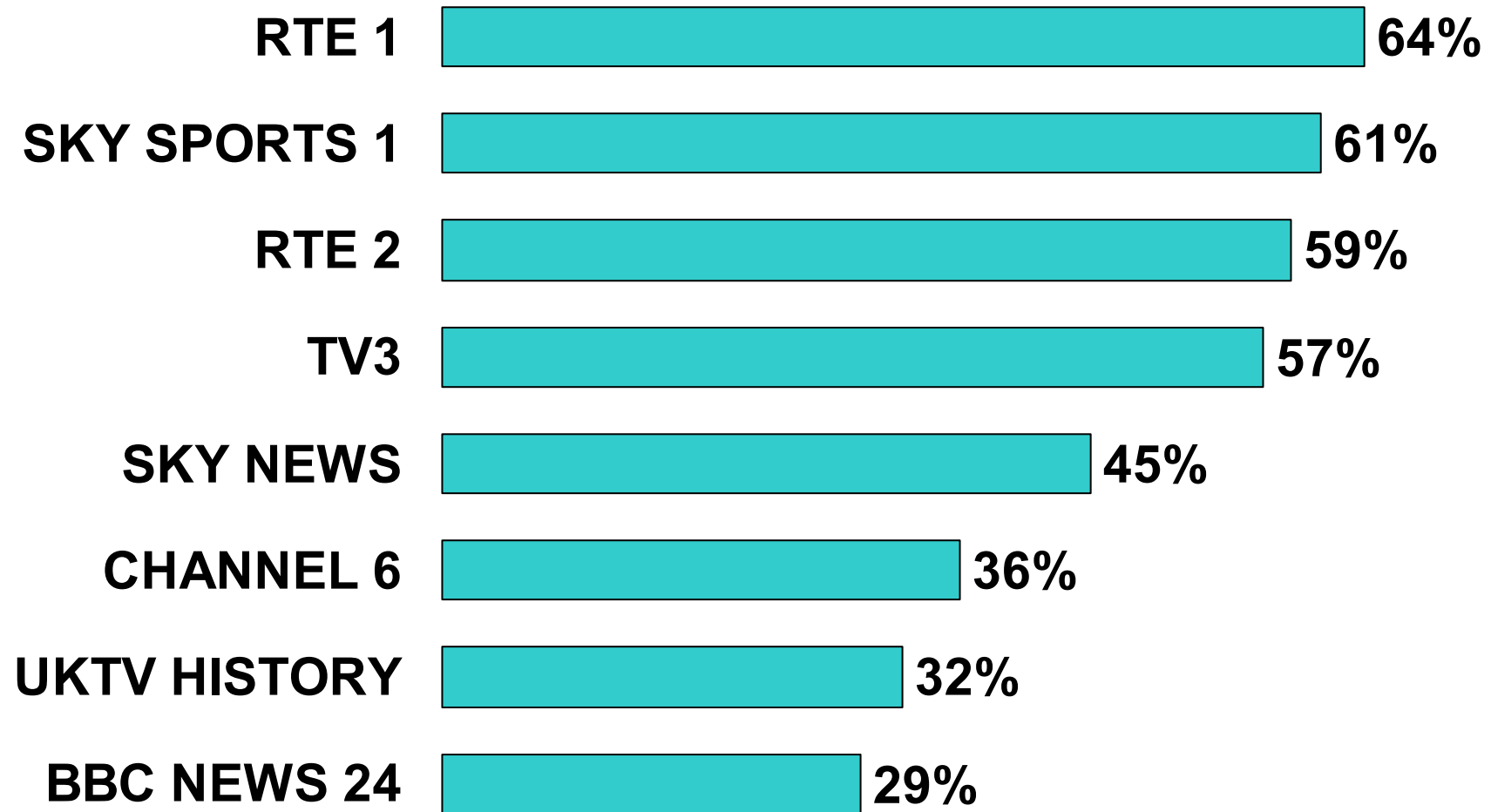
Viewing Repertoire – Most Watched Channel

Base: All panellists N=501



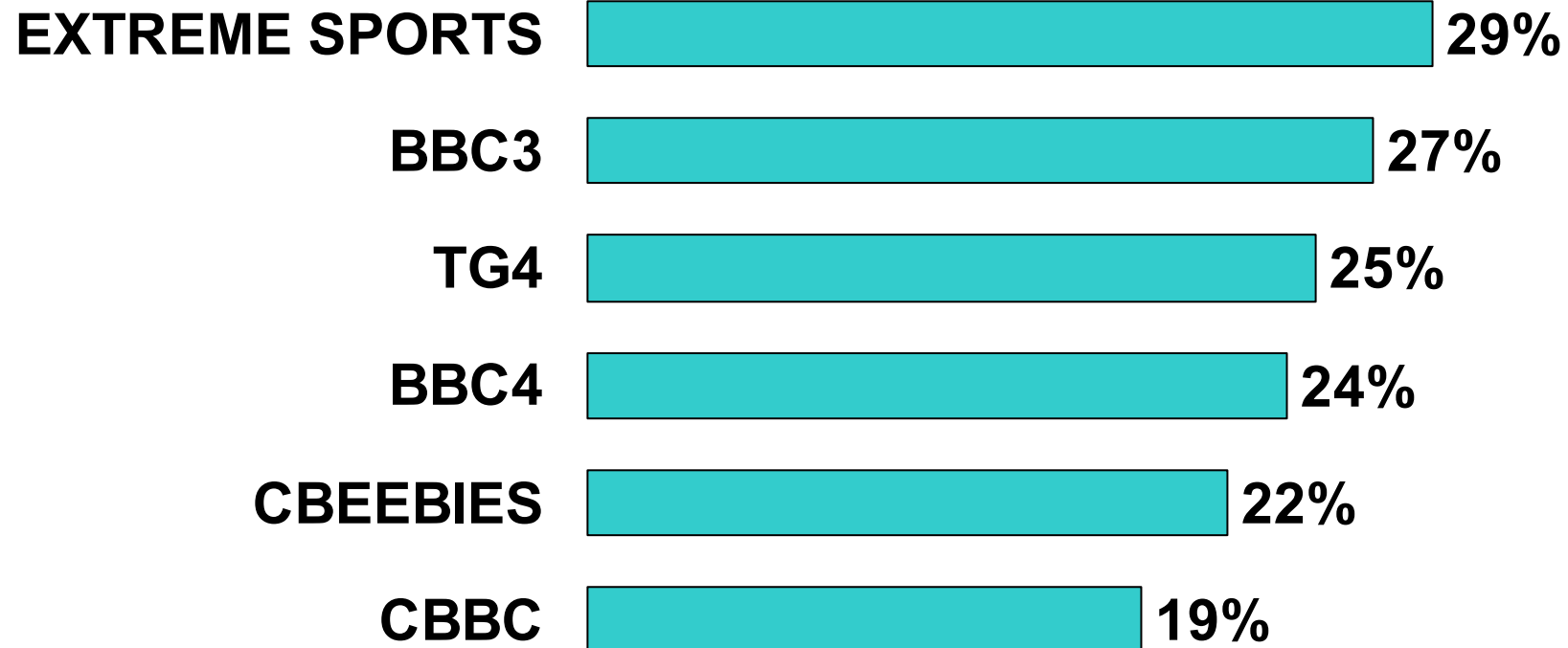
Viewing Repertoire – Watched in Past Week

Base: All panellists N=501



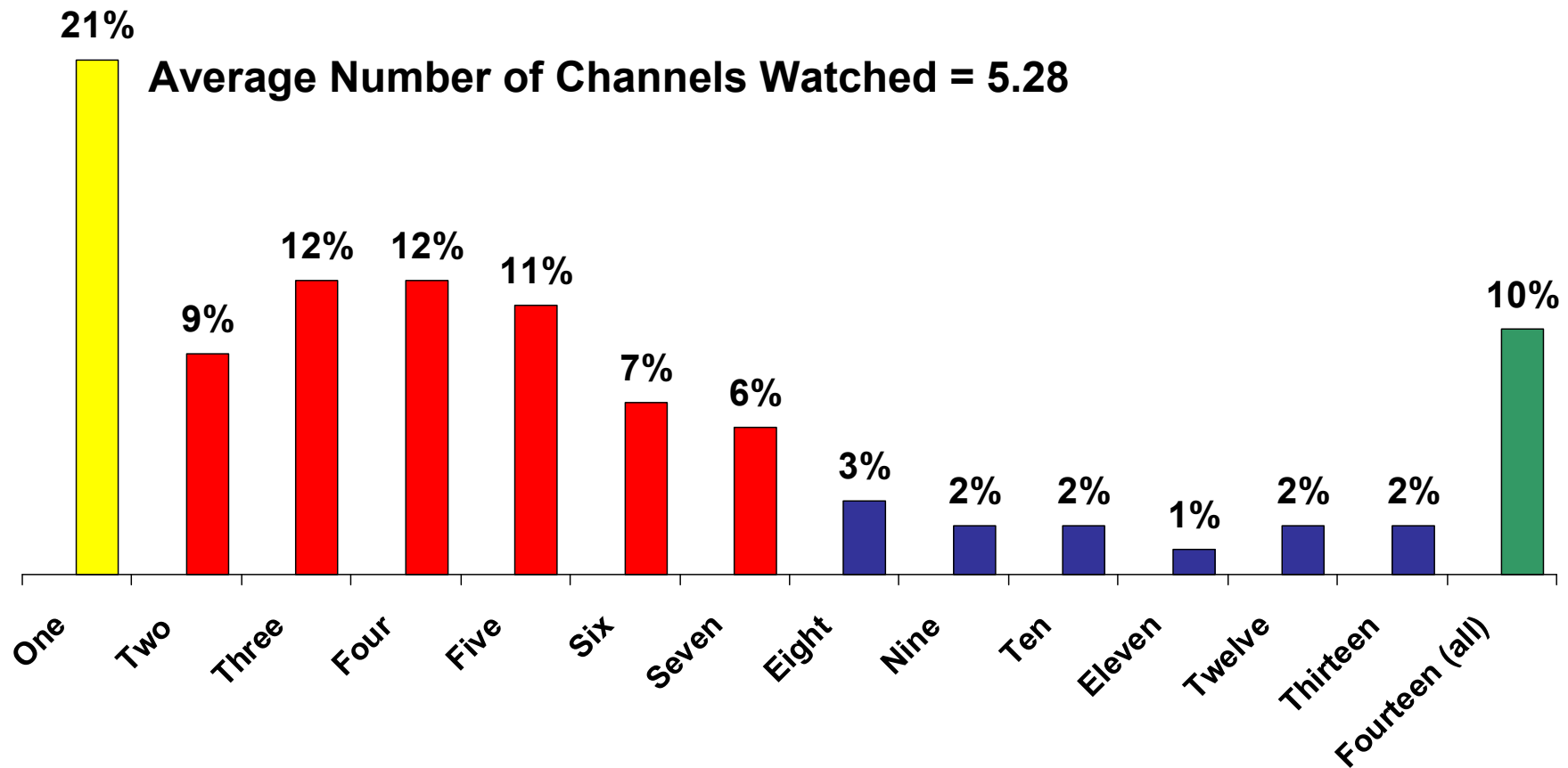
Viewing Repertoire – Watched in Past Week

Base: All panellists N=501



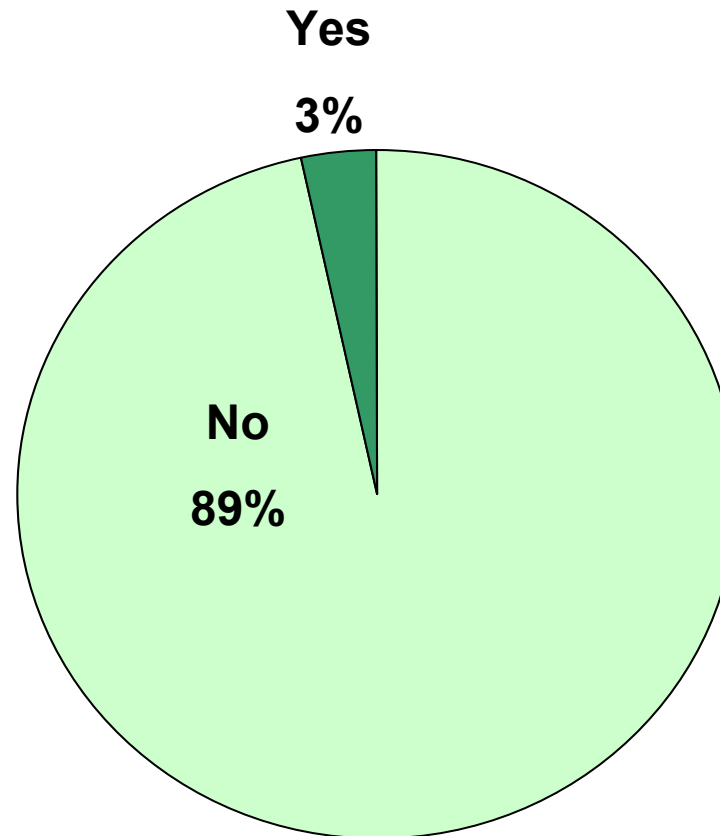
Number of Channels Watched in Past Week

Base: All panellists N=501



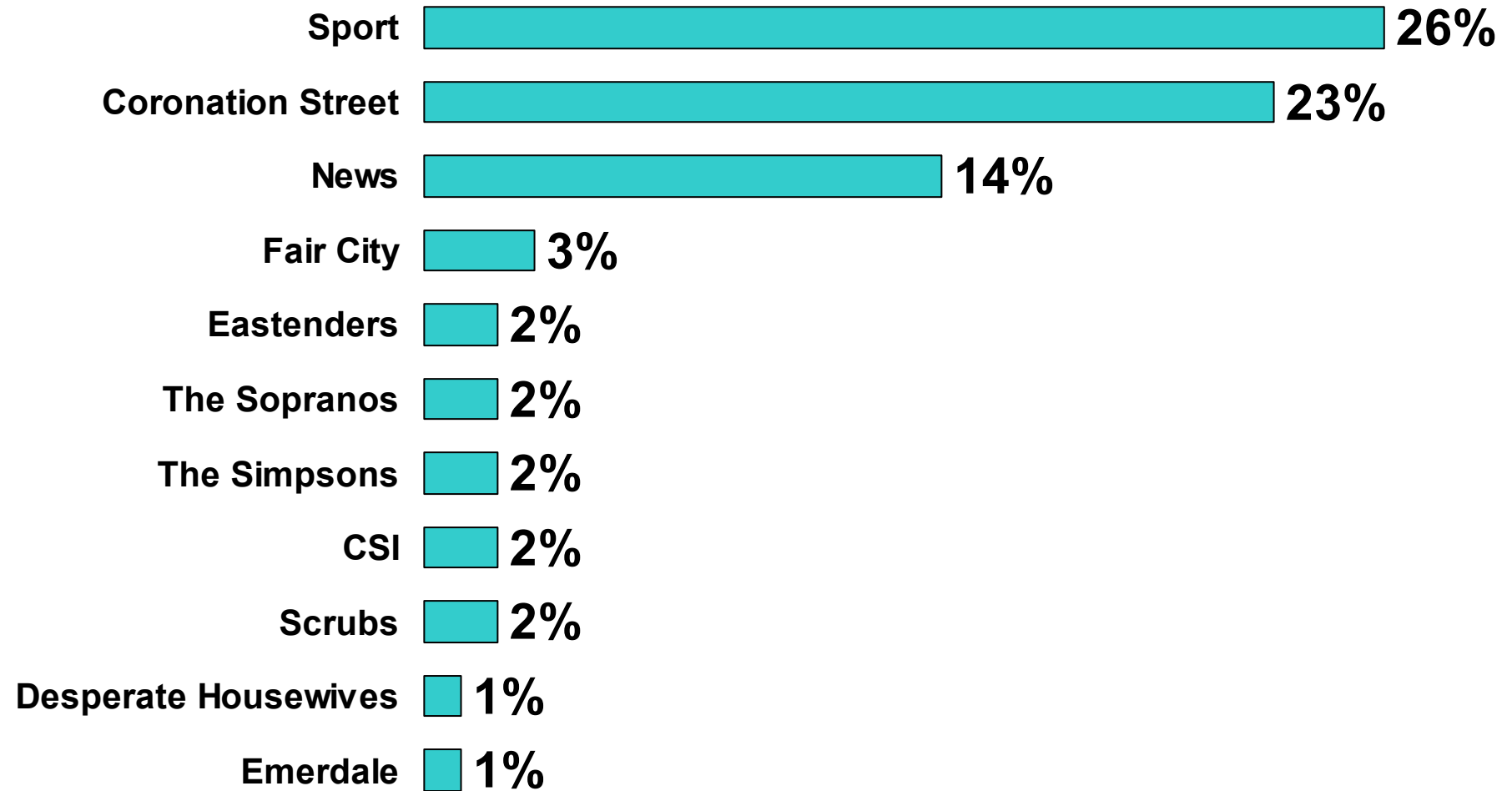
Incidence of Receiving UK Free view

Base: All panellists N=501



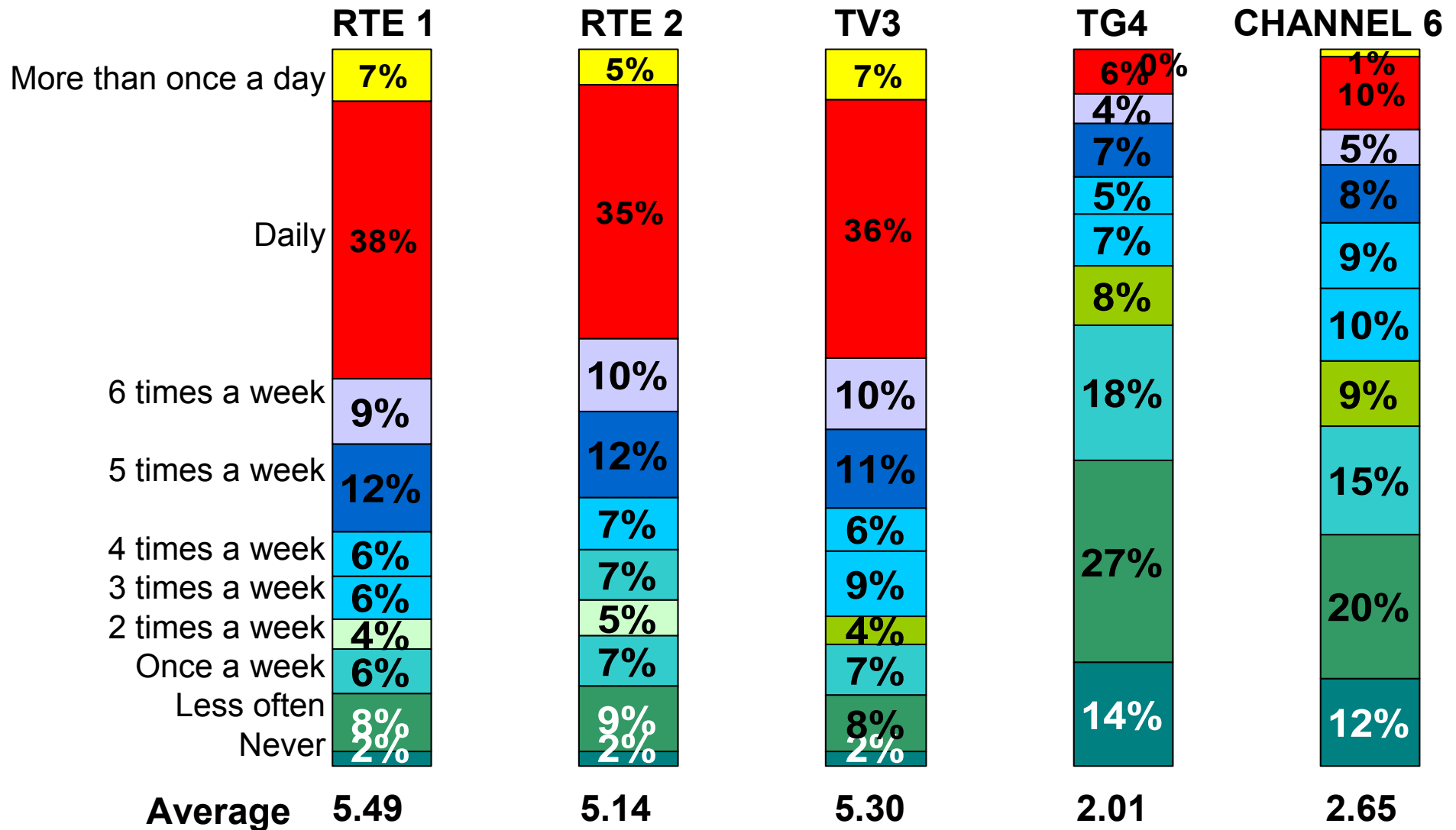
Most Watched TV Show

Base: All panellists N=501



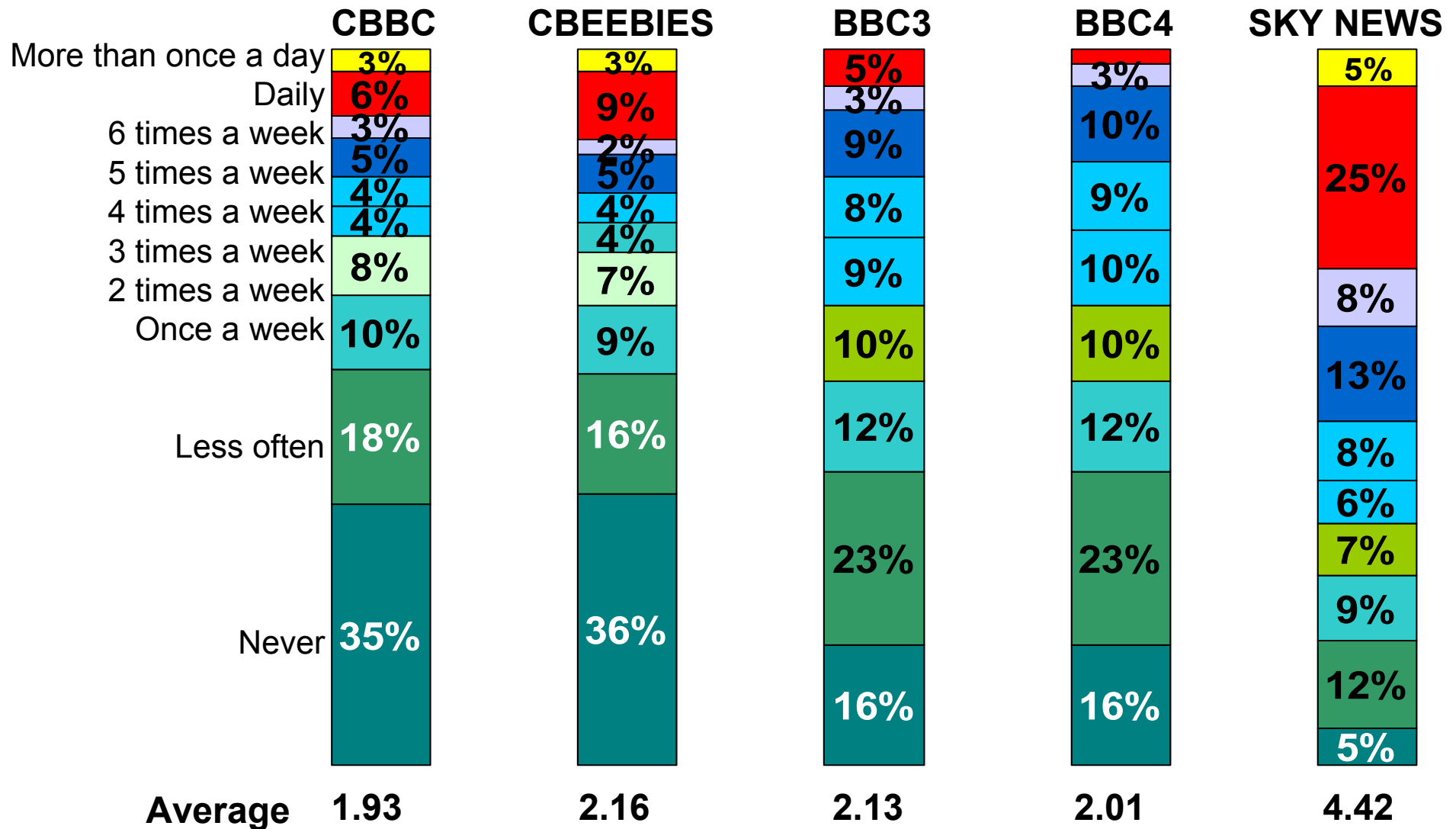
Frequency of Viewing Channels on DTT Trial

Base: All panellists N=501



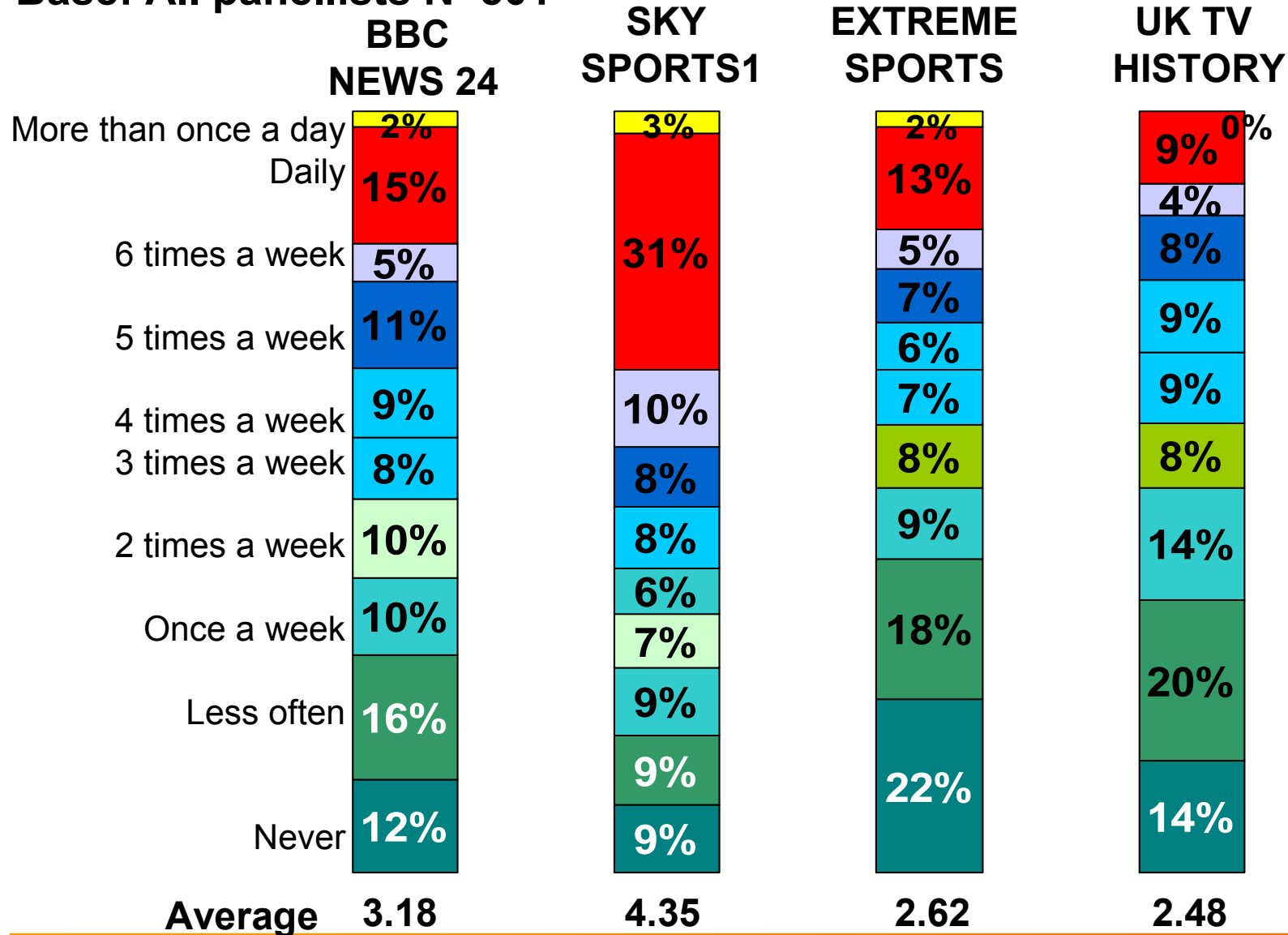
Frequency of Viewing Channels on DTT Trial

Base: All panellists N=501



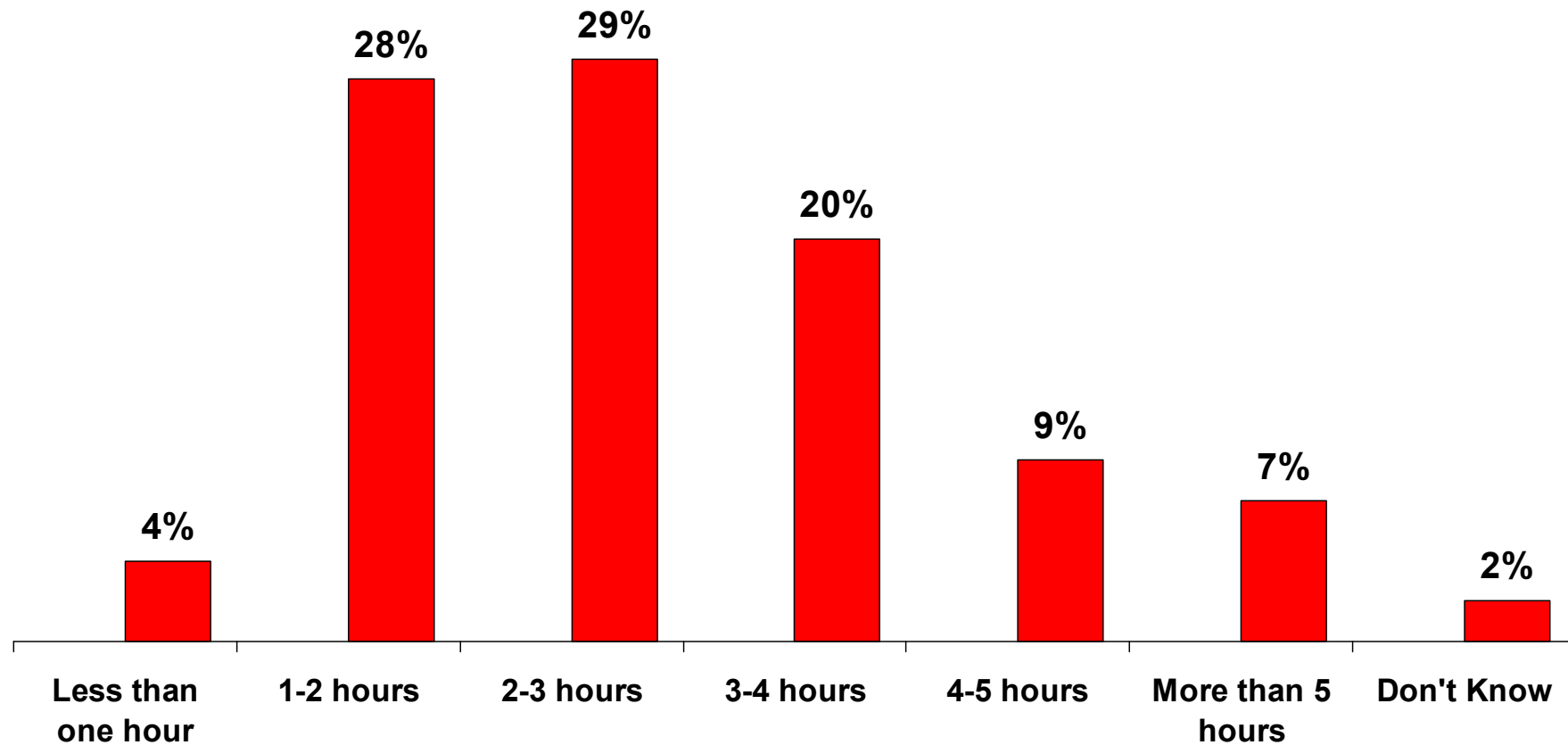
Frequency of Viewing Channels on DTT Trial

Base: All panellists N=501



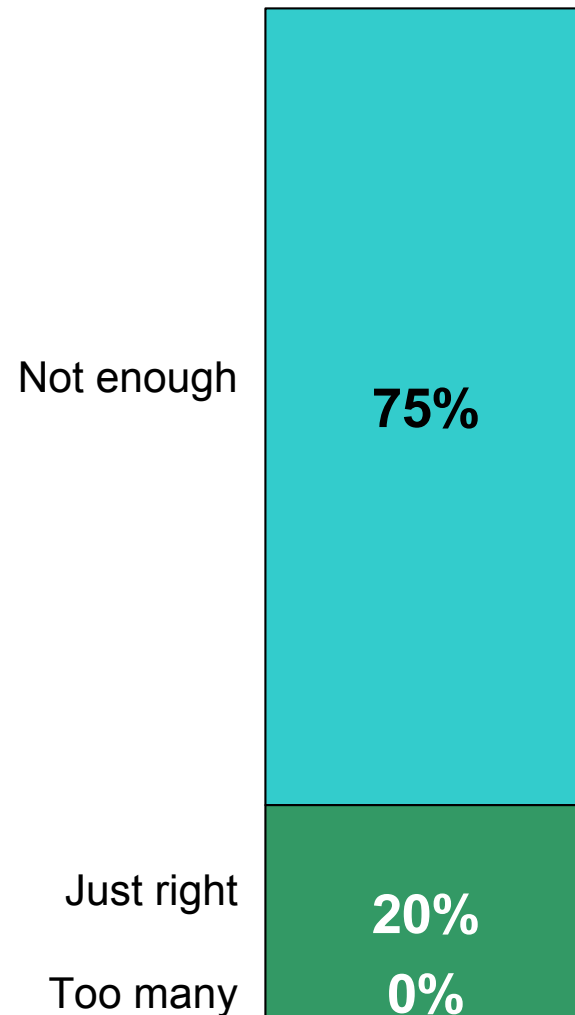
Number of Hours Per Day Spent Watching DTT Trial

Base: All panellists N=501



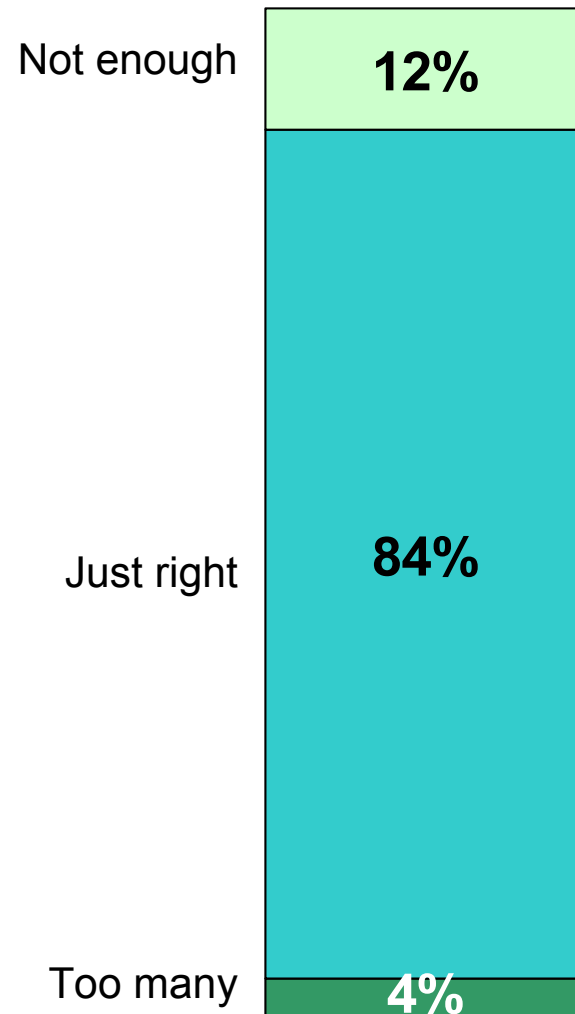
Satisfaction with Number of TV Channels

Base: All panellists N=501



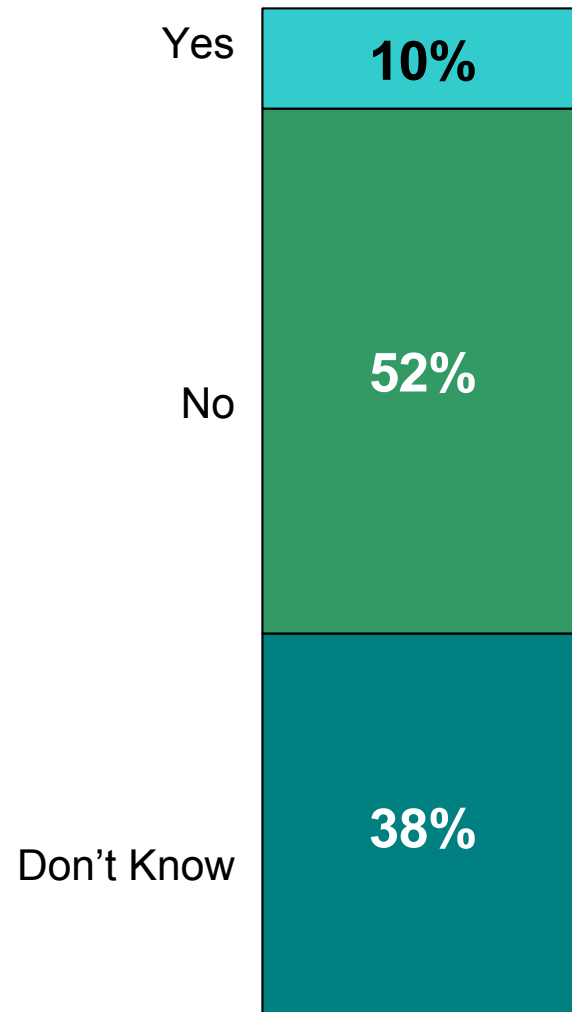
Satisfaction with Number of Radio Channels

Base: Excluding "Don't know" (N=285)



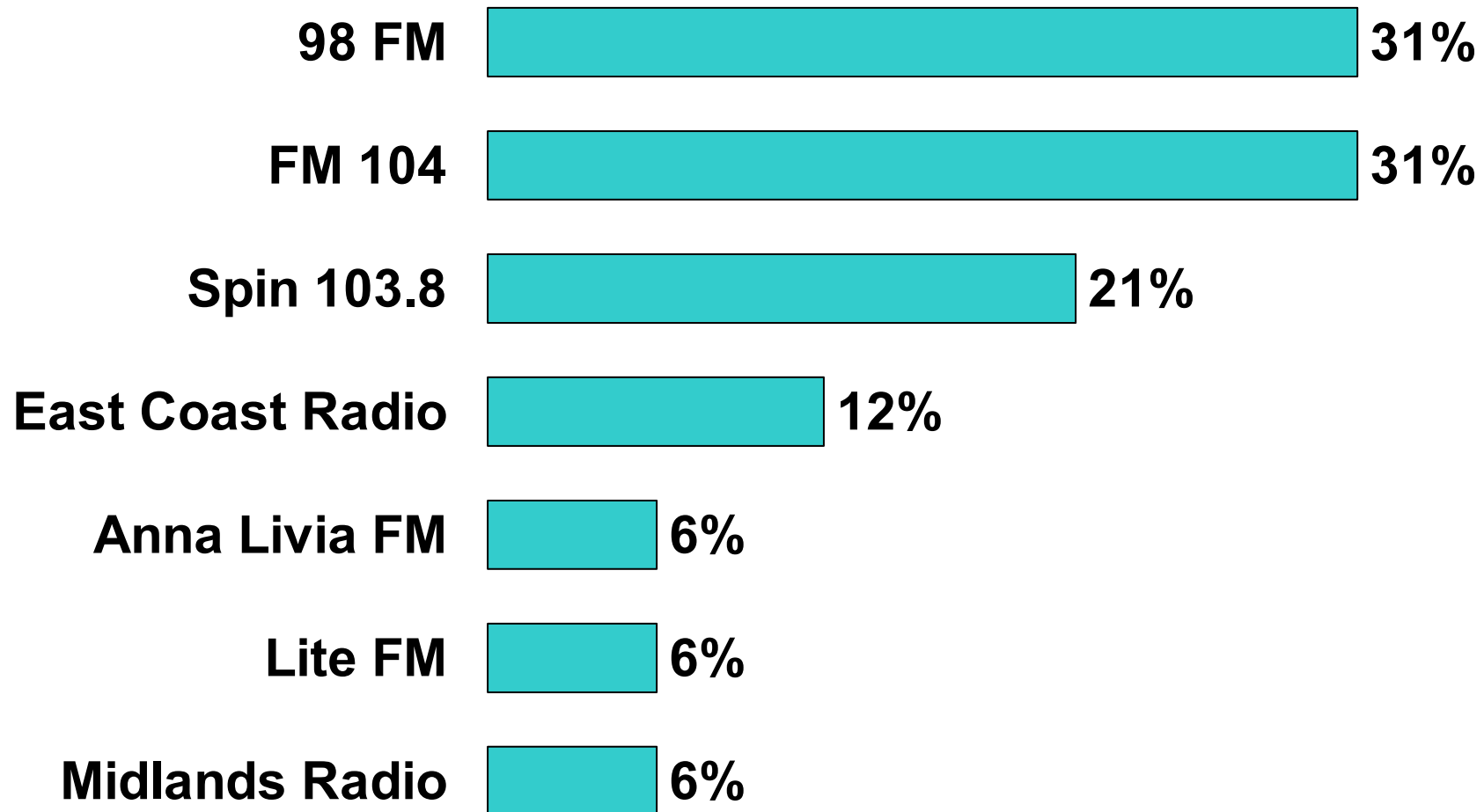
Desire for Additional Channels

Base: All panellists N=501



Additional Channels Sought

Base: All panellists Seeking Additional Channels N=52





Conclusions



Conclusions

- Overall the DTT Trial has been very well received by the panellists on the public trial.
- Satisfaction is very high with almost nine in ten (88%) panellists saying they are satisfied with the DTT Trial to date. A similar proportion (82%) say they are enjoying the DTT Trial so far. And in terms of initial installation found the Set Top Box and system easy to install (84%).
- panellists rationale for their delight with the DTT Trial is driven largely two fold, the channels on offer (72%) and the quality of reception (55%).
- The 37 individual panellists who are not currently satisfied principally level this dissatisfaction at the range of channels available (70%).
- Two in three panellists (65%) have devoted their main TV set in their main sitting room (57%) to the DTT Trial, indicative of the interest and good will around the DTT Trial.

Conclusions

- Looking at the individual attributes of the TV element of the DTT Trial the majority of panellists claim that the quality of both picture (97%) and sound (96%), the ease of use (93%), remote (93%), usability (91%) and reliability (81%) of the DTT Trial is good.
- Usage of the specific functionality on the DTT Trial is lower with the most used function being menu for one in two panellists (53%). That said however those who do use the individual functions claim they are good to use.
- Looking to the future and panellists' ideals in relation to functionality, the most requested feature is teletext (50%), followed albeit not closely by HD (9%) and interactivity (9%). Almost one in five panellist (15%) say there is nothing else they need on the DTT Trial.
- Panellists claim they have viewed all fourteen available TV channels and of the mix available the most watched channel is Sky Sports 1 (26%), followed by RTE 1 (15%) and TV3 (15%).

Conclusions

- Past week viewing is quite high with more than one in two panellists claiming to have watched at least four of the available channels in the past week. These channels are most likely to be RTE 1(64%), Sky Sports 1(61%), RTE 2 (59%) and TV3 (57%). Past week viewing hours average at 5.28, indicating the DTT Trial is watched for almost an hour a day on average.
- Channels viewed on a daily basis are (in order of average frequency of viewing) RTE 1, TV3, RTE 2 Sky News and Sky Sports 1.
- Despite panellists obvious enjoyment of the DTT Trial and their prolific use of the available channels, three quarters of the panellists on the public trial claim there are not enough TV Channels and as such would ideally like to have more channels available to them. The most popularly requested TV channels in this regard are BBC 1(64%), BBC 2(61%) Channel 4 (61%) UTV (51%) and Sky Movies (46%).

Conclusions

- Looking to Radio usage on the DTT Trial, almost eight in ten panellists (77%) are aware that there are digital radio channels available on the DTT Trial.
- However just under half of all aware (47%) have actually ever listened to the radio stations available. Those who are listening are listening to RTE 2fm (14%), Today FM(12%) and RTE Radio 1 (12%) most often and in the past week.
- Again panellists using the radio service on the DTT Trial say the usability (99%), reliability (98%) and quality of sound(98%) are very good.
- The majority of these panellists who use the radio service claim there are just the right amount of radio channels available (84%), if not a few too many channels (3%) to choose from. Just over one in ten panellists (12%) feel there are not enough channels available to them. In an ideal world these panellists would like channels such as 98fm (31%), FM 104 (31%) and Spin 103.8 (21%) to be made available to them.



Digital Terrestrial Television Quantitative Results Wave 2

Thank You