Television Services Consumer Survey

Introduction

Research Methodology

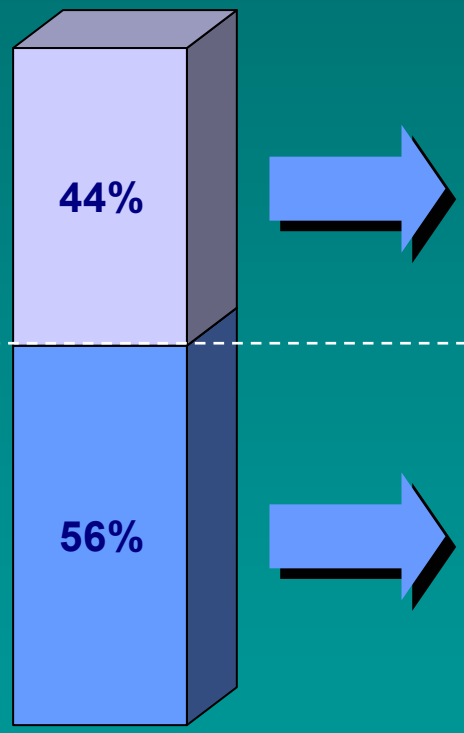
- 819 nationally representative CATI (Computer Assisted Telephone Interviewing) interviews conducted with the head of the household.
- Quotas applied on region and social class.
- Different questions put to subscribers (longer interview) and non-subscribers.
- Fieldwork took place between 25th November – 7th December, 2002.

Summary of Findings

- Over half of all households subscribe to Pay TV services via cable, MMDS and satellite (56%). Subscribers to Pay TV services have the highest representation in Dublin (42% of respondents that subscribe to Pay TV services are located in Dublin), perhaps due to the limited availability of cable/MMDS services in other areas.
- In relation to customer satisfaction, nearly half of cable/MMDS subscribers had complained in the past about some aspect of their service compared with one in four for satellite. It should be noted however that subscriptions with cable/MMDS service providers have generally been in place for a much longer period than satellite subscriptions with 60% of satellite customers claiming to be satellite subscribers for less than two years.
- Of the 6% of Pay TV subscribers that had switched service provider in the past two years, the majority had switched to satellite. Half of those respondents that had not considered switching service provider in the last two years indicated that they were happy with their service.
- One third of Pay TV households subscribe to digital television with a third of those subscribers having signed up within the last year.

Findings

Sample Profile (1)
(Base: All Respondents: 819)



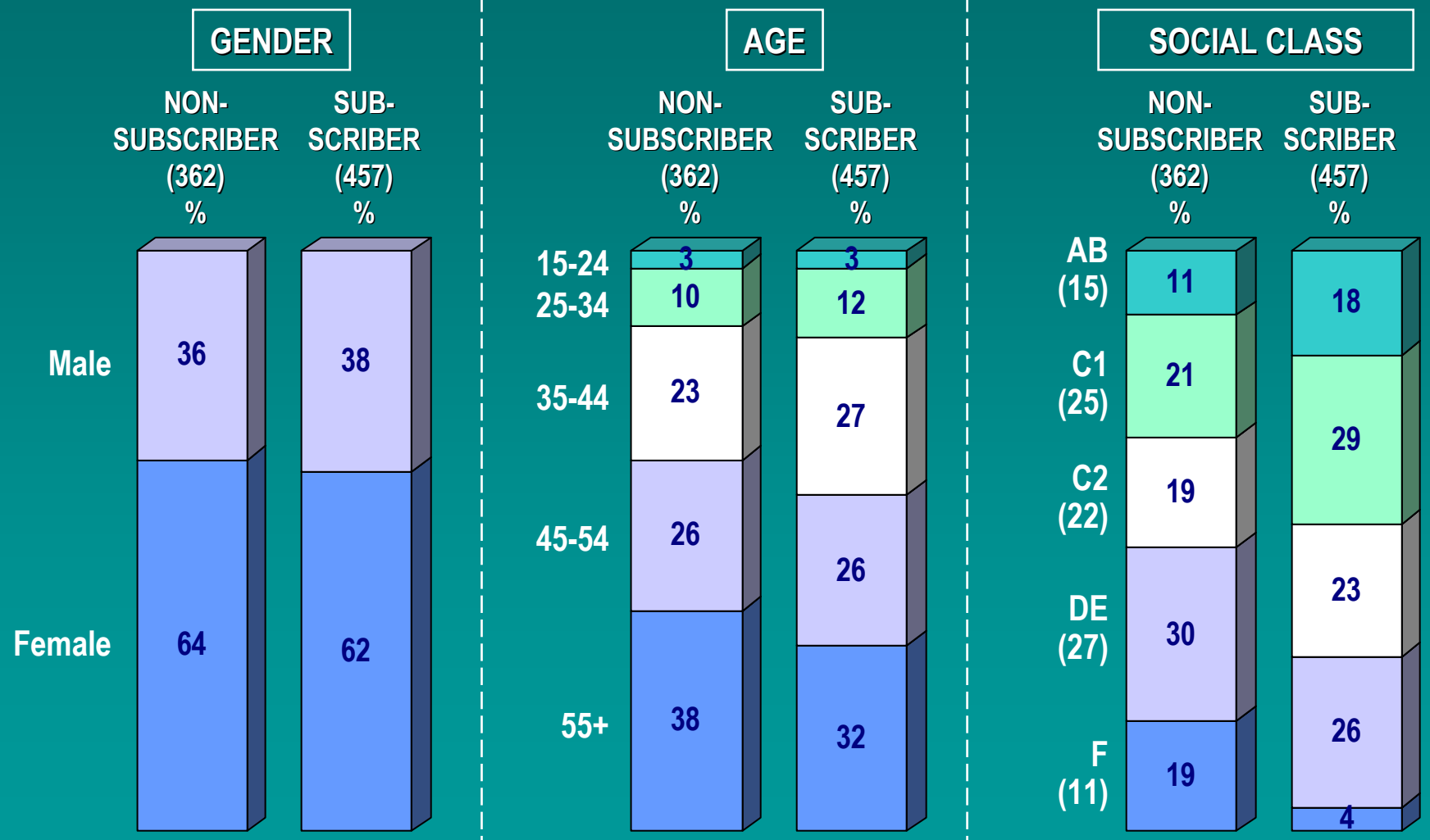
Irish channels only	20%
UK & other channels	18%
Deflector/Local Community Aerial	6%

Cable connection	30%
Satellite dish	20%
MMDS aerial	6%

Q: Do you receive Irish channels only (i.e. RTE/TV3/TG4) or both Irish and UK or other channels
Q: Do you pay to receive UK or other channels such as BBC/ITV/Sky News/Sky 1?
Q: Do you receive UK or other channels, such as BBC/ ITV/ Sky News/ Sky 1 via a satellite dish, cable connection or MMDS aerial or via a deflector or local community aerial?

Sample Profile (2)

(Base: All Respondents: 819)

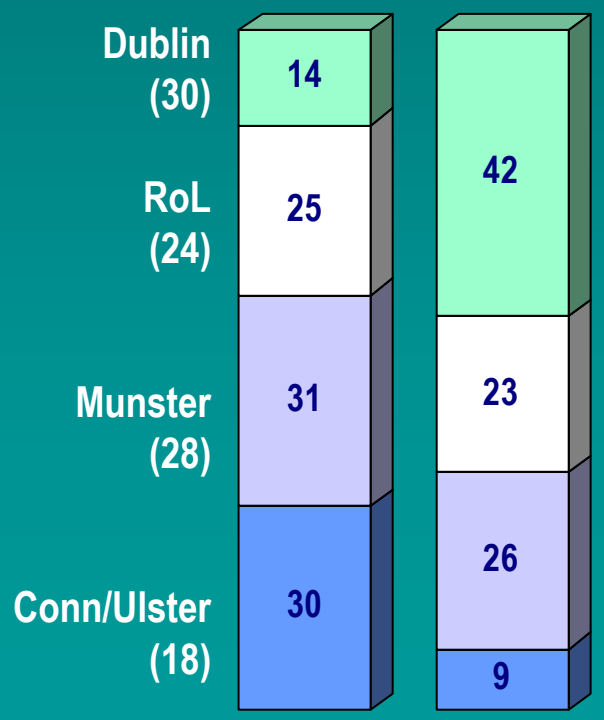


( ) National household profile
TNS MRBI PhoneBus

Sample Profile (3)

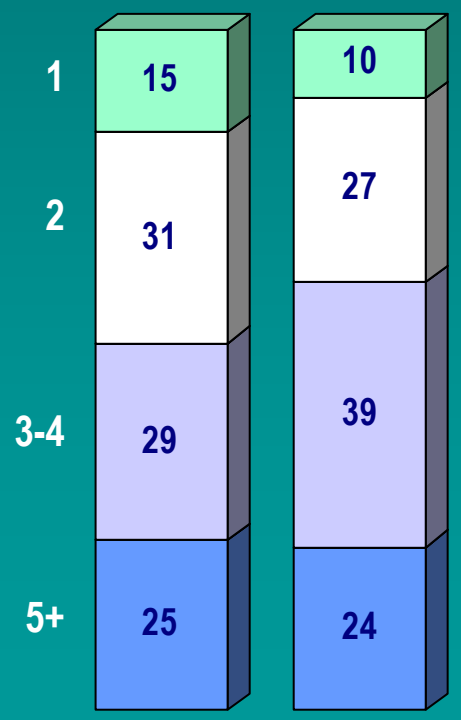
(Base: All Respondents: 819)

REGION

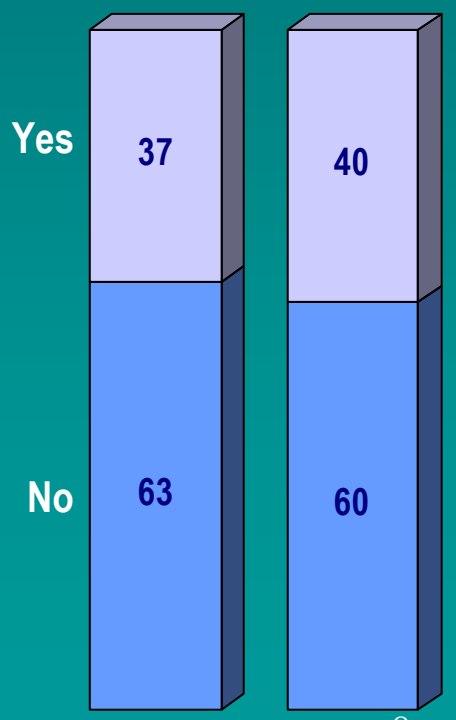


( ) National household profile
TNS MRBI PhoneBus

NO. IN HOUSEHOLD



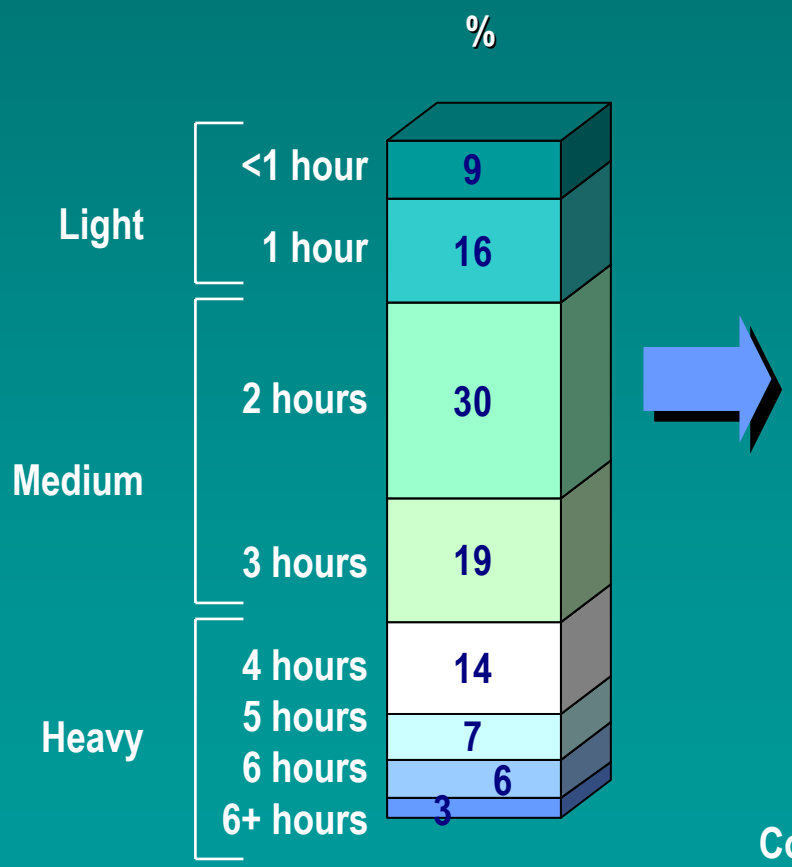
KIDS IN HOUSEHOLD

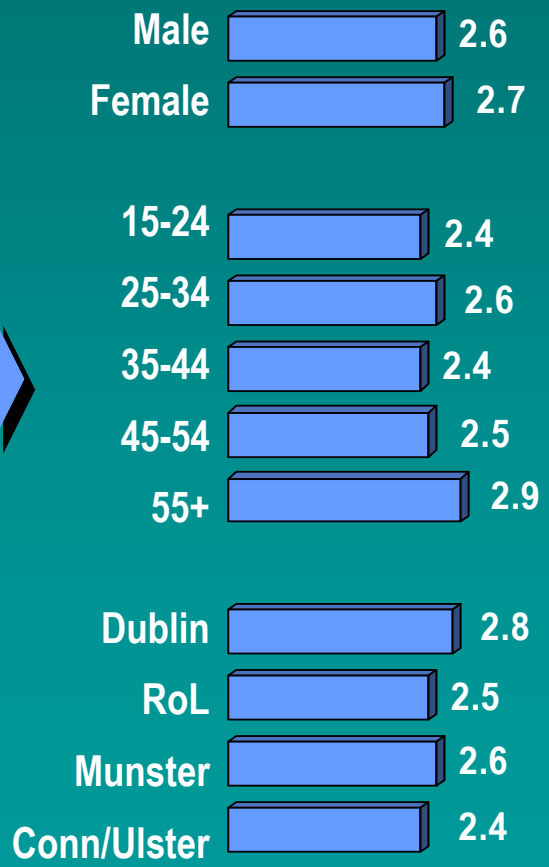


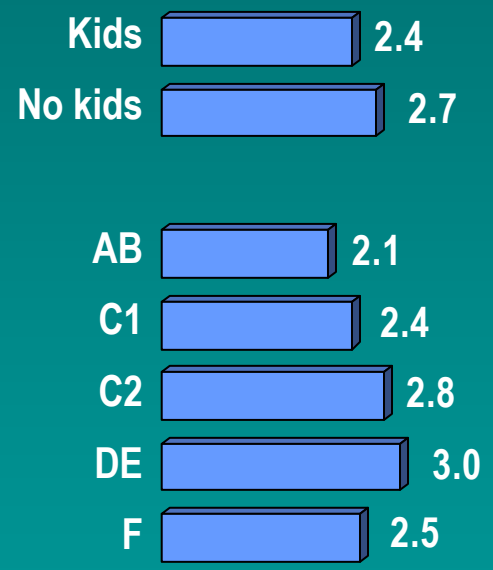
No. of Hours Spent Watching Television Per Day (1)

(Base: All Respondents: 819)

AVERAGE: 2.6 HOURS/DAY







Q: On average, how many hours do you spend watching television per day?

No. of Hours Spent Watching Television Per Day (2)

(Base: All Respondents: 819)

AVERAGE: 2.6 HOURS/DAY

NON-SUBSCRIBERS	
Irish channels only	2.3
UK & other channels	2.6
Deflector/Local Community Aerial	2.7

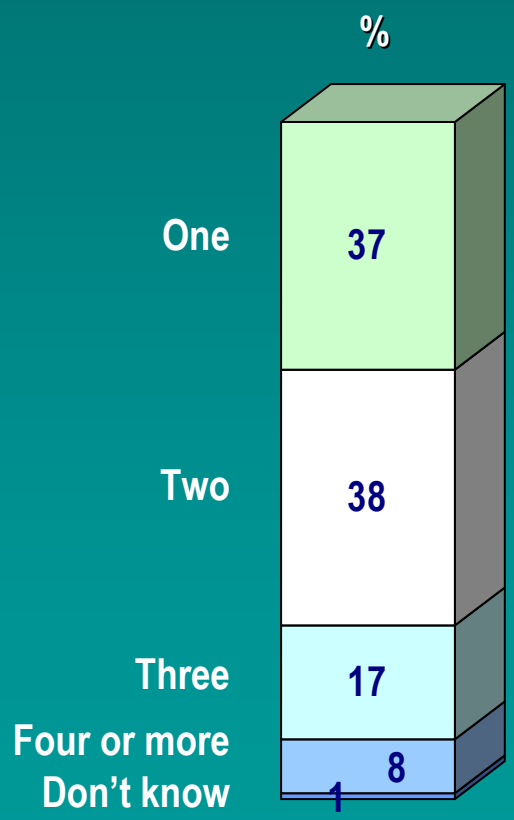
SUBSCRIBERS	
Cable connection	2.8
Satellite dish	2.6
MMDS aerial	2.8

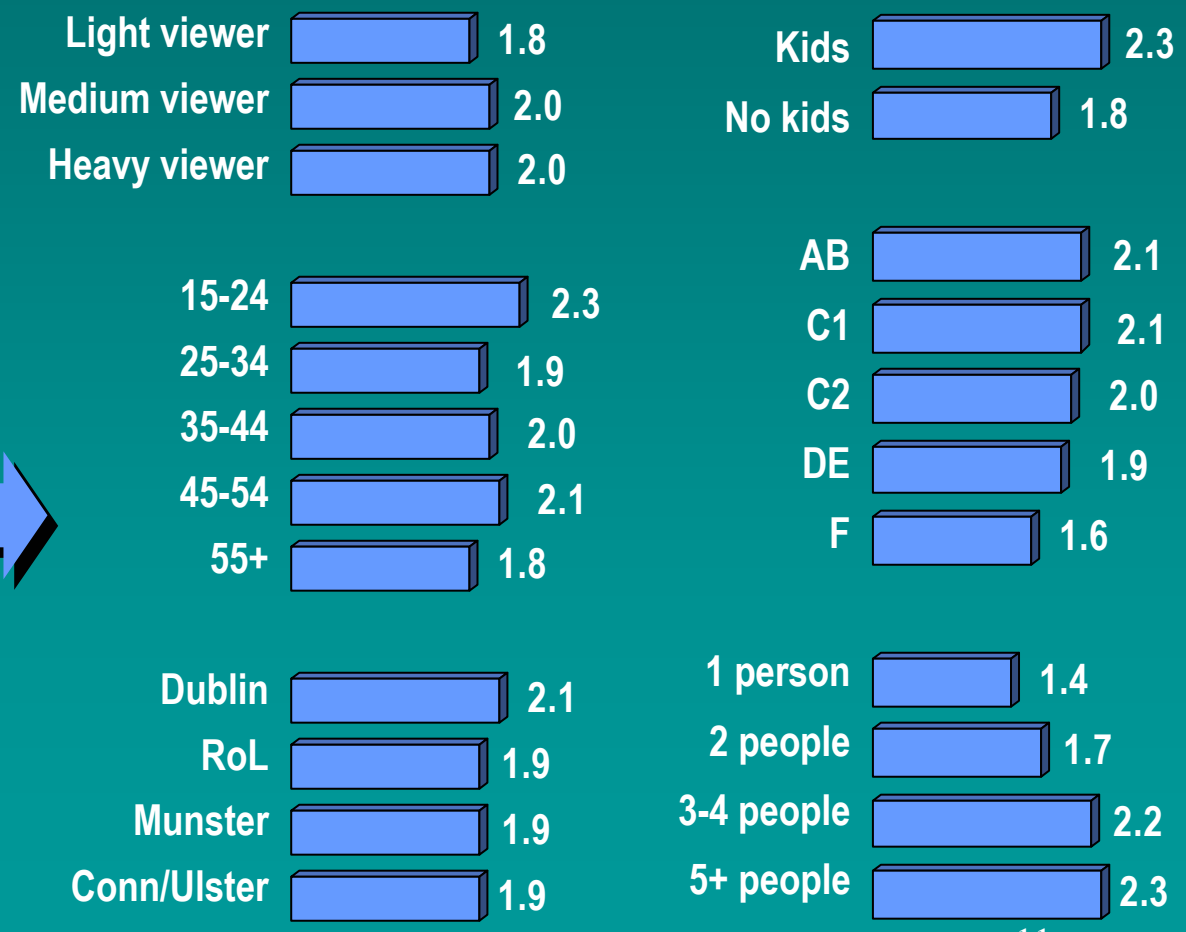
Q: On average, how many hours do you spend watching television per day?

No. of Television Sets in Household (1)

(Base: All Respondents: 819)

AVERAGE: 2.0 SETS





Q: How many TV sets do you have in your household?

No. of Television Sets in Household (2)

(Base: All Respondents: 819)

AVERAGE: 2.0 SETS

NON-SUBSCRIBERS	
Irish channels only	1.5
UK & other channels	2.0
Deflector/Local Community Aerial	1.8

SUBSCRIBERS	
Cable connection	2.1
Satellite dish	2.1
MMDS aerial	2.2

Q: How many TV sets do you have in your household?

Non-Subscribers

Breakdown of Non-Subscriberl FTA Recipients

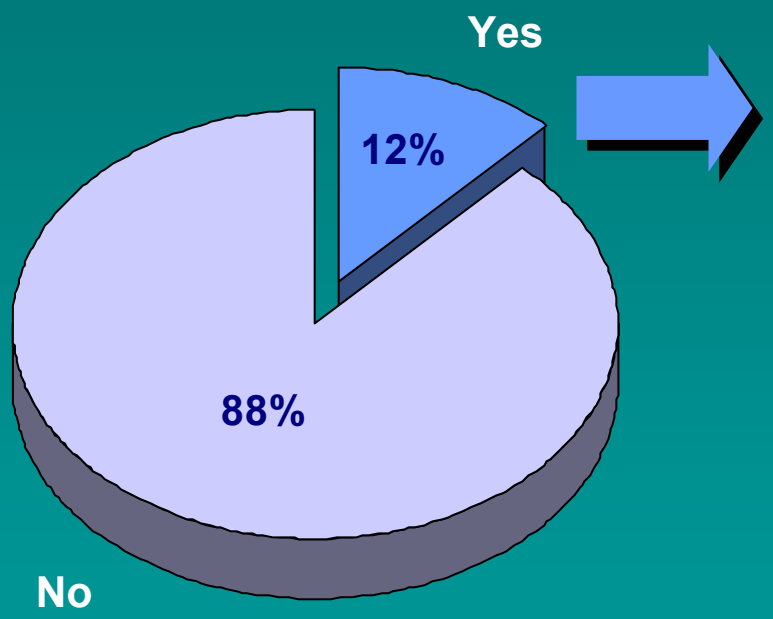
(Base: All Respondents: 819)

	Total	Dublin	RoL	Munster	Conn/Uls	AB	C1	C2	DE	F
	(819)	(245)	(197)	(230)	(147)	(122)	(207)	(176)	(225)	(89)
	%	%	%	%	%	%	%	%	%	%
Irish channels only	20	3	20	32	30	10	16	17	21	48
UK & other channels	18	13	23	7	35	14	14	19	20	21
Deflector/ Local Community Aerial	6	4	4	10	8	7	7	3	7	9

Q: Do you pay to receive UK or other channels such as BBC/ITV/Sky News/Sky 1?
Q: Do you receive UK or other channels, such as BBC/ ITV/ Sky News/ Sky 1 via a satellite dish, cable connection or MMDS aerial or via a deflector or local community aerial?

Whether Ever Paid To Receive TV Services Via Satellite, Cable Or MMDS In The Past

(Base: All Non-Subscribers: 362)

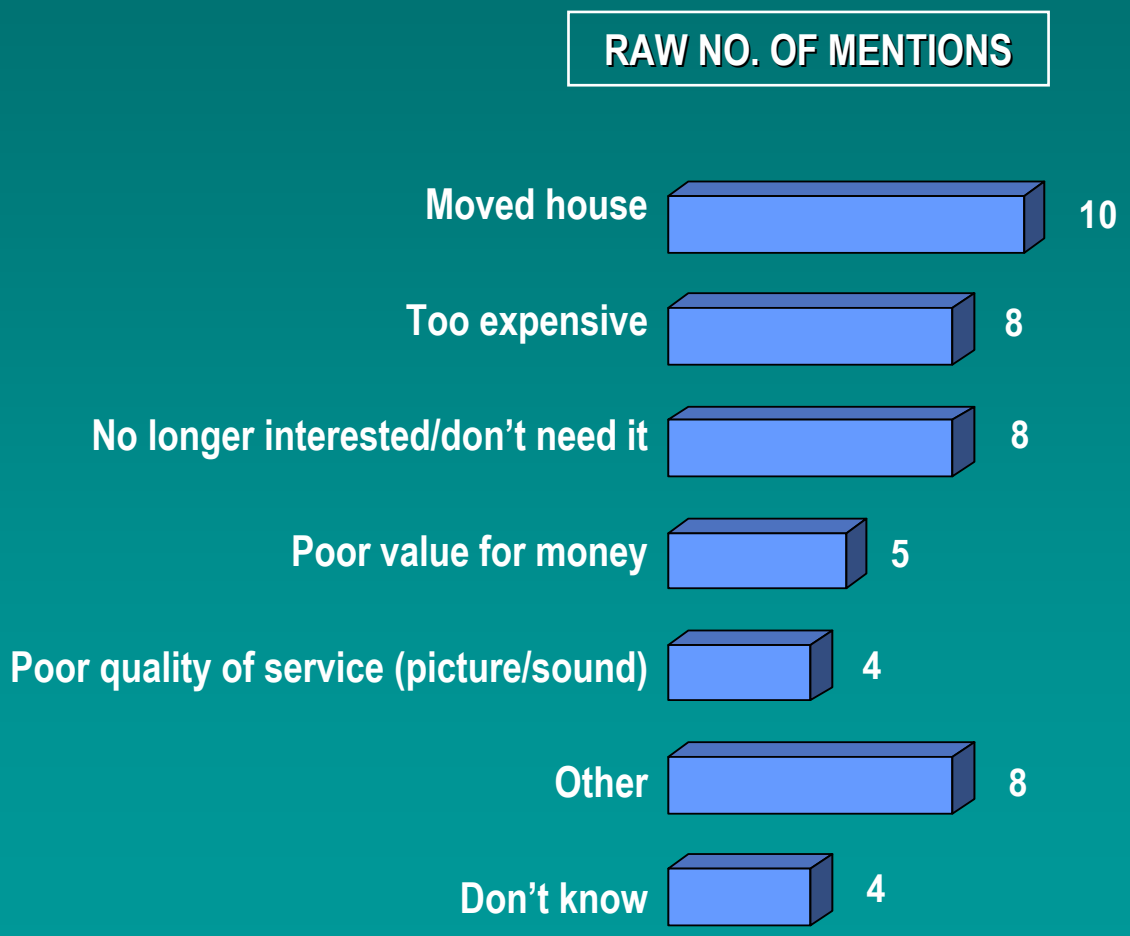


Service Provider Used	
Chorus	27%
Sky	27%
ntl	24%
Other	7%
Don't know	18%

Q: Have you ever paid to receive TV services or channels via satellite, cable or MMDS in the past?

Reasons For No Longer Subscribing To Service

(Base: All previously subscribing to satellite/cable/MMDS: 45*)

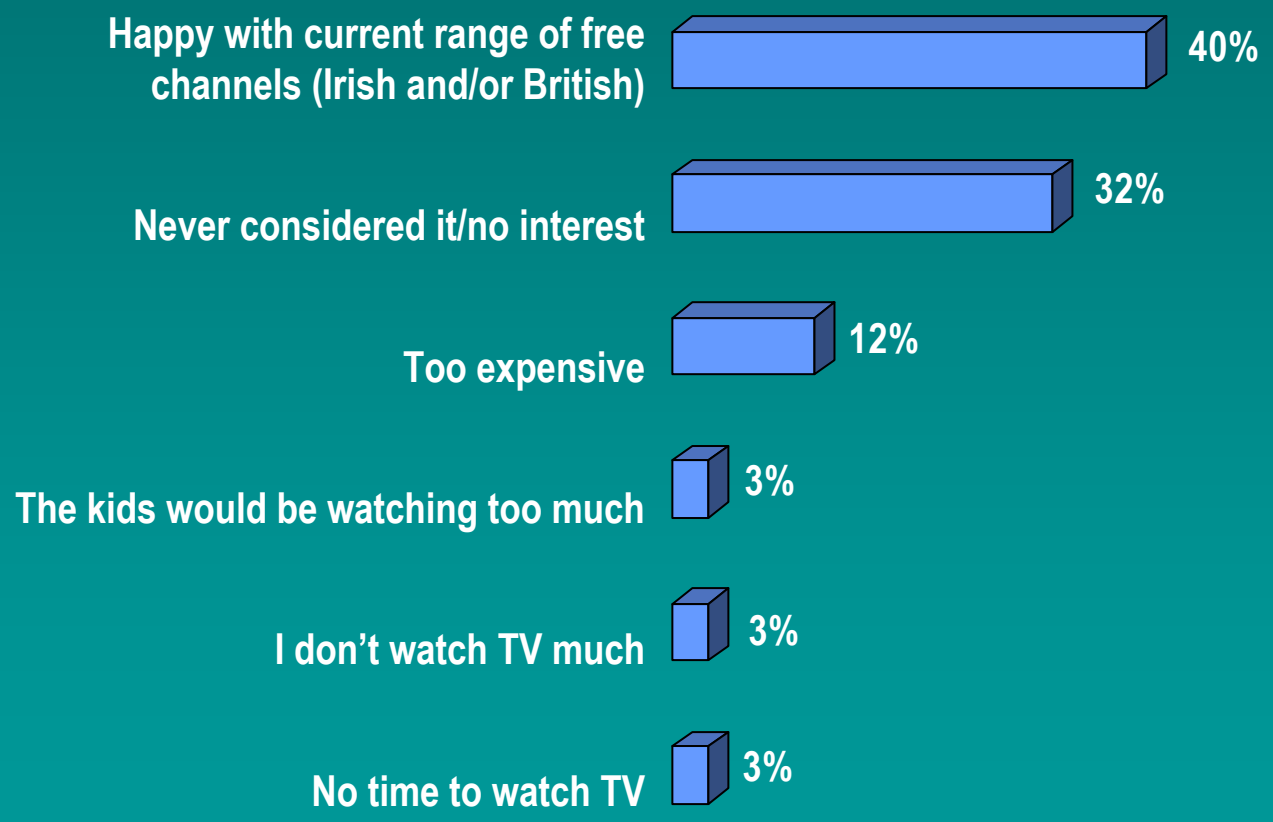


** Note: Small base*

Q: Why did you decide to stop subscribing to the service?

Reasons For Never Subscribing To Such Services

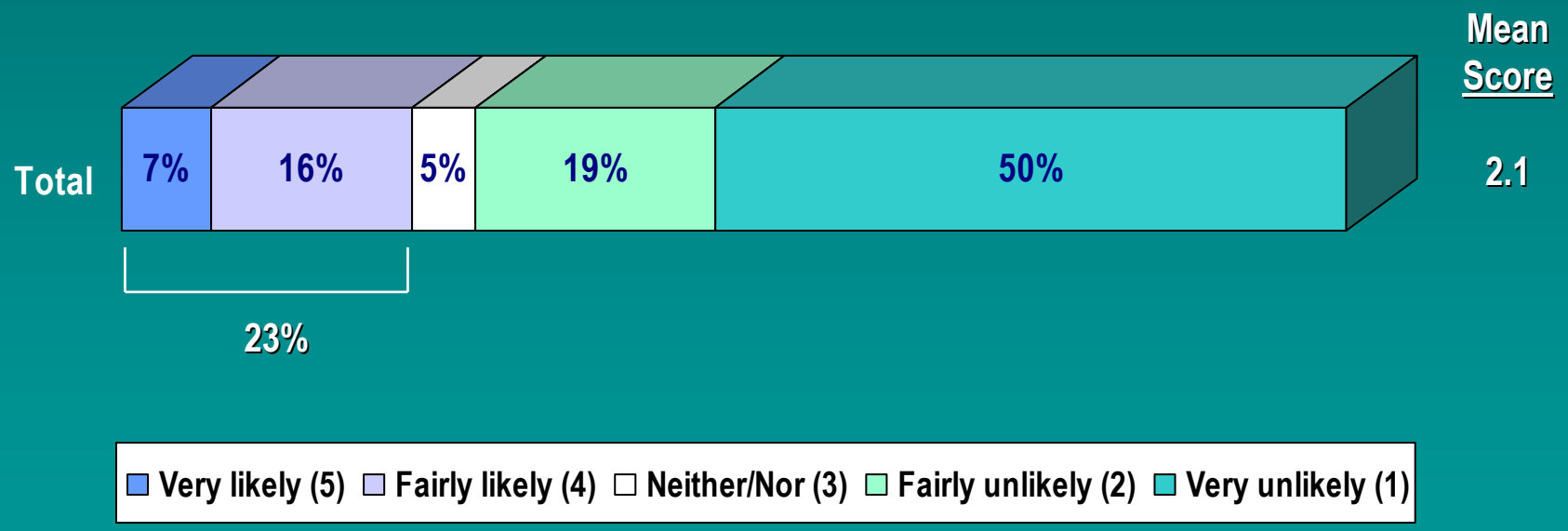
(Base: All who have never subscribed: 317)



Q: Why have you never subscribed to such services?

Likelihood Of Subscribing To Satellite/Cable/MMDS In The Future (1)

(Base: All Non-Subscribers: 362)



Q: How likely are you to subscribe to satellite/cable/MMDS in the future?

Likelihood Of Subscribing To Satellite/ Cable/MMDS In The Future (2) "Mean Score Summary"

(Base: All Non-Subscribers: 362)

AGE	
15 – 24	3.0
25 – 34	2.9
35 – 44	2.2
45 – 54	2.2
55+	1.6

REGION	
Dublin	1.8
RoL	2.2
Munster	2.2
Conn/Ulster	2.0

SOCIAL CLASS	
AB	2.4
C1	2.5
C2	2.0
DE	1.8
F	1.9

PRESENCE OF KIDS	
Yes	2.5
No	1.9

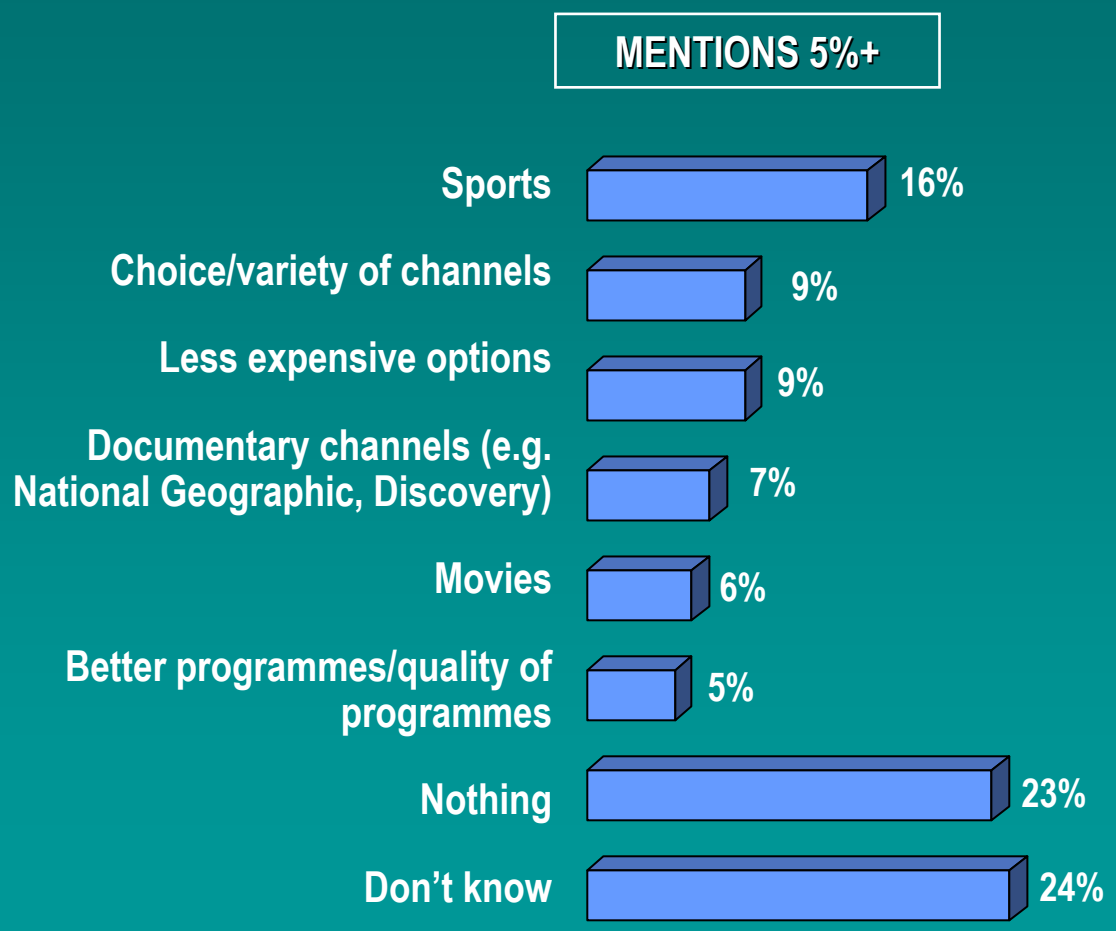
RESPONDENT VIEWING TYPE	
Light	1.9
Medium	2.2
Heavy	2.2

NON-SUBSCRIBER TYPE	
Irish only	2.0
UK & other	2.1
Deflector/Local Community Aerial	2.2

Q: How likely are you to subscribe to satellite/cable/MMDS in the future?

Factors That Would Encourage New Subscribers

(Base: All Non-Subscribers: 362)



* Note: Small base

Very Likely	Fairly Likely	Fairly Unlikely	Very Unlikely
(25)*	(59)	(70)	(181)
%	%	%	%
20	31	11	12
40	27	1	1
4	12	17	6
16	15	6	4
16	12	4	3
4	8	7	3
4	2	29	31

Q: What factors, if any, would encourage you to subscribe to TV services via satellite, cable or MMDS?

Subscribers

How Subscription/Pay TV Is Received
(Base: All Subscribers: 457)

	Total	Chorus	ntl	Sky	Other
	%	%	%	%	%
Cable connection	55	16	35	1	1
Satellite dish	35	1	1	33	1
MMDS aerial	10	7	1	1	1

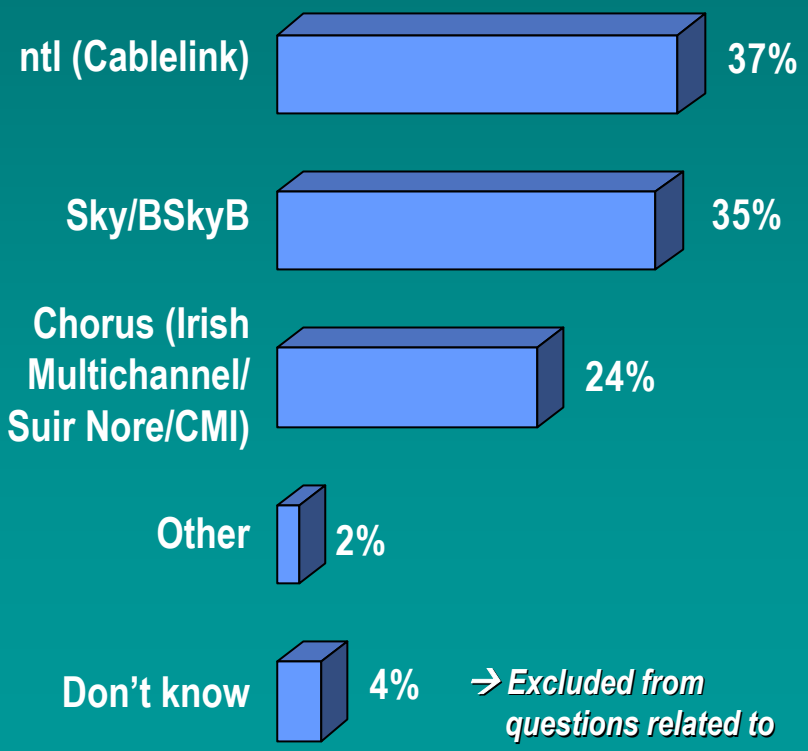
Note: 2% use two service providers

Q: How do you receive your pay TV?

Current Pay TV Service Provider (1)

(Base: All Subscribers: 457)

2% use two service providers



→ *Excluded from questions related to specific service providers*

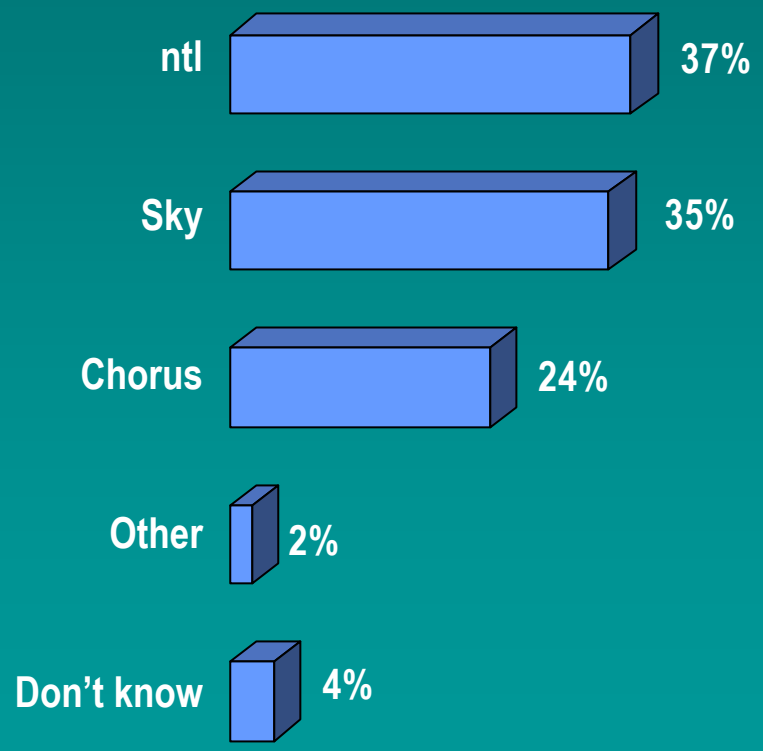
	15-34	35-44	45-54	55+	Dublin	RoL	Munster	Conn/Uls
	(69)	(122)	(121)	(145)	(194)	(105)	(118)	(40)*
	%	%	%	%	%	%	%	%
ntl (Cablelink)	46	34	39	34	74	14	3	23
Sky/BSkyB	33	44	31	30	19	39	53	48
Chorus (Irish Multichannel/ Suir Nore/CMI)	19	19	25	31	6	45	36	23
Other	1	3	2	1	1	1	4	5
Don't know	1	4	4	3	3	1	6	5

** Note: Small base*

Q: Can you tell me the name of your current pay TV service provider?

Current Pay TV Service Provider (2)

(Base: All Subscribers: 457)



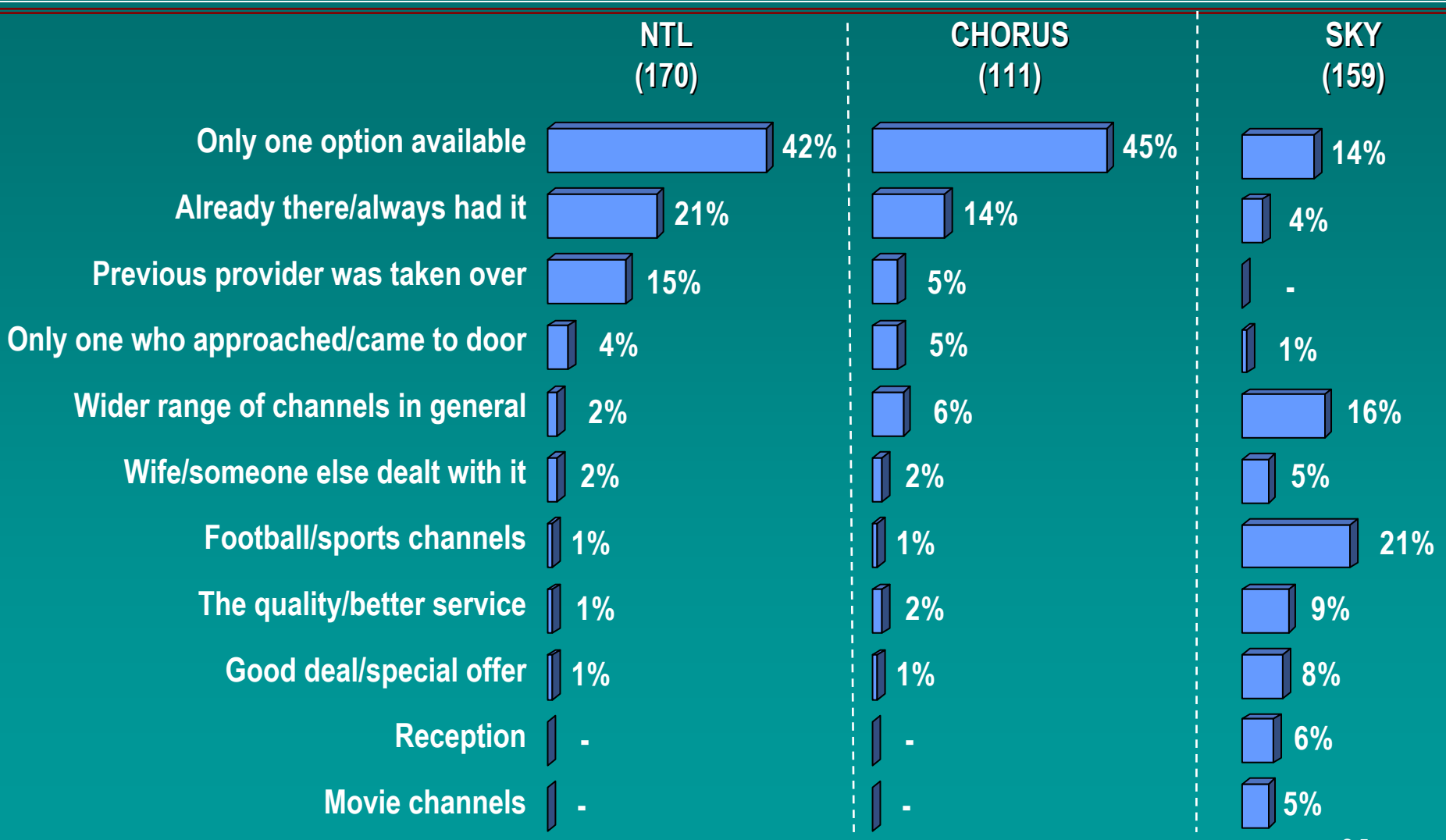
Kids	No Kids	AB	C1	C2	DE	F
(183)	(274)	(84)	(131)	(106)	(117)	(19)*
%	%	%	%	%	%	%
36	38	45	48	25	35	5
43	30	30	32	44	29	58
19	28	23	17	27	31	26
3	1	2	2	1	2	5
3	4	4	2	4	4	5

** Note: Small base*

Q: Can you tell me the name of your current pay TV service provider?

Reasons For Choosing Service Provider

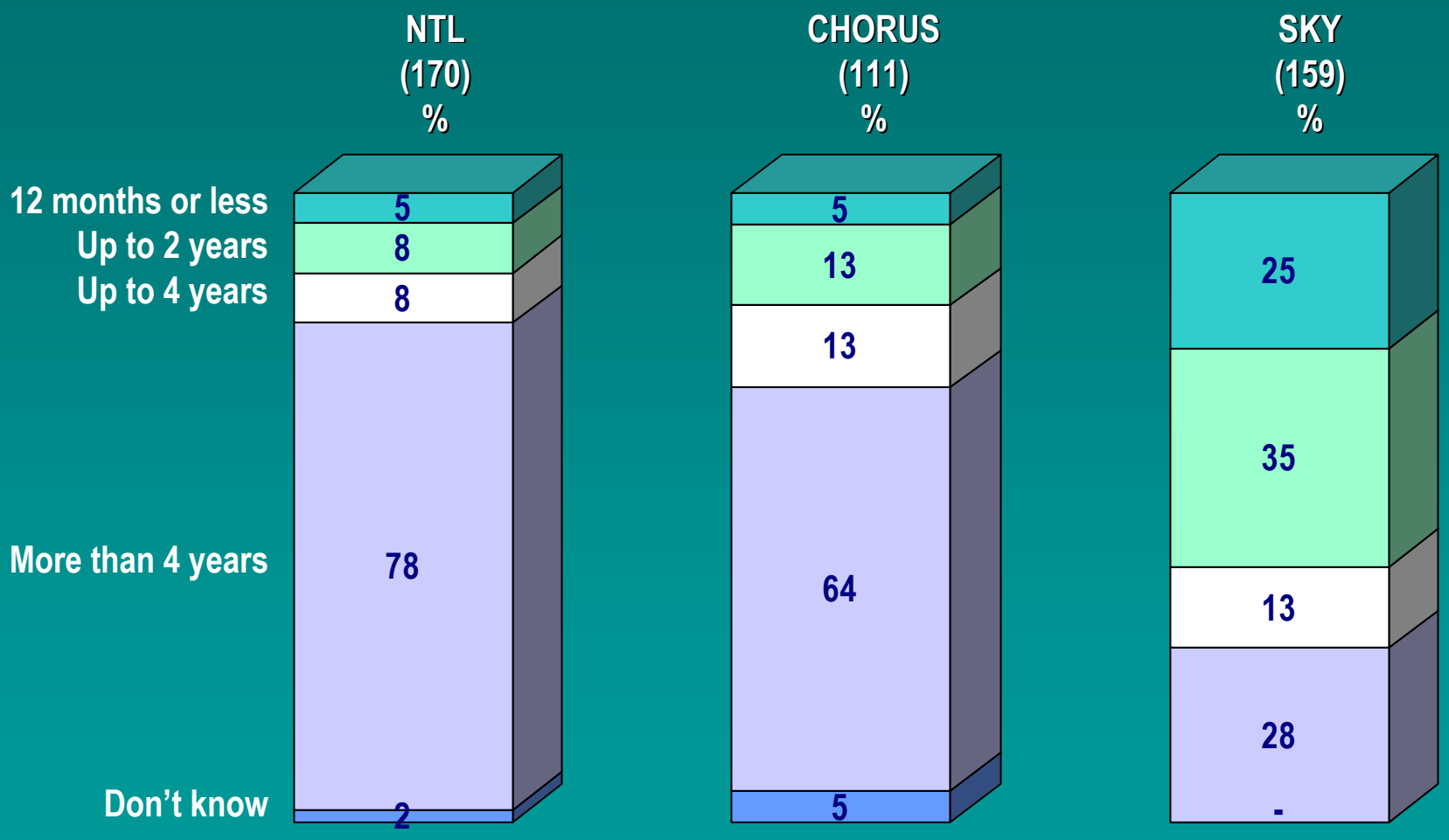
(Base: All Subscribers: 449)



Q: Why did you choose your pay TV service provider?

Length Of Time With Service Provider

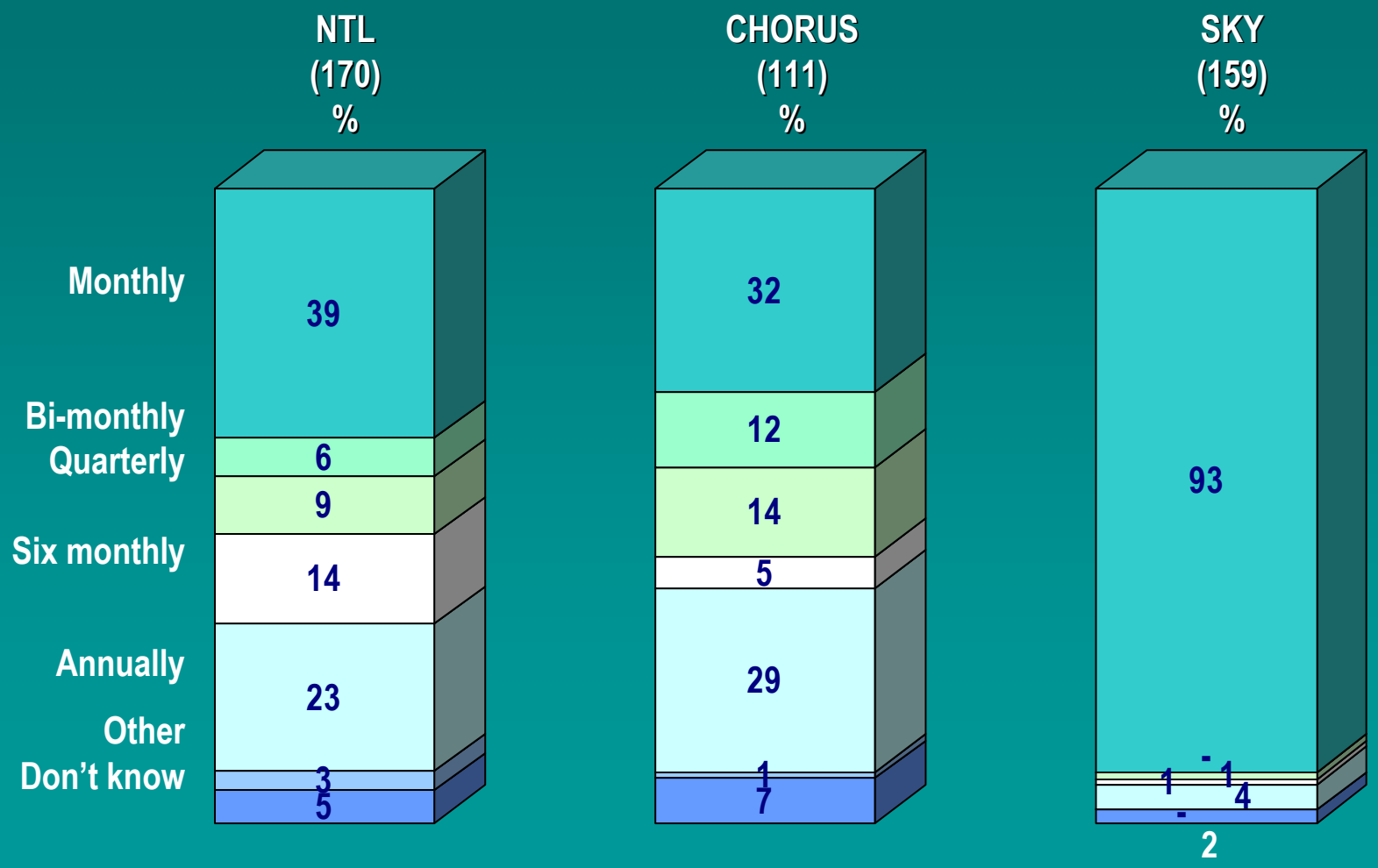
(Base: All Subscribers: 449)



Q: How long have you been with your pay TV service provider?

Frequency of Subscription Payment

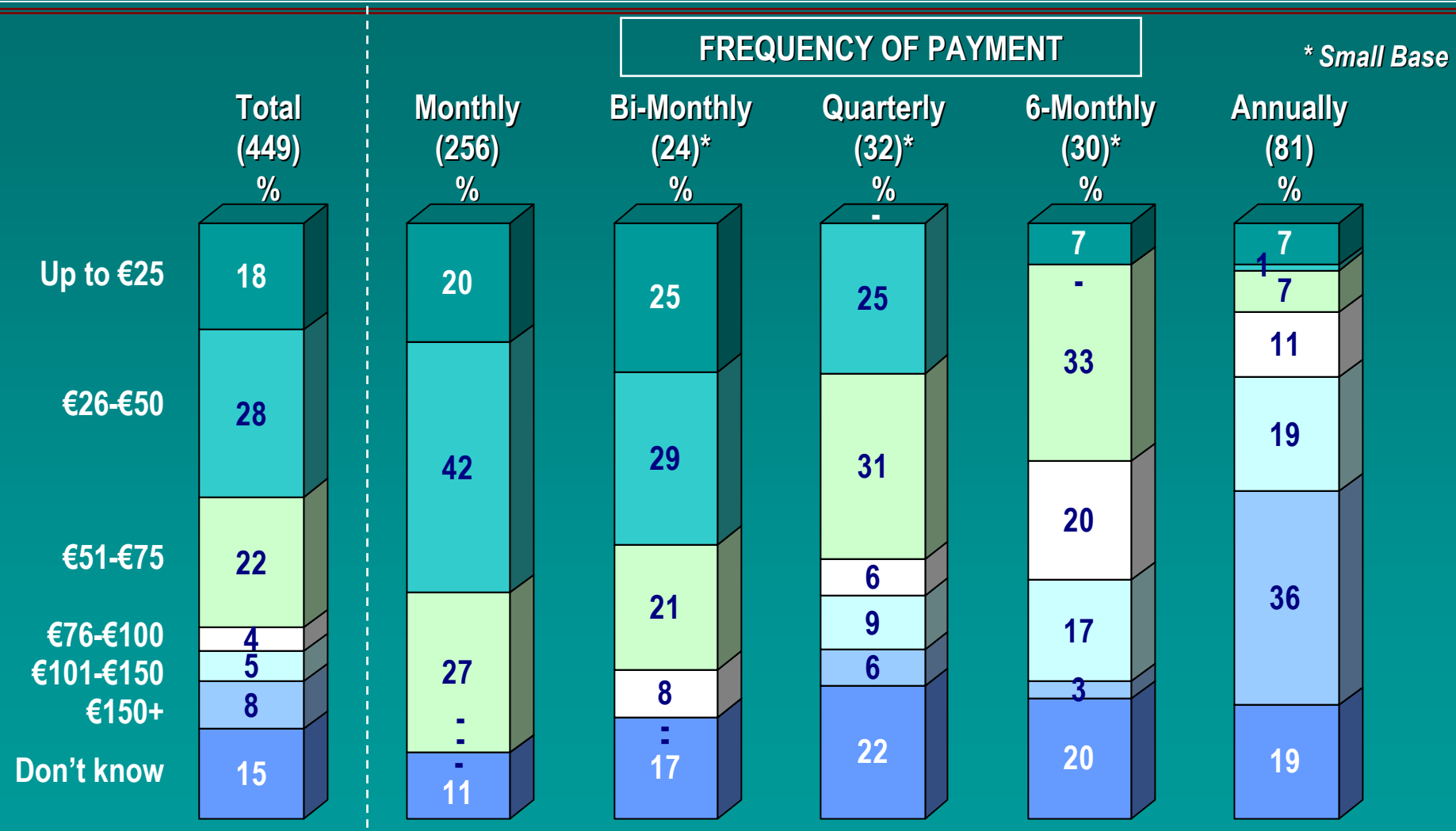
(Base: All Subscribers: 449)



Q: How often do you pay your subscription?

Approximate Subscription Fee Paid On Each Payment Occasion

(Base: All Subscribers: 449)



Q: Approximately how much do you pay each time, on average, in subscription fees?

Satisfaction With The Service Provided

Rating Of The Different Aspects Of The Service Provided (1)

(Base: All Subscribers: 449)

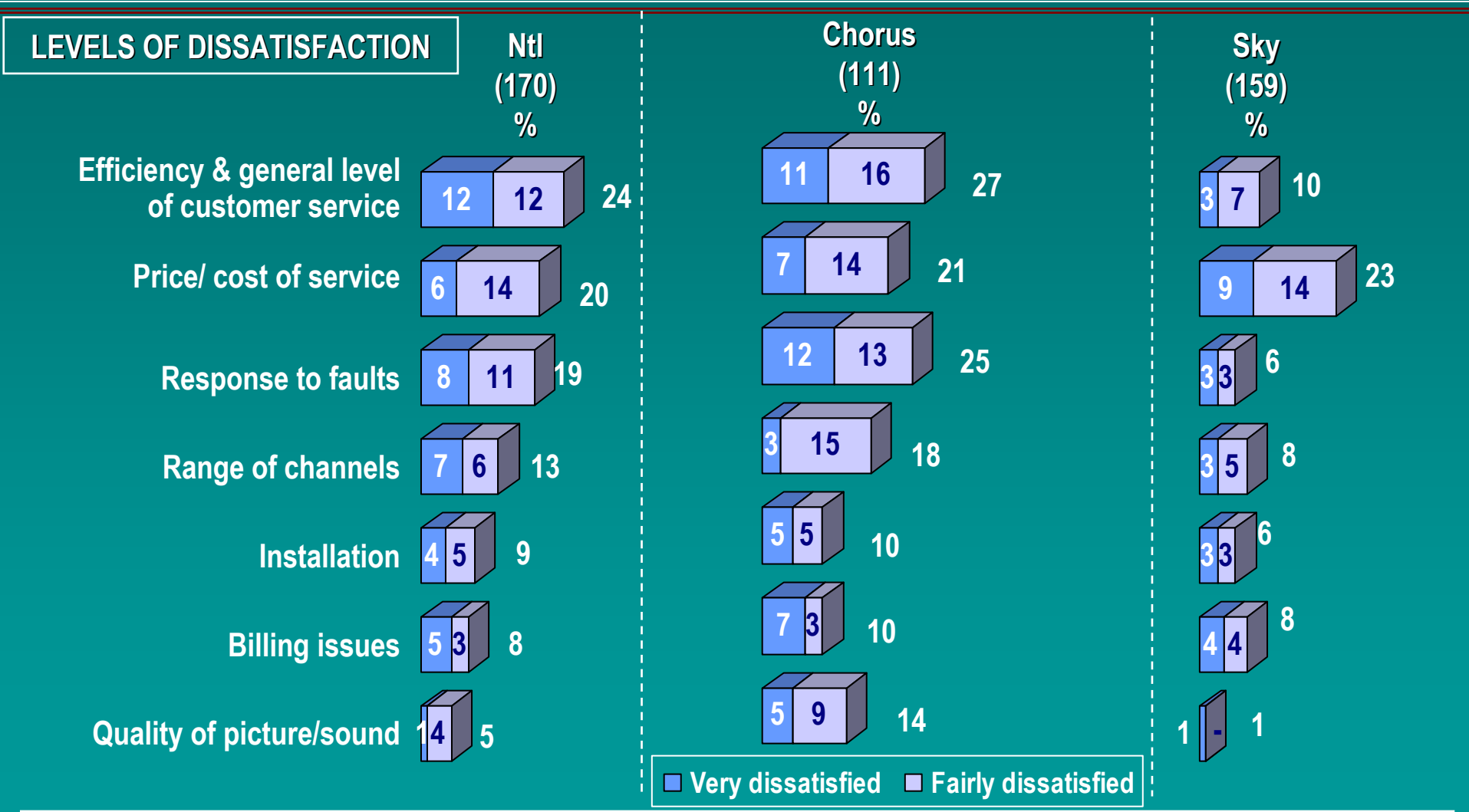
Mean Score Summary: 5 Point Scale
(5) = Very Satisfied, (1) = Very Dissatisfied

	ntl	Chorus	Sky
	(170)	(111)	(159)
Quality of picture/sound	4.18	3.86	4.69
Billing issues	4.07	3.83	4.19
Installation	4.06	3.83	4.36
Range of channels	3.73	3.56	4.12
Response to faults	3.42	3.30	4.12
Efficiency & general level of customer service	3.42	3.23	4.10
Price/ cost of service	3.39	3.19	3.26

Q: For each of the following aspects of their service, I would like you to rate your satisfaction with each aspect on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

Rating Of The Different Aspects Of The Service Provided (2)

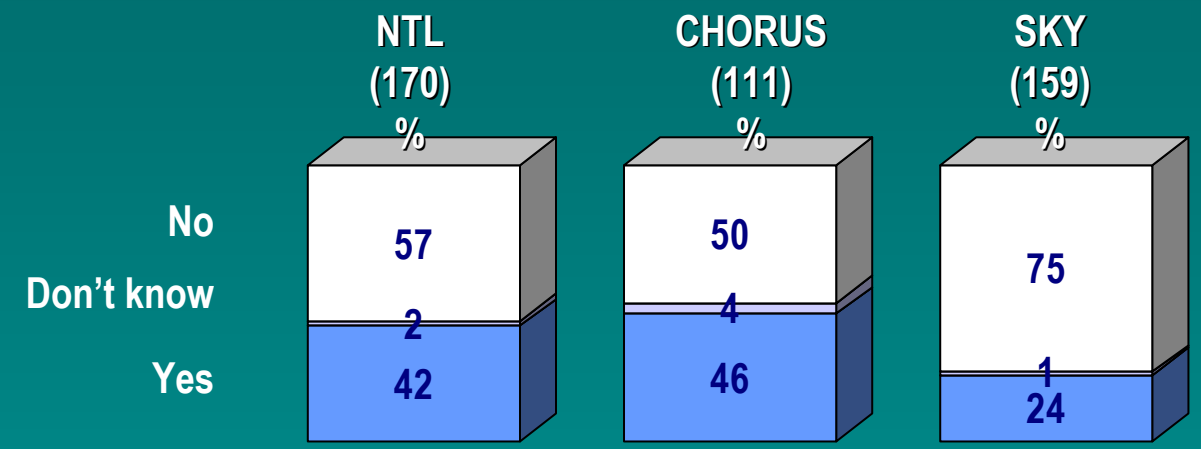
(Base: All Subscribers: 449)



Q: For each of the following aspects of their service, I would like you to rate your satisfaction with each aspect on a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

Whether Ever Complained About Any Aspect Of The Service Provided

(Base: All Subscribers: 449)



* Note: Small base

Base	(72)	(51)*	(39)*
Outages/breakdown in service	29%	43%	41%
Quality of picture/sound	28%	33%	15%
Changes to channel line-up	19%	8%	13%
Installation	10%	6%	8%
Response to faults	8%	12%	3%
Billing issues	8%	14%	18%
Efficiency & general level of customer service	6%	4%	-
Price/cost of service	1%	2%	5%
Speed in which call/letter/email answered	1%	2%	-
Don't know	4%	-	-

Q: Have you ever complained at all about any aspect of the service provided by your service provider?
Q: What aspect/s of your service provider's service did you complain about?

Rating Of The Response From The Service Provider In Relation To Areas Of Complaint - Summary

(Base: Those Having Made A Complaint Regarding A Certain Service Aspect*)

	ntl		Chorus		Sky	
Outages/breakdown in service	3.05	(21)	2.52	(22)	3.47	(16)
Quality of picture/sound	2.84	(20)	3.38	(17)	3.33	(6)
Billing issues	2.80	(6)	2.00	(7)	2.57	(7)
Response to faults	2.50	(6)	1.83	(6)	2.00	(1)
Changes to channel line up	2.14	(14)	1.67	(4)	2.40	(5)
Installation	1.71	(7)	2.67	(3)	2.00	(3)
Efficiency & general level of customer service	1.50	(4)	2.00	(2)	-	
Price/cost of service	1.00	(1)	5.00	(1)	1.00	(2)
Speed in which call/letter/email answered	1.00	(1)	1.00	(1)	-	

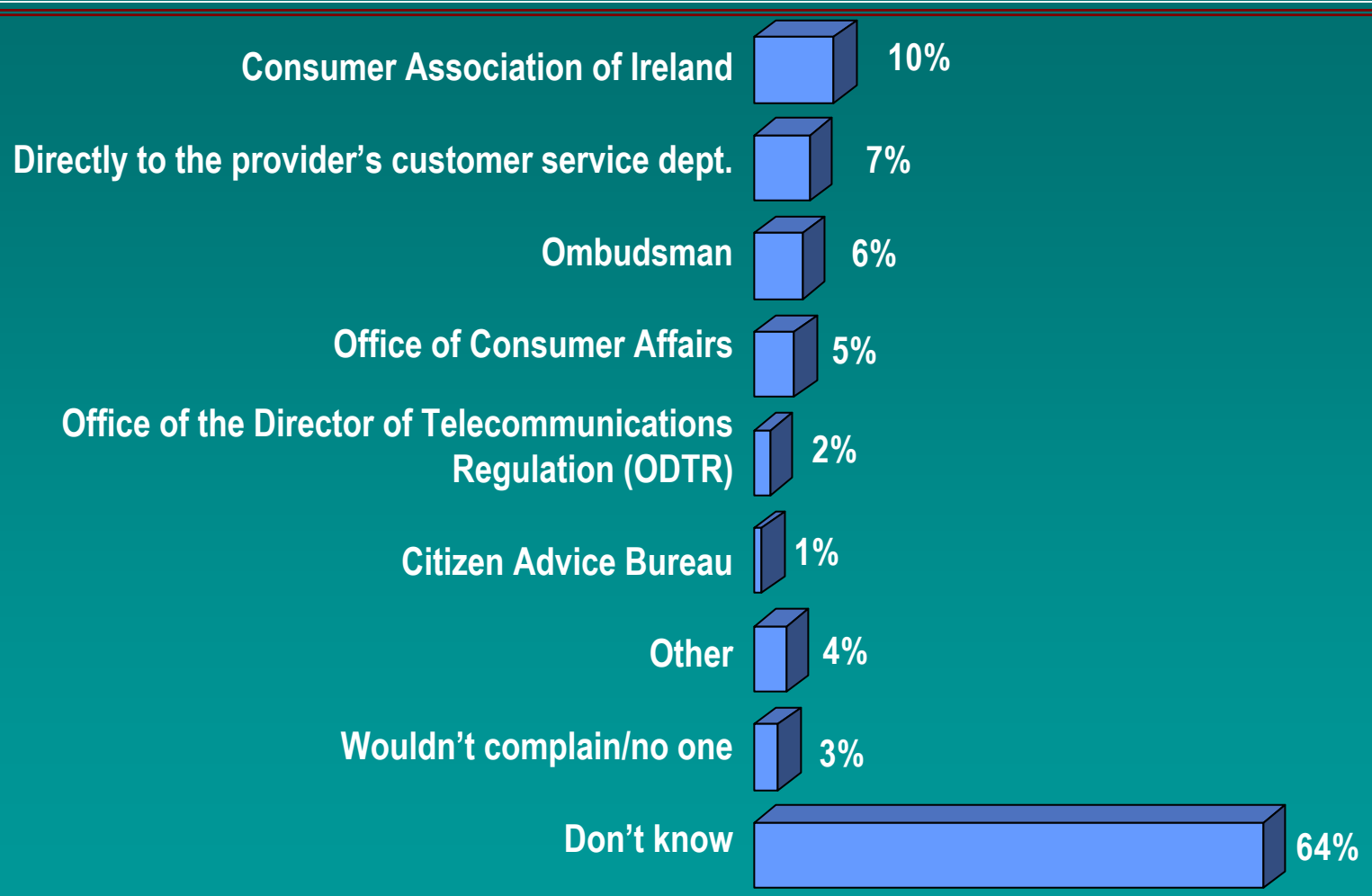
( ) = actual base size

** Base sizes vary by aspects & service provider*
Caution very small base sizes

Q: And how satisfied or dissatisfied were you with the response you got from your service provider, using a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied??

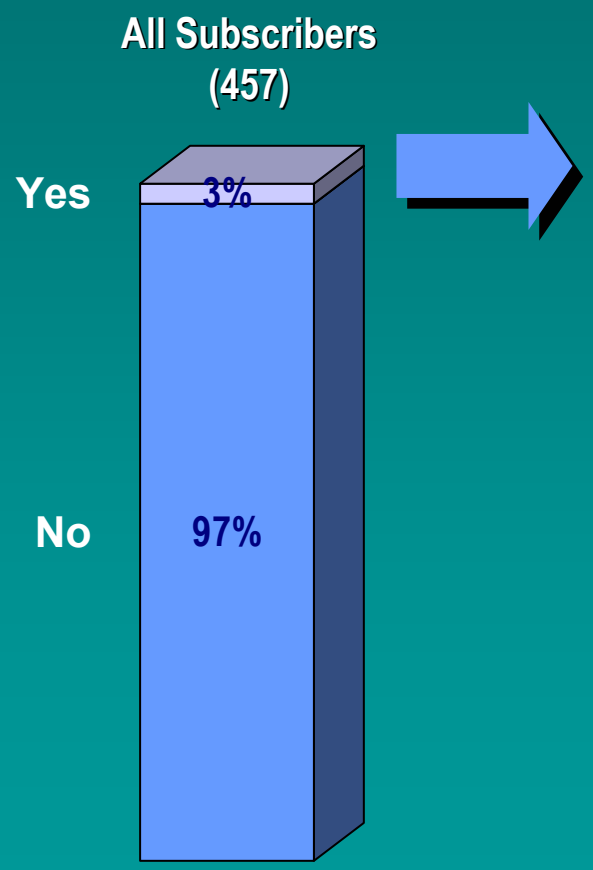
Spontaneous Awareness Of Whom To Complain To If Dissatisfied

(Base: All Subscribers: 457)



Q: If you were dissatisfied with the response from your service provider to a complaint, which consumer body/ agency, if any, would you complain to?

Whether Ever Approached A Consumer Body/Agency Regarding A Complaint With An Operator



Whom They Have Approached
(Base: All Spontaneous Mentions: 12*)

Consumer Association of Ireland	4
Office of Consumer Affairs	2
Ombudsman	2
Citizen Advice Bureau	1
Other	1
Don't know	2

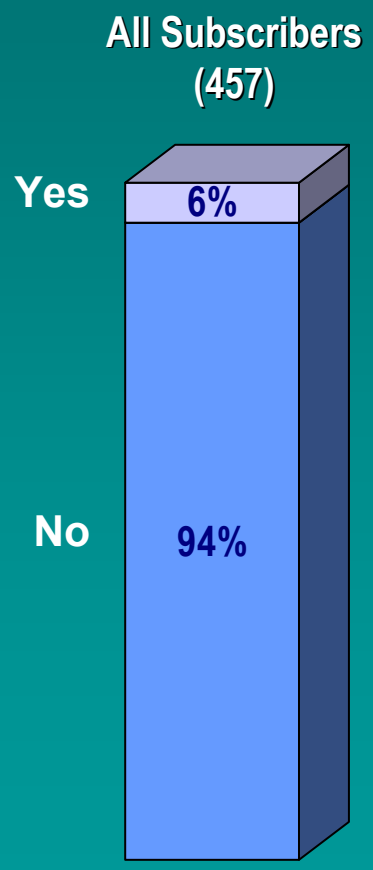
** Note: Small base*

Q: Have you ever approached a consumer body/an agency regarding a complaint with an operator?
Q: Can you name the consumer body or agency you approached?

Switching Behaviour

Whether Switched Provider In The Past Two Years

(Base: All Subscribers: 457)



Q: Have you switched pay TV service provider in the past two years?

Service Provider Previously Subscribed To And Reasons For Switching

(Base: All those who have switched in the past two years: 29*)

** Caution very small base sizes*

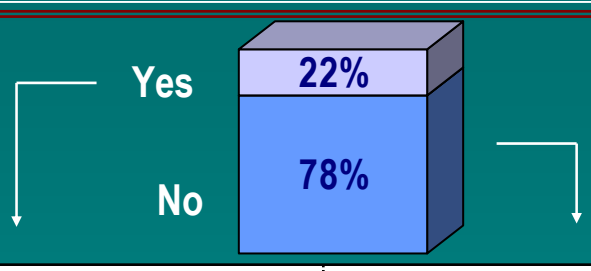
	PREVIOUS PROVIDER	CURRENT PROVIDER		
		ntl (2)	Chorus (3)	Sky (24)
Chorus Cable	10	1	1	8
Chorus MMDS	5	-	-	5
ntl Cable	4	-	1	3
ntl MMDS	4	-	-	4
Other	3	1	-	2
Don't know	3	-	1	2

MAIN REASONS FOR SWITCHING	
Wider range of channels in general	12
Individual issue/problem with existing service provider	10
Football/sports channel	5
Better picture/sound/reception	3
Better customer service	3
Other	3

Q: To which service provider did you previously subscribe?
Q: What were your main reasons for switching suppliers?

Whether Considered Switching From Existing Service Provider In The Last Two Years

(Base: All who have not switched: 428)



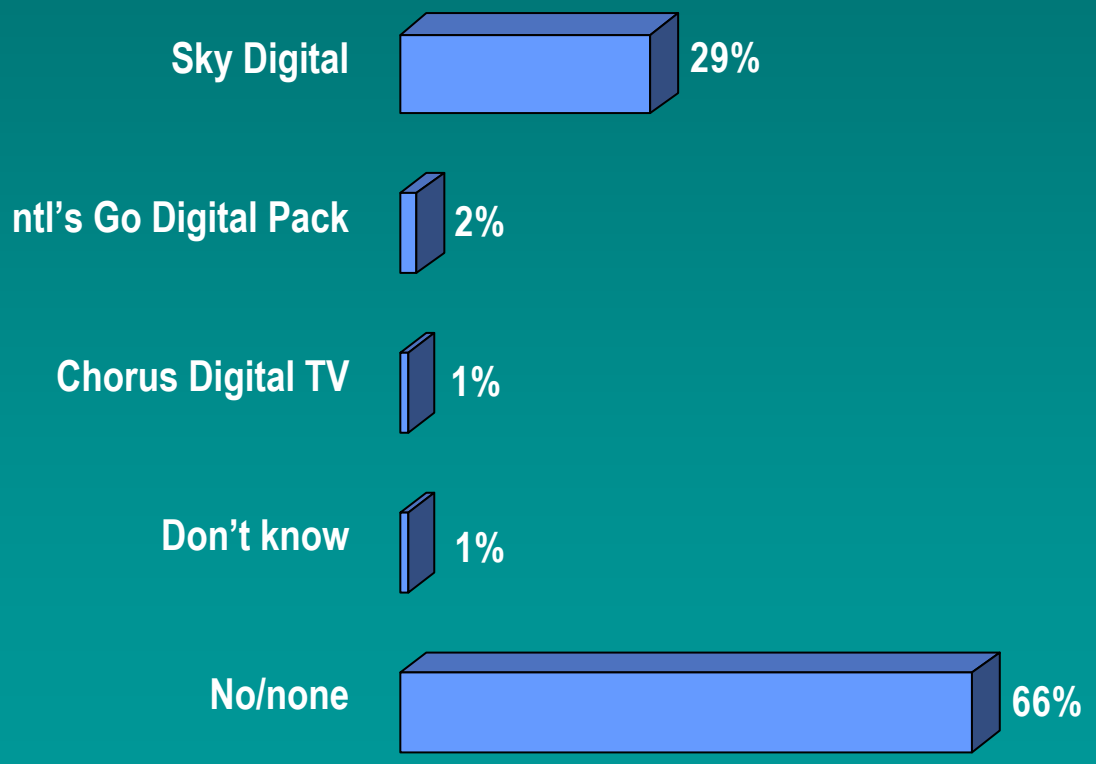
Mentions 3%+	Reasons for not switching	Reasons for not considering switching
	(94)	(332)
Too lazy/no time	15%	2%
Happy with current service	13%	49%
May consider changing in future	13%	1%
Too expensive to change	12%	2%
No other service provider available	9%	11%
No interest	6%	8%
Unaware of alternative/no information	6%	8%
No major benefits of switching	6%	4%
Satellite only available/do not want dish on my house	5%	-
Too much hassle	3%	3%
Have enough TV channels	3%	3%
Not interested much in TV	1%	3%
Don't know	4%	7%

Q: Have you considered switching from your existing service provider in the last two years?
Q: If Yes, why haven't you switched to another service provider?
Q: If No, why haven't you considered changing your supplier for your pay TV services provider?

Digital TV Service

Digital TV Services Subscribed To

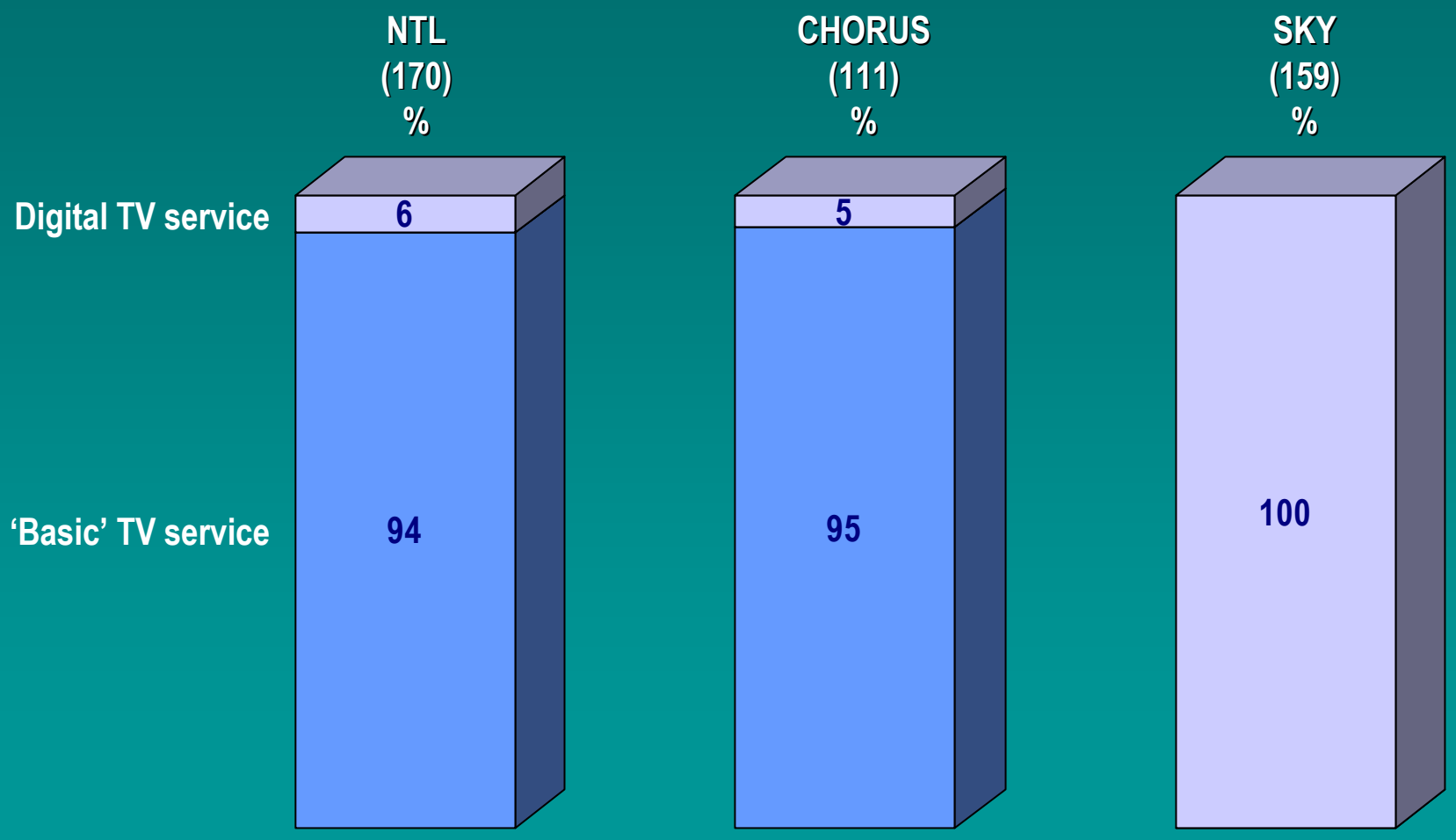
(Base: All Pay TV Subscribers: 457)



Q: Do you subscribe to any digital TV services at all? If so can you tell me which?

Proportion of Subscriptions Accounted For By Digital Services

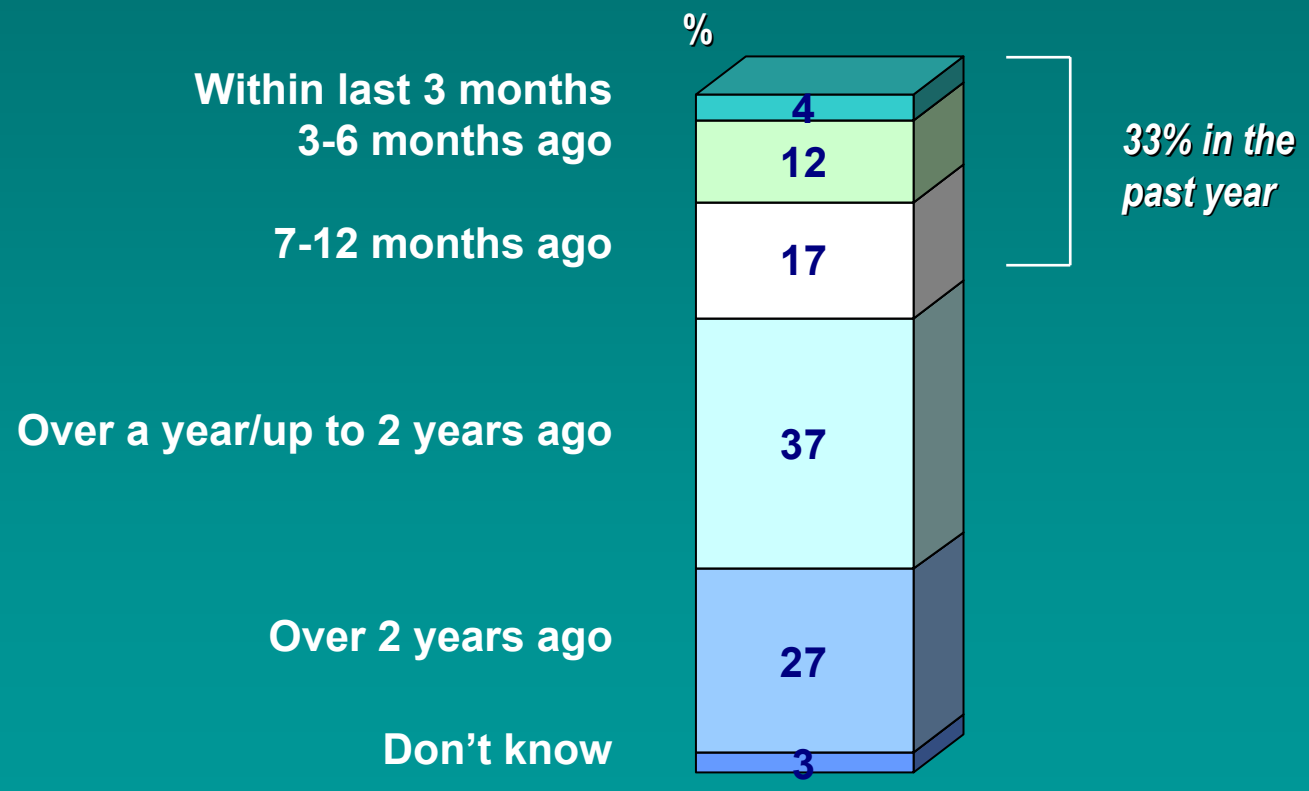
(Base: All Pay TV Subscribers: 457)



Q: Do you subscribe to any digital TV services at all? If so can you tell me which?

Recency of Subscribing to Digital TV Services

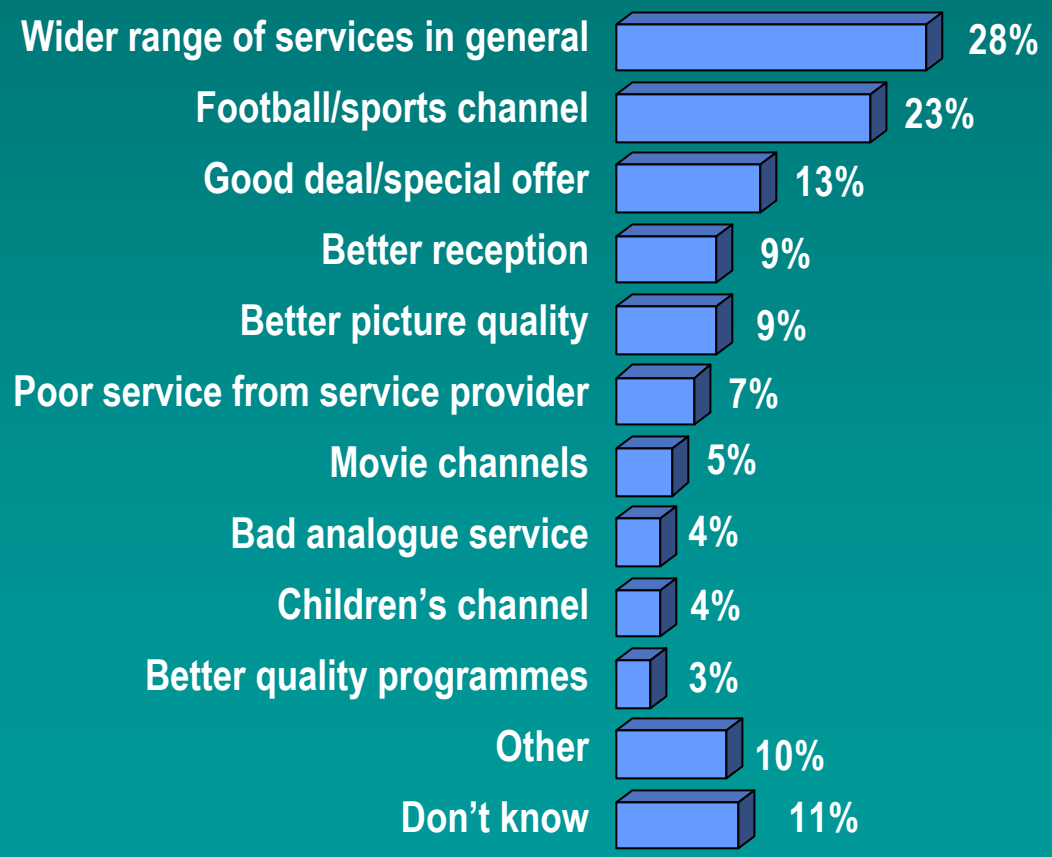
(Base: All Digital Subscribers: 150)



Q: When did you first subscribe to digital services?

Main Reasons For Switching To Digital Services

(Base: All Digital Subscribers: 150)



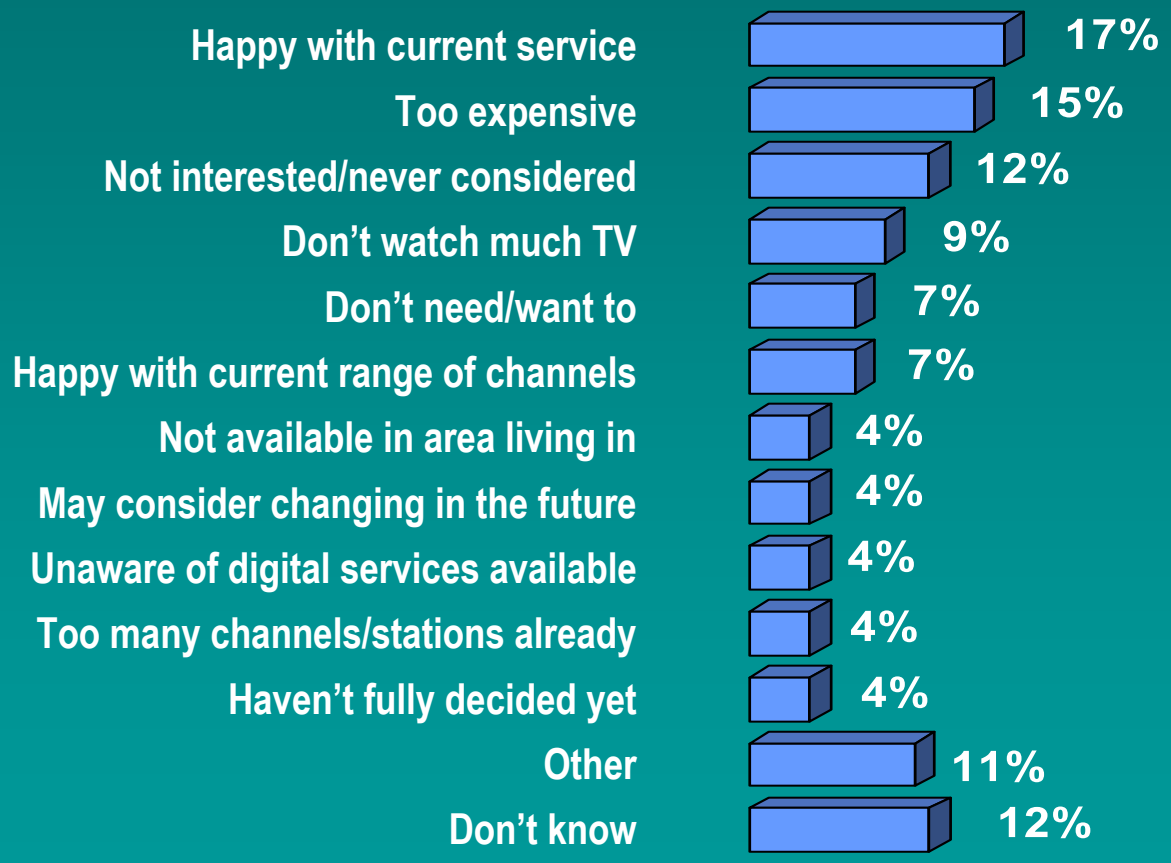
** Note: Small base*

Male	Female	15-34	35-44	45-54	55+
(65)	(85)	(24)*	(47)*	(38)*	(41)*
%	%	%	%	%	%
22	33	42	23	29	24
26	21	25	30	21	17
14	13	13	19	5	15
9	9	13	13	8	5
11	7	8	13	8	5
8	6	4	2	11	10
9	2	8	6	8	-
8	1	8	2	5	2
-	7	-	9	5	-
3	2	4	6	-	-
9	11	4	9	11	15
12	11	8	11	8	17

Q: What were your main reasons for switching to digital services?

Reasons For Not Switching To Digital TV Services

(Base: All Non-Digital TV Subscribers: 301)



Q: Why have you not switched to digital services?