

ASOCIACIÓN PARA LA INVESTIGACIÓN DE MEDIOS DE COMUNICACIÓN

# THE SPANISH PROCESS TO DTT (DIGITAL TERRESTRIAL TELEVISION)

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EMRO - Mallorca, 1st. Jun. 2010





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#### **AGENDA**

- Theoretical transitional process to DTT
- Distinctive features of Spain
- Technical coverage objective
- Conditions to view the DTT in households
- The real technical coverage
- Indicators for the real analogue switch-off
- Studies about population
- The monitoring of the population about DTT
- The real transition to DTT
- Effects of analogue switch-off in the peoplemeters panel

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## THEORETICAL TRANSITIONAL PROCESS TO DTT

- July 2005 → National Transitional Plan to DTT approved
  - Deadline of analogical broadcasting → 3<sup>rd</sup> April 2010
  - The most important broadcaster were pushed to emit digital and analogical signal at the same time
  - First national DTT emissions → 30<sup>th</sup> November 2005

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## **DISTINCTIVE FEATURES OF SPAIN**

- The extent, topography and population distribution
  - Above 46 million inhabitants / 16 million households
  - More than 8.000 municipalities
  - The fourth largest country in Europe → 504.645 Km<sup>2</sup>
  - The fifth most mountainous country in Europe
  - Low density → 91 inhabitants per Km<sup>2</sup> (very irregular distribution)
- Lower penetration other digital systems reception → 22-23%





## **TECHNICAL COVERAGE OBJECTIVE**

- Forecast objective of coverage
  - Private broadcaster → 95% population
  - Public broadcaster → 98% population
  - Technical design: the country in 90 areas ("technical projects")
- Three phases of analogical cuts:
  - Phase 1: 32 projects (12,6% population) Deadline: 30<sup>th</sup> June 2009
  - Phase 2: 25 projects (20%) Deadline: 31st December 2009
  - Phase 3: 33 projects (67,4%) Deadline: 3<sup>rd</sup> April 2010

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## **CONDITIONS TO VIEW THE DTT IN HOUSEHOLDS**

- To have the antenna prepared
- To have a TV with decoder (internal or external)
- To receive a strong digital signal
- Indicators to carry out the analogical cuts → IMPULSA TDT





## THE REAL TECHNICAL COVERAGE

- Goal succesfully reached
- February 2010: the DTT matches to the analogical coverage
  - Private operators → 97.8% population
  - Public operators → 98.5% population

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## INDICATORS FOR THE REAL ANALOGUE SWITCH-OFF

- Objective: To find out the real situation of the households.
  - Abertis Telecom technical coverage
  - Fenitel the antenna installation process
  - Ministry of Public Works and Statistic National Institute housing stock
  - GFK sales of tuners
  - Kantar Media consumption and changes in distribution systems
  - AIMC baseline data about audiovisual equipment
  - Ad-hoc studies about population

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## STUDIES ABOUT POPULATION

- First studies from AIMC
  - Knowledge and perception of DTT: three waves (2007 / 2008)
  - Each wave: 3.000 telephone interviews (landline and mobile phone)
- The monitoring of the population about DTT
  - Methodological advice and supervision audit of AIMC
  - From March 2009 to May 2010
  - More than 200.000 interviews
  - Strategic design → maximum dispersion

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# THE MONITORING OF THE POPULATION ABOUT DTT (1)

- To provide the Ministry indicators
  - Degree of knowledge of the DTT
  - Adaptation of homes antenna and decoder
  - Perceptions of signal
  - Pay TV subscribed
- Objective: to make decision from cuts of the analogical signals





## THE MONITORING OF THE POPULATION ABOUT DTT (2)

## Sample design:

- Interviews by telephone (CATI)
- Mixed sample: landline and mobile phones in the national waves
- Quota 15% interviews to households with only mobile phone
- Each project: minimun 200 interviews per wave
- No contact with the same household before three months
- Interviewee: member of the household, aged 16 or above
- To distinguish between houses and collective
- Weighted by age, sex and household size
- Phase and overall results weighted by population and households in each project
- Design flexible in function of the results

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# THE MONITORING OF THE POPULATION ABOUT DTT (3)

# Sample design:

TOTAL
PHASE 1 (32 projects)
PHASE 2 (25 projects)
PHASE 3 (33 projects)

THEORETICAL SAMPLE						
212.545						
71.600						
55.000						
05.045						

1	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14
l	Mar 09	Apr 09	May 09	Jun 09	Jul 09	Sep 09	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10
	F	F	F + M	F	F	F + M	F	F + M	F	F	F + M	F	F	F + M
1	18.000	6.400	20.669	6.400	6.400	20.669	12.000	20.669	12.000	18.000	20.669	12.000	18.000	20.669
1	6.400	6.400	6.400	6.400	6.400	6.400	400	6.400	400	6.400	6.400	400	6.400	6.400
ı	5.000	0	5.000	0	0	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000	5.000
	6.600	0	9.269	0	0	9.269	6.600	9.269	6.600	6.600	9.269	6.600	6.600	9.269

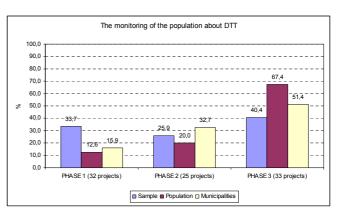
F: interviews to households with landline telephone

 $<sup>{\</sup>sf F+M:} interviews \ to \ households \ with \ landline \ telephone \ plus \ interviews \ to \ households \ with \ only \ mobile \ phone \ plus \ interviews \ to \ households \ with \ only \ mobile \ phone \ plus \ interviews \ to \ households \ with \ only \ mobile \ phone \ plus \ interviews \ to \ households \ with \ only \ mobile \ phone \ plus \ plus$ 

TOTAL
PHASE 1 (32 projects)
PHASE 2 (25 projects)
PHASE 3 (33 projects)

THEORE		POPUL	ATION	MUNICIPALITIES			
N	%	N	%	N	%		
212.545	100,0	46.153.070	100,0	8.112	100,0		
71.600	33,7	5.830.856	12,6	1.287	15,9		
55.000	25,9	9.234.581	20,0	2.653	32,7		
85.945	40,4	31.087.633	67,4	4.172	51,4		

Population and Municipalities data: 2009

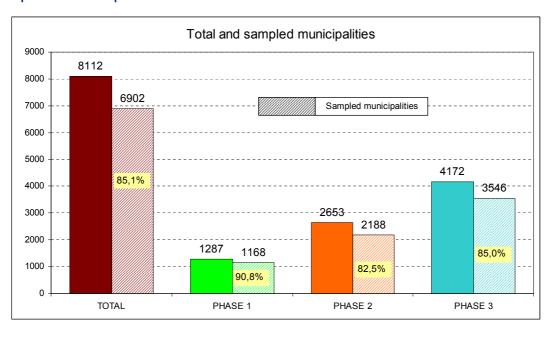






# THE MONITORING OF THE POPULATION ABOUT DTT (4)

Sampled municipalities: 85%



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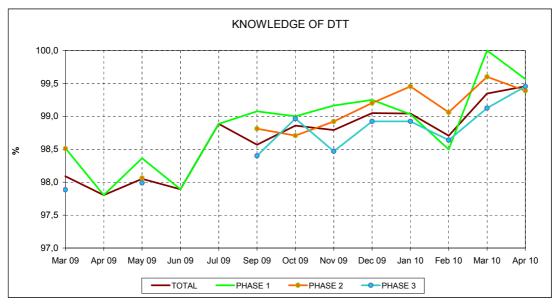




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# THE MONITORING OF THE POPULATION ABOUT DTT (5)

Knowledge of DTT: almost full



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

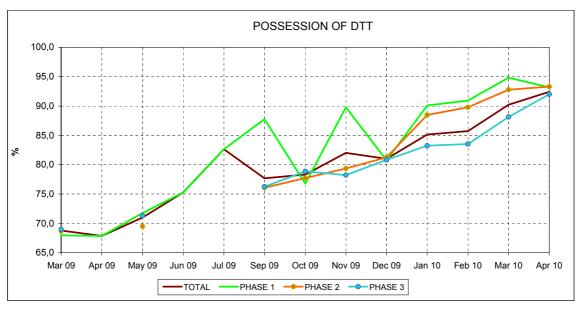
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# THE MONITORING OF THE POPULATION ABOUT DTT (6)

Possession of DTT: over 92% in April 2010



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

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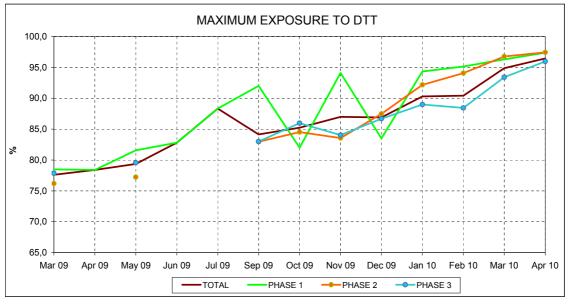




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# THE MONITORING OF THE POPULATION ABOUT DTT (7)

Maximum exposure to DTT: around 96%



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

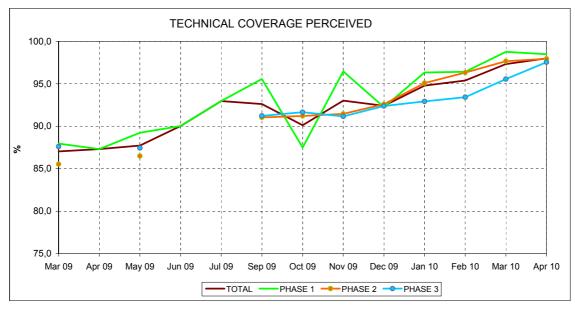
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## THE MONITORING OF THE POPULATION ABOUT DTT (8)

Technical coverage perceived: 98%



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

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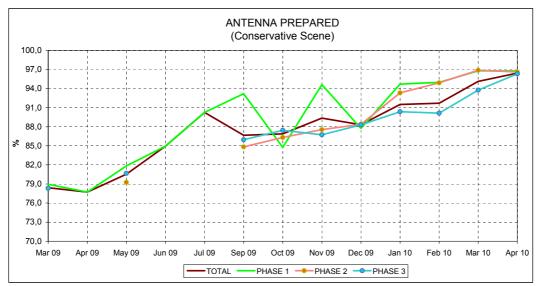




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# THE MONITORING OF THE POPULATION ABOUT DTT (9)

 Antenna prepared: over 96% under a conservative hypothesis (all homes need to adapt the antenna)



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

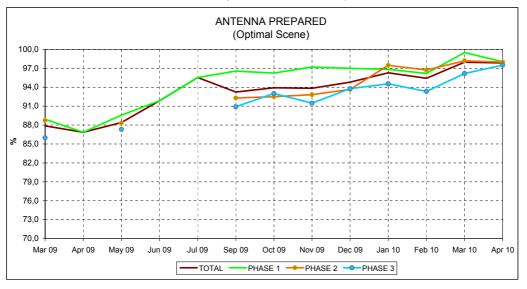
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## THE MONITORING OF THE POPULATION ABOUT DTT (10)

 Antenna prepared: almost 98% under a favourable hypothesis (only collective homes need to adapt the antenna)



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

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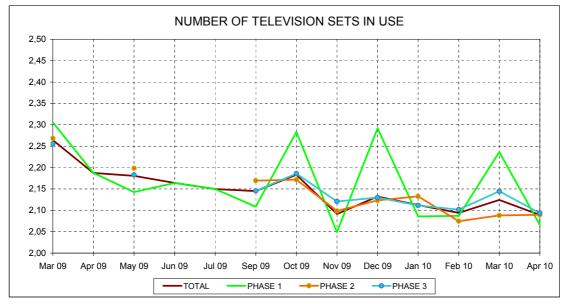




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# THE MONITORING OF THE POPULATION ABOUT DTT (11)

Number of TV sets in use: gradual decrease



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

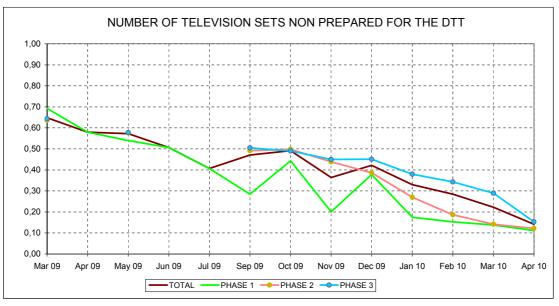
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## THE MONITORING OF THE POPULATION ABOUT DTT (12)

Number of TV sets not prepared for DTT: gradual decrease



Note: in the waves of October and December 2009 and March 2010 only two projects were sampled in phase 1

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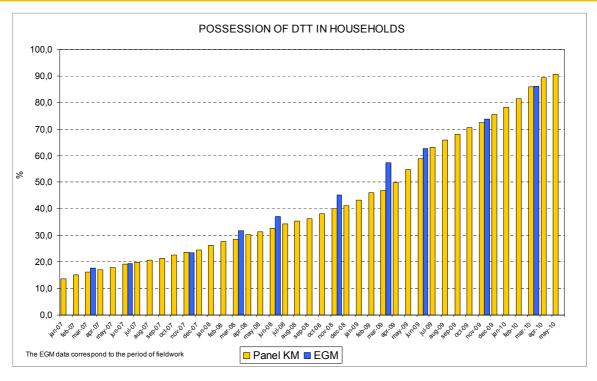
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## THE REAL TRANSITION TO DTT

- The process has been:
  - Continuous
  - Geographically dispersed
  - Not total: several days coexisted analogical and digital signals in some locations
- Some project deadlines were changed:
  - First switch-off (Phase 1: 30<sup>th</sup> June 2009):
    - \* gradually implemented to 18 of 32 projects.
    - ★ 12 projects between July and October.
    - ⋆ 2 projects added to phase 2
  - Second switch-off (Phase 2: 31<sup>th</sup> December 2009): between 10<sup>th</sup> Dec. and 29<sup>th</sup> Jan.
  - Last switch-off (Phase 3): ahead to 10<sup>th</sup> March until 3<sup>rd</sup> April 2010



## **EFFECTS OF ANALOGUE SWITCH-OFF IN THE PEOPLEMETERS PANEL (1)**



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# **EFFECTS OF ANALOGUE SWITCH OFF IN THE PEOPLEMETERS PANEL (2)**

- Current data of peoplemeters panel
  - 98,9% of households with DTT or payment TV
  - 90,5% with DTT
  - 8,4% subscribed to some payment TV
  - 1,1% without DTT or payment TV → analogical satellite or local channels in analogue
  - 17,3% television sets without DTT → The process continues in second or third TV sets
    - → Decrease of average TV sets by home
  - More DTT channels → Fragmentation of the consumption
    - → Higher consumption