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Digital Media in Australian Homes – 2006

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Canberra Central Office
Purple Building, Benjamin Offices
Chan Street, Belconnen
PO Box 78,
Belconnen ACT 2616
Tel: 02 6219 5555
Fax: 02 6219 5200

Melbourne Central Office
Level 44, Melbourne Central Tower
360 Elizabeth Street, Melbourne
PO Box 13112 Law Courts
Melbourne Vic 8010
Tel: 03 9963 6800
Fax: 03 9963 6899
TTY: 03 9963 6948

Sydney Central Office
Level 15, Tower 1 Darling Park
201 Sussex Street, Sydney
PO Box Q500
Queen Victoria Building NSW 1230
Tel: 02 9334 7700, 1800 226 667
Fax: 02 9334 7799

FOREWORD

The release of the results from this second study into the adoption of digital free-to-air television at ACMA's November 2006 Information Communications and Entertainment Conference coincided with the launch of the Australian Government's Digital Action Plan. The Minister for Communications, Information Technology and the Arts, Senator Helen Coonan, highlighted the importance of research to support the transition of free-to-air television from analog to digital. The plan provides ACMA with funding to continue a program of community research in this area.

This report gives the full results of the second ACMA national survey conducted in October 2006. It shows that household penetration of digital free-to-air television more than doubled in the 15 months between this survey (just under 30 per cent of households) and ACMA's first survey in July 2005 (13 per cent of households).

There is considerable work to be done as Australia moves towards digital switch-over. Both studies identify a substantial number of non-adopters, who lacked interest in digital free-to-air television, were happy with current television offerings, believed that digital equipment is too expensive or did not see any benefits in such a change.

Fundamental knowledge gaps are illustrated by the 40 per cent of all households who did not know whether digital free-to-air television is available to them and the 14 per cent who had not heard of digital free-to-air television at all.

As part of its Digital Action Plan activities, ACMA has developed a five-year community research strategy from 2007 to 2011. In 2007, ACMA will commission a third national annual 'adoption' survey and qualitative research as a prelude to a more specific series of 'switch-over' surveys and other studies between 2008 and 2011.

I commend to you this report and ACMA's future research in this area. It will be an essential source of information that will track the take-up of digital free-to-air television and address important community information needs as they arise along the way.

Chris Chapman
Chairman

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SUMMARY

Research context

Digital terrestrial television broadcasting (DTTB), or digital free-to-air television, is progressively being rolled out in Australia. Free-to-air television services are currently being simulcast in digital alongside the existing analog services across most parts of Australia, and DTTB will eventually replace the analog broadcast of these services. The five main free-to-air television services—Channels 7, 9 and 10 (and their affiliated regional services), the Australian Broadcasting Corporation (ABC) and the Special Broadcasting Service (SBS)—are available in digital to approximately 90 per cent of Australian households provided that households have the appropriate digital receiving equipment. The target identified by the Australian Government for commencing digital switch-over is 2010 to 2012.

On 23 November 2006, the Minister for Communications, Information Technology and the Arts, Senator Helen Coonan, launched the government's Digital Action Plan—*Ready, Get Set, Go Digital*. The plan aims to ensure that government, industry, manufacturers, the regulator and consumers work together to facilitate the transition to digital.

The Australian Communications and Media Authority (ACMA) will undertake an ongoing program of community and technical research into issues that are relevant to the adoption of DTTB. That program of research will build on two preliminary national community surveys commissioned by ACMA into the household adoption of DTTB and other digital media in 2005 and 2006.

Eureka Strategic Research conducted the two preliminary surveys for ACMA in July 2005[1] and October 2006. This report presents the results of the Digital Media in Australian Homes – 2006 study, which was conducted in October 2006 with key objectives to:

- identify the household penetration of DTTB, subscription television, the internet, and personal digital video recorders;
- understand the 'drivers' for adopting DTTB and reasons for non-adoption; and
- measure awareness of DTTB and analog switch-off, and sources of information about digital television.

Research design and sampling

The research was underpinned by a national representative and robust quantitative survey methodology. A large sample of N=1,537 households was attained, enabling a relatively high degree of statistical precision. Telephone interviews were conducted between 6 and 31 October 2006.

Anticipated incidences in important subgroups, for example, households in regional Australia, households speaking a language other than English (LOTE) and households with people with a disability, were reached, confirming the representativeness of the final sample attained.

[1] ACMA, *Digital Media in Australian Homes,* 2005

Key findings

MEDIA PENETRATION

Nationally, 29.6 per cent of households indicated they received DTTB, more than doubling the penetration recorded in the 2005 study (13 per cent). DTTB adopter households had higher adoption of subscription television and broadband internet.

Penetration of personal digital hard-drive recorders (PDRs) increased to almost one-fifth of households (18.2 per cent), representing an increase since July 2005 (when 4.7 per cent of households had a DVD player with hard drive, 1.0 per cent had a free-to-air digital set-top box with hard drive, and 1.0 per cent had Foxtel iQ).

Just over one-quarter (26.4 per cent) of households had subscription television, an increase since 2005 (23.7 per cent), and just over one-half of these households (54.4 per cent) also had DTTB.

It is estimated that approximately 41 per cent of households had either digital free-to-air or digital subscription television.

The internet was connected in 69.3 per cent of households and just over one-half of all households (51.7 per cent) had a broadband connection, double the number recorded in 2005 (25.8 per cent).

TELEVISION OWNERSHIP

Of the 3,564 display devices used to watch television programs in the sample, 609 (or 17.1 per cent of the overall 'stock') were identified as DTTB-capable, compared with 7.1 per cent in 2005.

AUDIO-VISUAL CONTENT DOWNLOADING/STREAMING

One-quarter (25.4 per cent) of respondents said they had watched audio-visual content that had been streamed or downloaded from the internet or from a mobile device in the last month. Computer monitors and laptops were mainly used to view such content (22.6 per cent of all respondents), followed by mobile phones or personal mobile devices (11.5 per cent), and television sets (2.3 per cent).

DIGITAL VERSUS NON-DIGITAL HOUSEHOLDS

There were differences between households that had adopted, or were planning to adopt, DTTB compared with other households—largely mirroring the insights from the 2005 study. In homes without DTTB, there was significantly less subscription television and broadband connectivity (including watching audio-visual material from the internet). Non-DTTB households also had:

- a relatively high incidence of low incomes, and a relatively low incidence of high incomes;
- a lower incidence of children aged under 16 years in their homes; and
- a higher proportion of flats or apartments than free-standing homes or townhouses.

DRIVERS FOR DTTB ADOPTION

'Enhanced picture experiences' remained the leading reason for DTTB adoption in more than one-third (36.5 per cent) of adopter households (up from 26.0 per cent in 2005). Reasons relating to 'television upgrade or replacement' increased in prominence to 28.4 per cent (11.0 per cent in 2005). Problem resolution-oriented reasons such as 'improved reception or signal' were cited by 19.6 per cent (down from 25 per cent in 2005), followed by 'extra channels, variety and choice' for 15.6 per cent (18.5 per cent in 2005).

AWARENESS OF DTTB

The 70.4 per cent of households without DTTB were asked whether DTTB reception was available in their area and if not, whether they had heard of digital free-to-air television.

- Just over one-third of non-adopters (37.5 per cent) believed that DTTB was available in their area, while 5.5 per cent said it was not available (the comparative figures for 2005 were 48.1 per cent and 6.5 per cent, respectively). The remaining 56.9 per cent did not know whether DTTB was available to them. The apparent lower awareness of DTTB availability by non-adopters in 2006 is largely due to the movement of some non-adopters to the adopter group since 2005.
- The proportion of all households that indicated they did not know whether DTTB was available in their area remained steady between 2005 and 2006, comprising 40 per cent of the survey sample. Fourteen per cent of households in 2006 had not heard of digital free-to-air television (similar to the 2005 result).

INTEREST IN DTTB

Twenty-nine per cent of non-adopter households indicated an interest in adopting DTTB (down from 39.0 per cent in 2005, again reflecting the movement of last year's non-adopters to the adopter segment). For interested non-adopter households (20.6 per cent of the total sample), expectations of 'enhanced picture experience' remained the strongest reason for their interest in 2006 (36.4 per cent of interested households, as in 2005), followed by perceiving it as 'something that will be needed eventually' (27.2 per cent, up from 14.6 per cent in 2005)—revealing greater awareness of the inevitable change to DTTB. There is still some way to go though before such interest is consummated: while 68.4 per cent of interested households planned to purchase DTTB equipment, 17 per cent of them said the purchase was likely to occur within 12 months, that is, 5.1 per cent of non-adopters.

Fundamental information needs remained among interested non-adopter households in 2006, with about three-quarters identifying specific information requirements. Twenty-one per cent said they 'needed to know everything about DTTB' or at least 'have more information' about it. Significant proportions also needed to know 'what it costs', 'what its benefits and features are', 'what brand and equipment options are available' and 'what actual equipment/hardware is required'.

Households not interested or unsure whether they were interested in adopting DTTB (70.7 per cent of non-adopters; 49.8 per cent of the total sample) put forward the following main reasons for their lack of interest:

- 'Don't know much or anything about it or haven't thought about it' (25.4 per cent of non-interested households);
- 'Having to buy equipment or too expensive/not good value' (22 per cent);
- 'Don't watch much TV' (19.4 per cent); and
- 'Currently satisfied or no need' (14.7 per cent).

ANALOG SWITCH-OFF

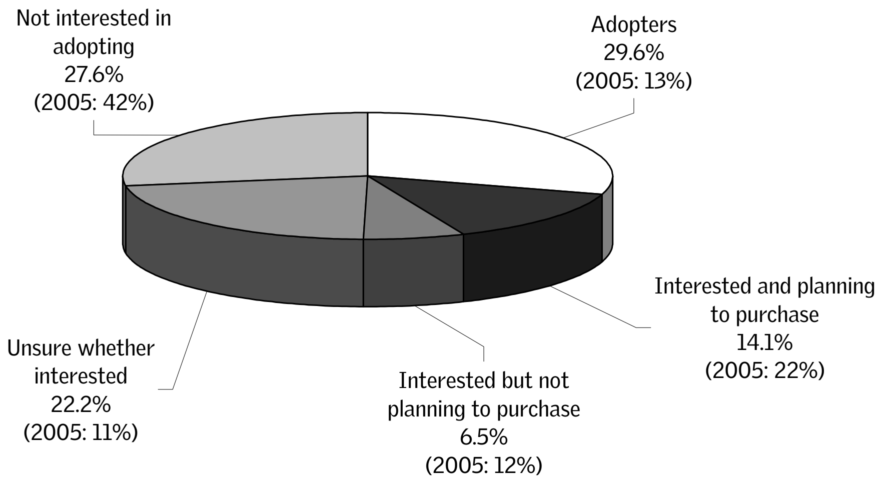
Sixty-seven per cent of households were aware of analog switch-off, a small increase on the 62 per cent recorded in 2005. The remainder—nearly one-third of all households—lacked knowledge about the future switch-over from analog to digital.

Information about DTTB was mainly obtained (by the 85.7 per cent of households who had at least heard of DTTB) from television (28.6 per cent and friends, family or colleagues (27.9 per cent). More than one-quarter (26.3 per cent) said they had neither sought nor received any information about DTTB.

SEGMENTATION OF TELEVISION-USING HOUSEHOLDS

Figure 1 summarises the distinct DTTB adoption-intention segments across Australian television-viewing households in 2006.

Figure 1: DTTB adoption-intention segmentation, October 2006



Base: N=1537 in 2006, and N=1148 in 2005

Since 2005, there has been a marked decrease in the 'not interested in adopting' segment, an increase in the 'unsure whether interested' segment, decreases in the two 'interested' segments, and a marked increase in the 'adopter' segment. The combined 'not interested' and 'unsure whether interested' segments show a small decrease (from 53 per cent in 2005 to 49.8 per cent in 2006), and there is a smaller increase in the combined 'interested' and 'adopter' segments (46.9 per cent in 2005 to 50.2 per cent in 2006).

Conclusions

The Digital Media in Australian Homes – 2006 study shows that DTTB has made considerable inroads into Australian households in the fifteen months since the 2005 survey. Compared with non-DTTB households, the 29.6 per cent of homes with at least one DTTB receiver were also characterised by significantly higher take-up of subscription television and broadband internet.

The key drivers for DTTB adoption have been enhanced picture quality, the upgrade or replacement of television sets, improved reception and the availability of some extra digital channels.

While there has been growth in household DTTB adoption since 2005 there are also a substantial number of non-adopters who appear to be some distance away from adopting DTTB. They are either happy or satisfied with their current television equipment and services, have apathy toward DTTB, believe that DTTB is too expensive, and/or do not perceive DTTB as offering benefits to them. This situation has remained relatively stable since July 2005 and reflects the views of about half (49.8 per cent) of all households in the 2006 sample (and most non-adopters of DTTB). In addition, about 15 per cent of households that indicated an interest in adopting DTTB identified a range of specific knowledge requirements.

Overlaying this is evidence that almost three in ten households (29.9 per cent; 35.2 per cent of non-adopters of DTTB) were not aware of digital switch-over, 14 per cent (20 per cent of non-adopters) had never heard of digital free-to-air television, and 56.9 per cent of non-adopters did not know if DTTB was available in their area—highlighting fundamental information gaps about DTTB and the transition to digital.

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RESEARCH CONTEXT

Background

Digital terrestrial television broadcasting (DTTB), or digital free-to-air television, has the potential to offer numerous benefits over the analog offering—for example, improved picture and sound quality, widescreen images, more channels, and a variety of program enhancements—and is being embraced by a significant proportion of Australian households. The progressive rollout of DTTB in Australia commenced in 2001.

Free-to-air television services are currently being simulcast in digital alongside the existing analog services across most parts of Australia, and DTTB will eventually replace the analog broadcast of these services. The five main free-to-air television services—Channels 7, 9 and 10 (and their affiliated regional services), the ABC and SBS—are available in digital to approximately 90 per cent of Australian households, provided the households have the appropriate digital receiving equipment. The target identified by the Australian Government for commencing digital switch-over is 2010 to 2012[2].

The Minister for Communications, Information Technology and the Arts, Senator Helen Coonan, launched the government's Digital Action Plan, *Ready, Get Set, Go Digital*, on 23 November 2006. A key objective of the plan is accelerated take-up of digital free-to-air television. The plan aims to ensure that 'industry, broadcasters, manufacturers, retailers, technicians and consumer groups are working together with Government to make the transition to digital a smooth one'[3].

The Australian Communications and Media Authority (ACMA) will undertake an ongoing program of community and technical research into issues relevant to the adoption of DTTB. That program of research will build on the two preliminary national community surveys commissioned by ACMA into the household adoption of DTTB and other digital media in 2005 and 2006.

ACMA is also responsible for managing the conversion of television transmissions from analog to digital mode. ACMA (as the Australian Broadcasting Authority—ABA) has developed legislative schemes for the conversion of commercial and national television broadcasting services from analog to digital mode over a period of time. ACMA is empowered under these conversion schemes to develop digital channel plans, which determine the channels to be allotted in each area and assigned to each broadcaster, as well as the technical limitations and characteristics of those channels.

To receive digital television programs, a minimum of either a digital set-top box (to attach to an analog television set or display device), or an integrated digital television set is required. Digital television uses a standard-definition television (SDTV) signal in a widescreen format. High-definition television (HDTV), which provides superior picture quality to SDTV, is also available using a monitor and receiver that is capable of displaying a HDTV signal.

[2] www.minister.dcita.gov.au/media/media_releases/new_media_framework_for_australia
[3] www.minister.dcita.gov.au/media/speeches/ready,_get_set,_go_digital_a_digital_action_plan_for_australia

2005 RESEARCH

In 2005, Eureka Strategic Research was commissioned by the (then) ABA to conduct a 'foundation' phase of research examining digital media in Australian homes, with a particular focus on the take-up of DTTB in Australia, and awareness and attitudes to it. That research[4] identified a small portion of 'early adopter' households (13 per cent of all households) who mainly had satisfactory experiences with DTTB hardware, with some evidence of DTTB being confused with digital subscription television. There were also substantial knowledge gaps about DTTB among non-adopter households.

Key findings of the 2005 research were:

- Many households that indicated an interest in DTTB expressed a need for more information before making a purchase. There was a widespread absence of short-term purchase intention (with only 1.3 per cent of all non-adopter households indicating that the purchase of necessary hardware would take place within 12 months).
- Almost half (45 per cent) of non-adopters did not know whether DTTB was available in their area.
- The majority of non-adopters (61 per cent) were either not interested or not sure if they were interested in adopting DTTB.

The specific objectives of the 2006 research are presented in the following section.

Research objectives

The objectives of the 2006 research were to:

- identify the number of television sets in households and the mode of free-to-air television reception (that is, digital or analog);
- identify the proportion of households with digital subscription television and personal/digital video recorders;
- gather information about why people with digital free-to-air television have taken it up, and non-adopters have not;
- identify intentions of non-adopters in terms of future adoption or non-adoption of digital television;
- identify the extent of knowledge about availability of digital free-to-air television, analog switch-off, and sources of information;
- segment the community into adopters, those planning to adopt, people who haven't decided yet, and those who have no interest or intention to adopt digital television technology;
- understand the relevant demographic characteristics of the sample and relevant sub-groups, for example, groups with different intentions to adopt, different levels of digital media take-up, and degrees of knowledge about digital free-to-air television;
- identify the proportion of households with broadband and dial-up internet connections, and the use of broadband for audio-visual content; and
- compare results to those from the same questions in ACMA's 2005 research.

[4] www.acma.gov.au/acmainterwr/_assets/main/lib100068/digitalmedia.pdf

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RESEARCH DESIGN

To achieve the objectives set out in the previous section and produce an accurate picture of DTTB attitudes and behaviours in 2006, the research was underpinned by a national representative and robust quantitative survey methodology

Methodology

SAMPLE DESIGN

At the core of this research project was the need to access a representative national sample of Australian households to establish a picture of how DTTB knowledge, awareness, adoption and intention has progressed since the 2005 study. The target sample also needed to be large enough to allow for analysis and comparison of sub-groups within. In all, the project resources allowed for a large sample of N=1,537 to be obtained, enabling a relatively high degree of statistical precision[5]. Unlike 2005, 'booster' sampling of DTTB adopter households was not necessary in 2006.

SAMPLING AND INFORMATION COLLECTION

As in 2005, the electronic WhitePages® was used as the sampling frame for Australian households and obtained using computer assisted telephone interviewing (CATI). The primary screening question was again:

> 'Does your household have a television?'

Followed by:

> 'I need to speak with someone in your household who makes decisions or contributes to making decisions about the purchase of items such as televisions. Are you 16 years or over and a decision-maker in regard to this type of item?'

DEVELOPING THE SURVEY INSTRUMENT

A draft questionnaire building on ACMA's suggested guideline was prepared, addressing the research objectives set out in the previous section.

While the 2005 study addressed a range of digital media, this 2006 update study was smaller and more focused on DTTB, enabling a considerably streamlined survey instrument. A short phase of qualitative pre-piloting confirmed the questionnaire's suitability for a range of household respondent types. The final questionnaire is an appendix to this report.

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5 95 per cent confidence interval of ±2.5 per cent

FIELDWORK

Fieldwork was conducted by N.Equals Fieldservices between 6 and 31 October 2006. Over this period, 8,268 telephone calls were made to households across Australia to reach the sample target. Interviews averaged six minutes in duration.

DATA ANALYSIS

All analysis was conducted using the SPSS statistical and Microsoft Excel spreadsheet applications.

Reporting

A presentation of key topline results was made by Eureka Director Tom Loncar at ACMA's Information Communications and Entertainment Conference in Canberra on 23 November 2006.

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SAMPLE CHARACTERISTICS

Introduction

Key demographic and other characteristics of the random sample of 1,537 households are presented below.

NATIONAL PROJECTION CONSIDERATIONS

One of the key findings in the survey was that 29.6 per cent of households reported having at least one television that receives DTTB. In other words, the penetration of DTTB among households (with a fixed-line telephone and a working television) was 29.6 per cent.

- The 95 per cent confidence interval on 29.6 per cent from a sample of 1,537 is ±2.28 per cent. So, the estimated penetration of DTTB ranges from 27.3 per cent to 31.9 per cent.
- Households without a fixed-line telephone were excluded from this research for practical and financial reasons. It is estimated that approximately six per cent of Australian households do not have a fixed-line telephone. The penetration of DTTB in these households is in all likelihood significantly lower than penetration in households with a fixed-line telephone (most households without a fixed-line phone are very low income households).
- 0.5 per cent of households that did have a fixed-line telephone were excluded from this research because they did not have a working television. Taking these two groups that were excluded from the research into account, the penetration of DTTB in all Australian households is likely to be slightly below 29.6 per cent.

Key household characteristics

Key household characteristics that emerged from the random sample of television-using households are presented in the Table 1.

Anticipated incidences in important sub-groups—for example, regional Australia, LOTE households and households where a person with a disability lived—were achieved, confirming the representativeness of the final sample attained.

Table 1: Household sample characteristics, October 2006

Household characteristics	%
Location	
Mainland state capital (n=967)	62.9
Regional/other (n=570)	37.1
NSW (n=464)	30.2
Vic (n=403)	26.2
Qld (n=317)	20.6
WA (n=141)	9.2
SA (n=118)	7.7
Tas (51)	3.3
ACT (n=23)	1.5
NT (n=20)	1.3
Children	
Children under 16 in h'hold (n=423)	27.5
Adults-only h'hold (n=1114)	72.5
Annual household income before tax	
Under $15,000	5.1
$15,001–$30,000	12.9
$30,001–$50,000	14.3
$50,001–$70,000	18.5
$70,001–$100,000	11.6
Over $100,000	10.8
Refused	26.7
Language	
LOTE (Language Other Than English) spoken in h'hold (n=251)	16.3
Type of house	
House or townhouse (n=1359)	88.4
Flat, unit or apartment (n=154)	10.0
Other (n=24)	1.6
Disability	
Disability (respondent/other in h'hold) (n=194)	12.6

Base: All households in random sample, N=1,537

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RESEARCH FINDINGS

In this section, the findings of the Digital Media in Australian Homes – 2006 study are presented in detail, specifically covering:

- overall media usage and behaviours in key areas;
- the characteristics of households that have adopted DTTB;
- the drivers for DTTB adoption;
- a comparison of media usage and demographic characteristics between DTTB adopter and non-adopter households;
- the characteristics of non-DTTB adopter households in detail, including adoption intentions and reasons for interest/non-interest and purchase plans;
- awareness of DTTB, and a comparison of different awareness-level groups; and
- identification of the distinct DTTB adoption-intention groupings facing DTTB policy-makers.

Statistical tests

This section highlights statistically significant differences between segments of interest. Adjusted standardised residuals for each cell in the contingency tables were examined. A value of ±1.96 or more indicates a significant deviation from the expected value for that cell (using an alpha value of 0.05). Statistically significant differences are highlighted in **bold**.

Media usage and behaviours

OVERALL DTTB PENETRATION

The primary focus of the study was on televisions capable of receiving digital free-to-air television using either an integrated receiver or separate set-top box that is designed specifically to receive DTTB. In all, 29.6 per cent of households indicated they had at least one television (including display devices and computer monitors) with a DTTB receiver.[6] In the 2005 study, 13 per cent of households indicated DTTB capability.

The sample of 1,537 households yielded a total of 3,564 television display devices that were currently in use. This represents an average of 2.3 television display devices per household. Of these, 609 were capable

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[6] In addition to the issue of sampling error discussed in the preceding section, this household penetration outcome may be influenced by non-sampling response error. This could have occurred if some survey respondents did not fully understood the difference between digital free-to-air television receivers (i.e. specifically for DTTB reception) and digital subscription television receivers which also allow access to some digital free-to-air television services. Such uncertainties about equipment may cause the ACMA take-up figure to be an over rather than an under estimate.

Digital Media Australia (DBA) has estimated from DTTB receiver sales to retailers that DTTB household penetration was 23 per cent in September 2006, and 25 per cent more recently at the end of 2006. The DBA estimates probably represent a conservative or base level of DTTB household penetration. The different results from the ACMA and DBA research can be explained by the different research methodologies used (i.e. community reporting of household equipment ownership versus figures on sales to retailers), the sampling errors that apply, and the accuracy of assumptions that underpin estimates.

of receiving DTTB, or 17.1 per cent of all television display devices. In the 2005 study, seven per cent of television display devices were reported as DTTB-capable.

Drivers for the increasing adoption of DTTB in the 15 months since the 2005 survey are described later in this report (see **Reasons for conversion to digital free-to-air television**).

PENETRATION OF DIGITAL MEDIA AND INCIDENCE OF KEY BEHAVIOURS

The household penetration of some other digital media was also examined. Table 2 summarises the findings across the different media categories, and presents comparisons with the 2005 results, where available.

Table 2: Incidence of media, October 2006

Media/equipment	% penetration/incidence	
	2006	2005
Free-to-air DTTB		
Overall incidence	29.6	13.0
Subscription TV		
Overall subscription TV	26.4	23.7
Hard-drive recorder		
Overall	18.2	na
DVD with hard drive	na	4.7
DTTB set-top box with hard drive	na	1.0
Foxtel iQ	na	1.0
Internet access		
Overall	69.3	66.6
Dial-up	16.5	39.4
Broadband	51.7	25.8
Watching AV content from internet or on mobile in last month		
Overall incidence	25.4	na
on TV set	2.3	na
on personal mobile device (e.g. Ipod)	6.2	na
on mobile phone	7.4	na
on computer monitor or laptop	22.6	na

Base: All households in random sample, N=1,537
na: not available

Key results are as follows:

- As already stated, 29.6 per cent of households received DTTB, representing a substantial increase over the 13 per cent with this capability in 2005.
- The incidence of hard-drive recorders (including PDRs and Foxtel iQ) that can record and replay television programs has significantly grown since 2005, with 18.2 per cent of households indicating ownership. (Slightly different questions in the 2005 survey established that the penetration level of DVDs with hard-drives was 4.7 per cent, DTTB set-top boxes with hard-drives was 1.0 per cent, and Foxtel iQ was 1.0 per cent).
- Just over a quarter (26.4 per cent) of households had subscription television, an increase on the proportion recorded in 2005 (23.7 per cent). Just over one-half of these households (54.4 per cent) also indicated they had taken up DTTB. Assuming that 90 per cent of subscription television is now digital,

it can be inferred from the data collected that approximately 41 per cent of households had digital television, that is, either digital free-to-air or digital subscription television.

- While overall household internet connectivity grew slightly (from 66.6 per cent in 2005 to 69.3 per cent in 2006), there was a large displacement of dial-up connections by broadband. Just over one-half of all households (51.7 per cent) had a broadband connection, doubling penetration in 2005 (25.8 per cent).
- A new question examining whether audio-visual content streamed or downloaded from the internet, or from a mobile device, had been watched 'in the last month' was introduced in 2006. In all, 25.4 per cent of respondents said they had performed such an activity. Computer monitors or laptops dominated as the 'hardware of choice'—converting the overall proportions given in the table above to apply within this sub-group, 88.7 per cent of 'downloaders' used computers monitors. These were followed by mobile phones (29.2 per cent) and personal mobile devices, such as Ipods (24.3 per cent).

The key demographic variations for DTTB adopter households are summarised in the Table 3.

Table 3: Penetration of DTTB by household demographic characteristics, October 2006

Household characteristics	% penetration/incidence
Location	
National	29.6
Mainland state capital	31.3
Regional/other	26.7
ACT	39.1
NSW	32.3
Tas	31.4
NT	30.0
Qld	29.7
SA	28.0
Vic	27.0
WA	26.8
Children	
Children under 16 in h'hold	36.5
Adults-only h'hold	27.0
Annual household income before tax	
Under $15,000	6.4
$15,001–$30,000	24.1
$30,001–$50,000	29.5
$50,001–$70,000	30.9
$70,001–$100,000	41.9
Over $100,000	42.2
Language	
LOTE spoken in h'hold	25.1
Type of house	
House or townhouse	31.0
Flat, unit or apartment	19.0
Disability	
Disability (respondent/other in h'hold)	28.0

Base: Refer to sample characteristics in Table 1.
Note: Sampling error increases with smaller sub-samples.

Table 3 illustrates variations from the overall free-to-air DTTB penetration of 29.6 per cent, in particular in the characteristics of income, household type and having children (note: small sample sizes underlie the penetration figures recorded for the smaller states and territories). As will be seen later in this report, there are statistically significant differences in these demographic characteristics for adopter, DTTB interested, and non-interested household segments.

Differences between digital and non-digital television households

DTTB ADOPTER/NON-ADOPTER COMPARISON

In this section, the media ownership and demographic characteristics of digital and non-digital television households are contrasted to provide a fuller understanding of 'adopter' versus 'non-adopter' household environments for DTTB policy-makers.

Looking first at DTTB adopter and non-adopter households, some marked differences emerged, particularly in digital media ownership and usage, as Table 4 demonstrates.

Table 4: Digital media ownership/usage – DTTB adopters and non-adopters, October 2006

Media	% penetration		
	DTTB adopters	Non-adopters	National random sample
Hard-drive recorder	**41.3**	**s8.4**	18.2
Subscription TV	**40.7**	**20.4**	26.4
Broadband internet	**64.0**	**46.6**	51.7
Watching AV content from internet or on mobile in last month	**35.2**	**21.3**	25.4

Base: All non-adopter households in random sample n=1,082, all DTTB adopter households n=455, N_{TOTAL}=1,537.
S: question presented only to DTTB and subscription TV households.
Data in **bold** represent statistically significant differences.

Significant differences are evident between DTTB adopter and non-adopter sub-groups for each of these media categories. DTTB adopter households were characterised by higher hard-drive recorder ownership (41.3 per cent penetration), subscription television (40.7 per cent), and broadband internet connectivity (64 per cent). Non-adopter households, on the other hand, were considerably lower on each measure, although broadband connectivity achieved almost 50 per cent penetration in non-adopter homes.

The demographic characteristics of DTTB adopter and non-adopter households are given in Table 5. The following statistically significant differences emerged in the profiles of these two groups:

- no significant differences between metropolitan and regional segments of the sample;
- DTTB adopter households were significantly more likely (than statistically expected) to have children aged under 16 years within their household (33.8 per cent) and less likely to be adults-only households (66.2 per cent)—non adopter-households contrasted sharply on both measures;
- higher income households featured most prominently among DTTB adopters (31.9 per cent with household income over $70,000 per annum versus 18.5 per cent for non-adopter households);
- lower income households featured least prominently among DTTB adopters (1.1 per cent with household income under $15,000 per annum versus 6.7 per cent for non-adopters); and
- DTTB adopter households were more likely to live in a house or townhouse (92.5 per cent versus 86.7 per cent for non-adopters).

Table 5: Demographic characteristics – DTTB adopters and non-adopters, October 2006

Household characteristic	%		
	DTTB adopters	Non-adopters	National random sample
Location			
Mainland state capital	66.6	61.4	62.9
Regional/other	33.4	38.6	37.1
NSW	33.0	29.0	30.2
Vic	24.0	27.2	26.2
Qld	20.7	20.5	20.6
SA	7.3	7.9	7.9
WA	8.4	9.6	9.2
ACT	2.0	1.3	1.5
Tas	3.5	3.2	3.3
NT	1.3	1.3	1.3
Children			
Children under 16 in h'hold	**33.8**	**24.8**	27.5
Adults-only h'hold	**66.2**	**75.2**	72.5
Annual household income before tax			
Under $15,000	**1.1**	**6.7**	5.1
$15,001–$30,000	10.5	14.0	12.9
$30,001–$50,000	14.3	14.3	14.3
$50,001–$70,000	19.3	18.2	18.5
$70,001–$100,000	**16.5**	**9.6**	11.6
Over $100,000	**15.4**	**8.9**	10.8
Language			
LOTE spoken in h'hold	13.8	17.4	16.3
Type of house			
House or townhouse	**92.5**	**86.7**	88.4
Flat, unit or apartment	**6.4**	**11.5**	10.0
Disability			
Disability (respondent/other in h'hold)	11.9	12.8	12.6

Base: All non-adopter households in random sample n=1,082, all DTTB adopter households n=455, N_{TOTAL}=1,537
Data in **bold** represent statistically significant differences.

Age of respondent

Respondent age was also collected in the survey, but has been excluded from the tables because of the household rather than individual focus of this study. With this caveat in mind, it was found that respondents from DTTB adopter households tended to be in younger and 'prime' working age groups. They were:

- significantly more likely to be aged 25 to 34 (16.0 per cent versus 12.0 per cent);
- significantly more likely to be aged 45 to 54 (21.5 per cent versus 16.9 per cent); and
- significantly less likely to be aged 65 or more (14.9 per cent versus 25.8 per cent).

Digital television – non-digital television households comparison

A broader definition was introduced, where a household qualified as having 'digital television' if it had either DTTB or subscription television. Forty-four per cent of households fell into this category and from that it is estimated that a total 41 per cent of households in the sample had digital television[7]. For the households with DTTB or subscription television:

- 67.3 per cent were DTTB adopter households, while 60.1 per cent were subscription television households; and
- 45.6 per cent of subscription television households also had DTTB and 40.7 per cent of DTTB households also had subscription television.

These results show a higher rate of adoption of DTTB in households with subscription television.

The higher incidence of DTTB in subscription television households could indicate that some households reported having a specific DTTB receiver when they did not. This might have occurred because digital subscription television receivers have the capacity to also receive digital free-to-air services. The degree to which households may have over-reported their ownership of specific DTTB set-top receivers is unclear from the survey data.

The media-using characteristics of these households are contrasted with non-digital television households in Table 6.

Table 6: Digital media ownership/usage – digital television and no digital television, October 2006

Media	% penetration		
	Digital households	Non-digital households	National random sample
Broadband internet	**65.2**	**41.1**	51.7
Watching AV content from internet or on mobile in last month	**33.6**	**19.0**	25.4

Base: DTTB and/or subscription TV households in random sample n=676, non-digital households in random households n=861, N_{TOTAL}=1,537
Data in **bold** represent statistically significant differences.

Illustrating a pattern similar to that attained in the DTTB adopter versus non-adopter comparison, using this broader definition, the following characteristics emerged:

- a high incidence of broadband connectivity within digital television households (65.2 per cent versus 41.1 per cent in non-digital television households); and
- digital television households were more inclined to watch audio-visual content from the internet or on a mobile phone—with a degree of difference that is similar to the one observed earlier between DTTB adopter and non-adopter households.

The demographic characteristics of these two groups are provided in Table 7. Again, the characteristics that emerged in the earlier DTTB adopter versus non-adopter comparison have emerged, with some regional differences, as follows:

- digital television households were significantly more likely to be located in the mainland state capital cities (67.2 per cent) than non-digital homes (59.6 per cent);
- digital television households also had a higher proportion of children aged under 16 years of age (32.8 per cent compared with 23.2 per cent for non digital households), and had a lower proportion of adults-only households than non-digital households (67.2 per cent versus 76.8 per cent);
- higher incomes were most prominent among digital television households (30 per cent with household income of more than $70,000 per annum compared with 16.5 per cent for non-digital households);

[7] Note: information on digital versus analog subscription was not collected in the survey. It is estimated that the total household penetration of digital television (i.e. DTTB and digital subscription) was about 41 per cent assuming that approximately 90 per cent of subscription television households had been converted to digital at the time of the study.

- lower income households featured least prominently among digital television households (12 per cent with household income under $30,000 per annum compared with 22.8 per cent for non-adopter households); and
- a high proportion of digital television households were houses or townhouses (92.3 per cent compared with 85.4 per cent for non-digital households), while a lower proportion were flats or apartments (6.5 per cent versus 12.7 per cent for non-digital households).

Table 7: Demographic characteristics – digital television and no digital television, October 2006

Household characteristic	%		
	Digital households	Non-digital households	National random sample
Location			
Mainland state capital	**67.2**	**59.6**	62.9
Regional/other	**32.8**	**40.4**	37.1
NSW	31.7	29.0	30.2
Vic	26.2	26.2	26.2
Qld	21.2	20.1	20.6
SA	6.7	8.5	7.9
WA	8.0	10.2	9.2
ACT	1.9	1.2	1.5
Tas	3.1	3.5	3.3
NT	1.3	1.3	1.3
Children			
Children under 16 in h'hold	**32.8**	**23.2**	27.5
Adults-only h'hold	**67.2**	**76.8**	72.5
Annual household income before tax			
Under $15,000	**2.4**	**7.2**	5.1
$15,001–$30,000	**9.6**	**15.6**	12.9
$30,001–$50,000	14.2	14.4	14.3
$50,001–$70,000	20.1	17.3	18.5
$70,001–$100,000	**14.9**	**9.1**	11.6
Over $100,000	**15.1**	**7.4**	10.8
Language			
LOTE spoken in h'hold	14.9	17.4	16.3
Type of house			
House or townhouse	**92.3**	**85.4**	88.4
Flat, unit or apartment	**6.5**	**12.7**	10.0
Disability			
Disability (respondent/other in h'hold)	11.7	13.2	12.6

Base: DTTB and/or subscription TV households in random sample n=676, non-digital households in random households n=861, N_{TOTAL}=1,537
Data in **bold** represent statistically significant differences.

SUMMARY

The comparisons presented in this section confirm differences between digital and non-digital households. There was significantly less broadband connectivity and viewing of audio-visual content from the internet in households that did not have DTTB or subscription television. Non-digital households also had a relatively high incidence of low incomes (and a relatively low incidence of high incomes), were less likely to have children aged less than 16 years and were more likely to reside in flats or apartments.

Reasons for conversion to digital free-to-air television

In this section, the reasons for adopting DTTB are examined.

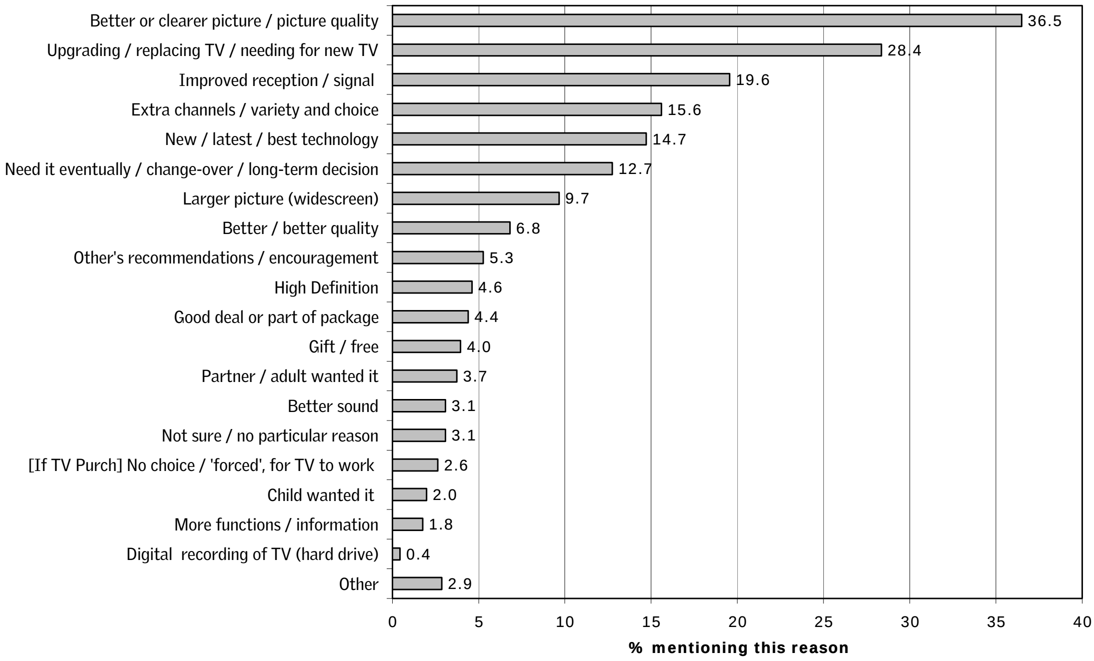
DRIVERS

To identify the drivers for DTTB adoption, the households surveyed were presented with the following open-ended question (that did not have prompted answer categories):

> 'I would now like to talk about digital free-to-air television. Please think about the reasons why you decided to get digital television in your household. What do you think was the main reason? Any others?'

The range of reasons provided by adopter households were analysed with the resultant answer categories presented below.

Figure 2: Reasons for conversion – all mentions, October 2006



Base: All DTTB adopter households, n=455

Examining the top four reason categories (which revealed the same drivers as in 2005, albeit with some re-ordering below the leading category), it can be seen that 36.5 per cent of adopter households cited reasons related to 'enhanced picture or better picture' for DTTB conversion. It has remained the most prominent driver of adoption (26 per cent of adopters in 2005). Following this, reasons associated with 'television upgrades' had greater prominence (28.4 per cent versus 11.0 per cent in 2005), suggesting that DTTB take-up is being assisted or encouraged at the point of purchase.

More 'functional' reasons relating to 'improved reception or signal' were mentioned by 19.6 per cent of adopters (versus 25 per cent in 2005) and these were followed by drivers relating to 'extra channels, and variety and choice' (15.6 per cent versus 18.5 per cent in 2005). Within this category (as some of the verbatim responses below demonstrate), there is less apparent confusion between DTTB and subscription television than in 2005—specific DTTB services such as ABC2 were referred to by households as a reason for adoption. After this, it is also interesting to note that ‘high definition’ emerged in 2006 as a driver of adoption in its own right. While only a small handful of adopters offered it as a reason in 2005, almost five per cent mentioned it as a reason for their household’s adoption.

Examples of verbatim responses that were collected by the survey explain the nature of the main response categories as follows:

- **Better or clearer picture/picture quality** (36.5 per cent)

  ‘I had watched my brother’s TV which was digital and the picture was far better than any picture I had seen.’

  ‘Bradley thought that it would give us a better picture as they have one at work that he reckons is a brilliant picture and its digital too.’

  ‘The clarity of the picture is so much better.’

  ‘…it was probably picture quality.’

  ‘We updated our TV and found when purchasing that the picture was better quality … sharper.’

  ‘My wife likes to watch netball and the ABC. We get a much better picture on the digital.’

- **Upgrading/replacing TV/need for new TV** (28.4 per cent)

  ‘I was buying a new TV, so figured I might as well go to the latest release in TV technology.’

  ‘We were setting up our first home together and decided to get digital to start off with rather than the older style of TV.’

  ‘We wanted a bigger screen and the TV we bought happened to be with digital TV.’

  ‘I was setting myself up with a new TV and surround sound package, so I decided to buy digital.’

  ‘I needed a new TV as mine was playing up. The salesperson talked me into buying digital and it seemed the way to go.’

- **Improved reception/signal** (19.6 per cent)

  ‘So that I could get good reception.’

  ‘The reception in our home was awful, even with a decent aerial. The guy who came out to fix the aerial suggested digital as a solution.’

  ‘Better quality reception as well was the main thing that convinced us.’

  ‘Our reception wasn't very good.’

- **Extra channels/variety and choice** (15.6 per cent)

  ‘We can also get a few local channels now that we were unable to before.’

  ‘The extra channels were a nice bonus as well.’

  ‘ABC2 is great for the kids.’

  ‘We wanted to get ABC2.’

Other verbatim answers that were put forward by 10 per cent or more of interested households were:

- **New/latest/best technology** (14.7 per cent)

  ‘I like to try and have the latest technology, or at least make an attempt to keep up with it.’

‘My father is one of those people who has to have everything new that comes out.’

‘Because it was a new-fangled thing.’

- **Need it eventually/change-over/long-term decision** (12.7 per cent)

‘I believe that in the future analogue will be phased out.’

‘Eventually we would have to get one to be able to receive any TV programs.’

‘It seemed like a good idea to buy a TV with this included as I imagined we would eventually have to buy one anyway.’

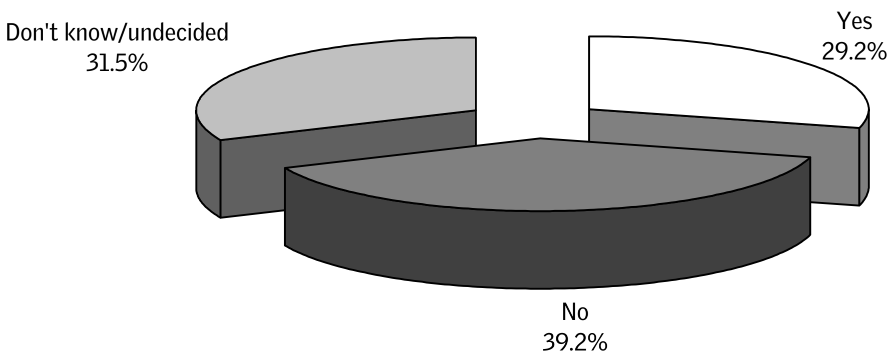
SUMMARY

The results demonstrate the prominent role that ‘enhanced picture experience’ has played, and continues to play, in DTTB adoption. It was cited as an adoption driver by over a third of adopter households—well above other response categories. The increase of reasons given in the ‘television upgrade’ category (from 11 per cent in 2005 to 28.4 per cent in 2006) also shows that DTTB is increasingly being considered when new television purchasing decisions are made.

Interest in digital free-to-air television

Households that had not adopted DTTB were asked about their future interest in obtaining DTTB. Their answers are summarised below.

Figure 3: Interest in obtaining DTTB, October 2006



Base: All non-adopter households n=1,082

As can be seen, 29.2 per cent of non-adopter households indicated an interest in obtaining DTTB, down from 39 per cent in 2005, perhaps reflecting a movement of interested non-adopters to adopter status.

INTERESTED HOUSEHOLDS

The intentions of households to purchase DTTB were explored in greater depth, with the following results:

- **Plans to purchase**—68.4 per cent of interested households indicated that they planned to purchase either a DTTB set-top box or integrated DTTB set to receive digital free-to-air television. Almost 13 per cent did not have purchase plans, while 19 per cent didn’t know. In 2005, 64.9 per cent of interested households planned to make such a DTTB purchase.

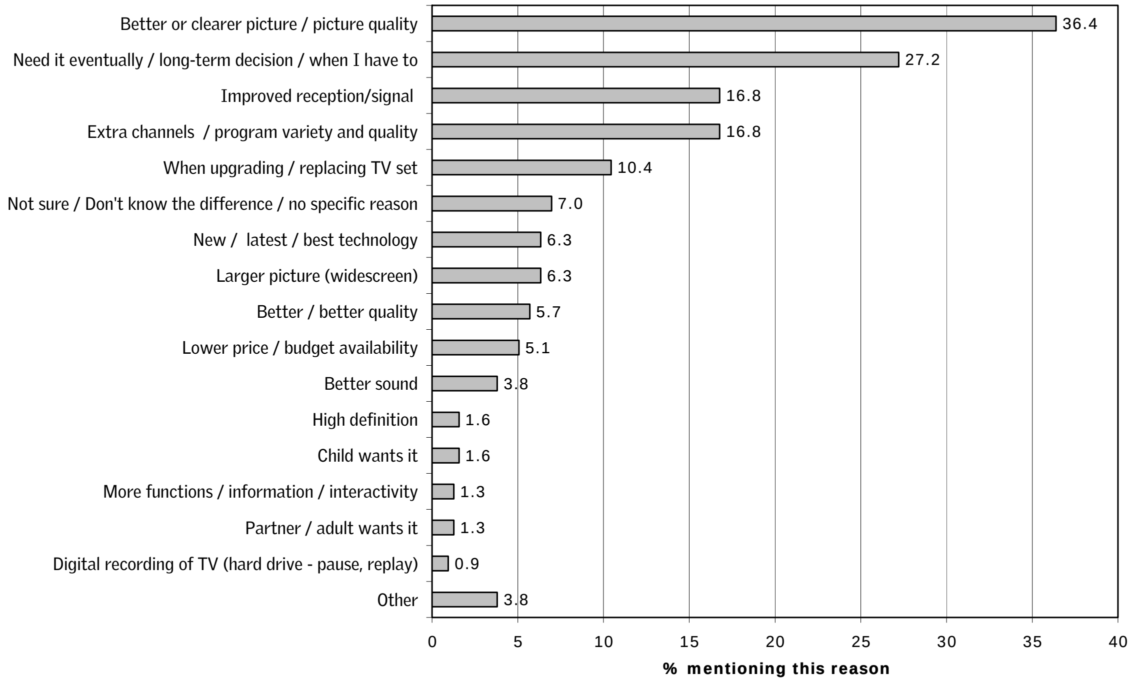
- **Purchase time-frame**—about one-quarter (25.6 per cent of households with purchase plans) said they would be likely to purchase DTTB within 12 months, 23.3 per cent said one to two years, and 22.3 per cent said more than two years (28.8 per cent didn't know). Intention to purchase DTTB within 12 months was significantly above the six per cent recorded in 2005.

An analysis of respondent purchase intentions in 2005 illustrates that intention, by itself, is an unreliable measure of future DTTB adoption. In 2005, an estimated 4.5 per cent of households indicated they would take up DTTB 15 months later—adding this to the 13 per cent DTTB penetration level of 2005 leaves us well short of the actual 2006 DTTB penetration outcome of 29.6 per cent.

DRIVERS OF INTEREST

All DTTB-interested households were asked about the reasons for their interest in taking up DTTB. An analysis of responses to the open-ended question revealed the following main response categories.

Figure 4: Drivers of DTTB interest, October 2006



Base: Interested non-adopter households, n=316

A range of potential drivers were mentioned by non-adopter households, with many parallels to the reasons for DTTB adoption that were reported earlier in this report by DTTB adopter households. Examining the top four reason categories (which reflect the same drivers as in 2005), it can be seen that 36.4 per cent of interested non-adopter households cited reasons related to 'better picture' for future DTTB conversion (the same proportion as in 2005). Some of the verbatim reasons that were put forward under this general response category are given below:

> 'As far as I am aware, it improves the quality of your picture.'
>
> 'I'm told quality of image or picture resolution is far superior to normal free-to-air.'
>
> 'It is supposed to be a better picture.'
>
> 'Clarity—they reckon it's a lot better quality.'

Other verbatim answers mentioned by 10 per cent or more of DTTB-interested households were:

- **Need it eventually/long-term decision/when I have to** (27.2 per cent)

  'Only because it will be the only thing available.'

‘Basically it’s a matter of time before analog is wiped out. It’s coming—like what happened to VCRs.’

‘Since they will replace analog, it will be the only option to receive a signal.’

‘Will purchase one, when I have to, waiting for the analog to go.’

- **Improved reception/signal** (16.8 per cent)

  ‘... no interference due to it being digital it doesn’t get affected by wind or weather.’

  ‘I think it will improve the quality of my TV reception.’

  ‘I presume that the reception would be better.’

  ‘… to get better reception for ABC. We get poor reception for ABC now.’

- **Extra channels/program variety and quality** (16.8 per cent)

  ‘I understand there are other channels that you can get that may be of interest.’

  ‘More channels, we’ve talked about ABC2.’

  ‘ABC2.’

  ‘Extra free channels.’

  ‘I think there will be an additional channel for sports.’

- **When upgrading/replacing TV set** (10.4 per cent)

  ‘One of the TVs in our home is playing up, and once we can afford to replace it, we will buy digital.’

  ’It is just something I will get when ready will buy a new TV.’

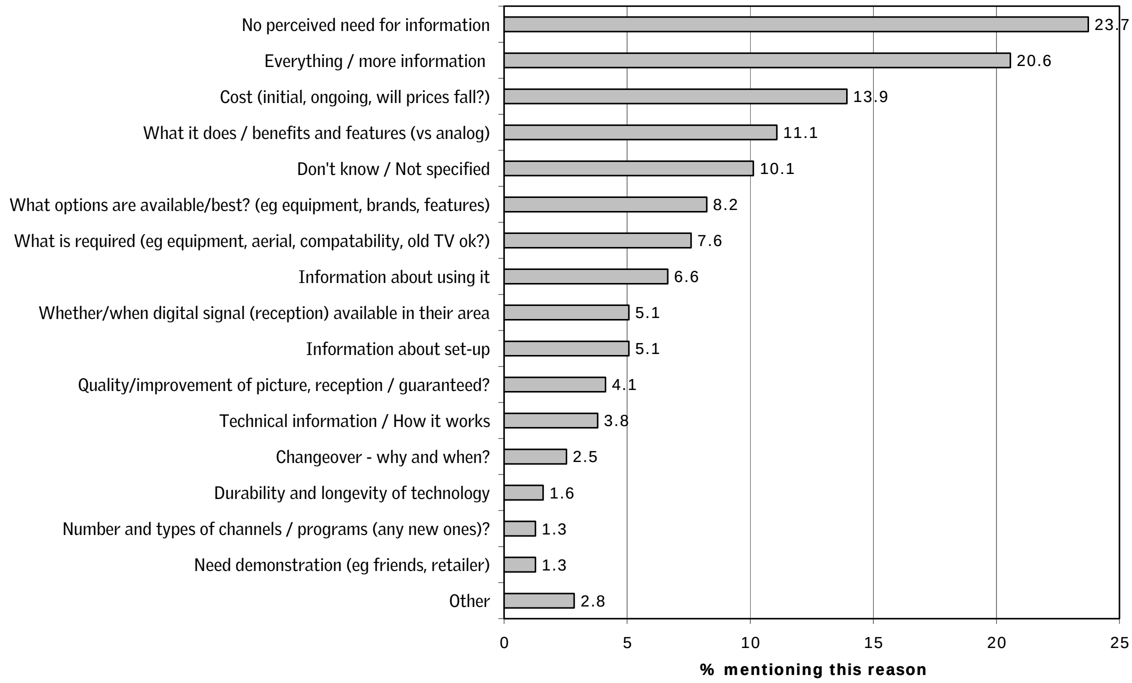
  ‘Only if the current TV breaks down.’

KNOWLEDGE REQUIREMENTS

The households that were interested in DTTB (20.6 per cent of all households; 29.2 per cent of non-adopters) were then asked what specific additional knowledge or information they required before converting to DTTB. An analysis of the open-ended responses is shown in Figure 5.

Except for the largest response category, where 23.7 per cent of interested households indicated having no need for further information, the answers reveal a need for a range of information about DTTB, similar to the 2005 survey results. In general, the results show that many interested non-adopters lacked basic information about digital free-to-air television—for example, cost, features, benefits, and equipment options—information that was perceived to be needed before making a DTTB purchase.

Figure 5: Knowledge requirements, October 2006



Base: Interested non-adopter households, n=316

The main need was to know 'everything' or at least 'more information' about DTTB (20.6 per cent—up from 14.4 per cent in 2005). Some examples are as follows:

> 'Everything, (from) how to use it, to how to operate it and most of all how to set it up.'

> 'I don't actually know a lot just that we will eventually need a free-to-air set-top box to watch free-to-air TV.'

> 'Whatever there is, as I don't know enough about it.'

> 'Well. I don't know too much about it at all, so everything.'

Many of the remaining response categories that were put forward by more than five per cent of this group of households also referred to fundamental information needs, as the following verbatim examples demonstrate:

- **Cost—initial, ongoing, will prices fall?** (13.9 per cent—similar to 13.3 per cent in 2005)

> 'How much it would cost and whether or not it is advisable to go to a slightly more expensive digital set-top box rather than one of the quite cheap ones I have seen advertised.'

> 'What sort of money you have to spend to get a decent one. If there is much difference between a cheaper version and a more expensive version.'

> 'What's the best type of equipment to buy without paying out a small fortune?'

- **What it does/benefits and features compared with analog** (11.1 per cent, down from 22.6 per cent in 2005)

> 'Basically, what it offers, what the service provides.'

> 'I need more knowledge about what it does and if I need it.'

> 'Just the general benefits. How it compares to the current free-to-air TV, well, exactly what bits will be better?'

- **What options are available/best?—equipment, brands, features** (8.2 per cent, up from 4.9 per cent in 2005)

  ‘Information about the differences in set-top boxes.’

  ‘Which brand is best suited to our TVs? I don’t know if all brands of top boxes are suitable to all TVs.’

  ’Find out which brands are best and if I have to spend hundreds of dollars or if the cheaper ones are just as good.’

- **What is required—equipment, aerial, compatibility, old TV ok?** (7.6 per cent, similar to 7.4 per cent in 2005)

  ‘How it works, basically, and any equipment that might be needed.’

  ‘We are quite computer-competent and have DVD recorder programs, so I’d just like some information on how this would all work in together.’

  ’It’s the part about not needing an aerial that I don't understand.’

- **Information about using it** (6.6 per cent, up from 2.3 per cent in 2005)

  ‘How to operate it and how and it will impact my other equipment.’

  ‘How to use it most importantly.’

  ‘Just the basic ‘how it operates’.’

- **Whether/when digital signal (reception) will be available in their area** (5.1 per cent, up from 3.3 per cent in 2005)

  ‘I am in a rural area and don’t know if we do have digital yet.’

  ‘Does it work anywhere?’

  ‘What happens if I move to an area that doesn’t support the free-to-air digital transmission?’

- **Information about set-up** (5.1 per cent, up from 2.1 per cent in 2005)

  ‘How to set it up is the main thing.’

  ‘Everything, from how to use it, to how to operate it and most of all how to set it up.’

  ‘Just whatever the person in the store may tell me about setting it up.’

The ‘need to know more’ about DTTB was dominant among interested non-adopter households indicating that the provision of information is one of the areas that might assist consumers to make the transition to digital free-to-air television. A salient point is that DTTB take-up has continued to increase despite a general lack of information, which has remained relatively unchanged since the 2005 study.

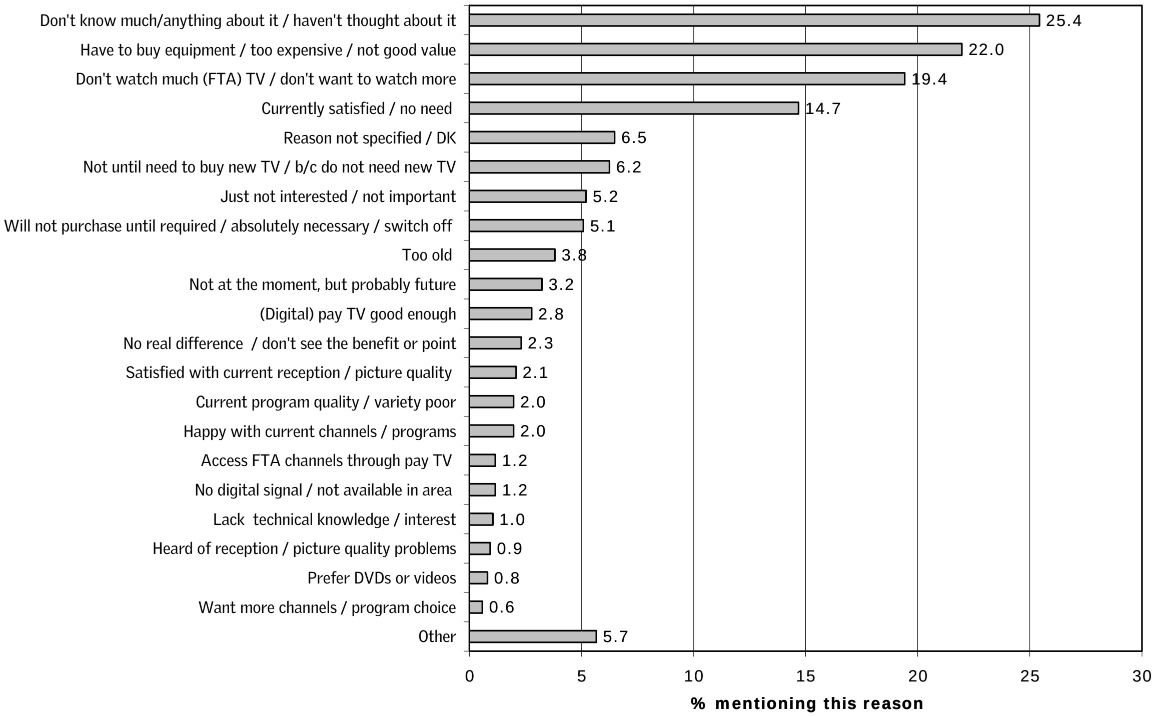
HOUSEHOLDS NOT INTERESTED IN DTTB

A total of 70.7 per cent of non-adopter households (49.8 per cent of all households) either were not interested or did not know whether they were interested in obtaining DTTB. An open-ended question was presented to these households:

> ‘There are a number of reasons why people are not interested, or not planning to take-up digital free-to-air TV. Can you tell me why this is the case for your household? Is there anything else?’

An analysis of the verbatim answers is presented in Figure 6.

Figure 6: Reasons for non interest in DTTB, October 2006



Base: Uninterested non-adopter households, unsure whether interested, and interested households with no plans to adopt, n=865

While there has been growth in household DTTB adoption since 2005, there are a substantial number of non-adopters who appear to be some distance away from adopting DTTB. By combining the response categories shown in Figure 6, a general picture is revealed about the reasons for non-adoption. Most notably this comprises groups of respondents who:

- were happy or satisfied with their current television equipment and services (including subscription television services);
- had apathy toward DTTB;
- believed that DTTB is too expensive; and/or
- did not perceive DTTB to offer benefits that are of value to them.

The highest proportion of responses in Figure 6 reflect a general apathy toward DTTB, where lack of knowledge and/or thought about DTTB was expressed (25.4 per cent, up from 20.4 per cent in 2005). Some examples of verbatim answers under this general response category are presented below:

> 'Not aware of it—and don't really care.'
>
> 'I just need time to work it all out and see what it all means, so maybe one day when I have some free time.'
>
> 'I don't know a thing about it.'
>
> 'Never heard of it.'
>
> 'Haven't looked into it.'
>
> 'I don't know anything about it, to be honest.'

The remaining response categories that were put forward by more than five per cent of this group are as follows:

- **Have to buy equipment/too expensive/not good value** (22 per cent, down from 26.6 per cent in 2005)

> 'It is still too expensive. I don't have that much spare time to watch TV.'
>
> 'Unless one of the boys wants to pay for it, I have no interest in it. The TV that we have works perfectly well without it.'
>
> 'Can't afford to either buy the digital top box or buy a new television.'
>
> 'We have had so many other things to think about buying after setting up our house together, that I don't think digital TV is a priority.'

- **Don't watch much (free-to-air) TV/don't want to watch more** (19.4 per cent, down from 32.0 per cent in 2005, when it was the leading category)

> 'I hardly ever watch TV, and don't feel like spending any more money on one or on anything to modify the TV that I have.'
>
> 'It's not really something I have thought about. My wife and I don't watch much television and so it's not a big interest to us.'
>
> 'I hardly have time outside of work to watch TV other than at the weekends.'

- **Currently satisfied/no need** (14.7 per cent, up from 11.8 per cent in 2005)

> 'I like the TV I have. It works fine for how much I watch.'
>
> 'There's no need for it. What we have is fine.'
>
> 'I just have not considered it yet. I'm happy with the status quo.'

- **Not until need to buy new TV/do not need new TV** (6.2 per cent, up from 1.3 per cent in 2005)

> 'We won't worry about it until we update our TV.'
>
> 'If the time came to buy a new TV we would consider things like digital then.'
>
> 'My TV is three years old.'

- **Just not interested/not important** (5.2 per cent, up from 4.4 per cent in 2005)

> 'It's not a huge priority as far as I am concerned.'
>
> 'Not interested.'
>
> 'No, we don't want it and we don't need it.'

- **Will not purchase until required/absolutely necessary/switch off** (5.1 per cent—a new category in 2006)

> 'I don't see the point in buying it unless it is absolutely necessary.'
>
> 'The government are too pushy. They should let people make up their own minds and I know one day that I will need to go digital. It's just the principle of it. I won't get it till I have to.'
>
> 'Technology changes too quickly so we will wait until it is absolutely necessary to get a set-top box otherwise we'll spend too much too soon and the prices come down quickly.'

A small portion of non-interested households were waiting until they needed a new television (6.2 per cent) and/or factoring in the possibility of purchasing DTTB equipment when 'absolutely necessary' (5.1 per cent). This latter response category has developed since the 2005 study.

DIFFERENCES BETWEEN INTERESTED AND NON-INTERESTED HOUSEHOLDS

For the three main non-adopter groups that have been identified, namely, those interested, those undecided, and those with no interest in taking up DTTB, differences in media ownership and usage were also examined, as presented in the Table 8.

Table 8: Digital media ownership/usage – interest and no interest in DTTB, October 2006

Media	% penetration			
	Interested in adopting	No interest in adopting	Undecided	National random sample
Hard-drive recorder	9.4	5.9	10.6	18.2
Subscription TV	**25.0**	**15.8**	22.0	26.4
Broadband internet	**57.0**	**42.9**	**41.6**	51.7
Watching AV content from internet or on mobile in last month	**27.8**	**17.9**	19.6	25.4

Base: Non-adopters that are interested n=316, non-adopters that are undecided n=341, non-adopters with no interest n=424, N_{TOTAL}=1,537
Data in **bold** represent statistically significant differences.

Households that were interested in DTTB had higher subscription television access and broadband connectivity than the non-interested and undecided segments. Interested households also exhibited the highest viewing of audio-visual content from the internet or mobile phone. The non-interested household group, on the other hand, had a lower incidence of digital hard-drive recorder ownership and subscription television.

A demographic comparison between these three groups is provided in Table 9.

A similar overall pattern to that observed in 2005 re-emerged with the greatest distinguishing characteristics applying to those ‘interested in adopting’ compared to those who were ’not interested’, with the ‘undecided’ group being closer to ’interested’ rather than ‘non interested’ households.

- The income-related statistically significant differences that emerged in 2005—where higher incomes were more prominent among interested households—were less pronounced in 2006. However, households with an income less than $15,000 per annum did feature most prominently in non-interested households in 2006.
- Perhaps the strongest insight is that non-interested households comprised a high proportion of adults-only households and households with a person with a disability.
- Victoria had a particularly large segment of interested households at 32.6 per cent (compared to 23.1 per cent with no interest in adopting), while Queensland was particularly low at 15.2 per cent (compared to 25 per cent not interested).

Table 9: Demographic characteristics – interest and no interest in DTTB, October 2006

Household characteristic	%			
	Interested in adopting	No interest in adopting	Undecided	National random sample
Location				
Mainland state capital	62.3	59.9	62.5	62.9
Regional/other	37.7	40.1	37.5	37.1
NSW	26.6	29.5	30.5	30.2
Vic	**32.6**	**23.1**	27.3	26.2
Qld	**15.2**	**25.0**	19.9	20.6
SA	7.3	8.3	7.9	7.9
WA	11.7	9.4	7.9	9.2
ACT	1.3	1.7	0.9	1.5
Tas	3.8	2.6	3.5	3.3
NT	1.6	0.5	2.1	1.3
Children				
Children under 16 in h'hold	25.9	**20.8**	28.4	27.5
Adults-only h'hold	74.1	**79.2**	71.6	72.5
Annual household income before tax				
Under $15,000	**3.5**	**9.0**	7.0	5.1
$15,001–$30,000	12.3	13.9	15.5	12.9
$30,001–$50,000	**19.3**	12.5	11.7	14.3
$50,001–$70,000	16.5	16.7	21.7	18.5
$70,001–$100,000	**12.7**	7.5	9.4	11.6
Over $100,000	10.1	8.0	8.8	10.8
Language				
LOTE spoken in h'hold	19.9	14.6	18.5	16.3
Type of house				
House or townhouse	86.1	86.6	87.4	88.4
Flat, unit or apartment	11.7	11.1	11.7	10.0
Disability				
Disability (respondent/other in h'hold)	10.1	**15.3**	12.3	12.6

Base: Non-adopters that are interested n=316, non-adopters that are undecided n=341, non-adopters with no interest n=424, N_{TOTAL}=1,537
Data in **bold** represent statistically significant differences.

SUMMARY

This section reveals that many non-adopters of DTTB were happy or satisfied with their current television equipment and content services (including subscription television services). There was also considerable apathy expressed about the prospect of DTTB by many respondents, and the cost of DTTB equipment remains a barrier to many.

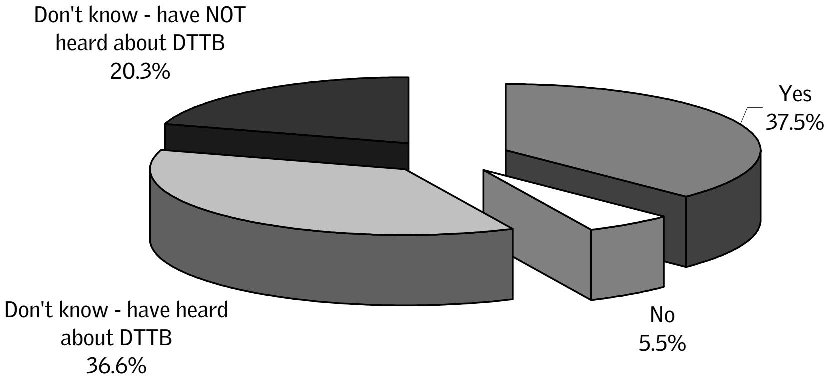
Significant portions of the non-adopter segment also said they needed to know ‘everything’ or have ‘more information’ (20.6 per cent), ‘cost information’ (13.9 per cent), and ‘what it does/its benefits and features’ (11.1 per cent).

Anticipation of an 'enhanced picture experience' remains the key driver of DTTB appeal (36.4 per cent of reasons), followed by 'needing it eventually/being a long-term decision' accounting for 27.2 per cent of reasons. The latter's growth since 2005 points to greater awareness of the inevitable shift from analog to digital in future.

Awareness and understanding of digital free-to-air television

All households without DTTB were asked whether DTTB was available in their area. Those who didn't know were then asked whether they had heard of DTTB. The results are presented in Figure 7.

Figure 7: DTTB awareness among non-adopter households, October 2006



Base: Non-adopter households, n=1,082

- More than one-third of non-adopters (37.5 per cent) believed that DTTB was available in their area, while 5.5 per cent said it was not available (the comparison figures for 2005 were 48.1 per cent and 6.5 per cent, respectively). The remaining 56.9 per cent did not know whether DTTB was available to them. The apparent lower awareness of DTTB availability by non-adopters in 2006 is largely due to the movement of some non-adopters to the adopter group since 2005.
- The proportion of all respondents who said they did not know whether DTTB was available in their area remained steady between 2005 and 2006, comprising 40 per cent of the total survey sample.
- Fourteen per cent of the 2006 survey respondents had not heard of digital free-to-air television (similar to the 2005 result).

DIFFERENCES BETWEEN NON-ADOPTER AWARENESS GROUPS

This last group of households who had not heard of DTTB was contrasted with other non-adopter households who knew at least something about DTTB. The differences in media usage between the two groups are presented in Table 10.

Table 10: Digital media ownership/usage – awareness of DTTB, October 2006

Media	% penetration		
	May know about DTTB	Has never heard about DTTB	National random sample
Subscription TV	21.3	16.8	26.4
Broadband internet	**51.9**	**25.9**	51.7
Watching AV content from internet or on mobile in last month	**24.0**	**10.9**	25.4

Base: Non-adopter households who may know about DTTB n=862, non-adopter households who didn't know about DTTB n=220, N_{TOTAL}=1,537
Data in **bold** represent statistically significant differences.

The broadband connectivity (51.9 per cent versus 25.9 per cent) and audio-visual downloading incidence (24.0 per cent versus 10.9 per cent) strongly suggest that DTTB-aware households were more likely to have these other digital services than households that had never heard of DTTB. Demographic differences are presented in Table 11.

Table 11: Demographic characteristics – awareness of DTTB, October 2006

Household characteristic	%		
	May know about DTTB	Has never heard about DTTB	National random sample
Location			
Mainland state capital	**63.0**	**55.0**	62.9
Regional/other	**37.0**	**45.0**	37.1
NSW	28.3	31.8	30.2
Vic	27.4	26.4	26.2
Qld	**22.7**	**11.8**	20.6
SA	**6.7**	**12.3**	7.9
WA	9.0	11.8	9.2
ACT	1.4	0.9	1.5
Tas	3.2	3.2	3.3
NT	1.2	1.8	1.3
Children			
Children under 16 in h'hold	**26.2**	**19.1**	27.5
Adults-only h'hold	**73.8**	**80.9**	72.5
Annual household income before tax			
Under $15,000	6.4	8.2	5.1
$15,001–$30,000	**12.2**	**20.9**	12.9
$30,001–$50,000	15.1	11.4	14.3
$50,001–$70,000	**20.3**	**10.0**	18.5
$70,001–$100,000	**10.7**	**5.5**	11.6
Over $100,000	**10.3**	**3.2**	10.8
Language			
LOTE spoken in h'hold	16.9	19.1	16.3
Type of house			
House or townhouse	87.4	84.1	88.4
Flat, unit or apartment	11.1	12.7	10.0
Disability			
Disability (respondent/other in h'hold)	**11.4**	**18.6**	12.6

Base: Non-adopter households who may know about DTTB n=862, non-adopter households who don't know about DTTB n=220, N_{TOTAL}=1,537
Data in **bold** represent statistically significant differences.

Unlike in the 2005 results, there is some divergence occurring between the DTTB-aware and unaware segments.

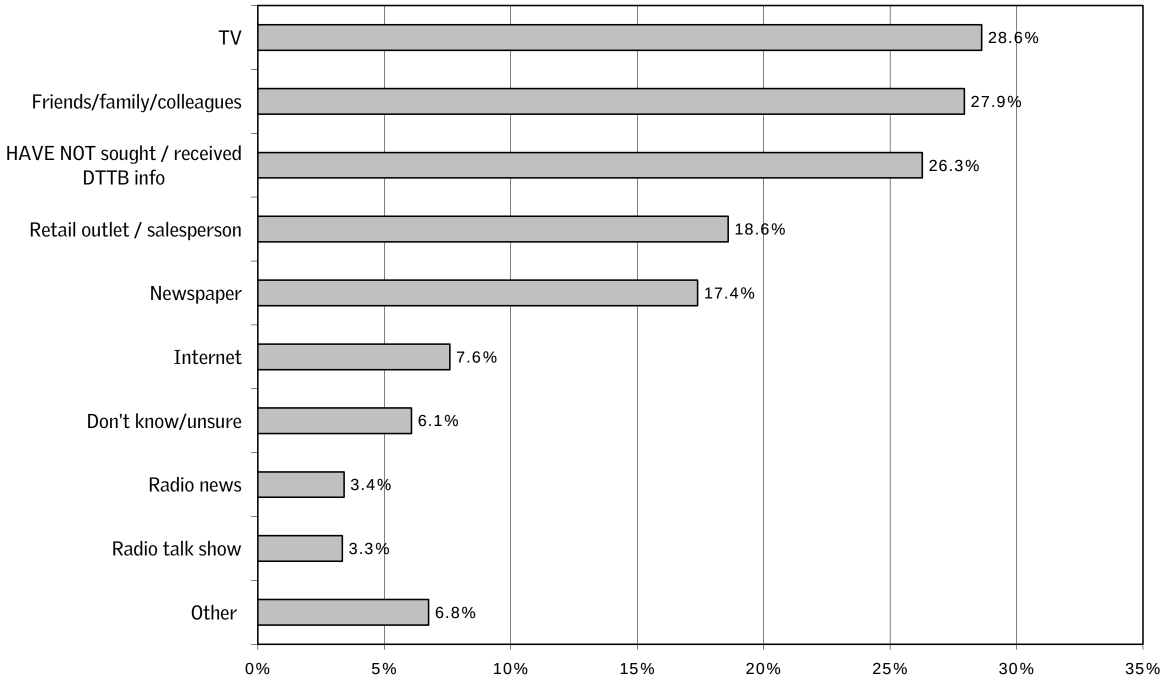
- Households that had not heard of DTTB were more likely to be in regional areas (45.0 per cent compared with 37.0 per cent DTTB-aware households), were less likely to be Queensland households (11.8 per cent compared with 22.7 per cent) and more likely to be South Australian households (12.3 per cent compared with 6.7 per cent).

- Households that had heard of DTTB were also more likely to be medium to high income households (those with incomes more than $50,000—41.3 per cent compared with 18.7 per cent who had not heard of DTTB);
- Households that had not heard about DTTB were also more likely to be adults-only households (80.9 per cent compared with 73.8 per cent of DTTB-aware households).

INFORMATION SOURCES

All households with some awareness of DTTB were asked where they had mainly found out about DTTB. The range of information sources that emerged are presented in Figure 8.

Figure 8: Information sources, October 2006



Base: All households, except those who have not heard about DTTB n=1,317

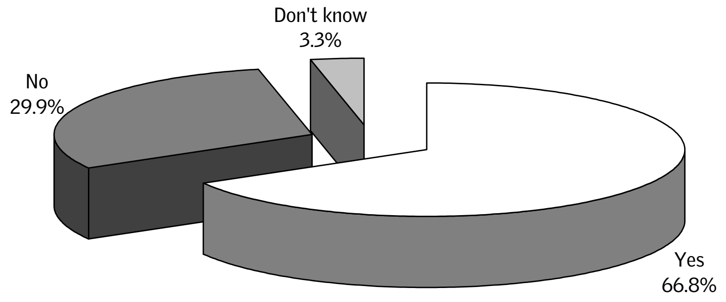
Television, and friends, family and colleagues were the most prominent sources of information about DTTB, accounting for 28.6 per cent and 27.9 per cent of household responses, respectively. In 2005, television was also most prominent (32.3 per cent), followed by newspapers (21.5 per cent). However, more than a quarter (26.3 per cent) of households indicated they had not sought or received information of DTTB (up from 18.1 per cent in July 2005).

The following scenario was then presented to respondents:

> 'Do you know that the current analog free-to-air television services—that is, Channels 7, 9 and 10, the ABC and SBS—will be completely replaced by digital free-to-air television in the future? This will mean that you will not be able to receive any free-to-air TV services without special digital TV equipment.'

The results are summarised in Figure 9.

Figure 9: Awareness of analog free-to-air television switch-off, October 2006



Base: N_{TOTAL}=1,537

Two-thirds (66.8 per cent) of households indicated that they knew about analog switch-off, a small increase on the 62 per cent recorded in 2005. The fact that nearly a third of all households did not know about analog switch-off indicates a fundamental information gap. This group included 17.4 per cent of DTTB adopter households, which indicates that their adoption of DTTB has not been driven by the prospect of future switch-off.

SUMMARY

Awareness and understanding of DTTB was examined and it was found that 20.3 per cent of non-adopter households (14 per cent of all households) had never heard of DTTB, which was similar to the level in 2005.

It was also found that television and friends, family and colleagues have been the main information sources on DTTB. However, more than one-quarter (26.3 per cent) of households with some awareness of DTTB indicated they had neither sought nor received information on DTTB at any stage.

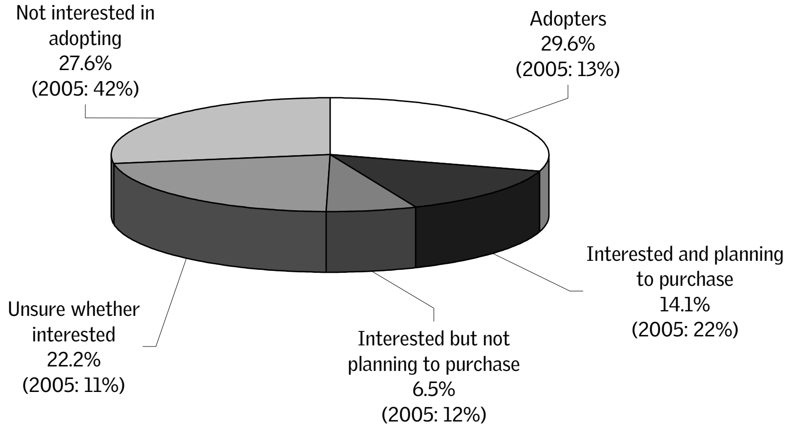
Since 2005, there has been a small increase in the overall proportion of households aware that analog free-to-air television broadcasting will be replaced by DTTB in the future—now at 66.8 per cent (up from 62 per cent in 2005).

Generally, while there has been little apparent increase in people's awareness and knowledge of DTTB, take-up has more than doubled between July 2005 and October 2006.

Adoption-intention segments for digital free-to-air television

A summary of the distinct segments that underlie the DTTB adoption-intention environment across Australia is presented in Figure 10.

Figure 10: Adoption-intention segmentation, October 2006



As seen in this section, DTTB adopter households amounted to 29.6 per cent of the random sample of television-using households. Those interested in DTTB are segmented into two groups that reflect ‘proximity to purchase’—14.1 per cent were interested and had plans to purchase, while 6.5 per cent were interested but had no purchase plans. Those who were unsure whether they were interested (22.2 per cent) and not interested at all (27.6 per cent) together accounted for approximately half (49.8 per cent) of the sample.

Since 2005, there has been a marked decrease in the ‘not interested in adopting’ segment, an increase in the ‘unsure whether interested’ segment, decreases in the two ‘interested’ segments, and a marked increase in the ‘adopter’ segment. This suggests some movement between the segments—from ‘not interested’ to ‘unsure whether interested’, and from ‘interested’ to ‘adoption’. More broadly, there has been a small decrease of the combined ‘not interested’ and ‘unsure whether interested’ segments (down from 53 per cent in 2005 to 49.8 per cent in 2006), and a small increase in the combined ‘interested’ and ‘adopter’ segments (up from 46.9 per cent in 2005 to 50.2 per cent in 2006).

APPENDIX: QUESTIONNAIRE

Australian Communications and Media Authority Digital Media in Australian Homes Questionnaire

Eureka project no. 3308

To be administered using computer-assisted telephone interviewing. Headings will not appear in field version.

RECORD STATE/TERRITORY
RECORD POSTCODE

Introduction

Hello, my name is [INTERVIEWER] from Eureka Strategic Research and I'm calling on behalf of the Australian Communications and Media Authority, the Commonwealth Government agency responsible for regulating television and radio broadcasting in Australia.

We are conducting an important research project examining views about television across Australian households. Does your household have a television? TERMINATE WITH THANKS IF NO.

N.EQUALS: PLEASE RECORD NUMBER OF PEOPLE WHO TERMINATED BECAUSE OF NO TELEVISION IN HOUSEHOLD

I actually need to speak with someone in your household who makes decisions or contributes to making decisions about the purchase of items such as TVs. Are you 16 years or over and a decision-maker in regard to this type of item? IF NOT, ASK FOR APPROPRIATE PERSON, REPEAT INTRODUCTION. IF RESPONDENT UNCERTAIN, CONFIRM JOINT DECISION-MAKER IS ACCEPTABLE.

If you choose to participate in this survey, the information and opinions you provide will be used only for research purposes and will remain confidential, and assist the Commonwealth Government to better understand the views of Australians about television. Would you like to participate?

IF YES, CONTINUE
IF DURATION QUERIED: about 5 minutes
IF TIME INCONVENIENT, ARRANGE CALL BACK
IF NOT INTERESTED: Thank & close.

IF QUERIED ABOUT BONA FIDES OF RESEARCH: I can provide the names of people who will verify the legitimate nature of this research project. The first is the Australian Market and Social Research Society enquiry line on 1300 36 4830. The second is the Project Manager at Eureka Strategic Research, Tom Loncar, on (02) 9519 2021.

IF QUERIED ABOUT HOW NAME WAS SOURCED: We are contacting people from the White Pages.

Television sets, display devices & computer monitors used to watch TV programs

1. [ALL] First, how many working television sets are currently used in your household, including display devices or computer monitors that are used to watch TV programs?
   RECORD NUMBER
   [IF RESPONDENT IS CONFUSED, STRESS THIS MEANS 'BROADCASTS', NOT 'PLAYBACK-ONLY'

2. [ALL – INTERVIEWER MUST READ OUT ENTIRE DESCRIPTION] And how many of those/does it receive broadcasts of digital free-to-air television? To receive digital free-to-air TV you would need an integrated TV set that has an inbuilt digital decoder **or** a digital free-to-air set-top box attached to your TV screen. Please note that I am referring to a digital free-to-air set-top box and not a digital pay TV set-top box. [IF NECESSARY: You could only have purchased these since January 2001.]

RECORD NUMBER OF DTVS
DON'T KNOW=98

3. [IF 0 OR 98 ABOVE] As far as you are aware, is digital free-to-air TV available to households in your area? [IF DON'T KNOW, PROMPT WITH 'have you heard about digital free-to-air television?' AND CODE APPROPRIATELY]

YES	1
NO	2
DON'T KNOW – HAVE HEARD ABOUT DIGITAL FTA TV	96
DON'T KNOW – HAVE NOT HEARD ABOUT DIGITAL FTA TV	97

Pay TV

4. [ALL] Does your household subscribe to Pay TV? [IF NECESSARY: For example, Foxtel, Austar, Optus, Trans TV/TransACT, Neighborhood Cable.]

YES	1
NO	2
DON'T KNOW	98

Free-to-air digital TV set-top box with hard drives/PDR functionality

5. [DTV HHOLDS IE >0, ≠ 98 @ Q2 OR PAY TV HHOLDS IE 1 @ Q4] Does your household have a hard drive recorder that can record and replay free-to-air TV programs, including the personal digital recorders (or PDRs) provided by pay TV companies, for example, Foxtel iQ? [IF NECESSARY: A personal digital recorder or PDR allows program recording, pausing, and replaying, and some have the ability to record two different channels at once.]?

YES	1
NO	2
DON'T KNOW	98

'Drivers' of digital change (adopters of Digital Free-to-air only)

6. [>0 **AND** ≠ 98 @ Q2] I would now like to talk about digital free-to-air TV. Please think about the reasons why you decided to get digital TV in your household. What do you think was the main reason?

   (a) **RECORD VERBATIM** FIRST MENTION, AS SEPARATE VARIABLE

   (b) Any others? **RECORD VERBATIM**. ALL OTHER MENTIONS AS SEPARATE VARIABLE

Non-adopter intentions

7. [NON DTV ADOPTERS I.E. 0 OR 98 @ Q2] You told me that your household has not taken up digital free-to-air television. Are you interested in getting digital free-to-air TV some time in the future?

YES	1
NO	2 – GO TO Q12
DON'T KNOW/UNDECIDED	98 – GO TO Q12

8. [CODE 1 ABOVE] And are you planning to purchase a digital set-top box or integrated digital television in order to receive free-to-air digital TV? [IF NECESSARY: the minimum price for a digital set-top box is $70 to $150, and the minimum price for an integrated digital TV set with an

in-built decoder is about $1500].

YES	1
NO	2 – GO TO Q10
DON'T KNOW/UNDECIDED	98 – GO TO Q10

9. [CODE 1 ABOVE] And is that …? [READ OUT]

Within 12 months	1
In 1 to 2 years	2
Or, after 2 years	3
[DO NOT READ OUT] DON'T KNOW/UNDECIDED	98

10. [ALL THOSE INTERESTED I.E. 1 @ Q7] There are many possible reasons why people might get digital free-to-air television. I would now like you to think about the reasons why you are interested in getting digital free-to-air TV. What do you think is the main reason?

(a) RECORD FIRST MENTION.
(b) Any others? RECORD OTHER MENTIONS

11. [ALL THOSE INTERESTED I.E. 1 @ Q7] What specific or additional knowledge do you feel you need before getting digital free-to-air TV? PROMPT WITH 'Anything else?'
RECORD VERBATIM

12. [ALL NOT-INTERESTED-TO-ADOPT OR NO PLANS I.E. 2/98 @ Q7 OR 2/98 @ Q8] There are a number of reasons why people are not interested, or not planning to take-up digital free-to-air TV. Can you tell me why this is the case for your household? PROMPT WITH 'Is there anything else?'
RECORD VERBATIM

Awareness and knowledge of DTV

[ALL] I would now like to ask you a few general questions about digital free-to-air TV broadcasting in Australia.

13. [ALL, EXCEPT CODE 97 AT Q3]
Where have you **mainly** found or received information about digital free-to-air TV, for example, information about its introduction to Australia, the equipment required and the features offered? [DO NOT READ OUT, MULTI]

DON'T KNOW/UNSURE	98
HAVE NOT sought or received information about digital TV	1
Internet	2
Retail outlet / salesperson	3
TV	4
Radio talk show	5
Newspaper	6
Radio news	7
Friends/family/colleagues	8
Other RECORD VERBATIM	9

14. [ALL] Do you know that the current analog free-to-air television services (that is, Channels 7, 9 and 10, the ABC and SBS) will be completely replaced by **digital** free-to-air television in the future? This will mean that you will not be able to receive any free-to-air TV services without special digital TV equipment.
[IF NECESSARY, EG IF RESPONDENT SHOWS ALARM/PANIC: 'Please note that this will not happen for a number of years. Current government plans indicate that this will happen between 2010 and 2012.']

YES	1
NO	2
DON'T KNOW	98

Internet

15. [ALL] Thank you. That is all I need to ask you about television. I now have some short questions about the internet.

    Does your household have internet access?

YES	1
NO	2 – GO TO Q17
DON'T KNOW	98 – GO TO Q17

16. And is that a dial-up or broadband connection?

Dial-up	1
Broadband [IF NECESSARY: For example, ADSL, cable or wireless broadband]	2
DON'T KNOW	98

Audio-visual content

17. [ALL] The next question is about audio-visual content streamed or downloaded from the internet, or on a mobile device. By audio-visual content I mean things like TV programs, sports events, news and music clips, movies and movie previews, but not games.

    In the last month, have you watched any audio-visual content from the internet or on your mobile?

YES	1
NO	2
DON'T KNOW/UNDECIDED	98

18. [IF 1 @ Q17] What types of display devices have you watched this audio-visual content on in the last month? Has it been on …? [READ OUT, MULTI]

A TV set	1
A personal mobile device, for example, an iPod or video player	2
A mobile phone	3
A computer monitor or laptop	4
Anything else? RECORD VERBATIM	9

Demographic information

Thank you, that's great! We are almost finished. I would like to conclude by asking you some questions that will help us to understand the range of people in our survey.

19. RECORD GENDER

20. Firstly, into which of the following age groups do you fall? [READ OUT – SINGLE RESPONSE]

Under 18 years	1
18-24 years	2
25-34 years	3
35-44 years	4
45-54 years	5
55-64 years	6
65+ years	7

Refused [DO NOT READ OUT]	99

21. How many people aged 16 years or over, including yourself, live in your household? [RECORD NUMBER]

22. Are there children under 16 living in your household?

YES	1 – CONTINUE
NO	2 – GO TO Q24

23. And how many are aged … [READ OUT]?

Under 6	RECORD NUMBER
6 to 11	RECORD NUMBER
12 to 15	RECORD NUMBER
Refused [DO NOT READ OUT]	99

24. Is your current employment status …? [READ OUT – SINGLE RESPONSE. IF AMBIGUOUS TO RESPONDENT, SEEK 'MAIN' OR 'BEST DESCRIPTOR']?

Full-time	1
Part-time	2
Casual	3
Retired	4
Unemployed	5
Home duties	6
Student	7
Refused [DO NOT READ OUT]	99

25. What is the highest level of education that you have completed to date? [READ OUT]

No formal education	1
Primary school	2
Secondary school	3
Technical College (TAFE)	4
University	5
Refused [DO NOT READ OUT]	9

26. Roughly speaking, is your annual household income before tax more or less than $50,000? And into which of the following ranges would your annual household income fall? Is it …? [READ OUT RELEVANT RANGES 1–3 OR 4–6 ONLY – SINGLE RESPONSE]

Under $15,000	1
$15,001–$30,000	2
$30,001–$50,000	3
$50,001–$70,000	4
$70,001–$100,000	5
Over $100,000	6
Refused [DO NOT READ OUT]	99

27. Is any language other than English spoken in your household?

YES	1
NO	2

28. In what type of property do you live? Is it a …? [READ OUT – SINGLE RESPONSE] [INTERVIEWER'S NOTE: 'HOUSE' INCLUDES SEMI-DETACHED, 'DUPLEX' AND TERRACE HOUSE]

House or townhouse	1
A flat, unit or apartment?	3
Or another type of property	4

29. Do you consider yourself a person with a disability, or does anyone else in your household experience a disability? [IF QUERIED, ADD 'By this we mean any condition that has lasted or is likely to last 6 months or more ***and*** restricts your life in some way.']

YES (SELF)	1
YES (OTHER)	2
NO	3

30. [ASK IF CODE 1 OR 2 AT Q30] And does this disabling condition relate to sight, hearing or mobility? [MULTI]

SIGHT	1
HEARING	2
MOBILITY	3
OTHER	4
Refused	9

Sign Off

That is the end of our survey. Thank you for participating. This research is being carried out on behalf of the Australian Communications and Media Authority. The information you have provided will help ACMA better understand how digital media are affecting Australian households.

DIGITAL MEDIA IN AUSTRALIAN HOMES – 2006

CANBERRA CENTRAL OFFICE
Purple Building, Benjamin Offices
Chan Street, Belconnen
PO Box 78
Belconnen ACT 2616
Tel: 02 6219 5555
Fax: 02 6219 5200

MELBOURNE CENTRAL OFFICE
Level 44, Melbourne Central Tower
360 Elizabeth Street, Melbourne
PO Box 13112 Law Courts
Melbourne Vic 8010
Tel: 03 9963 6800
Fax: 03 9963 6899
TTY: 03 9963 6948

SYDNEY CENTRAL OFFICE
Level 15, Tower 1 Darling Park
201 Sussex Street, Sydney
PO Box Q500
Queen Victoria Building NSW 1230
Tel: 02 9334 7700, 1800 226 667
Fax: 02 9334 7799

www.acma.gov.au