



Navigation Overview:

A Preliminary Look at Findings from the
November 2006 Navigation Study

Originally presented at the PBS Showcase
May 2007 –Dallas, Texas

Adapted for use by the Accessibility Working Group

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Survey Design and Method

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Survey Design

- Two weeks of interviewing (November 5-18, 2006)
 - Survey “open” 10 PM each night to 10 AM the next morning
 - 571 interviews completed within the designated 12-hour period; majority of interviews completed within 5 hours
 - November 7th (Election night) “swapped” for November 21st
- Three “levels” of television viewing explored
 - Primetime television viewing tonight or last night, as well as past-week PTV primetime viewing
 - Up to two one-hour viewing periods investigated for each respondent
 - A total of 651 primetime viewing events explored
- General approach to primetime television
 - Technology (IPGs, DVRs, VOD, HDTV)
 - How they locate and learn about programs

Methodology and Sample

- Projectable results
 - KnowledgePanelSM is the only online panel that is a national probability sample recruited through random digit dialing (RDD)
 - Demographics closely resemble Census data
 - Non-internet homes included through use of WebTV
- “Natural” setting for the survey
 - Primetime viewing in one’s own home
 - Random selection of nights interviewed (not a “recruit-to-view”)
 - Beginning with the question, “What did you watch tonight/last night?”
 - Subsequent questions referred to that *specific* viewing experience
- Analyzed by strategic audience segment
 - Data from 2006 Awareness, Attitudes, and Usage (AAU) Study merged with viewing data collected in this study

Television Reception in the Home

	All Adult Primetime Viewers (n=571)	Primetime PTV Viewers* (n=459)
Broadcast-only	12%	12%
Cable-plus**	88	88
Digital cable	25	22
Digital satellite	27	27

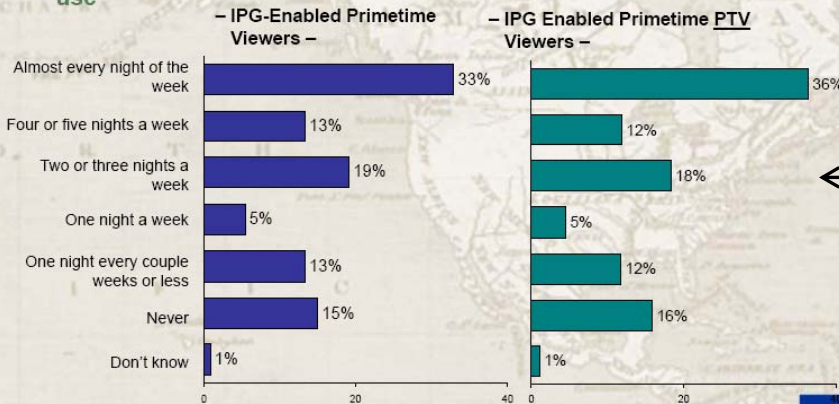
**“Primetime PTV Viewers” are defined as adults who reported having done any of the primetime viewing on a public television station within a week of the survey*

*** “Cable-plus” is defined as a household that has access to cable programming either through any kind of cable or satellite reception.*

How to Read Slides

Use of IPGs during Primetime

- > More than one-third of IPG-enabled respondents use their IPGs almost daily, which translates into 17% of all adult primetime viewers
- > Primetime PTV viewers closely resemble all primetime viewers in IPG use



Q18. How often, if at all, do you use an interactive program guide during primetime, 8 to 11 PM (7 to 10 PM)? Base: IPG-enabled (digital cable or satellite) respondents: primetime viewers (285); primetime PTV viewers (221)

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Main take-away

Supporting data

Question as it is worded in the survey



Two Main Areas of Learning

1. Usage of specific TV technologies

- **Interactive Program Guides (IPGs)**
- **Digital Video Recorders (DVRs)**
- **Video on Demand (VOD)**
- **High Definition Television (HDTV)**

2. Methods for navigating choices

- **Promotion**
- **Scheduling**
- **Favorites sets**

Usage of TV Technologies

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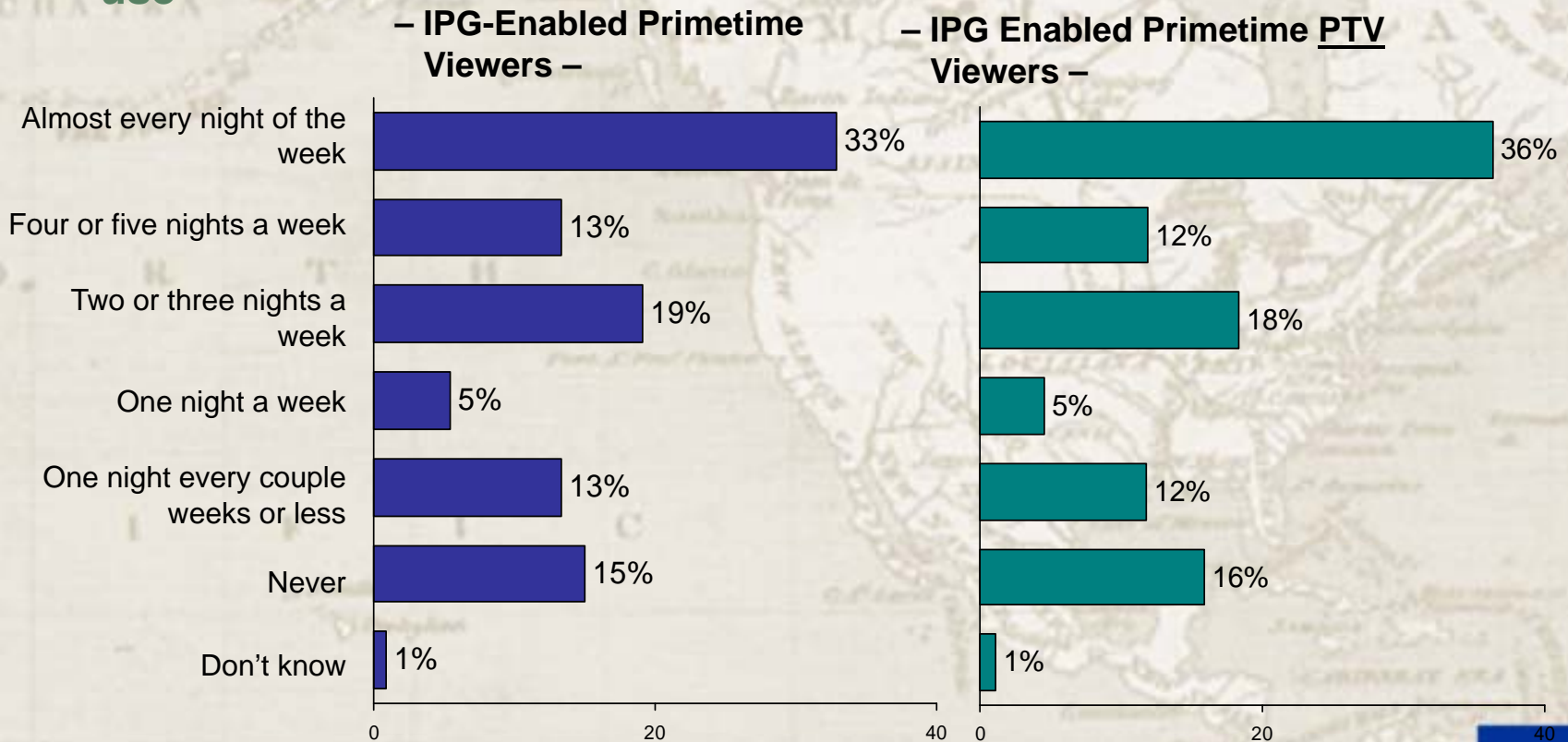


Interactive Program Guides

**50% of primetime-viewing adults in this study are IPG-enabled
[compare with Home Technology Survey results: 46% in 2006 and 53% in 2007]**

Use of IPGs during Primetime

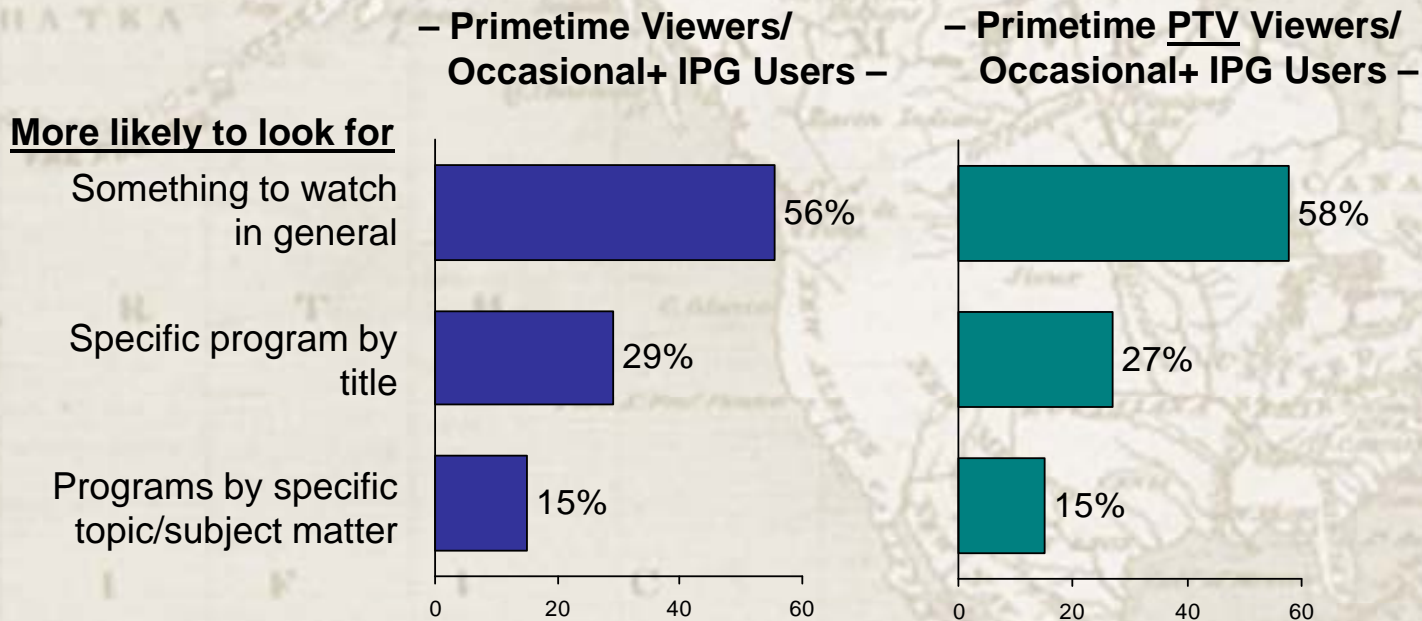
- More than one-third of IPG-enabled respondents use their IPGs almost daily, which translates into 17% of all adult primetime viewers
- Primetime PTV viewers closely resemble all primetime viewers in IPG use



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Purpose of IPG Use

- A majority of IPG use involves looking for something to watch in general

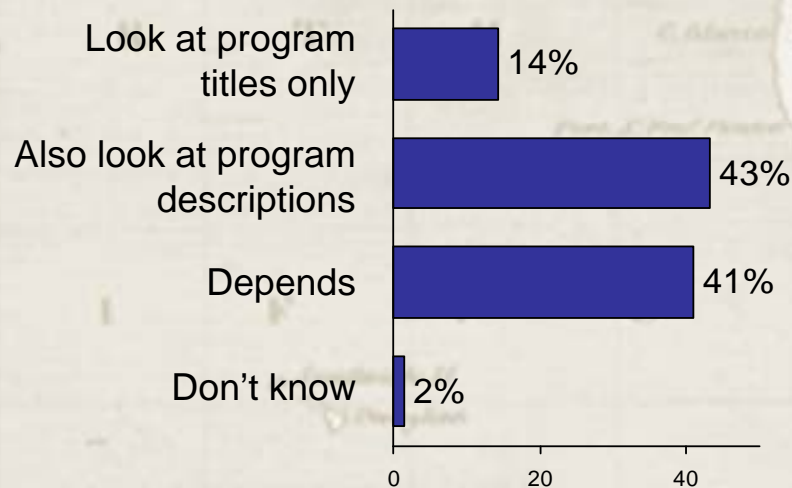


Q19. On occasions when you use your IPG during primetime, are you more likely to look for specific programs by title ... look for programs by specific topic or subject matter ... of just look for something to watch in general? Base: Occasional or more frequent IPG users: primetime viewers (218); primetime PTV viewers (167)

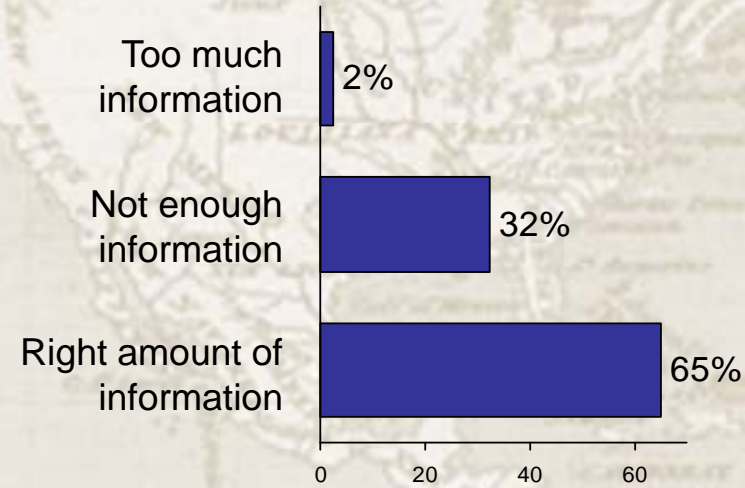
Titles and Descriptions

- Most IPG users move beyond title checking to program descriptions
- Most who use an IPG program information feature are content with amount of information provided; if anything, more information is desirable

– Primetime Viewers/
Occasional+ IPG Users –



– Primetime Viewers Who Use
IPG Program Info Feature –



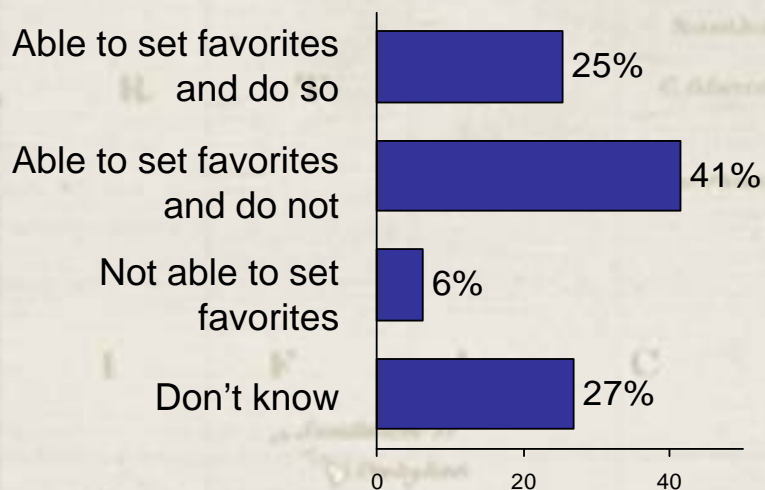
Q20. And, do you typically just look at the program titles on the interactive program guide grid, or do you move to the next level to read the program descriptions? Base: Occasional or more frequent IPG users: primetime viewers (218); primetime PTV viewers (167)

Q21. When you use the program information feature of your interactive program guide which provides program descriptions, do you feel that it gives you too much information ... not enough information ... or the right amount of information? Base: Typical primetime TV viewers who use IPG program information feature: total (183); PTV (142)

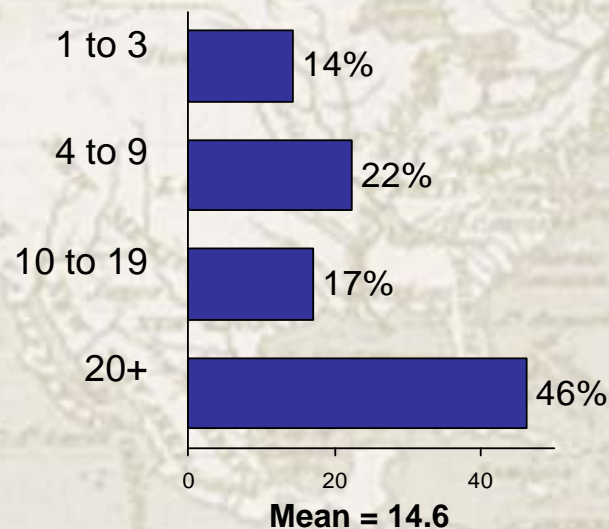
Use of IPG “Favorites” Feature

- Two-thirds of IPG users are capable of setting “favorites”; one-quarter do so
- Close to one-half of those who set favorites have done so with 20 or more channels

– Primetime Viewers/
Occasional+ IPG Users –



– Among those who set favorites,
number of favorites set



Q22. Some interactive program guides have a feature that allows users to set their favorite channels. Does your interactive program guide provide this feature and, if so, do you use it? Base: Occasional or more frequent IPG users: primetime viewers (218); primetime PTV viewers (167)

Q23. How many channels have you set as your “favorites”? Base: IPG “favorites” users: primetime viewers (55); primetime PTV viewers (41)



Digital Video Recorders

20% primetime-viewing adults in this study have DVRs of any kind

[compare with Home Technology Survey results: 12% in 2006 and 14% in 2007]

DVR Ownership by Audience Segment

	All Adult Primetime Viewers	Discerning & Dedicated	Measured & Engaged	Enthusiastic & Open	Innovating & Inclined
Yes, HH has DVR	20%	13%	11%	17%	26%
No, HH does not have DVR	80	87	89	83	74

Q10. Does your household have a Digital Video Recorder (DVR) that is hooked up to any TV set? [Explanation of DVR followed.] Base: Total respondents (571); primetime PTV viewers (459); past-week PTV viewers (115)

DVR-Recorded Program Viewing

- Primetime viewers overall who record with a DVR typically record:
 - 2.8 nights per week (slightly less for PTV viewers)
 - 2.3 programs per night
- Top genres for DVR recording:
 - Drama (63%)
 - Crime/law/forensic (38%)
 - SciFi/fantasy (25%)
 - Reality (23%)
 - Comedies/sitcoms (22%)
- Other genres recorded by DVR (less than 10%):
 - News/public affairs
 - Sports
 - Public television
- 20% of those who record primetime programs typically watch them the same evening; 41% watch them the day after

Q27. On a typical evening when you use the DVR to record programs, about how many different primetime programs do you usually record

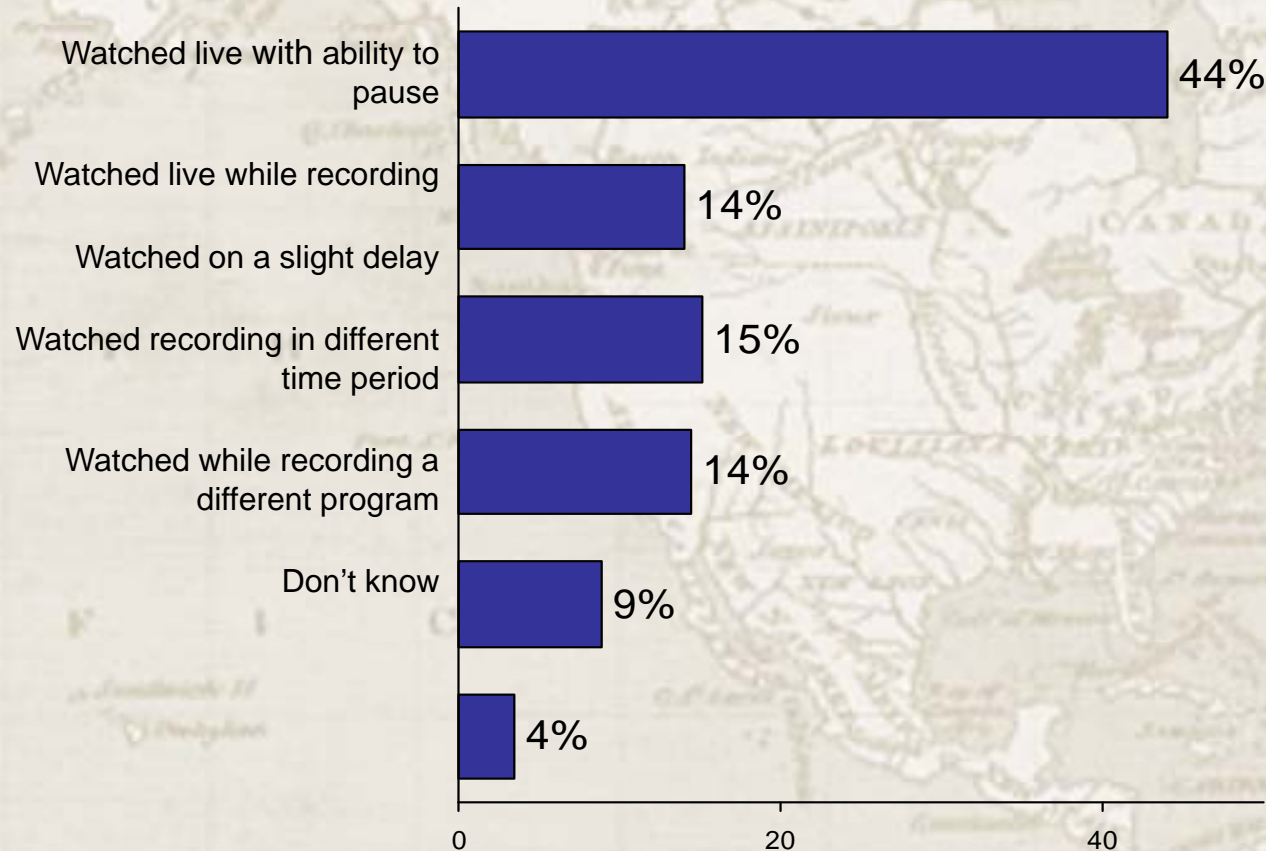
Q28. What are the names of the primetime programs that you regularly record on your DVR?

Q29. How long after you record these programs do you typically watch them?

Base: Primetime viewers who record with a DVR: total (76); PTV (62)

How They Watched with their DVR

- More than ½ of DVR viewers were watching their selected program live



Q2G/Q3G/Q4G. Which of the following best describes how you watched [selected program] [tonight/last night] between [hour reference]?
Base: 15+-minute viewers with DVRs connected to set for whom each hour was selected and a program named (115 viewing events)

Perceived Benefits of DVR Use

"Strongly agree that . . ."	Primetime Viewers who record with a DVR
DVRs make TV viewing more enjoyable	73%
Your DVR helps you plan your viewing	59
Your DVR makes it easy for you to find something to watch	55
Using a DVR expands the variety of programs you watch	44
You are channel surfing less now that you have a DVR	35

Q30. Please tell me how much you agree or disagree with each of the following statements about digital video recorders.

Base: Primetime viewers who record with a DVR: total (76); PTV (62)

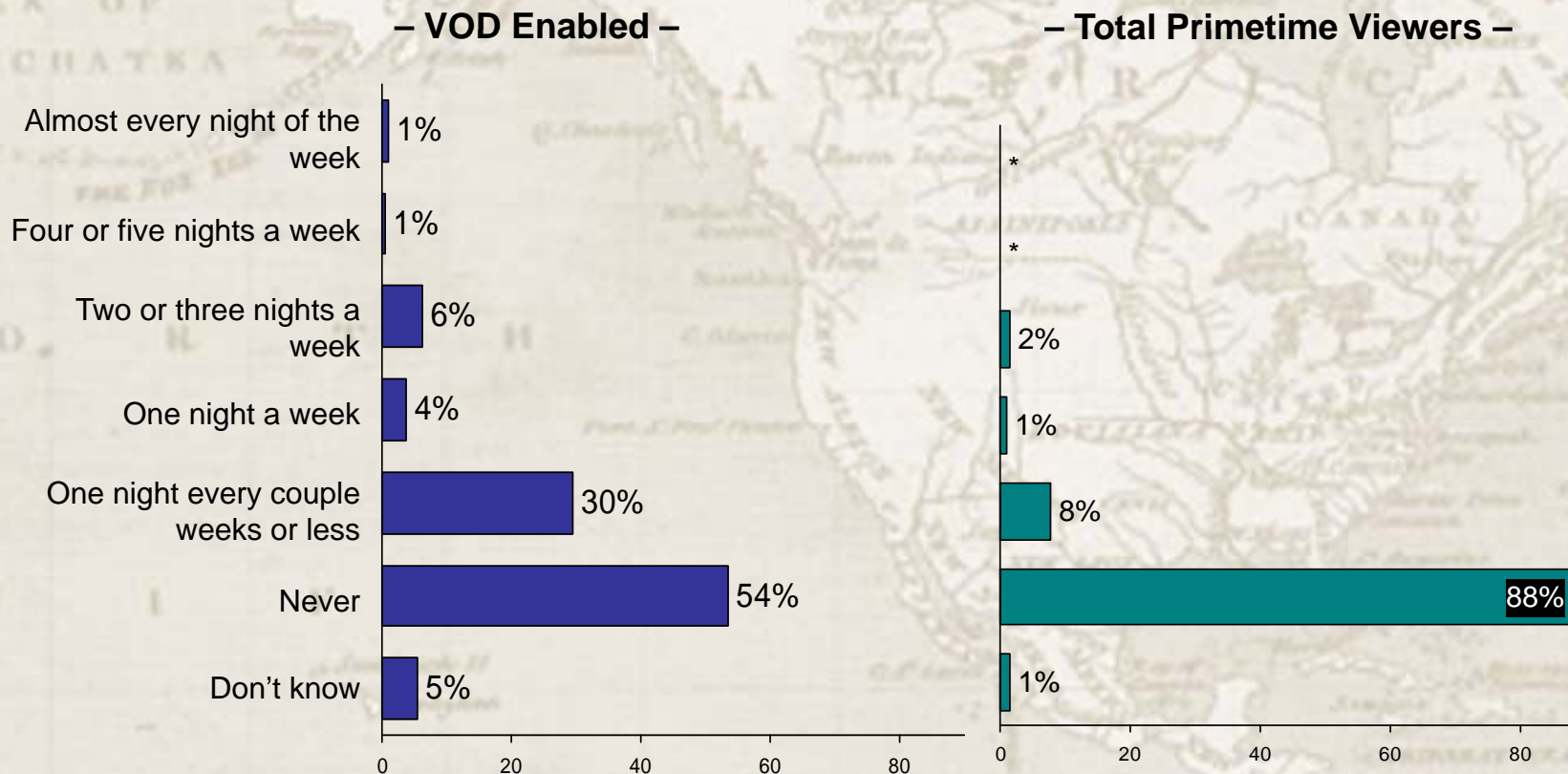


Video On Demand

**19% of primetime-viewing adults in this study are VOD-capable
[compare with Home Technology Survey results: 17% in 2006 and 22% in 2007]**

Frequency of VOD Use

- On-Demand program viewing is infrequent, even in VOD-enabled households



Q31. How often, if at all, do you watch programs "on-demand" during primetime, 8 to 11 PM (7 to 10 PM)?

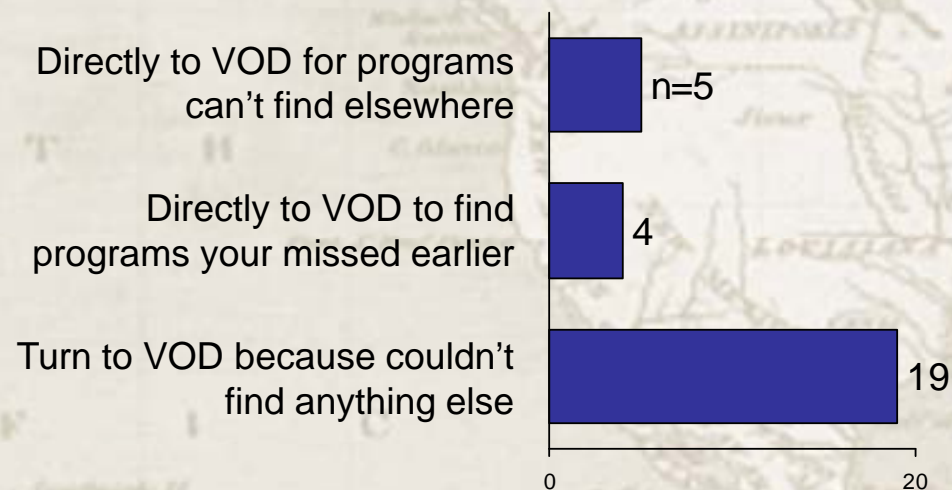
Base: VOD-enabled primetime viewers (144); total primetime viewers (549)

* Less than 0.5 percent

Typical Reason for Accessing VOD

- For the few who use it, on-Demand program viewing in primetime is more often a last resort than a destination

– Primetime Viewers Who Watch VOD at Least Occasionally –



Q32. On evenings when you watch on-demand programs, which of the following best describes how you typically use your on-demand service?
Base: Typical primetime TV viewers who use on-demand at least occasionally: total (28); PTV (17)



High Definition TeleVision

15% of primetime-viewing adults have HD sets

[compare with Home Technology Survey results: 14% in 2006 and 20% in 2007]

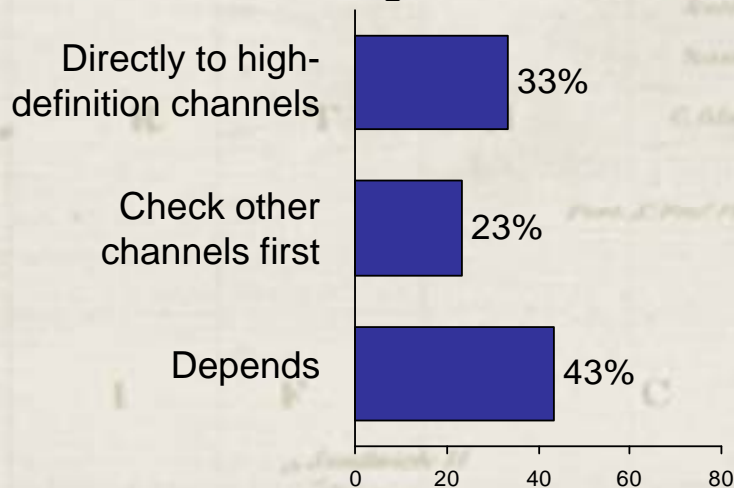
11% have HD reception

[compare with Home Technology Survey results: 11% in 2006 and 13% in 2007]

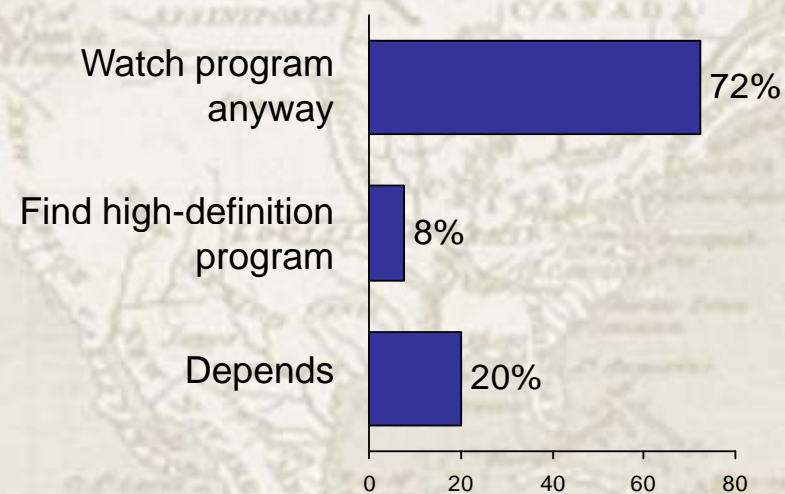
Impact of HD on Program Choice

- For one-third of primetime viewers with an HDTV set, high-definition channels are their first destination
- But content will win out over picture in most cases

– How Primetime Viewers with an HDTV Set Typically Start Their Viewing –

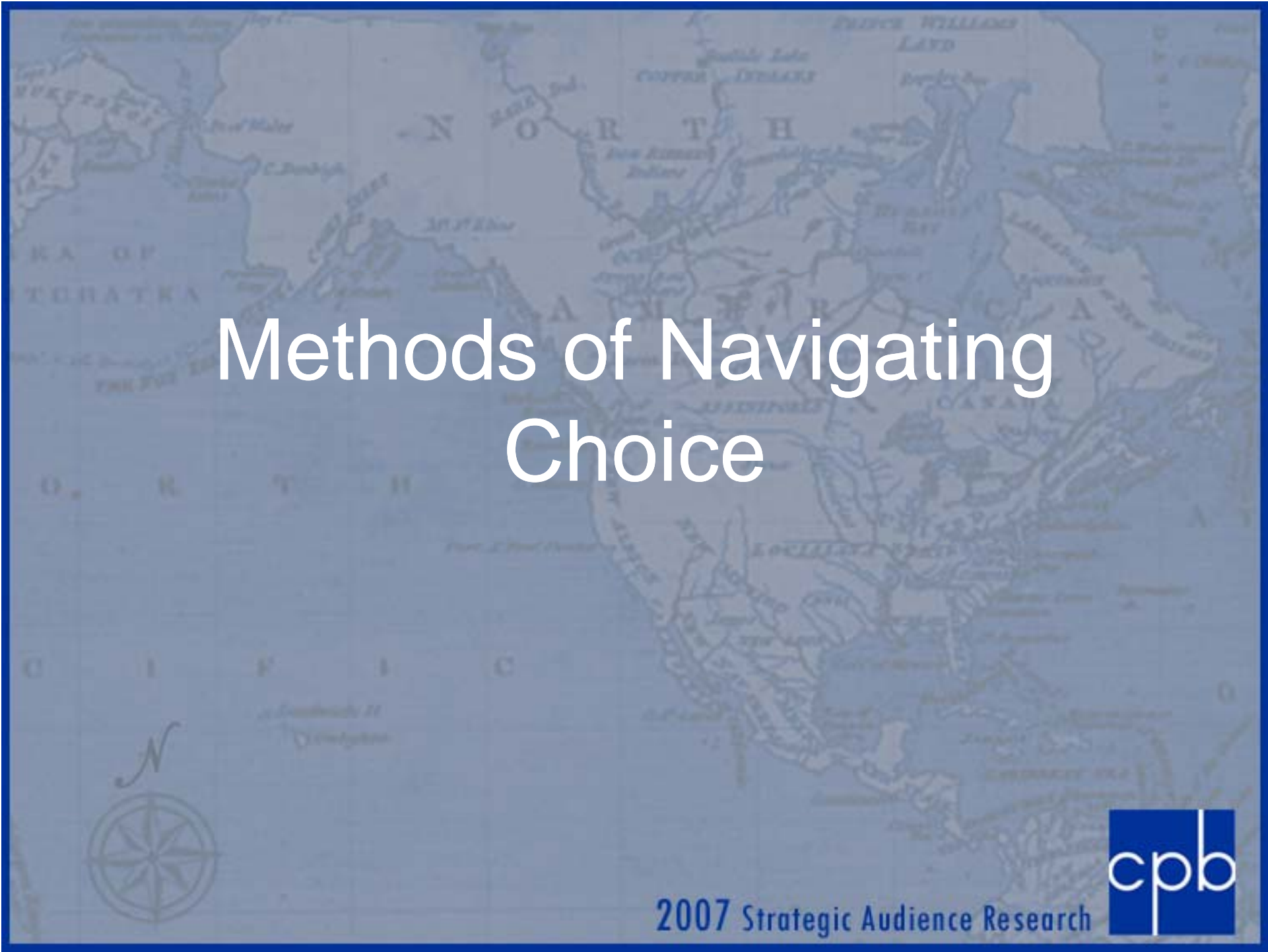


– What They do if the program they want to watch isn't available in HD –



Q33. On evenings when you watch TV on your HDTV set, do you typically start your viewing by going directly to the high-definition channels, or, do you look at your high-definition channels only after you have checked for programs on the other channels on your set? Base: Typical primetime TV viewers with an HDTV set: total (60); PTV (44)

Q34. If a program you wanted to watch in primetime was not being broadcast in high definition, would you watch it anyway or find a different program that was being broadcast in high definition? Base: Typical primetime TV viewers with an HDTV set: total (60); PTV (44)



Methods of Navigating Choice

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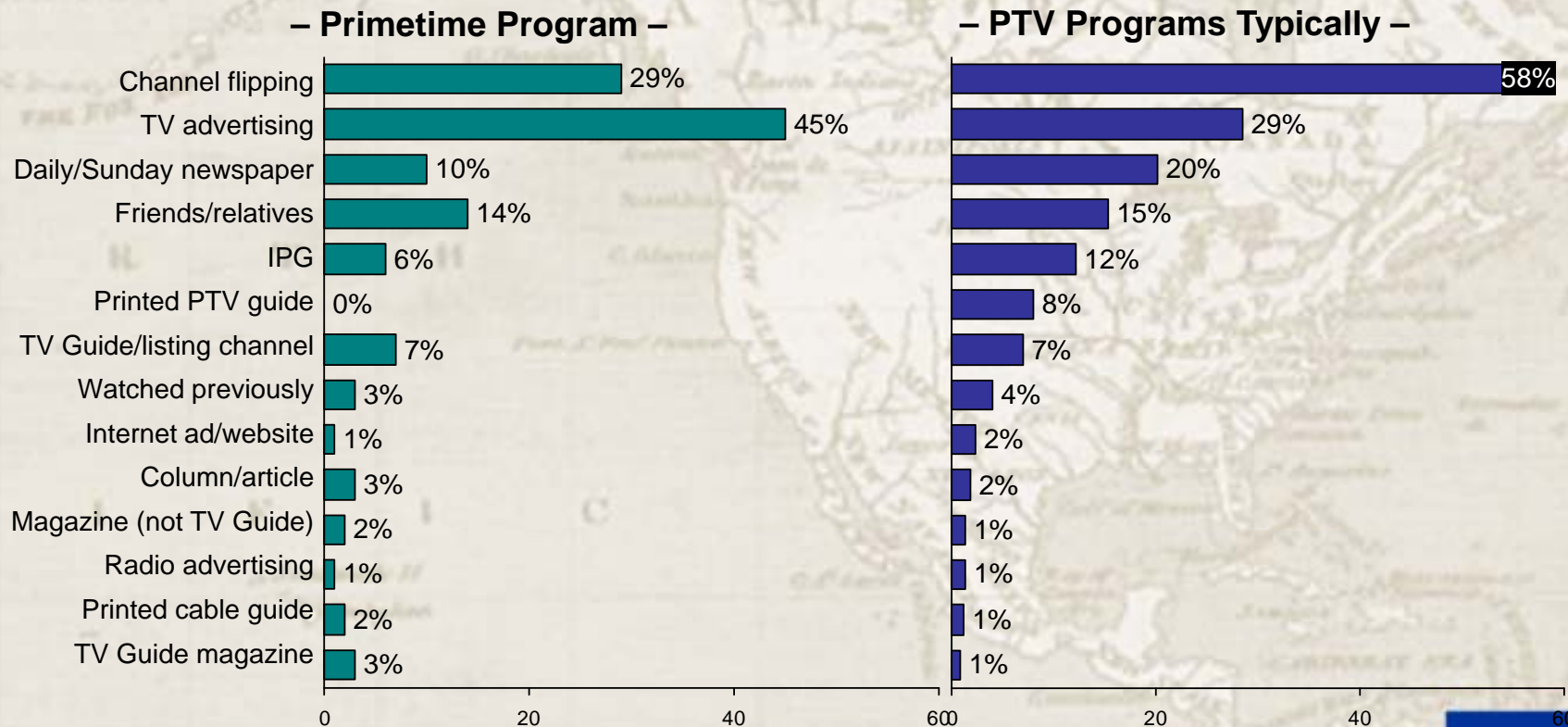
The Impact of Promotion

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How Viewers First Learn About Programs

- Advertising dominates sources of program information in the overall primetime environment
- But learning about PTV programs is more often a matter of chance, with channel flipping the dominant path to PTV programs watched



Q7B. How do you typically first learn about the primetime programs you watch on your public TV channel(s)? Base: PTV programs typically: viewers who named a public TV program (115)

Q2D/Q3D/Q4D. As best you can recall, how did you first learn about [selected program]? Base: Primetime program: 15+-minute viewers for whom each hour was selected and who named a program (618 viewing events) Multiple responses accepted



A historical map of North America, showing the continent from the Atlantic to the Pacific. The map is titled 'The Role of Scheduling' in large, bold, red text. The map itself is a detailed historical representation, showing various geographical features, rivers, and settlements. The title is centered over the eastern part of the continent.

The Role of Scheduling

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Planned Viewing

- Close to two-thirds all primetime and primetime viewers knew in advance they were going to watch the program they selected before they started watching TV
- Some variation by strategic audience segment

	All Adult Primetime Viewers	Discerning & Dedicated	Measured & Engaged	Enthusiastic & Open	Innovating & Inclined
Knew in advance	63%	62%	84%	59%	53%
Did not know in advance	36	38	16	39	47
Don't know	1	-	-	2	-

Q21/Q31/Q41. Did you know you were going to watch [selected program] before you started watching TV? Base: 15+-minute viewers for whom each hour was selected and a program named: primetime viewers (618 viewing events); primetime PTV viewers (501 viewing events); past-week primetime PTV viewers (141 viewing events)

Setting Time Aside for Programs

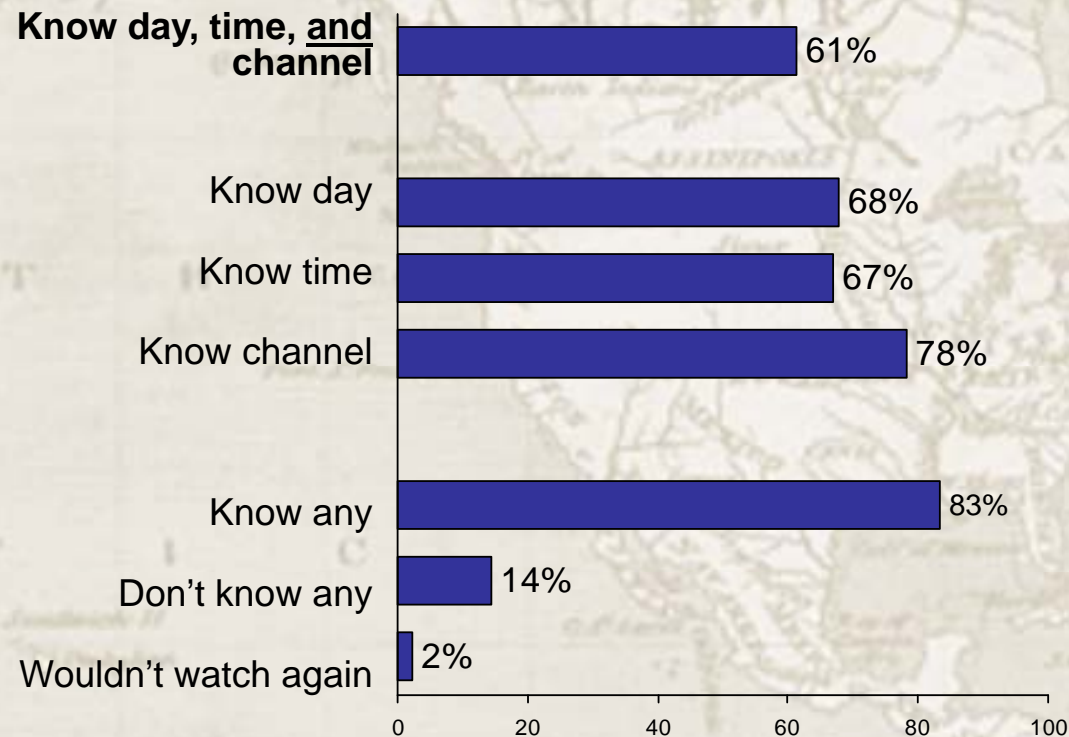
- Two-thirds of all primetime viewers typically make a special effort to watch their selected program
- Some segment-based differences

	All Adult Primetime Viewers	Discerning & Dedicated	Measured & Engaged	Enthusiastic & Open	Innovating & Inclined
Set aside time/made special effort	66%	65%	76%	68%	60%
Did not set time aside	32	35	20	29	40
Don't know	2	-	4	3	-

Q2J/Q3J/Q4J. Is [selected program] a show you typically set aside time for or make a special effort to watch? Base: 15+-minute viewers for whom each hour was selected and a program named: primetime viewers (618 viewing events); primetime PTV viewers (501 viewing events); past-week primetime PTV viewers (141 viewing events)

Finding Their Way Back

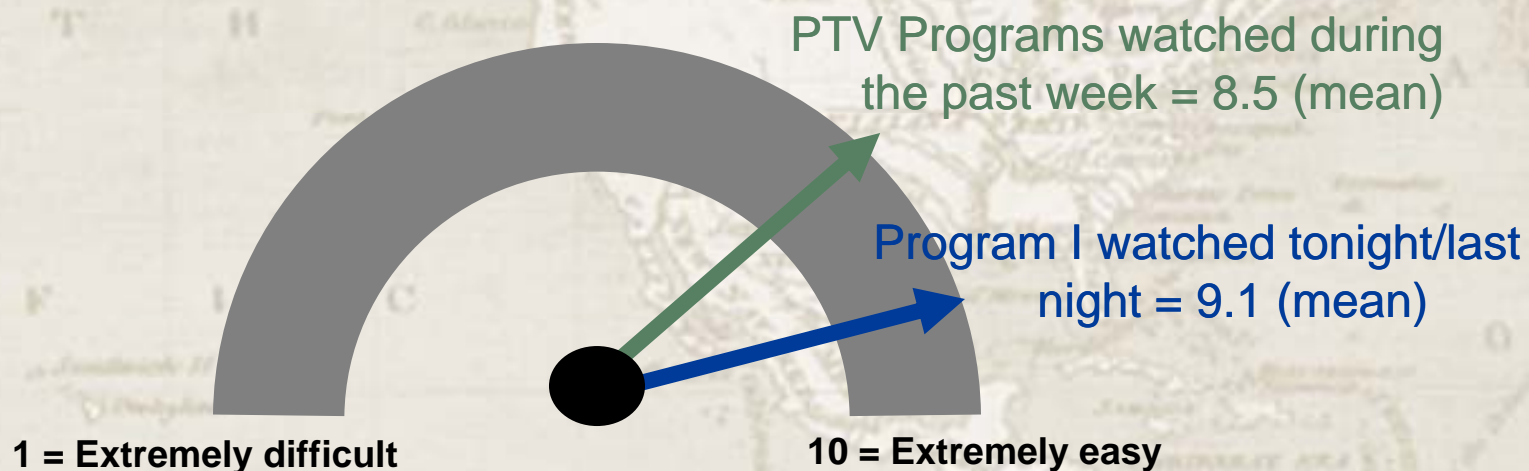
- Six in ten viewers believe they know when (date and time) and where (channel) to look for their selected program if they wanted to watch again.



Q2N/Q3N/Q4N. If you wanted to watch [selected program] again, the next time it would be broadcast, would you know the day, the time, and the channel to locate that program? Base: 15+-minute viewers for whom each hour was selected, a program named, and would watch again (616 viewing events)

PTV Programs Somewhat Harder to Find

- PTV programs watched in the past week would be somewhat more difficult to locate for repeat viewing than tonight/last night's primetime programs
 - Measured & Engaged (9.6) would have the least difficulty re-locating the PTV programs they viewed in the past week
 - Younger viewers, 18-34 (6.9) would find it most difficult to re-locate the PTV programs they viewed in the past week



Q7L. Using the scale below (1-10), please tell us how easy or difficult it would be for you to locate again the programs that you watched on PTV this past week? Base: Past-week primetime PTV viewers (115)

Q20/Q30/Q40. And, using the scale below (1-10), please tell us how easy or difficult it would be for you to locate [selected program] again, the next time you want to watch it? Base: 15+-minute viewers for whom each hour was selected, a program named, and want to watch again (597 viewing events)

A historical map of North America, showing the continent from the Arctic region in the north to the Gulf of Mexico in the south. The map is titled 'NORTH AMERICA' and includes various geographical features, rivers, and tribal names. The text 'Use of "Favorites" Sets' is overlaid in a large, bold, red font across the center of the map.

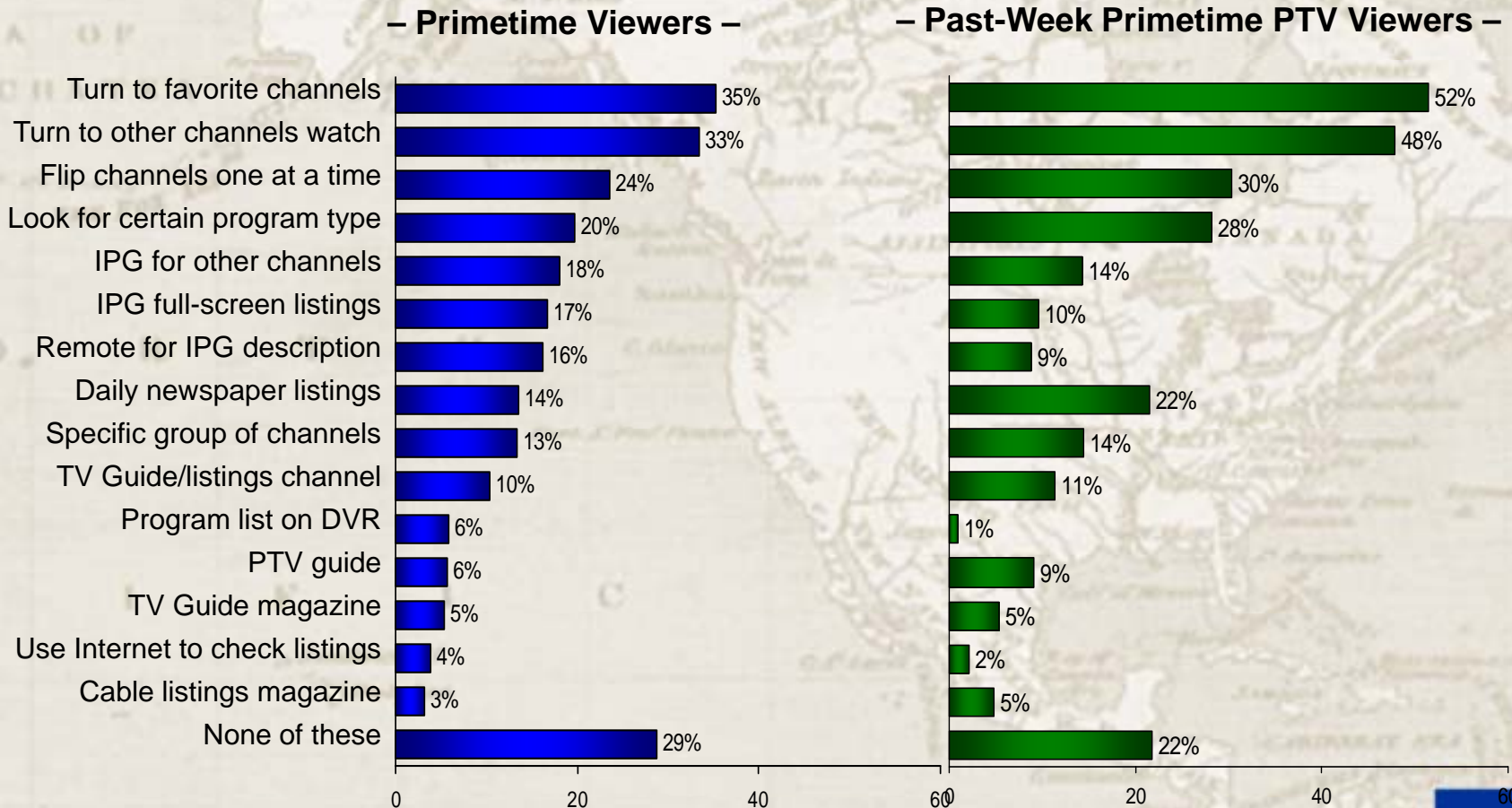
Use of "Favorites" Sets

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Actions Leading Up to Viewing

- Past-week PTV viewers among those most likely to check “favorites”



Q2K/Q3K/Q4K. On this particular viewing occasion for [selected program], did you do any of the following leading up to your viewing of that program? Base: 15+-minute viewers for whom each hour was selected and a program named: all primetime viewers (618 viewing events); past-week primetime PTV viewers (141 viewing events) Multiple responses accepted

Number of Channels Flipped Through Before Deciding on Selected Show

	All Adult Primetime Viewers	Discerning & Dedicated	Measured & Engaged	Enthusiastic & Open	Innovating & Inclined
1-9 channels	61%	40%	100%	54%	35%
10-19 channels	18	25	-	33	26
20+ channels	21	36	-	14	39
mean # of channels	16.2	24.1	2.7	10.8	17.0

Q2L/Q3L/Q4L. About how many channels did you flip through before you decided to watch [selected program]?

Base: 15+-minute viewers for whom each hour was selected, a program named, and flipped channels to locate the program (145 viewing events)