

# TV Trends

## A view from the Establishment Survey



# What exactly is the Establishment Survey?

TAM Ireland commission the Establishment Survey twice a year. The data collected gives us a snap shot of the market and is used to derive TV universe estimates for the following 6 months.

The Establishment Survey is also a useful resource in monitoring trends in hardware ownership

It also provides Nielsen with a continuous pool of recruits for the TAM Panel

# 2016 TV Household Universes



**1,574,000 TV Homes**

**3,362,000 Adults**

**730,000 kids 4 – 14 years**

**1,010,000 Adults 15 -34 years**

**1,372,000 ABC1 Adults**

**531,000 housekeepers with kids**



# TV Home Reception Type – A 10 Year View

Base: All TV Households



Cable



Sky

Irish DTT



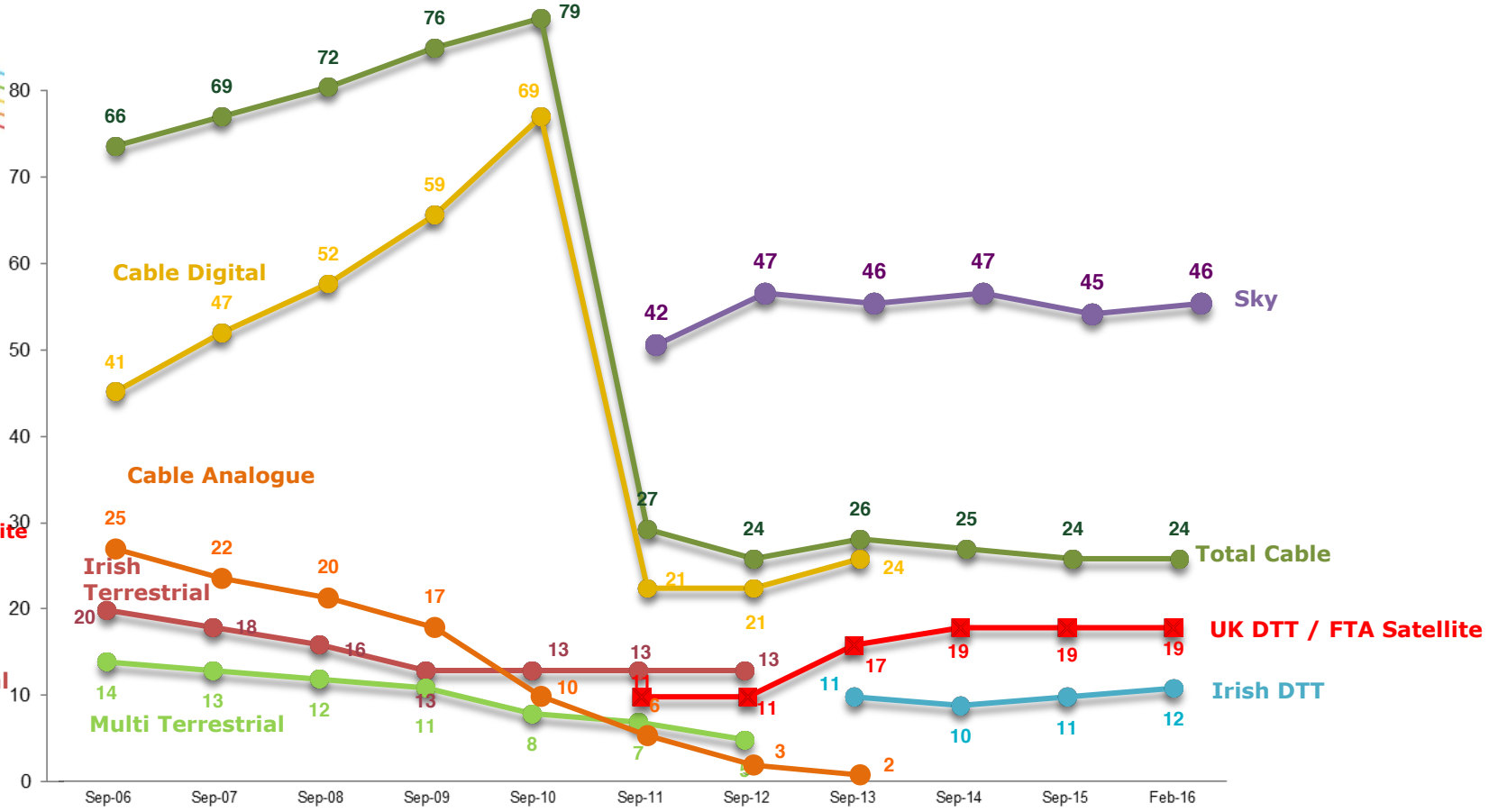
UK DTT/FTA Satellite



Irish Terrestrial



Multi Terrestrial



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Base: All TV Households



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Irish DTT



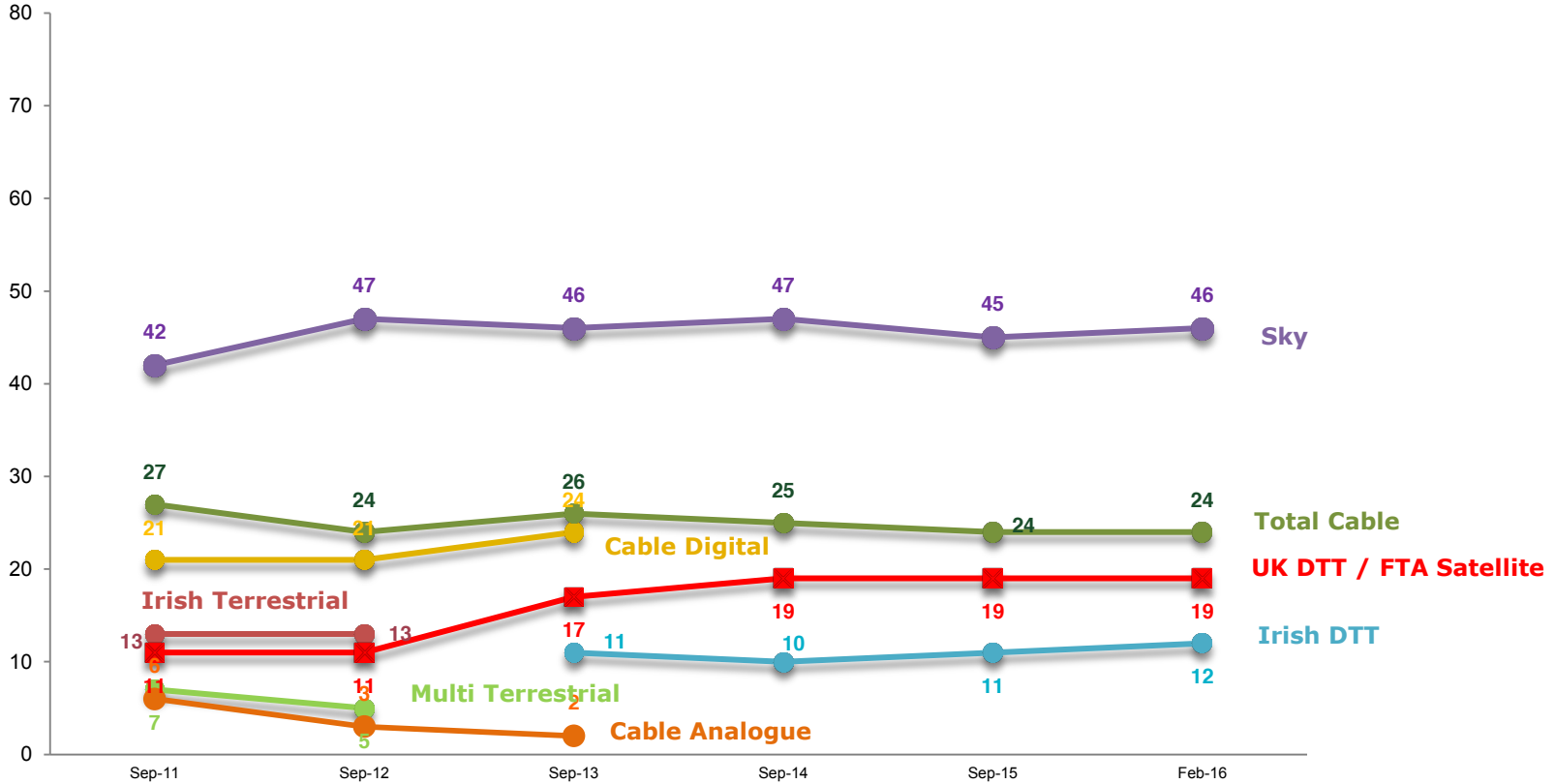
UK DTT/FTA Satellite



Cable

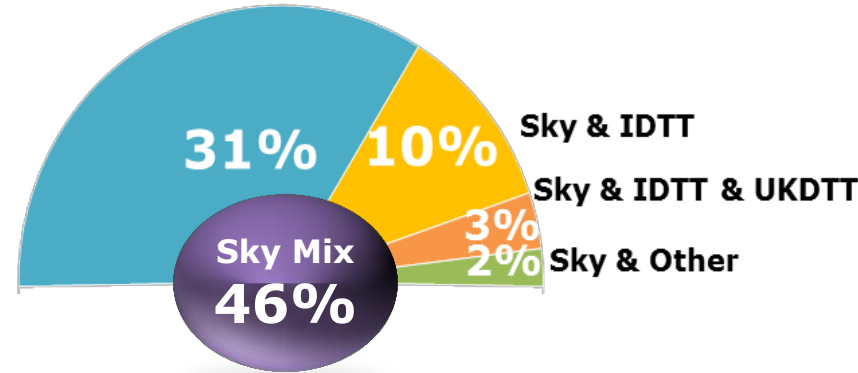
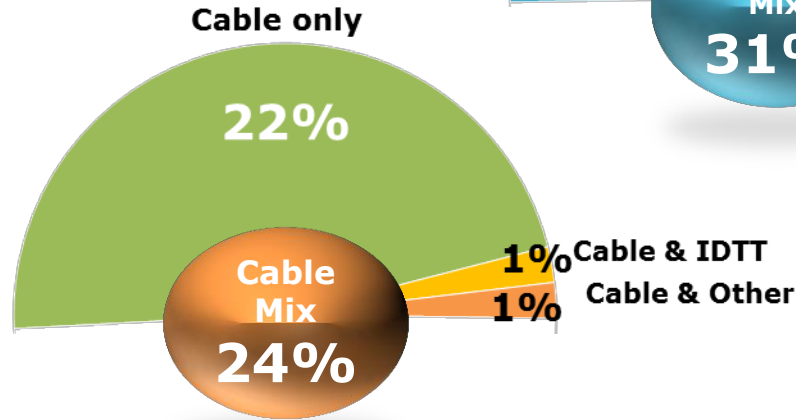
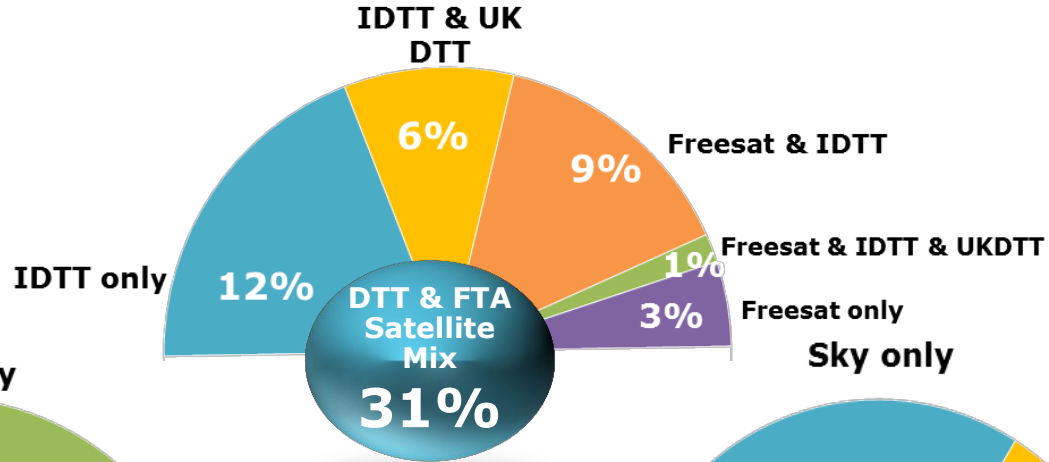
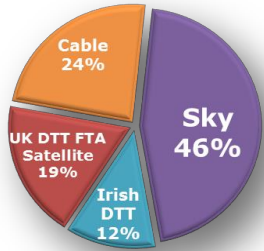


Sky



# And there are some interesting overlaps between the different reception types

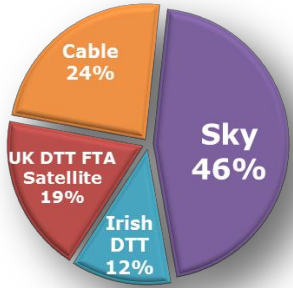
Base: All TV Households



43% of TV homes have some form of IDTT reception  
 10% have some form of UKDTT reception  
 15% have some form of FTA satellite

47% have some form of TV reception other than Cable or Sky

# What's going on beneath the surface of these reception types?

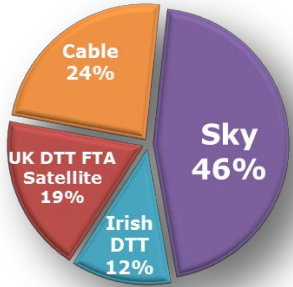


## Reception Type

	Total	IDTT (12%)	UK DTT (6%)	FTA Satellite (13%)	Cable (24%)	Sky (46%)
<b>Pay TV Subscription</b>	<b>67%</b>	<b>0%</b>	<b>0%</b>	<b>8%</b>	<b>99%</b>	<b>92%</b>

Who pay?	-	-	-	Foreign satellite Company	7% Virgin eir VF	89% 9% 1%	Sky 92% Non-subscription Sky satellite dish 10%
				Other	1%		

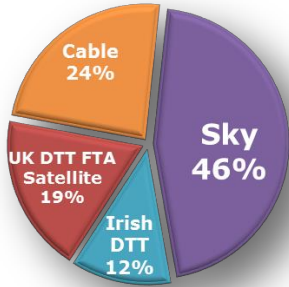
# What's going on beneath the surface of these reception types?



	Reception Type					
	Total	IDTT (12%)	UK DTT (6%)	FTA Satellite (13%)	Cable (24%)	Sky (46%)
Broadband penetration	74%	43%	62%	77%	87%	86%



# What's going on beneath the surface of these reception types?



Reception Type					
Total	IDTT (12%)	UK DTT (6%)	FTA Satellite (13%)	Cable (24%)	Sky (46%)

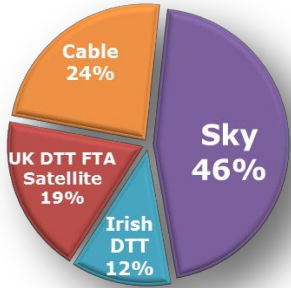
**Watch TV content on non TV devices at home**

<b>34%</b>	<b>15%</b>	<b>15%</b>	<b>31%</b>	<b>40%</b>	<b>38%</b>
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**Which devices?**

<b>Laptop</b>	<b>21%</b>	<b>9%</b>	<b>8%</b>	<b>21%</b>	<b>26%</b>	<b>24%</b>
<b>Tablet</b>	<b>17%</b>	<b>4%</b>	<b>3%</b>	<b>13%</b>	<b>21%</b>	<b>21%</b>
<b>Smartphone</b>	<b>16%</b>	<b>5%</b>	<b>7%</b>	<b>14%</b>	<b>19%</b>	<b>20%</b>

# What's going on beneath the surface of these reception types?



	Reception Type					
	Total	IDTT (12%)	UK DTT (6%)	FTA Satellite (13%)	Cable (24%)	Sky (46%)
Access any Player	<b>30%</b>	<b>13%</b>	<b>15%</b>	<b>23%</b>	<b>39%</b>	<b>33%</b>
Subscribe to Netflix	<b>25%</b>	<b>8%</b>	<b>6%</b>	<b>16%</b>	<b>32%</b>	<b>30%</b>

# Meanwhile, the 'quality' of TV set viewing in the home has improved exponentially

Base: All TV Households



1 set homes



2 set homes



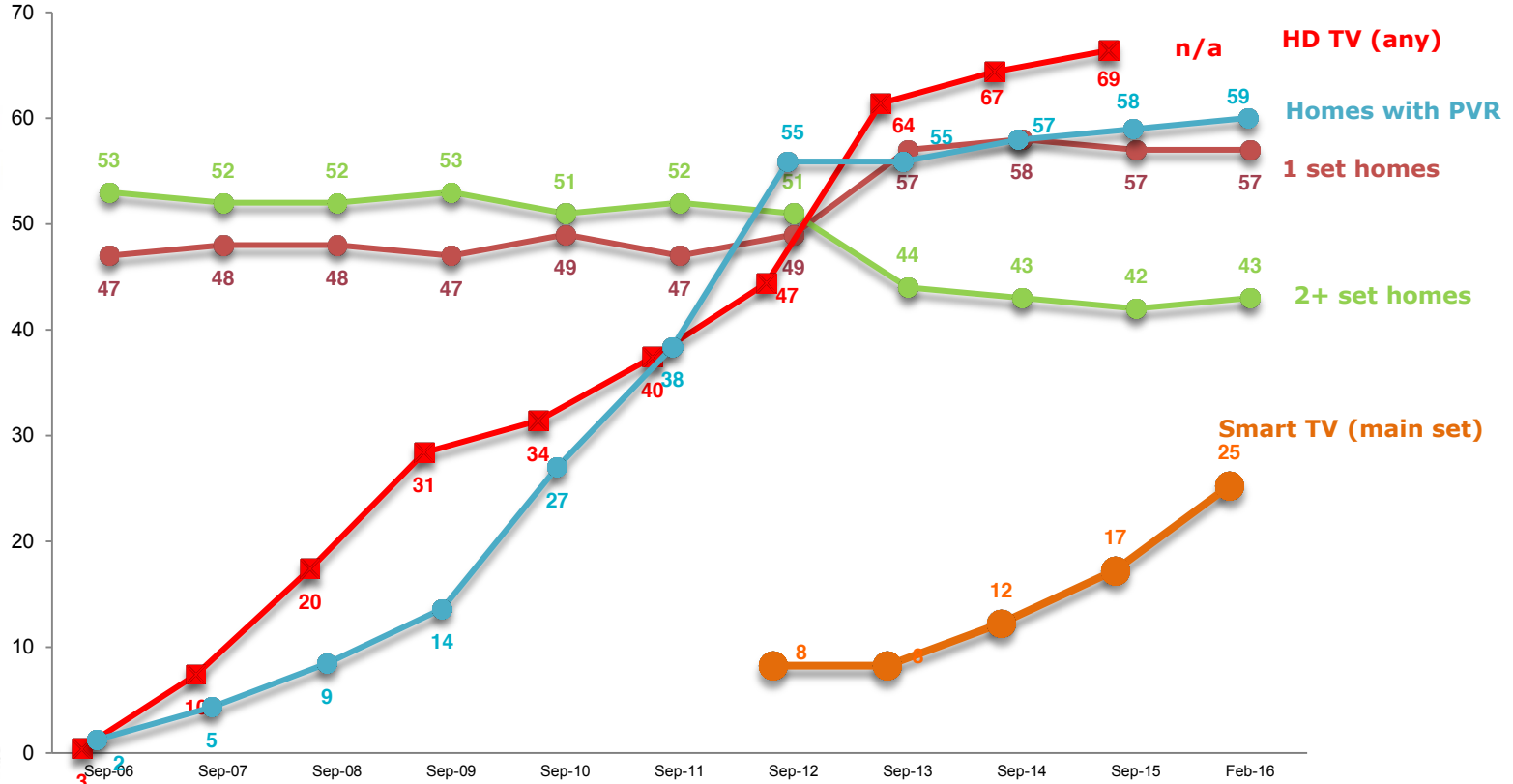
HD TV



Smart TV Home (Main set)



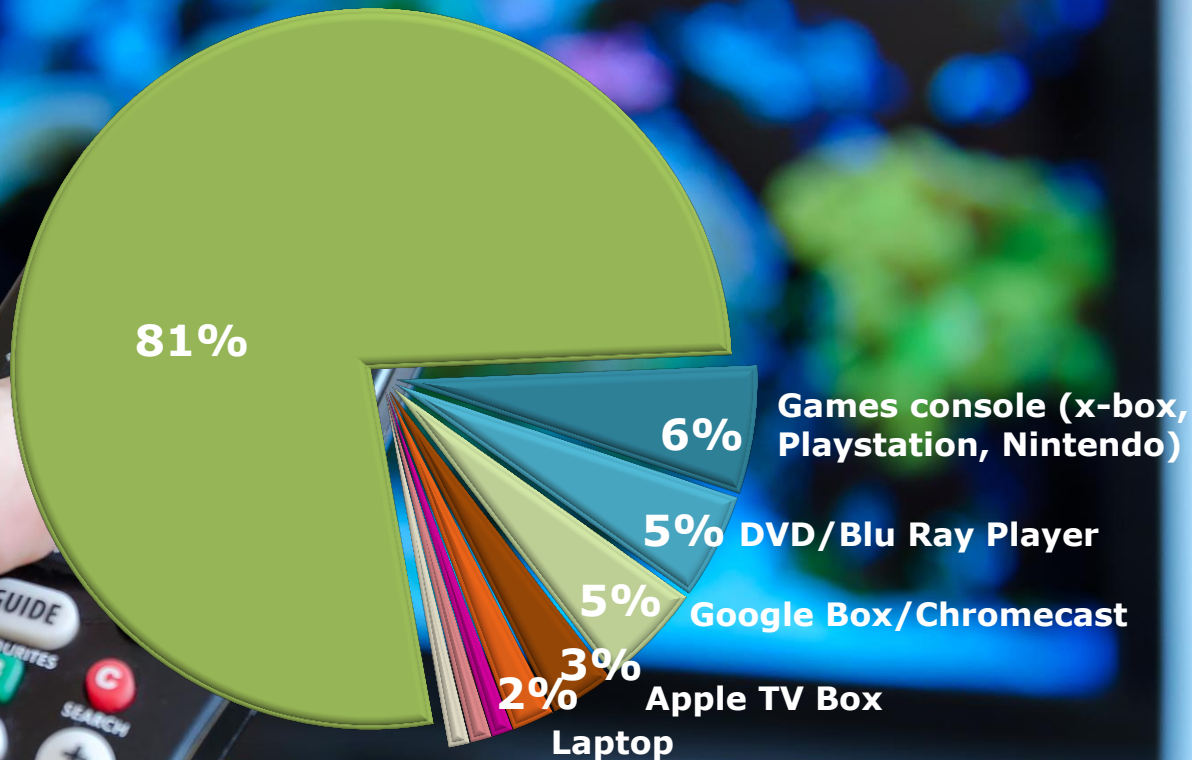
Homes with PVR



# Let's take a closer look at how connected these TV sets are

Base: All TV Households

Any sets connected through peripheral device

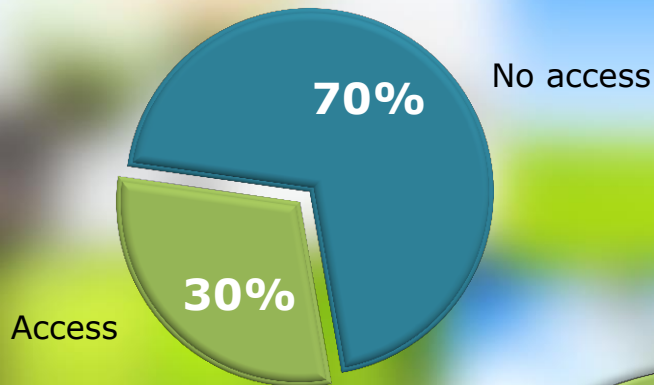


1% Other media player (e.g. Roku)  
1% Tablet  
1% Other (e.g. Android stick)

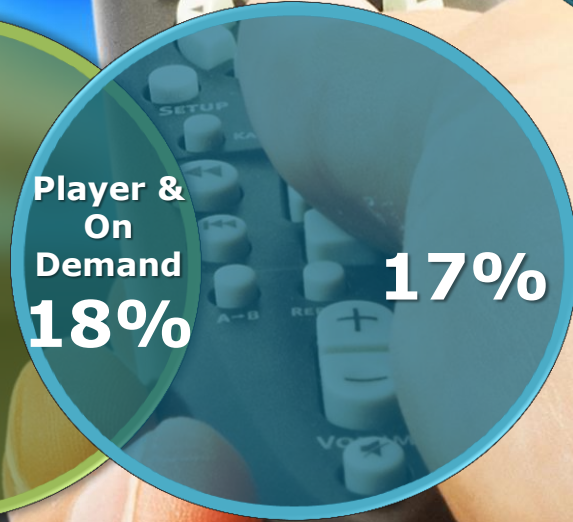
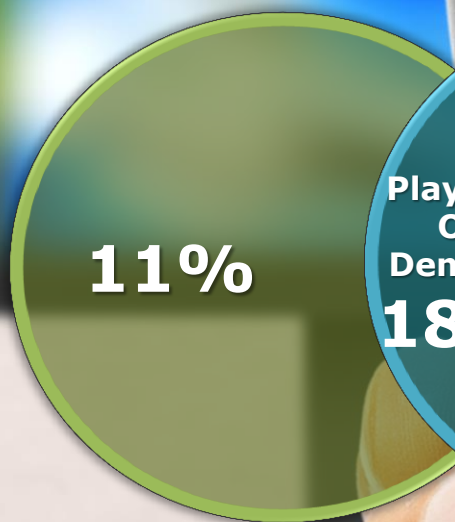
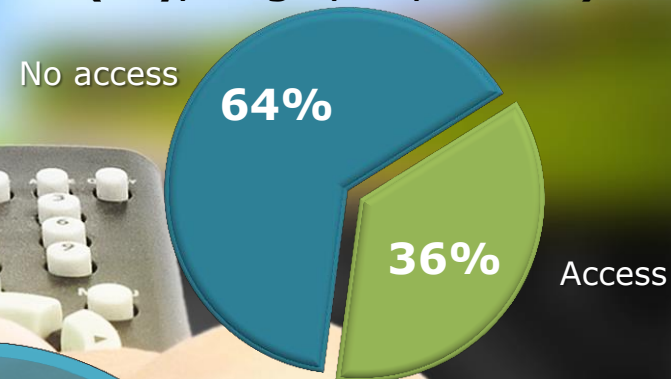
# Total VOD Home Access Overview

Base: All TV Households

## Access any Player



## Access any On Demand service (Sky, Virgin, eir, Netflix)



Player only

On Demand only

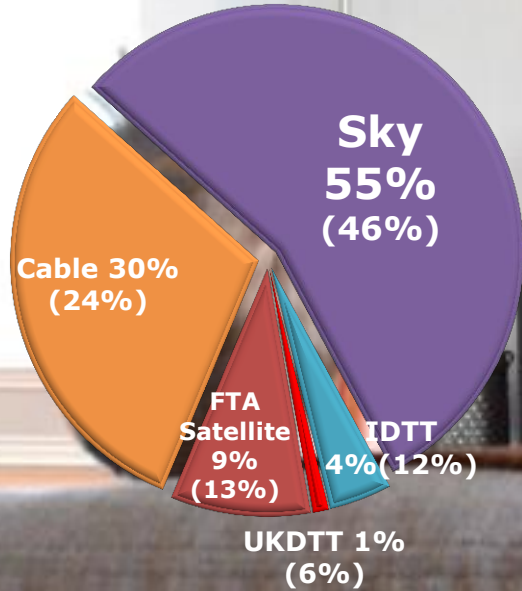
Almost half (46%) of all TV households subscribe to, pay for or access for free at least one type of VOD service



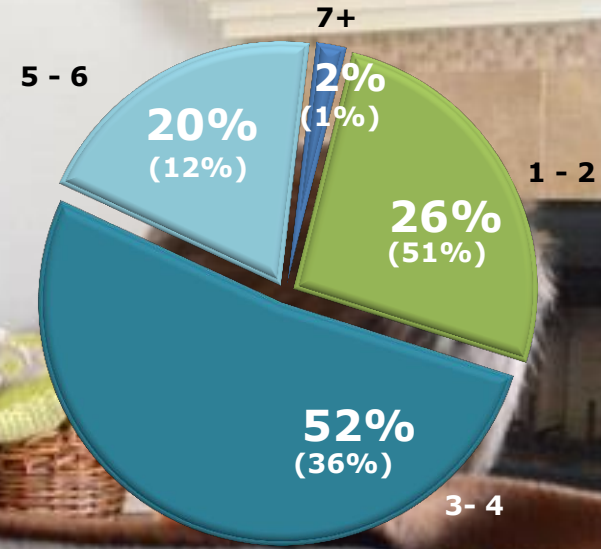
# What's been going on with Netflix?

Base: All Netflix Users

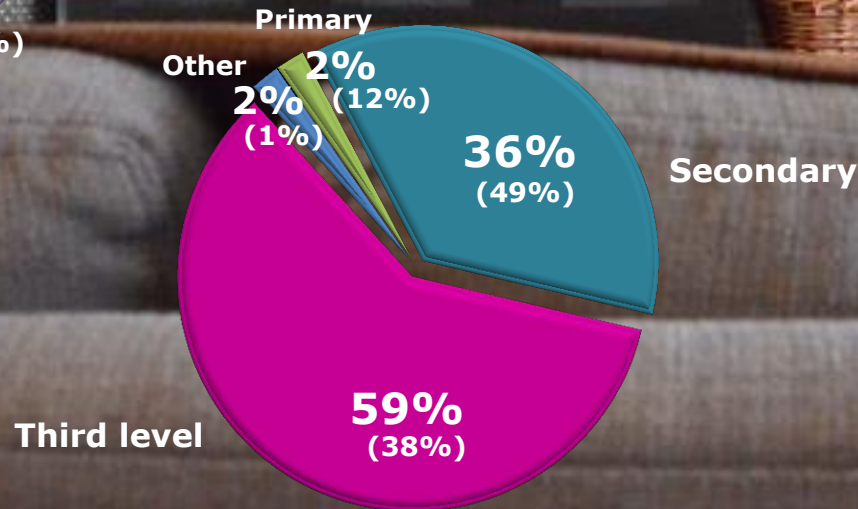
## Reception Type



## Household Size



## Education Level



(% of all TV homes)



**THANK YOU**

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