Broadcasting Authority of Ireland

Broadcasting services strategy – market analysis (summary of survey results)

17th November 2017

Summary of key findings

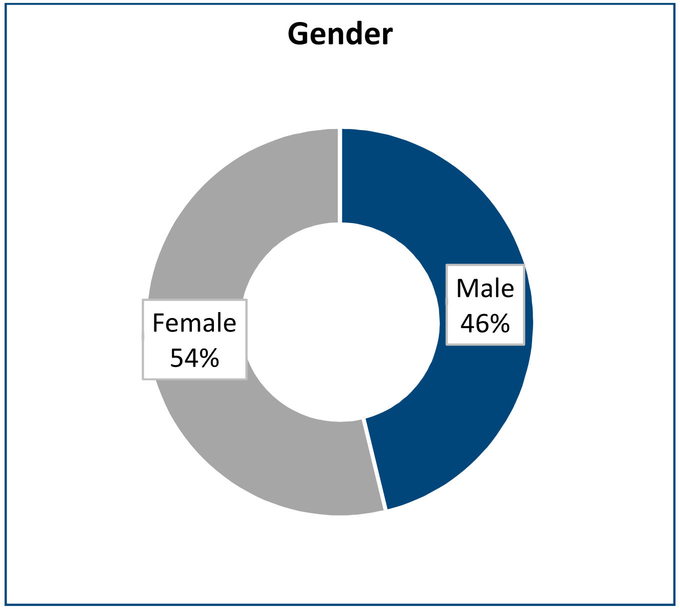
- Media consumers undertake an increasing range of activities, although both broadcast TV and broadcast radio remain the largest media in terms of activity and time spent. The scale of such activity varies by age group, with younger age groups reducing their consumption of broadcast media at a faster rate than other groups; however, even among the youngest adults, TV and radio remain two of the most used media
- In-home use of traditional broadcast equipment (standard analogue radio, TV via an aerial, set-top boxes) remain the primary means of receiving and consuming video and audio content; although take-up and use of connected devices continue to increase
- Irish audiences claim a wide range of tastes and preferences for video and audio content. News, talk, popular music and easy listening are the most popular radio genres. Film, news, documentaries, drama and sport are the most popular TV genres
- Irish audiences claim broad satisfaction with the range and quality of content available on broadcast media. There is no consensus around major gaps in provision - in broad terms, audiences believe that there is the right amount of content provision in key genres including Irish music, Irish language and news
- There is some scope for Irish broadcasters to improve the way they reflect Irish culture and diversity, and to increase the amount of available content that is made in Ireland; although on average, most audiences are happy with the performance of TV and radio broadcasters
- In summary, the survey reveals an increasingly complex picture of content consumption within a landscape that is still primarily led by broadcast media. There is overall satisfaction with the nature and range of broadcast content provision, and the output and performance of Irish broadcasters

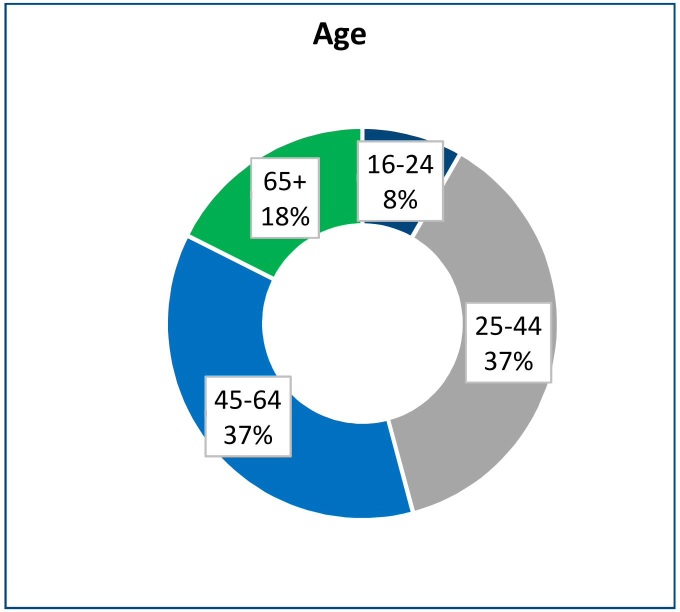
As part of our work for the BAI, we commissioned Kantar Media to undertake a consumer survey to interrogate individuals about their claimed behaviours and viewpoints

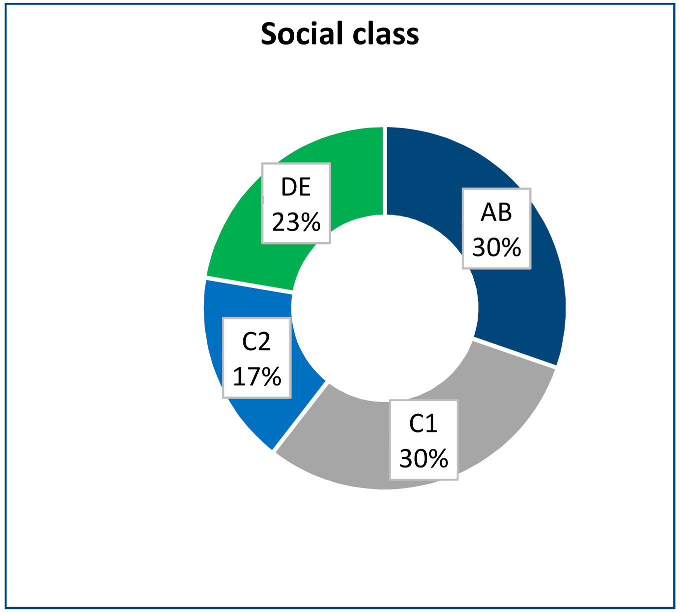
- We were tasked with identifying the main needs and preferences of broadcast viewers and listeners in Ireland. To this end, we commissioned Kantar Media to undertake a consumer survey to interrogate individuals about their claimed behaviours and viewpoints
- The survey was structured in five main areas:
  - Establishment questions – TV provider, other services
  - Claimed usage of media activities, including video and audio services
  - Content preferences by station/channel type and genre
  - Views on the quality, distinctiveness and scale of provision of broadcast services in Ireland
  - …this included views on satisfaction with the amount of Irish content available on different media in Ireland
- The survey results give us insight into the underlying drivers of consumption outcomes, as well as highlighting attitudes towards current service providers and range of content available
- This enabled us to identify potential gaps in provision, and potential concerns around the quality and distinctiveness of Irish content. The responses are also used to inform our forecasts of future market outcomes
- **This short document illustrates the key findings of the survey: most responses are expressed as a proportion of the entire sample; in practice there are material differences among age groups and other categories (e.g., TV ownership, internet penetration)**

Kantar Media constructed the survey to be representative of the Irish population, weighted by age, gender and TV service market share

- The survey was undertaken in October 2017 using a combination of online and telephone interviews to a total sample of 1,515 adults living in the Republic of Ireland
- Claimed responses often vary from industry data, due to differences in definition (e.g., access to services, regularity of usage, "ever" used) and over/under-reporting (particularly of habitual media). As a result, some claimed activity rates in the survey such as Netflix usage will be higher than some industry figures







Source: Kantar Media Survey
Sample: all respondents

Establishment questions

Claimed usage of media activities

Content preferences

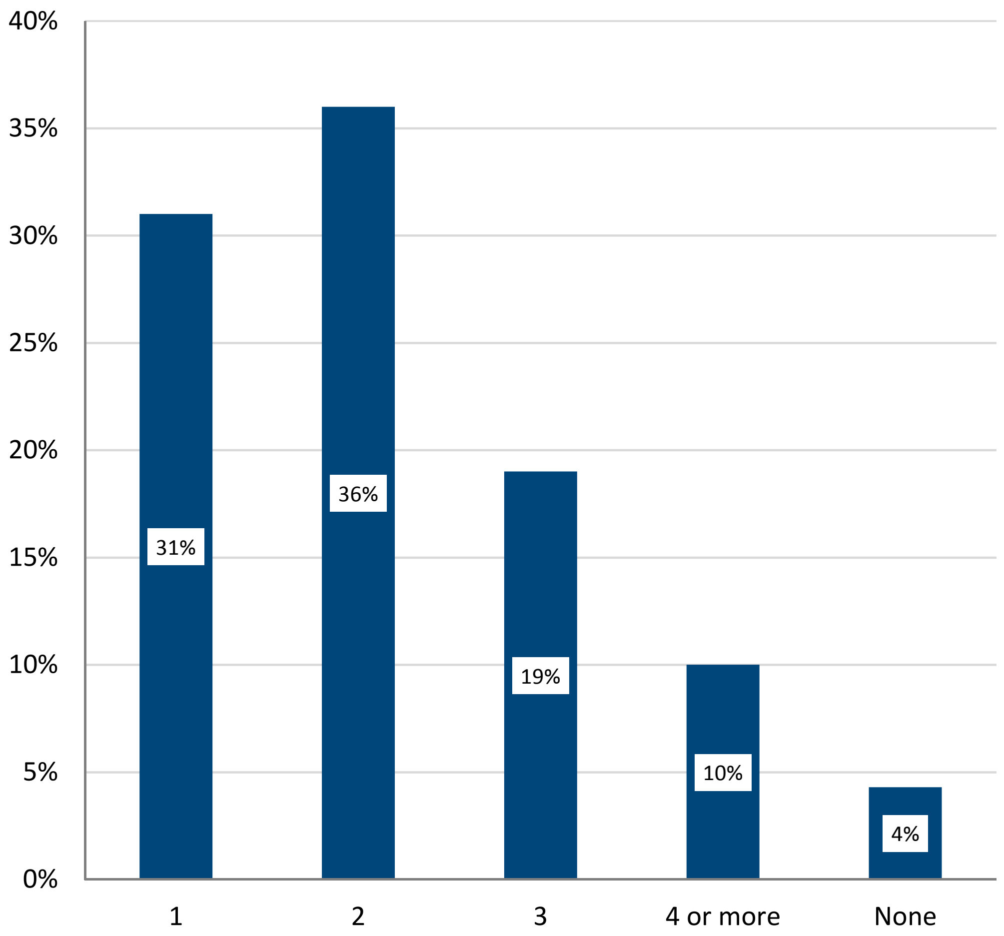
Views on quality and distinctiveness – radio

Views on quality and distinctiveness – TV

Most Irish households own more than one TV set, and more than 75% of Irish TV homes are now able to receive HD channels

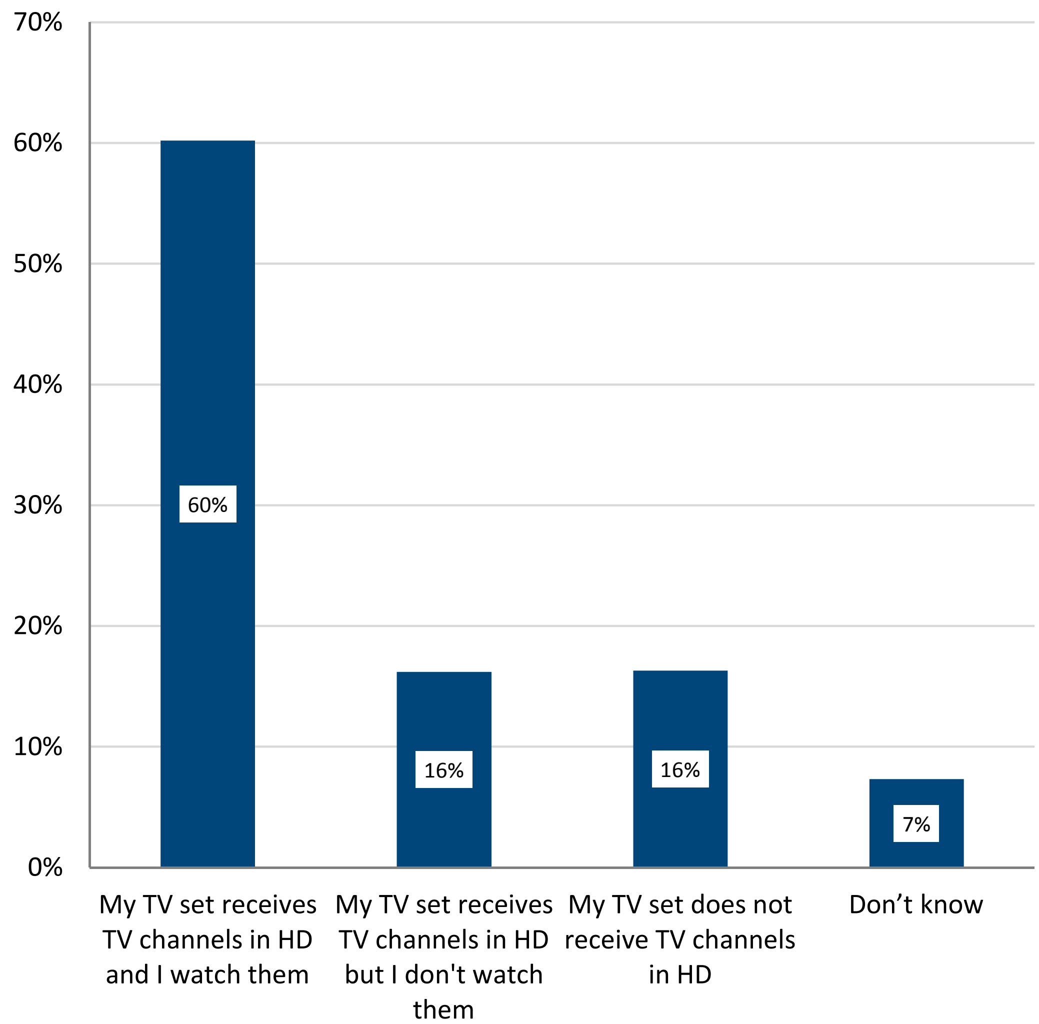
Mediatique

How many TV sets there are in your household?



Source: Kantar Media Survey
Sample: all respondents (1515)

Do you receive and watch TV channels in HD on the main TV set?

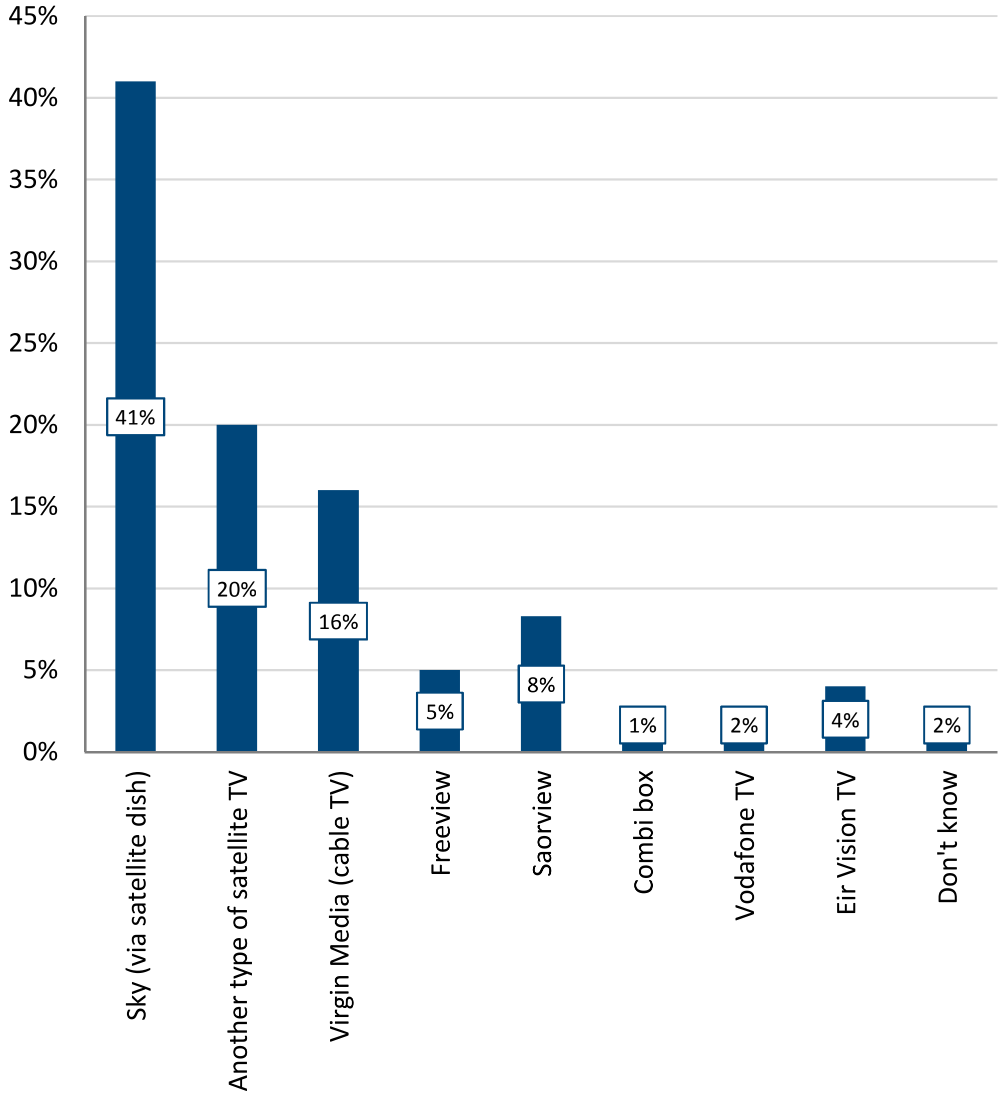


Source: Kantar Media Survey
Sample: all respondents with a TV (1450)

Satellite and cable are the primary delivery mechanisms to the primary TV set in Irish homes; Saorview (DTT) is a major platform for secondary sets in the home

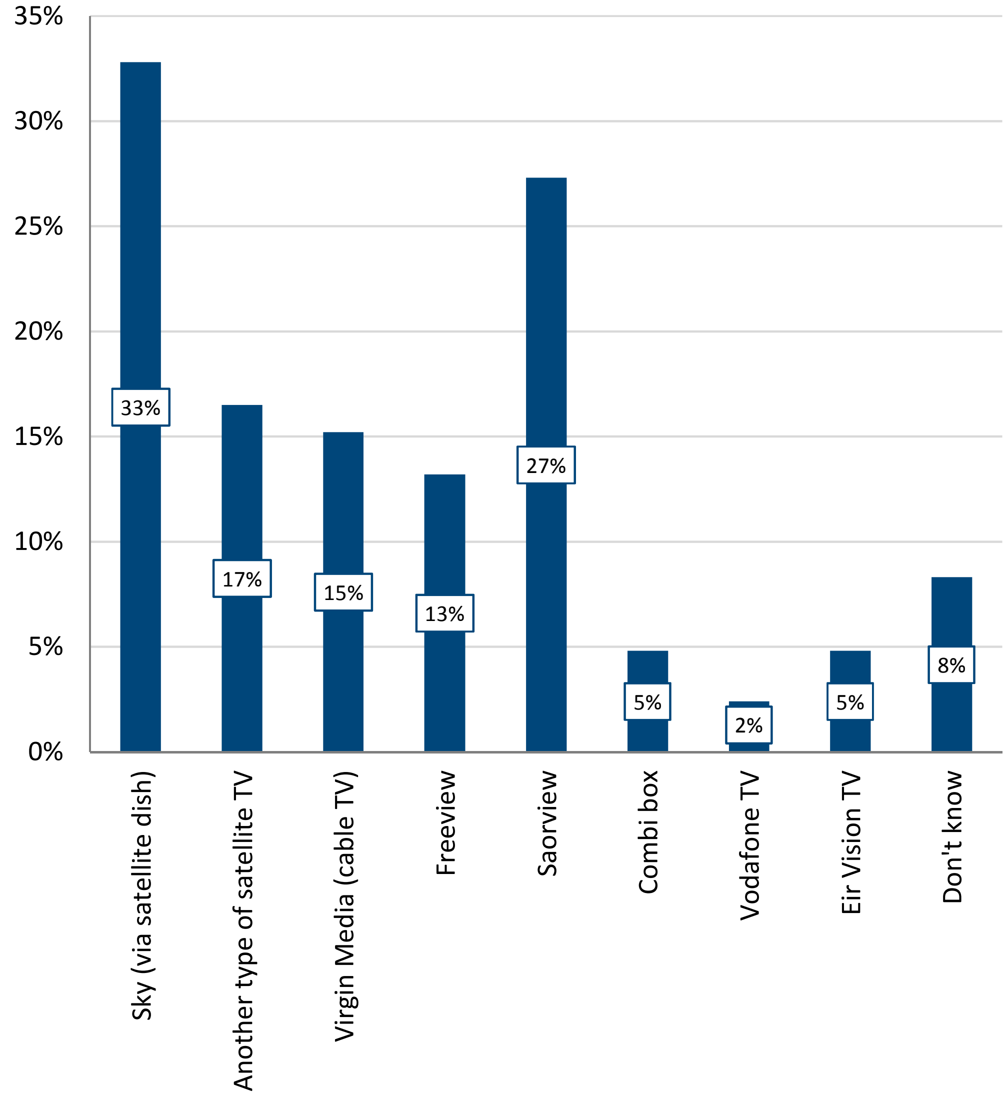
Mediatique

How do you receive TV programmes on the main TV set?



Source: Kantar Media Survey
Sample: all respondents with a TV (1450)

…and on other TV sets in the home?

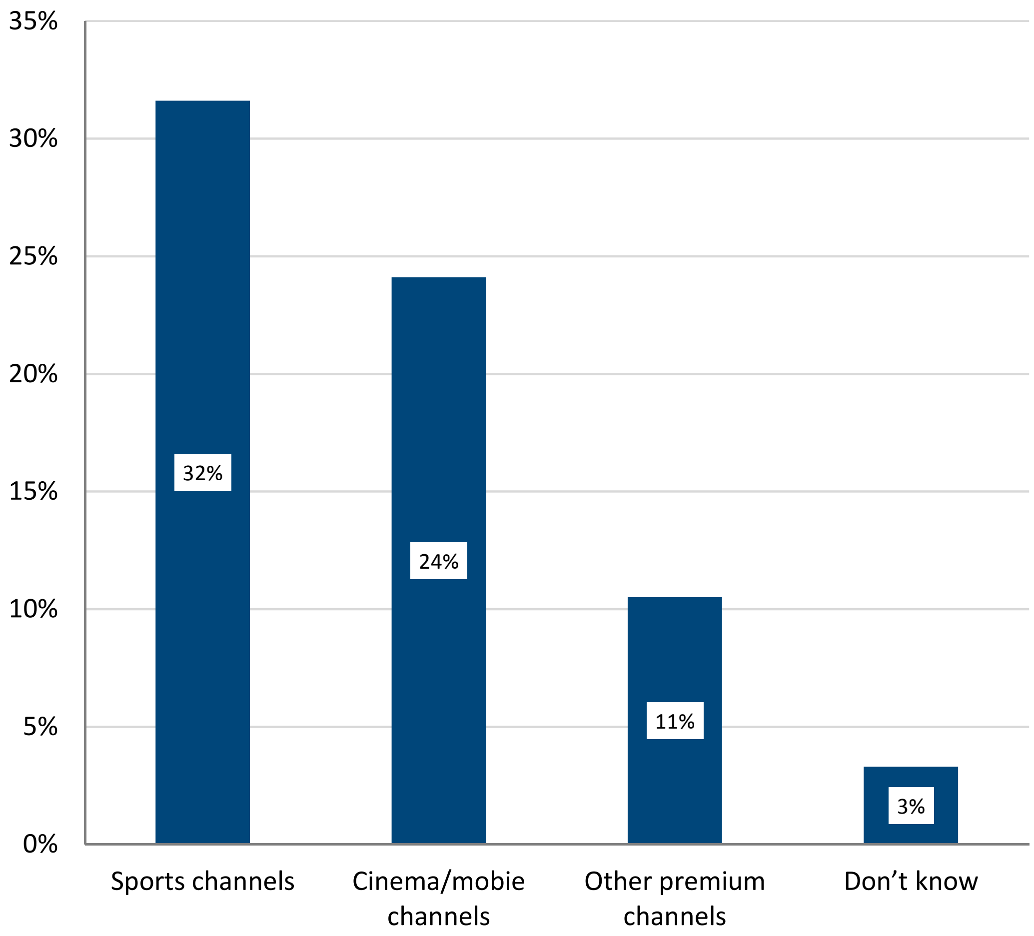


Source: Kantar Media Survey
Sample: all respondents with more than one TV (990)

A material number of respondents claimed to subscribe to premium TV channels – and to SVOD services. These results may be subject to over-reporting

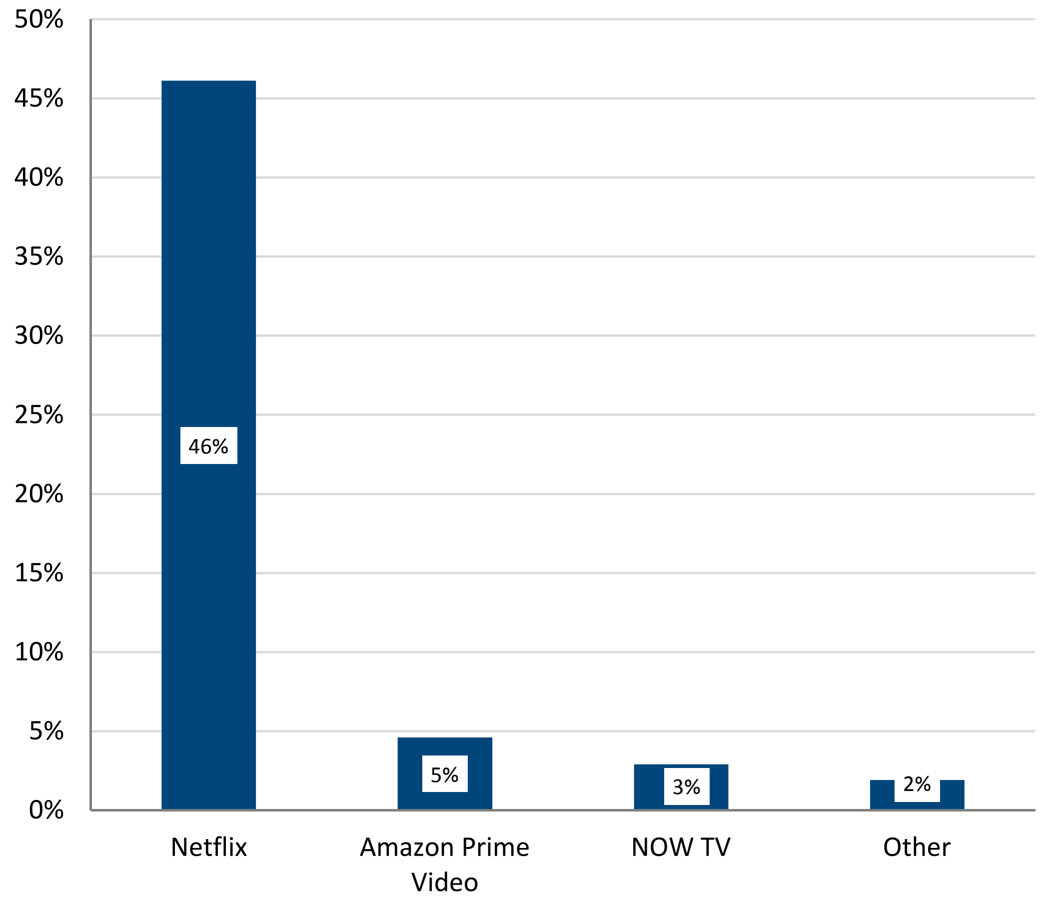
Mediatique

Which if any of these types of channels do you pay extra for?



Source: Kantar Media Survey
Sample: all respondents with pay TV (1035)

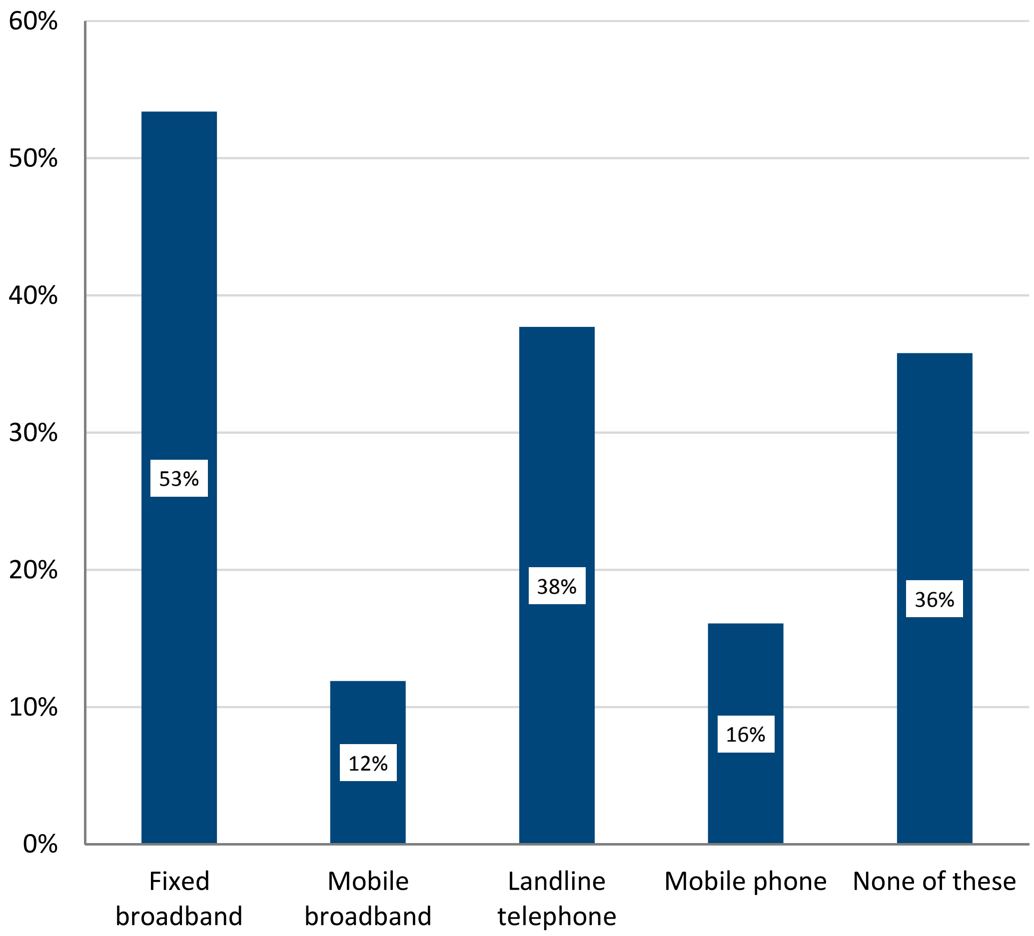
Which of these services do you or someone else in your household subscribe to in order to watch television programmes (or films)?



Source: Kantar Media Survey
Sample: all respondents with internet (1498)

More than 50% of respondents take broadband from their TV provider – ensuring that total bundled ARPU is relatively high

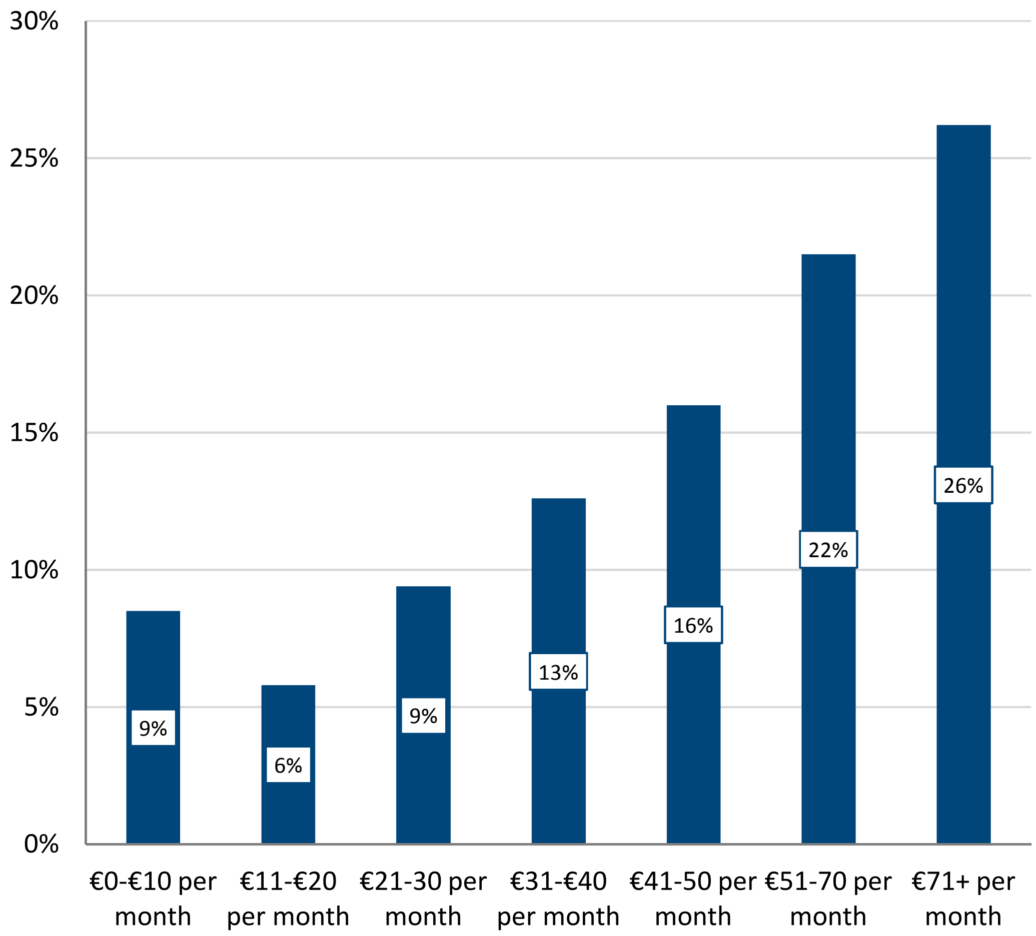
Which other services does your household get from your TV provider?*



***Which, if any, of the following services does your household also get from <INSERT TV PROVIDER> in addition to your current TV service?**

Source: Kantar Media Survey
Sample: all respondents with pay TV (1035)

Approximately how much are you paying for these in total each month?



Source: Kantar Media Survey
Sample: all respondents (1515)

Establishment questions

Claimed usage of media activities

Content preferences

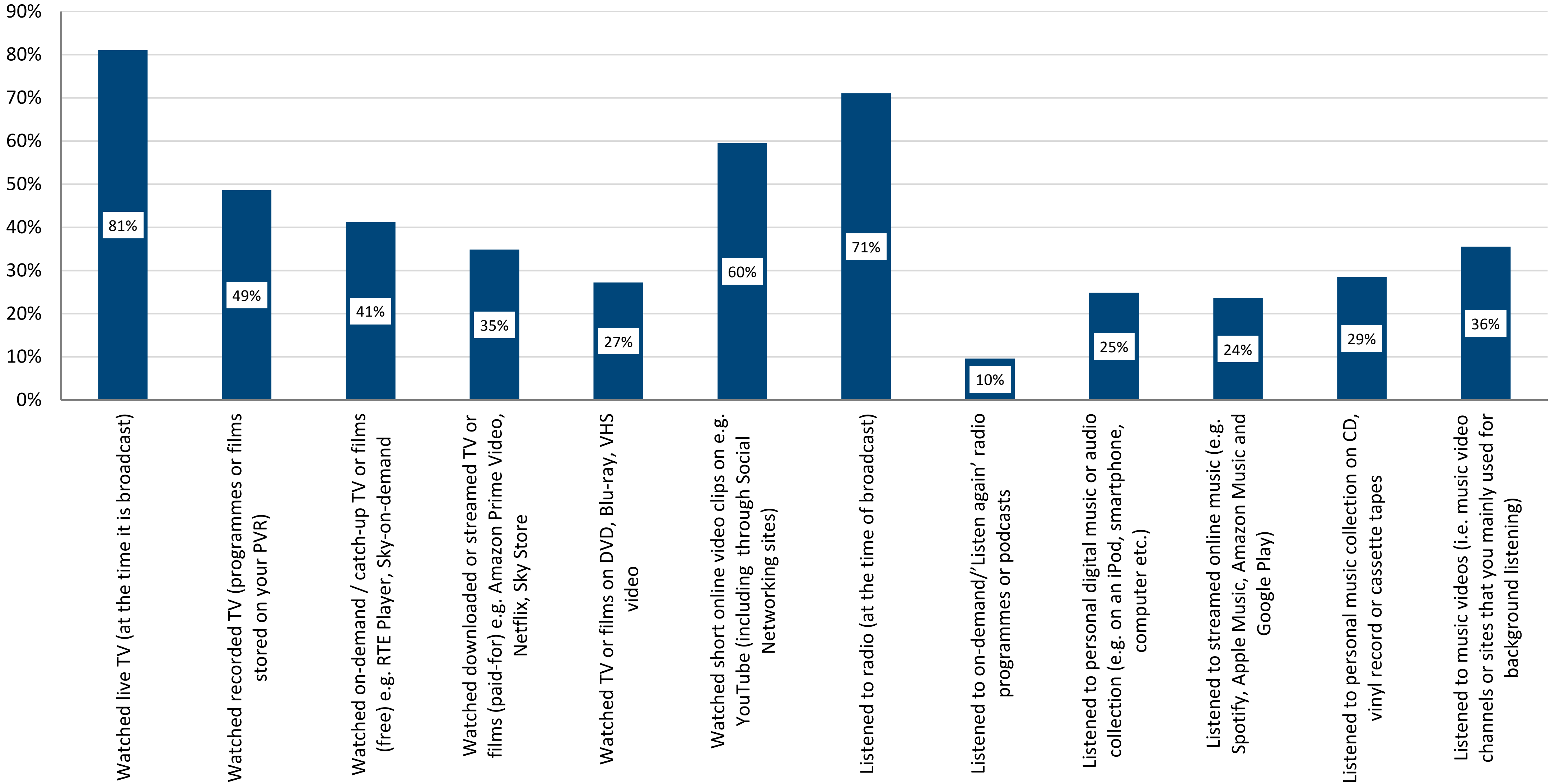
Views on quality and distinctiveness – radio

Views on quality and distinctiveness – TV

Broadcast TV and broadcast radio are the primary media activities across the entire sample – despite the increasing array of other media engagement that is now possible

Mediatique

For each of these activities, please indicate which of them you have done in the last month

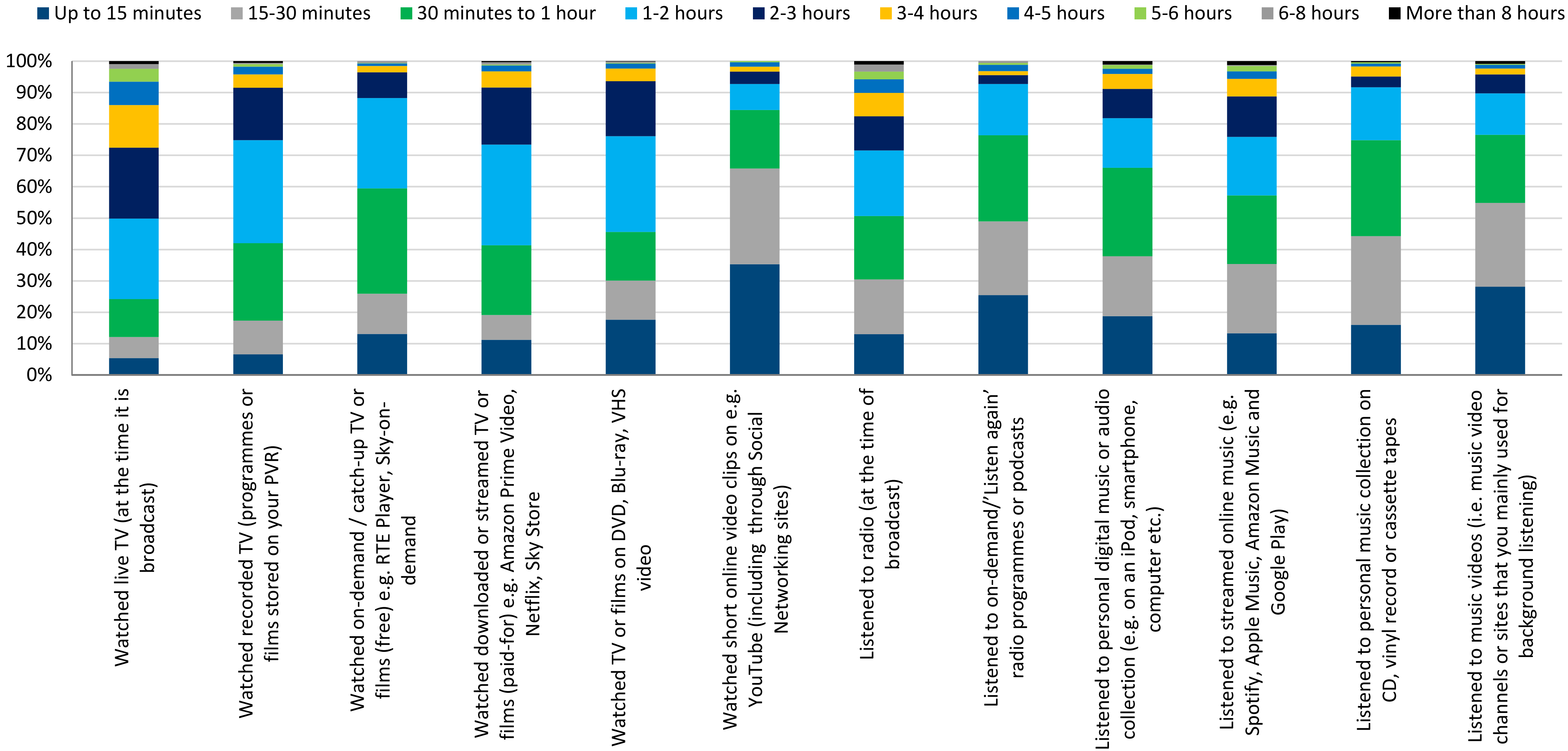


Source: Kantar Media Survey
Sample: all respondents (1515)

The survey reveals wide differences in time spent with each media – emerging media activities such as short-form video are more suited to snacking in short time periods

Mediatique

For each of these activities please say how long you spend doing this in an average day

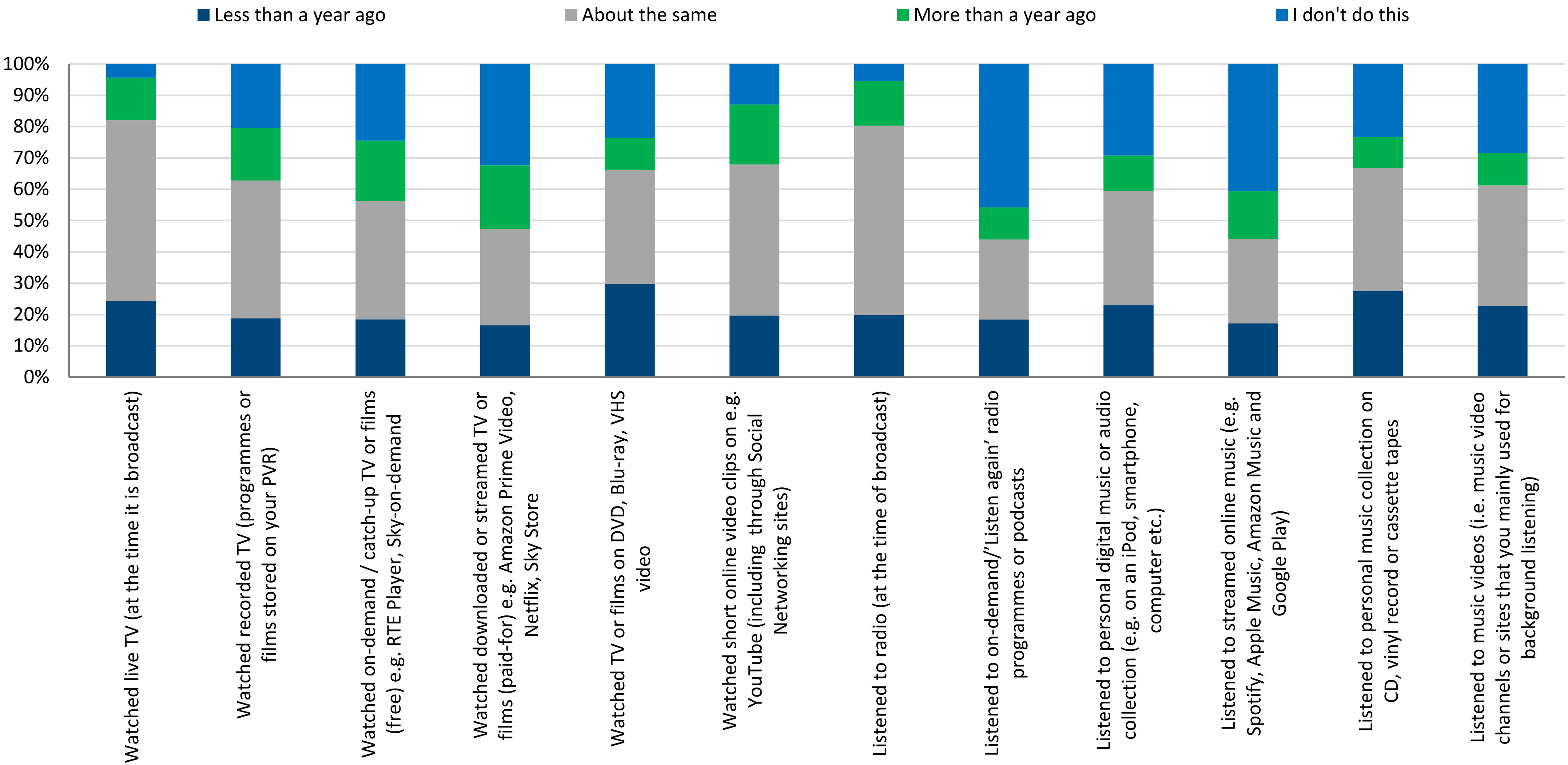


Source: Kantar Media Survey
Sample: all respondents (1515)

The survey reveals a net decrease in consumption of broadcast TV and radio over the last year; although the overwhelming majority have not changed their overall consumption at all

Mediatique

For each of the following, please indicate if you do this more than, less than or about the same as a year ago

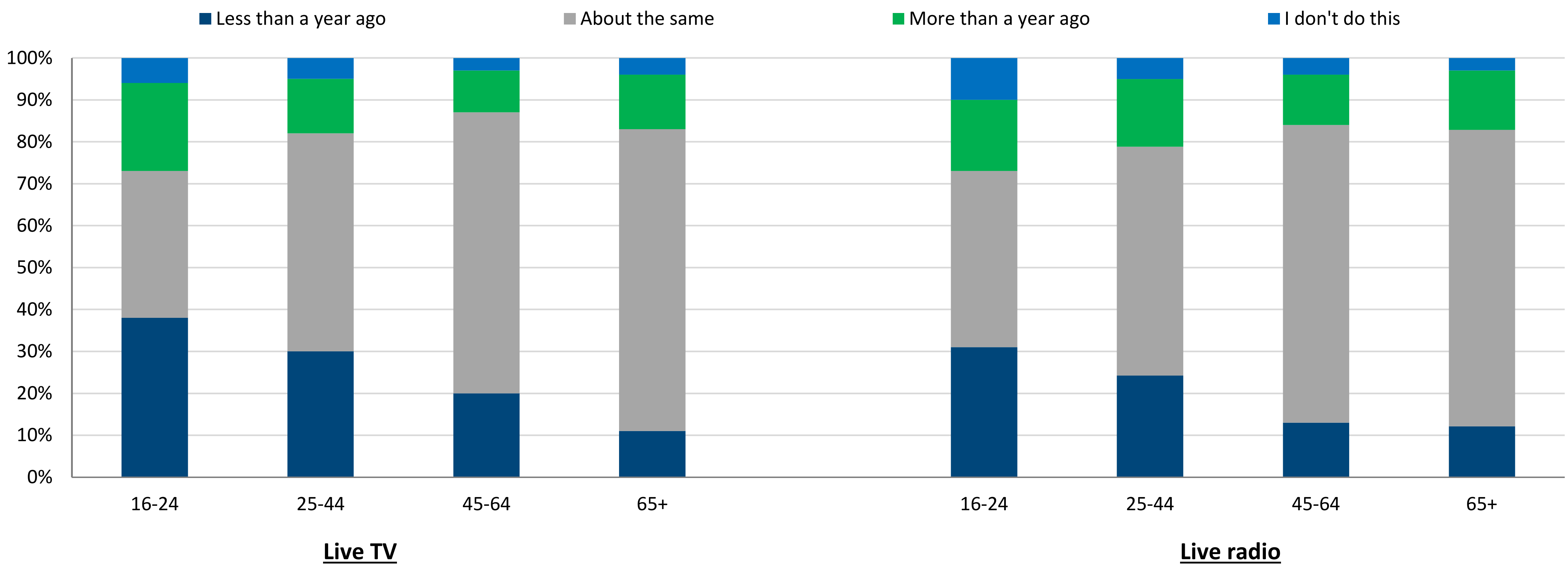


Source: Kantar Media Survey
Sample: all respondents (1515)

Changes in media engagement are more pronounced among younger age groups – 16-24s are far more likely to have reduced their consumption of broadcast media than older age groups

Mediatique

For each of the following, please indicate if you do this more than, less than or about the same as a year ago

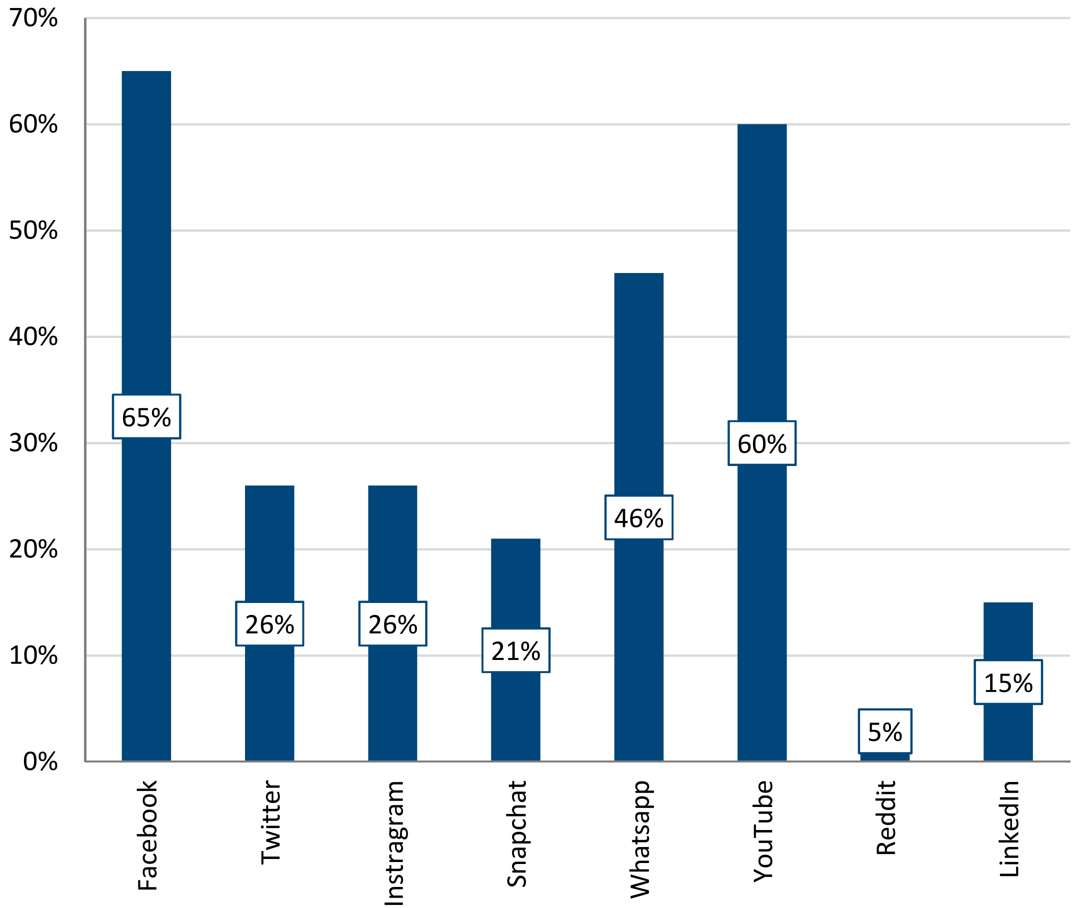


Source: Kantar Media Survey
Sample: all respondents (1515)

The survey reveals widespread usage of online services including social media, messaging and short-form content – although time spent with these applications is relatively short across the entire day

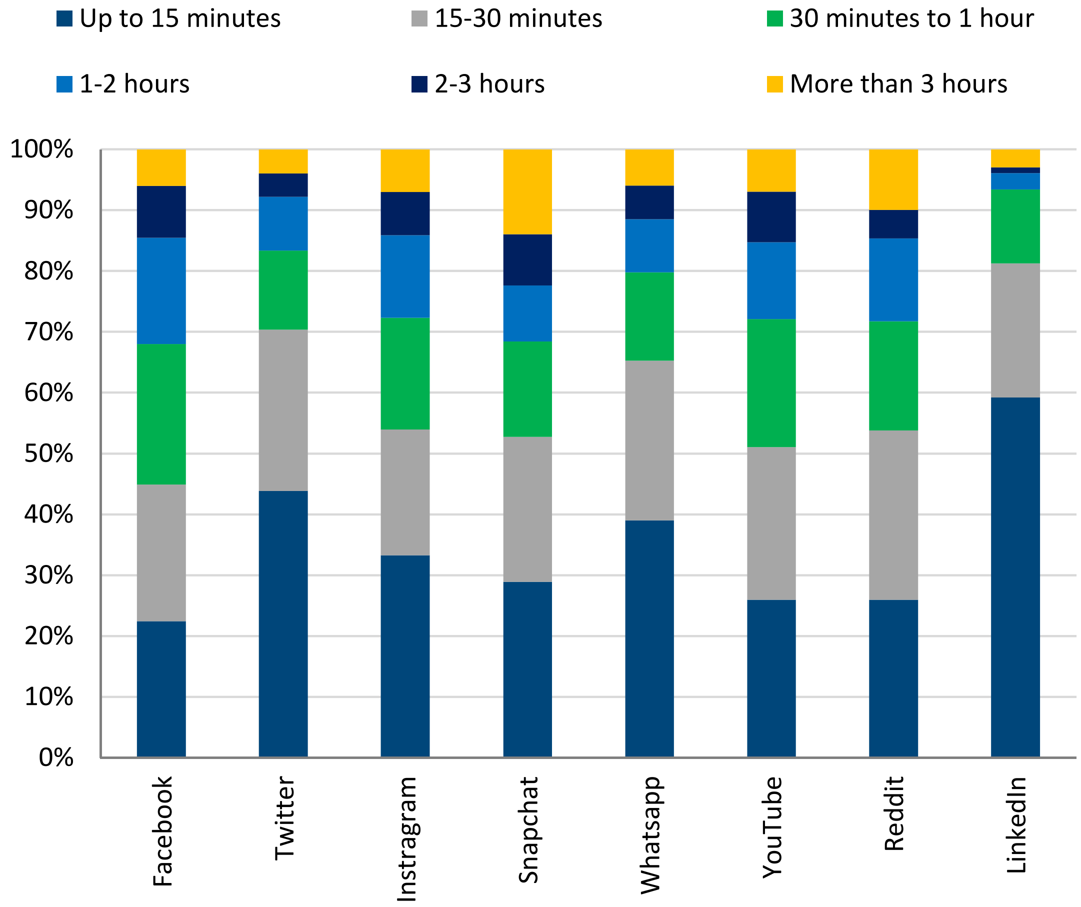
Mediatique

Which of these social networks have you used in the last month?



Source: Kantar Media Survey
Sample: all respondents (1515)

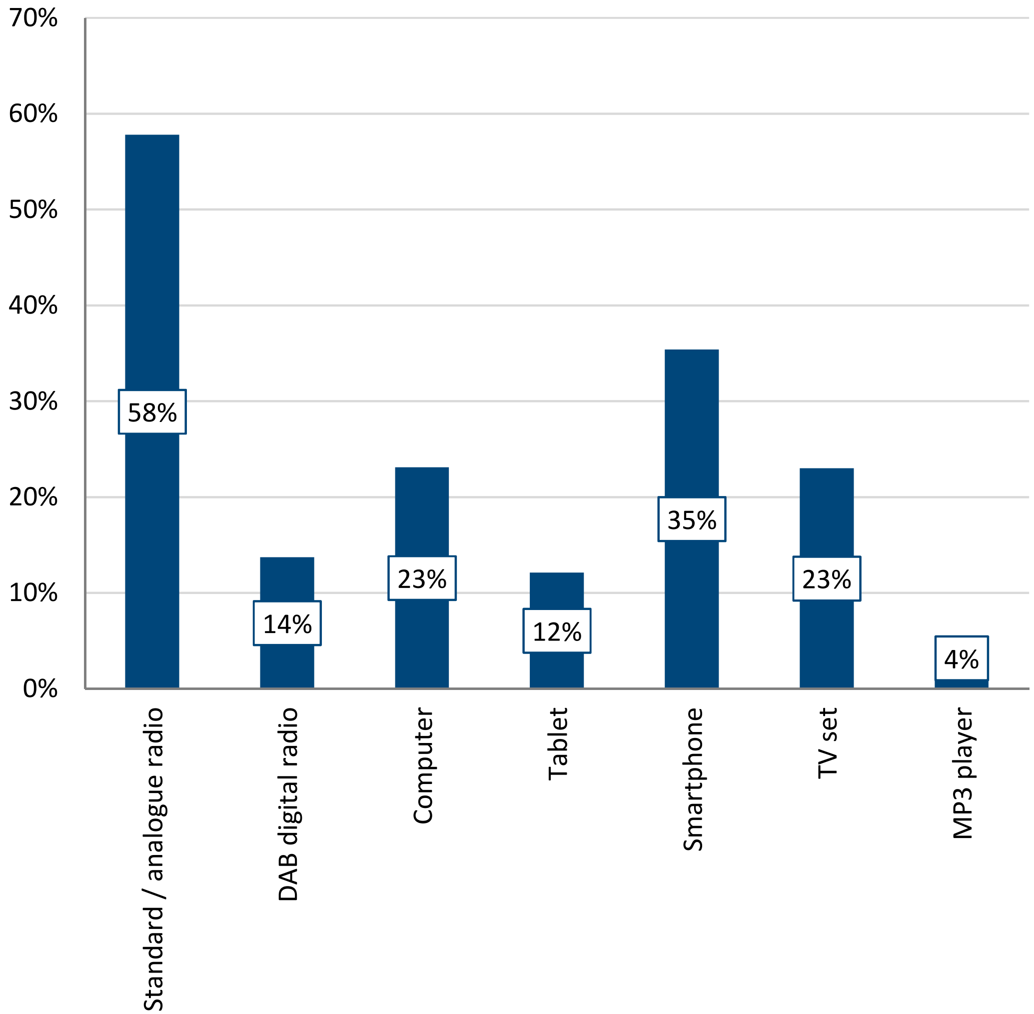
How long do you spend on these apps each day?



Source: Kantar Media Survey
Sample: all respondents (1515)

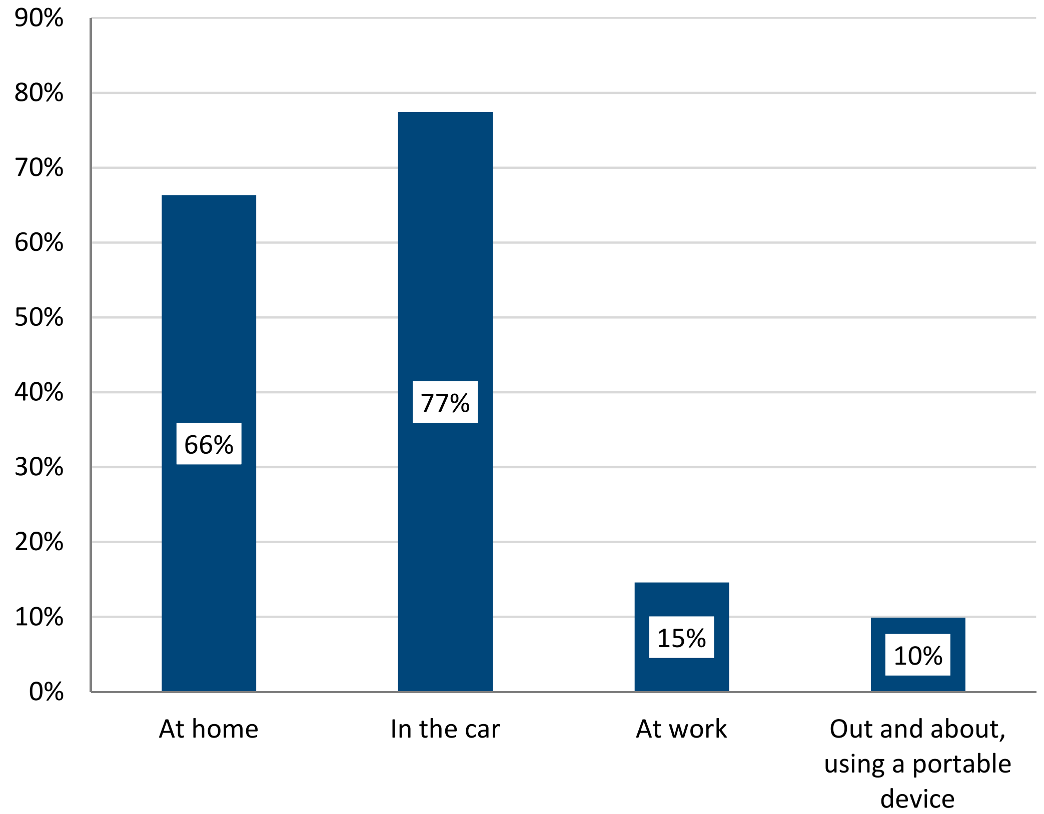
Traditional analogue transmission is the most heavily used basis for listening to broadcast radio – largely at home or in the car. This increasingly takes place alongside a range of other devices, however

Which of these devices do you use to listen to the radio?



Source: Kantar Media Survey
Sample: all respondents (1515)

Where do you tend to be when you listen to the radio?

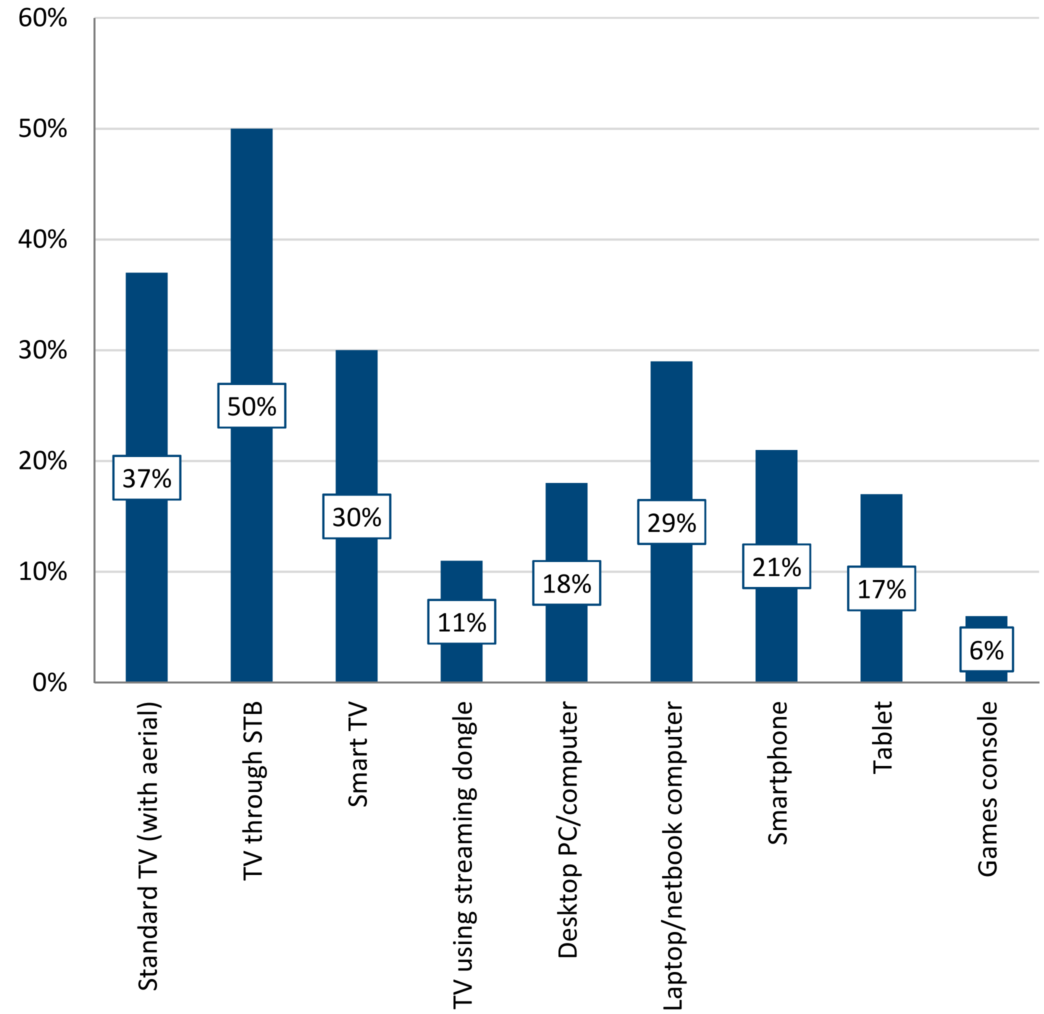


Source: Kantar Media Survey
Sample: all respondents who listen to radio (1112)

The survey reveals a wide range of devices in use to watch TV programmes, although most viewing still takes place on traditional devices (set-top boxes or via an aerial) and in the main living room

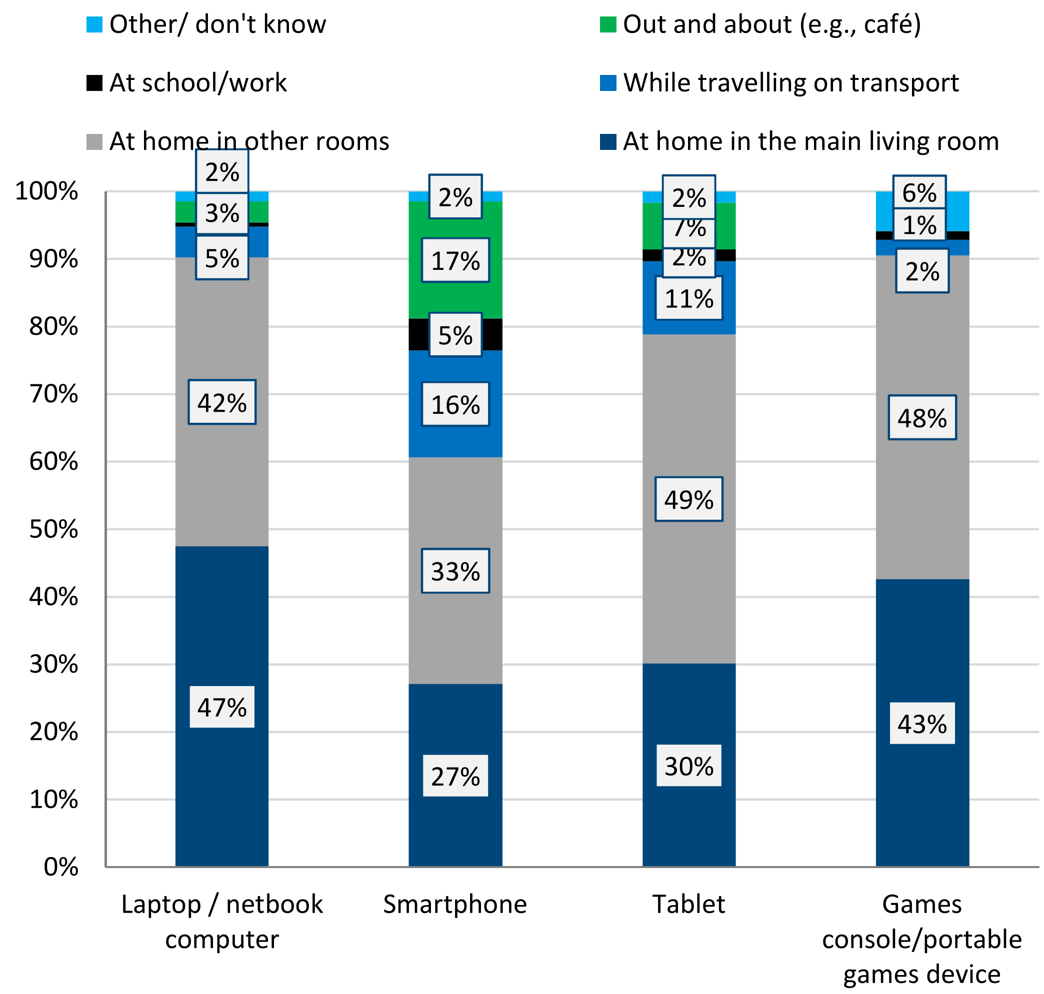
Mediatique

Which of these devices do you ever use to watch TV?



Source: Kantar Media Survey
Sample: all respondents (1515)

Where do you use the following devices to watch TV most often?



Source: Kantar Media Survey
Sample: all respondent who watch TV on relevant device (varies)

Establishment questions

Claimed usage of media activities

Content preferences

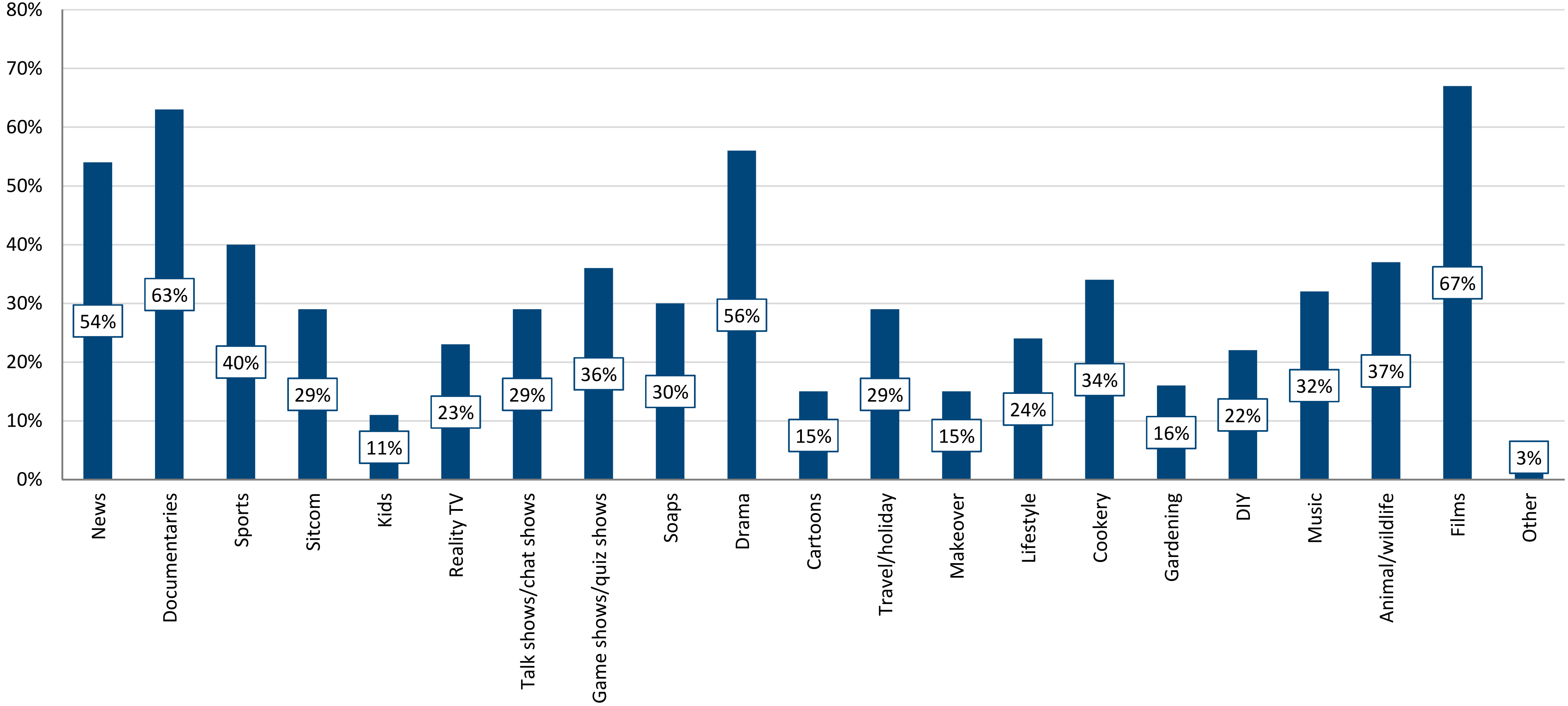
Views on quality and distinctiveness – radio

Views on quality and distinctiveness – TV

Irish TV audiences have a wide range of content tastes and preferences; the most popular programmes are films, documentaries, news, drama and sport

Mediatique

Which of these types of TV programmes do you like to watch?

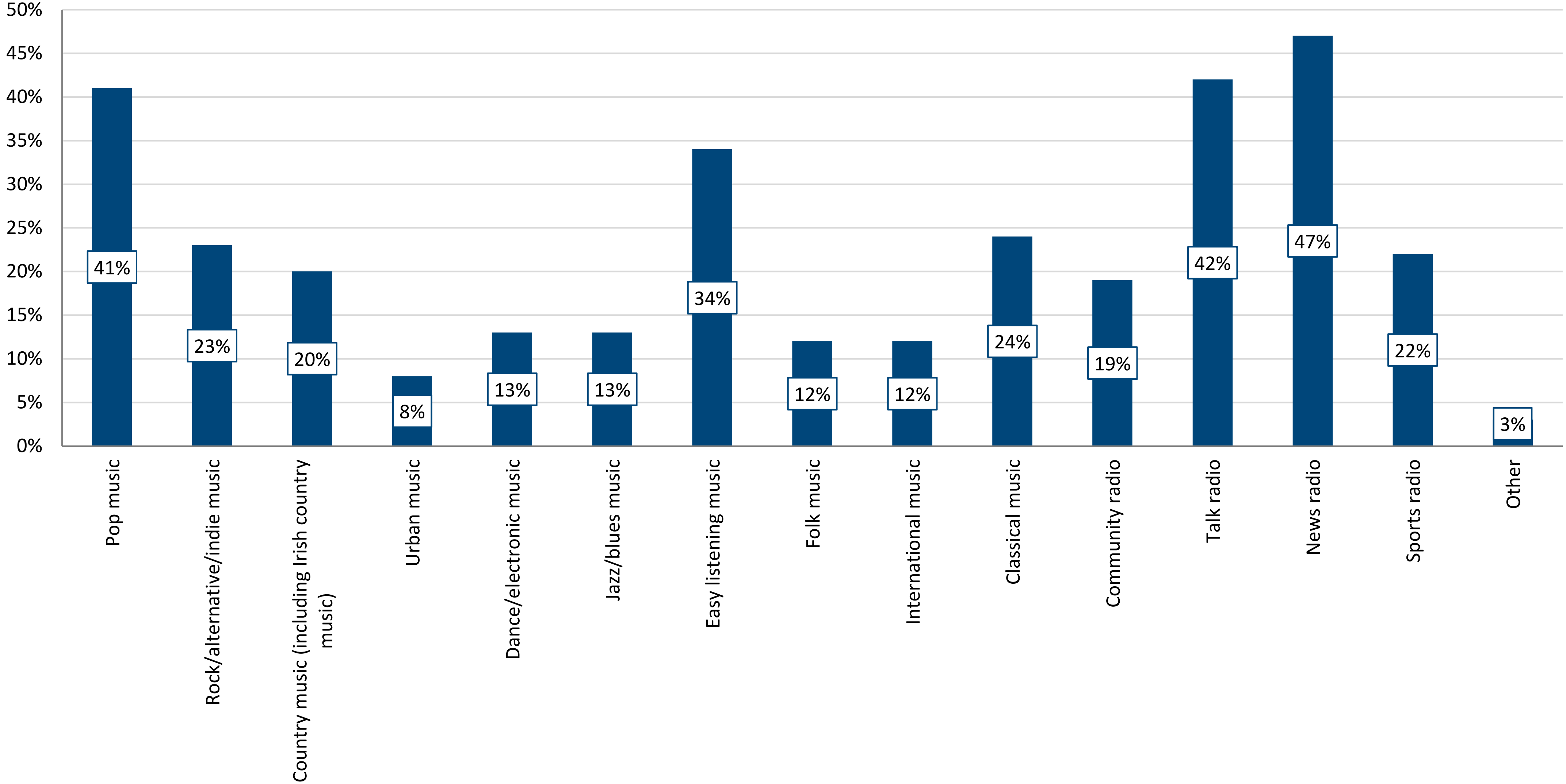


Source: Kantar Media Survey
Sample: all respondents (1515)

Similarly, radio listeners like a wide range of genres – with news, talk radio and popular music the most listened to categories

Mediatique

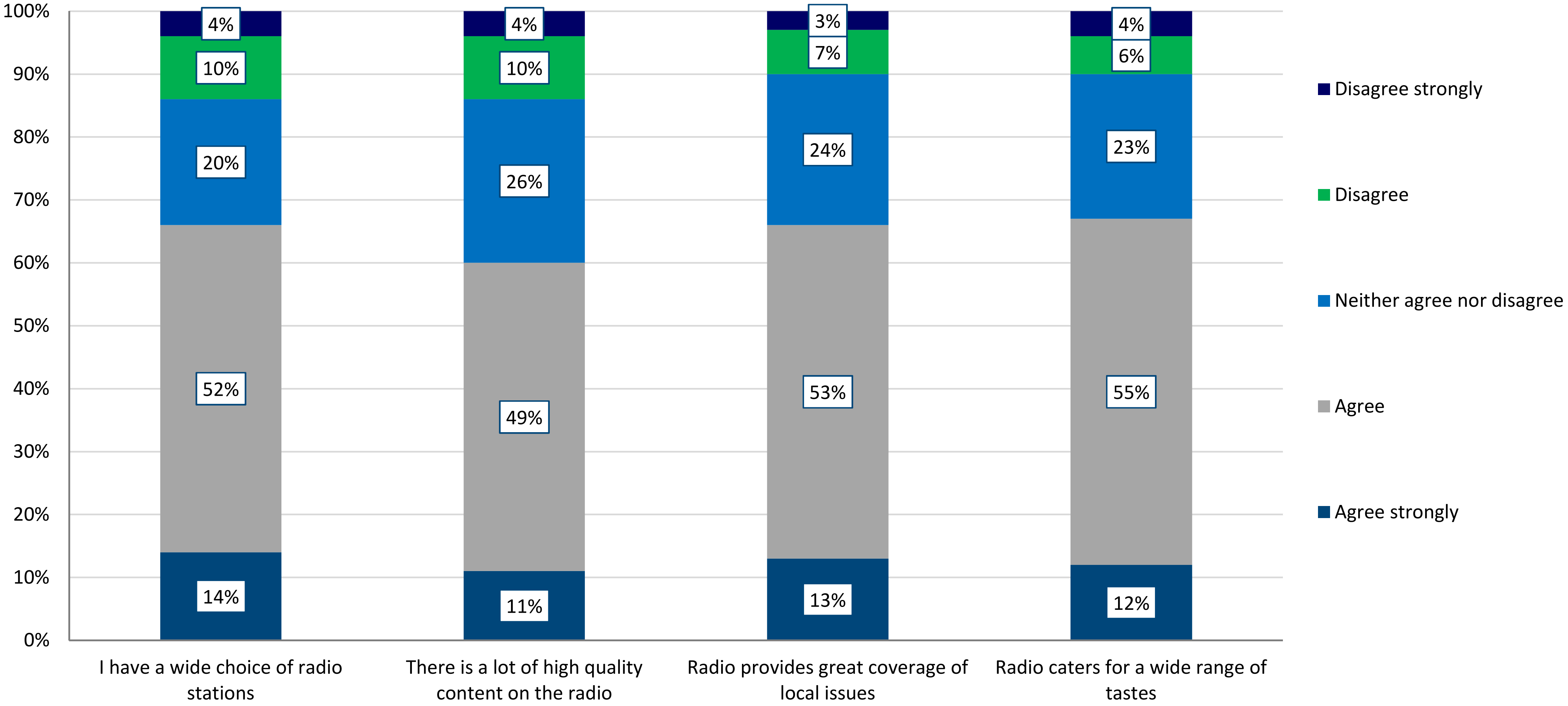
Which of these types of radio stations or programmes do you like to listen to?



Source: Kantar Media Survey
Sample: all respondents who listen to the radio (1112)

Only a small minority of respondents express dissatisfaction with the radio sector; most Irish households are satisfied with the range and quality of radio stations available to them

Thinking about radio provision in Ireland, how much do you agree with the following statements?*



*** 1 is the lowest, 10 is the highest**

Source: Kantar Media Survey
Sample: all respondents (1515)

News content was widely seen as important to Irish radio listeners. Irish radio was also seen to have broadly the right amount of key Irish content categories available

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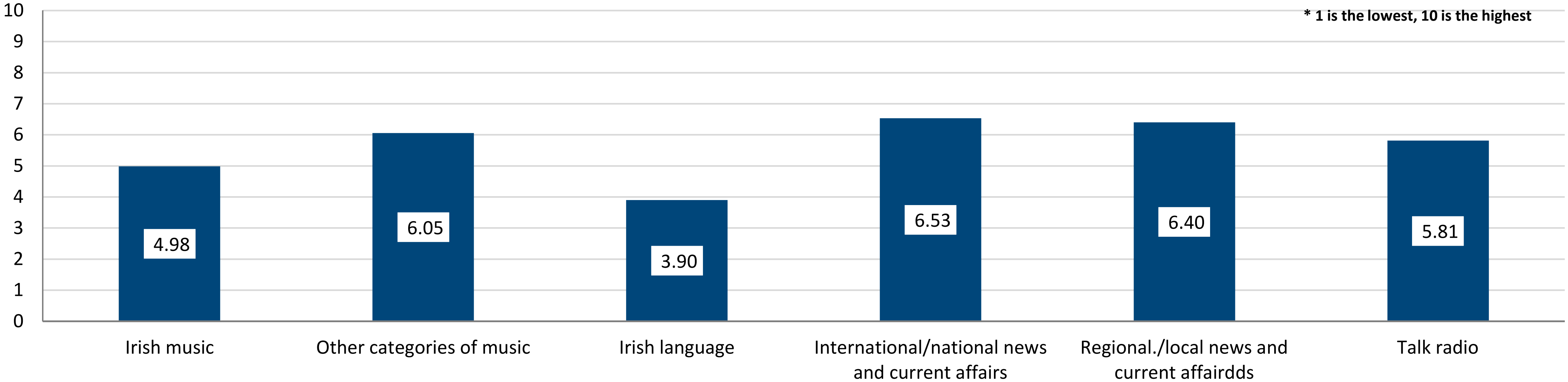
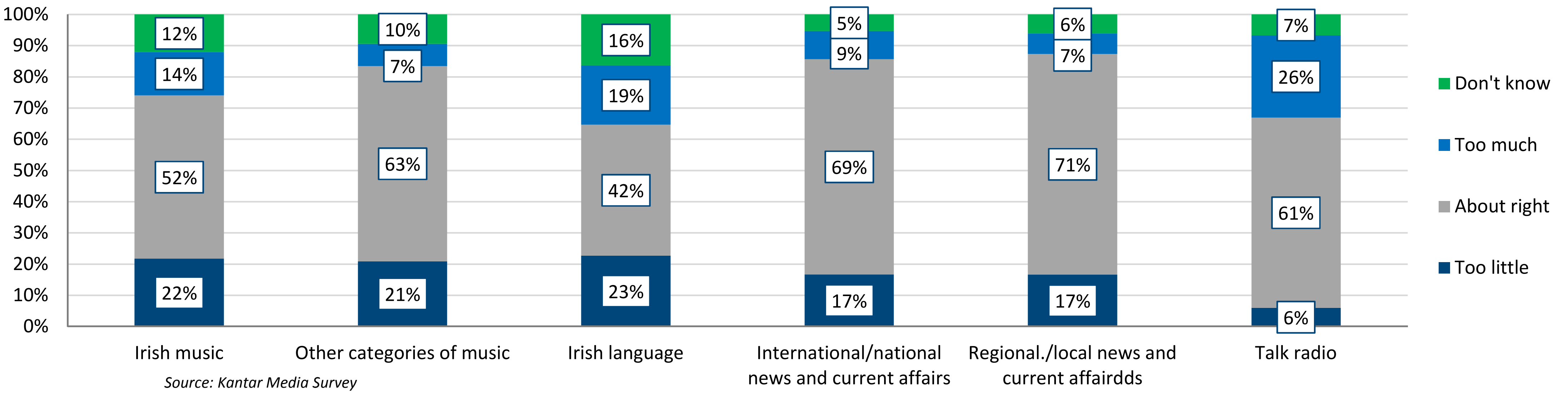
Thinking about your listening of Irish radio, on a scale of 1-10, how important are the following categories of content to your listening experience?*



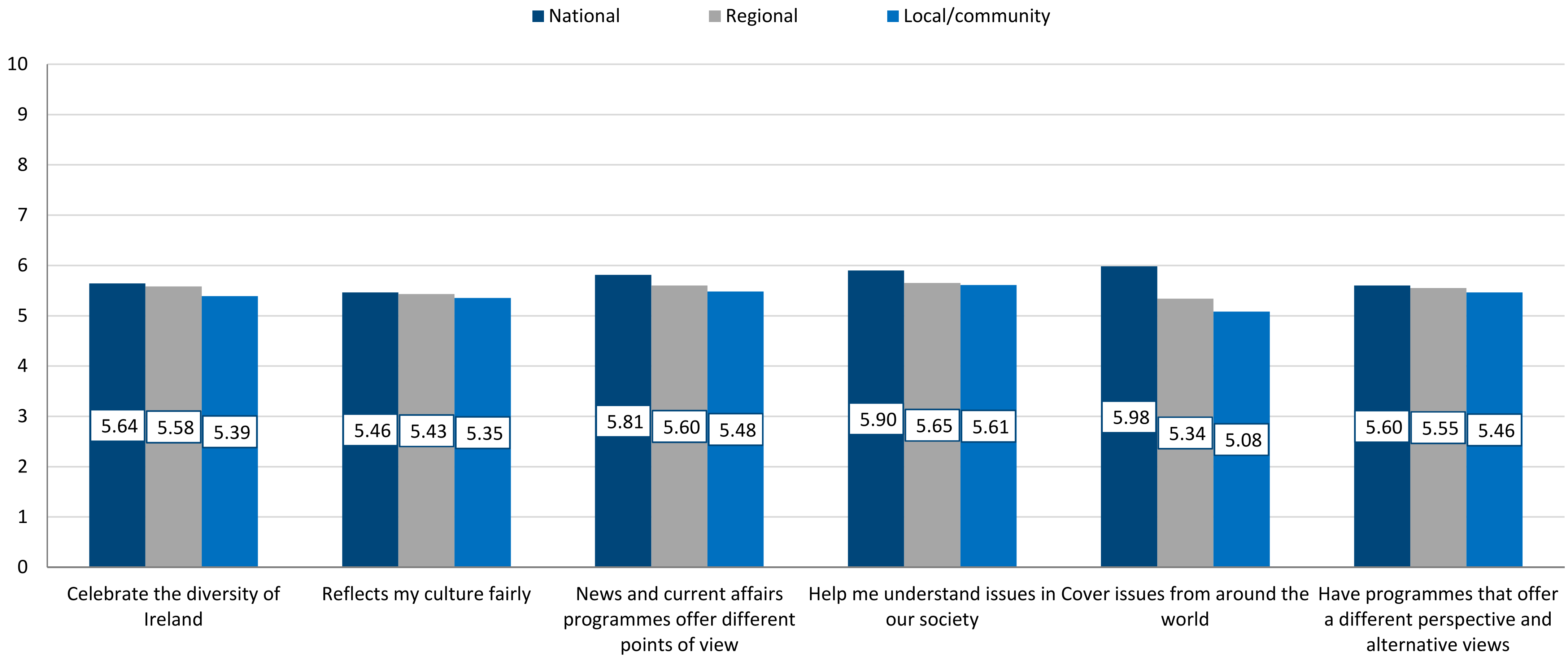
Thinking about these categories of content, do you think there is too much, too little or about the right amount of each?



Source: Kantar Media Survey
Sample: all respondents (1515)

There was consensus that news programmes on all categories of Irish radio broadly reflected diversity and covered a broad range of viewpoints and issues

Thinking about Irish radio stations, how would you rate them against the following statements on a scale of 1-10? *



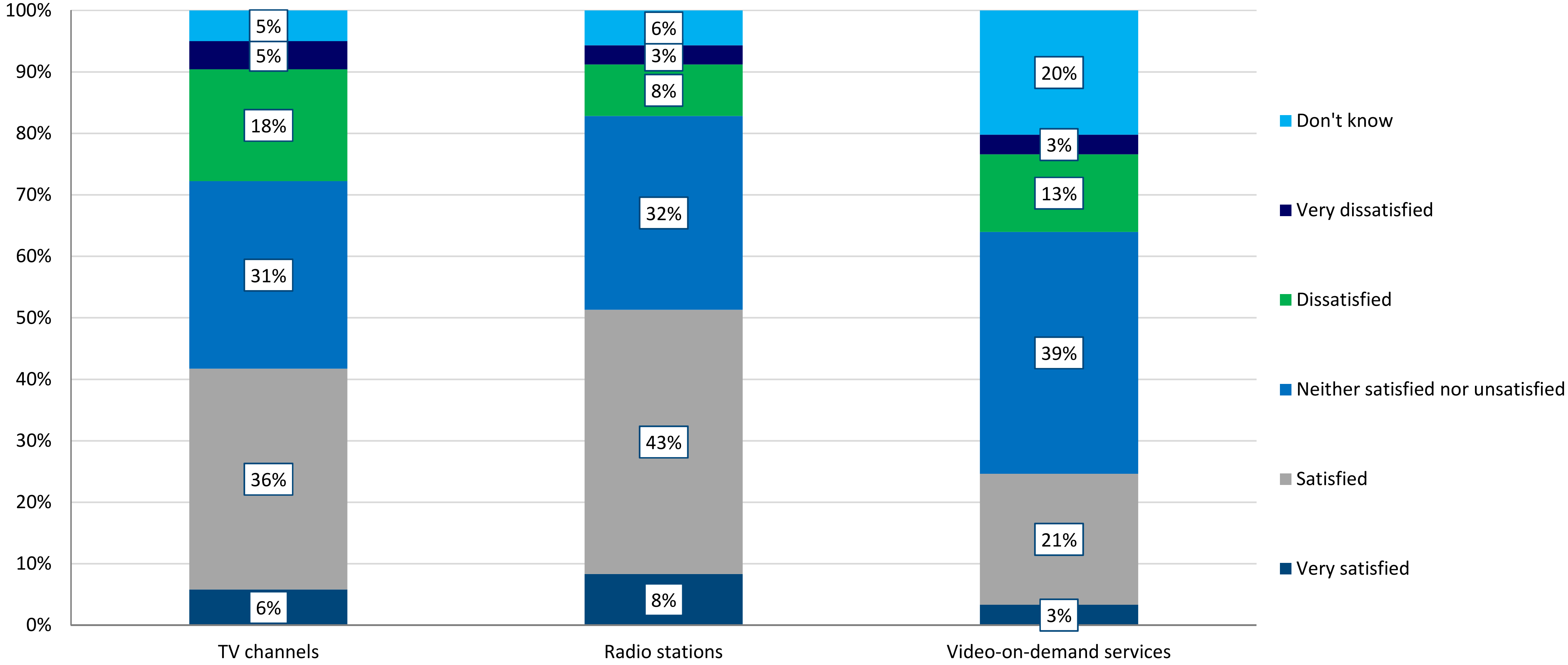
*** 1 is the lowest, 10 is the highest**

Source: Kantar Media Survey
Sample: all respondents (1515)

As a comparison across all media categories, a minority expressed dissatisfaction with the amount of Irish-made content available – this was highest among VOD services, followed by TV channels and lastly radio stations

Mediatique

Thinking about content that is produced in Ireland for Irish people, how satisfied are you with the amount of content produced in Ireland that is available on the following services?



Source: Kantar Media Survey
Sample: all respondents (1515)

Establishment questions

Claimed usage of media activities

Content preferences

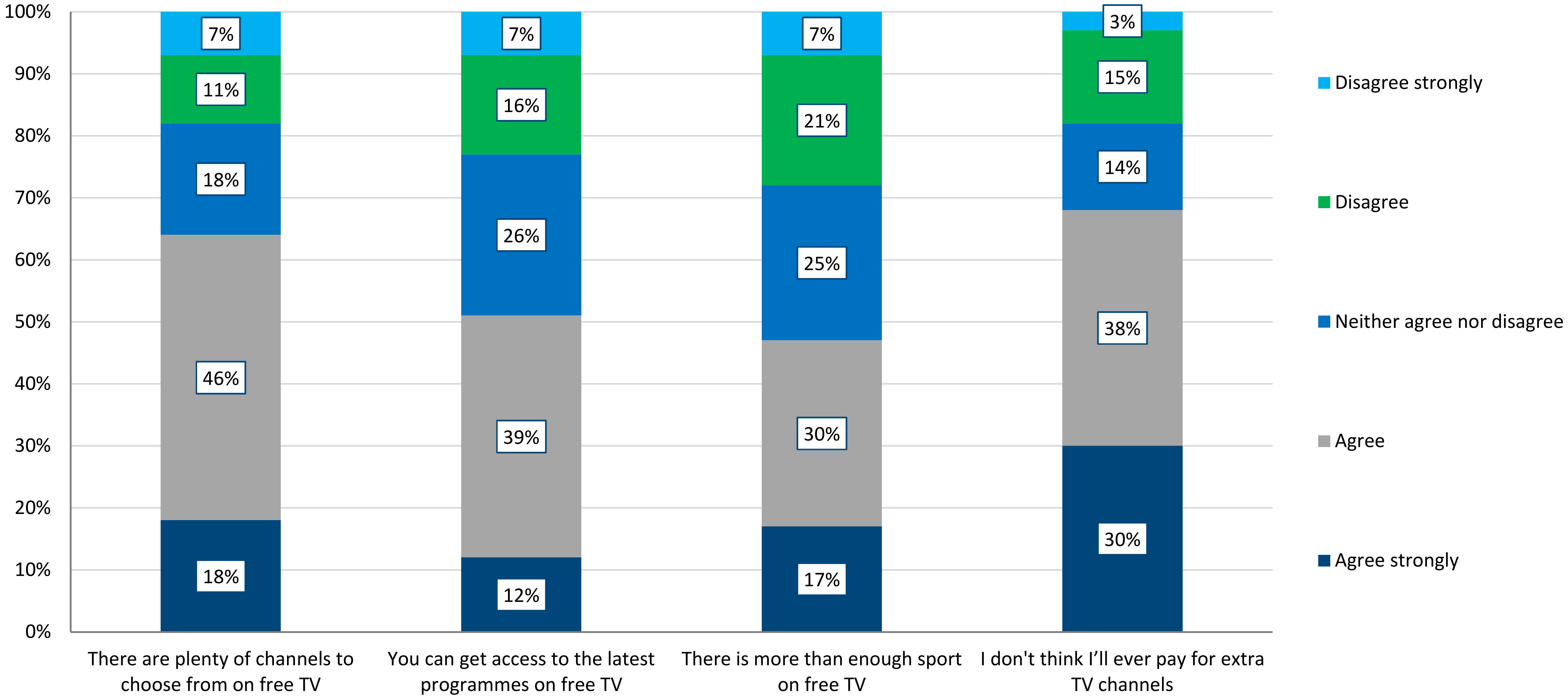
Views on quality and distinctiveness – radio

Views on quality and distinctiveness – TV

Only a small minority of respondents expressed dissatisfaction with the range and quality of TV channels available in Ireland; the amount of sport available to free TV users was a potential issue, however

Mediatique

How much do you agree with each of the following statements?

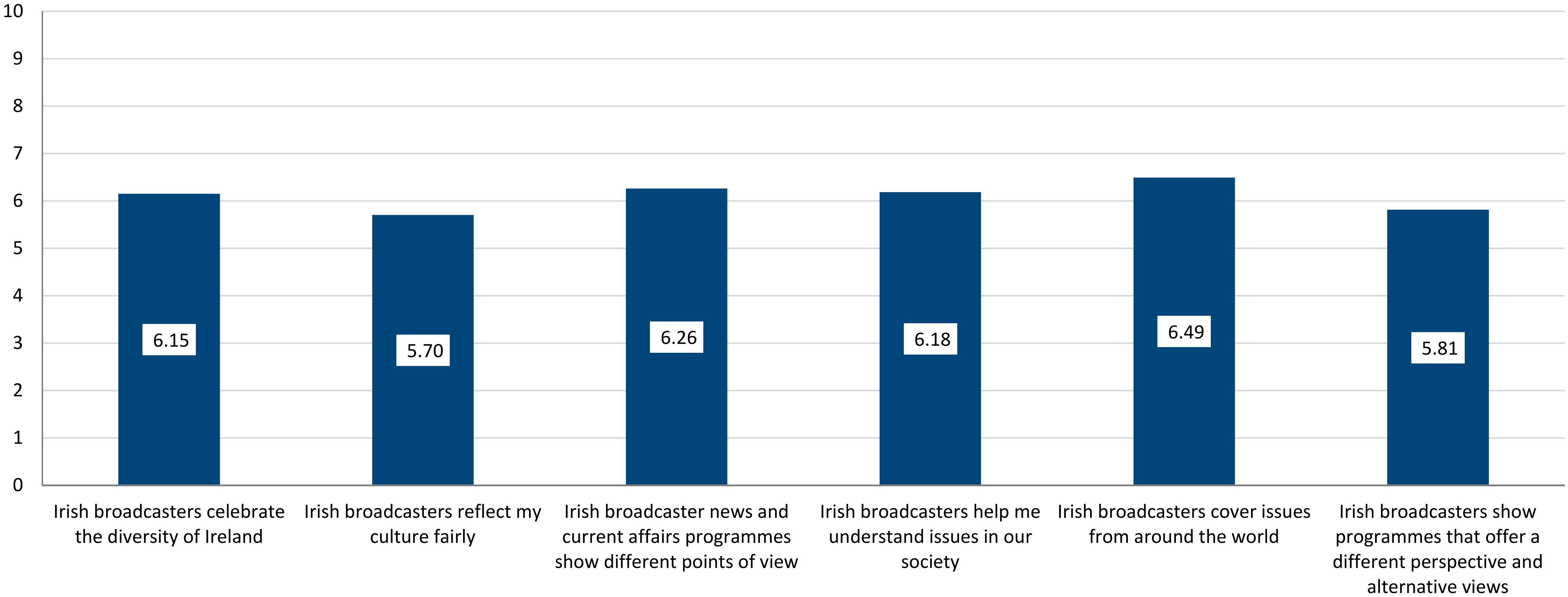


Source: Kantar Media Survey
Sample: all respondents (1515)

There was broad consensus that Irish TV channels reflected diversity and delivered plurality fairly well…

Mediatique

Thinking about Irish broadcasters*, how would you rate them against the following statements?**



*** Defined as RTÉ, TV3, TG4**
**** 1 is the lowest, 10 is the highest**

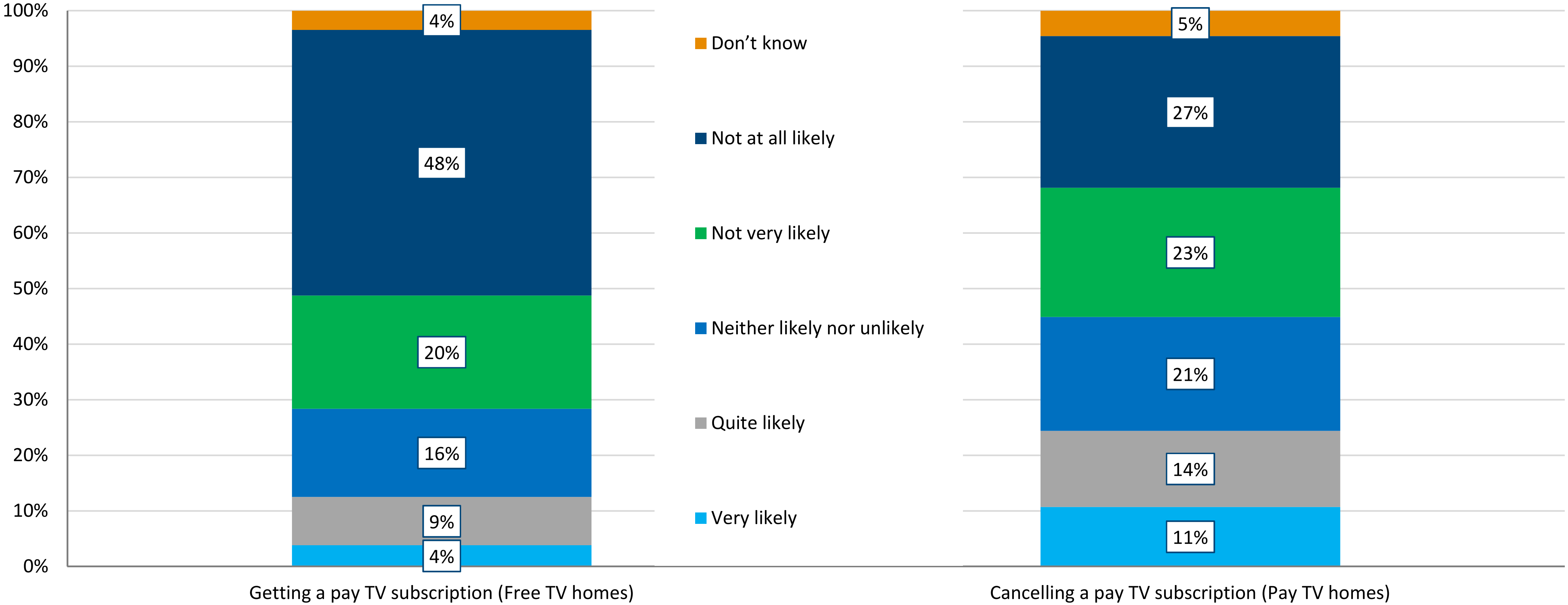
Source: Kantar Media Survey
Sample: all respondents (1515)

Less than 15% of free TV homes would consider getting a pay TV subscription in the near future, and less than 25% of pay TV homes would consider cancelling theirs – suggesting a potential trend away from traditional pay TV

Mediatique

How likely do you think you are to consider getting a pay TV subscription in the next 6 months? (Free TV households)

How likely do you think you are to consider cancelling your pay TV subscription in the next 6 months? (Pay TV households)



Source: Kantar Media Survey
Sample: all respondents with free TV on the main set (285) or all respondents with pay TV on the main set (1035)

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