

# Digital TV Transitions Lessons and Projections

**Paul Rappoport, Temple University and Centris  
Columbia Institute for Tele-Information**

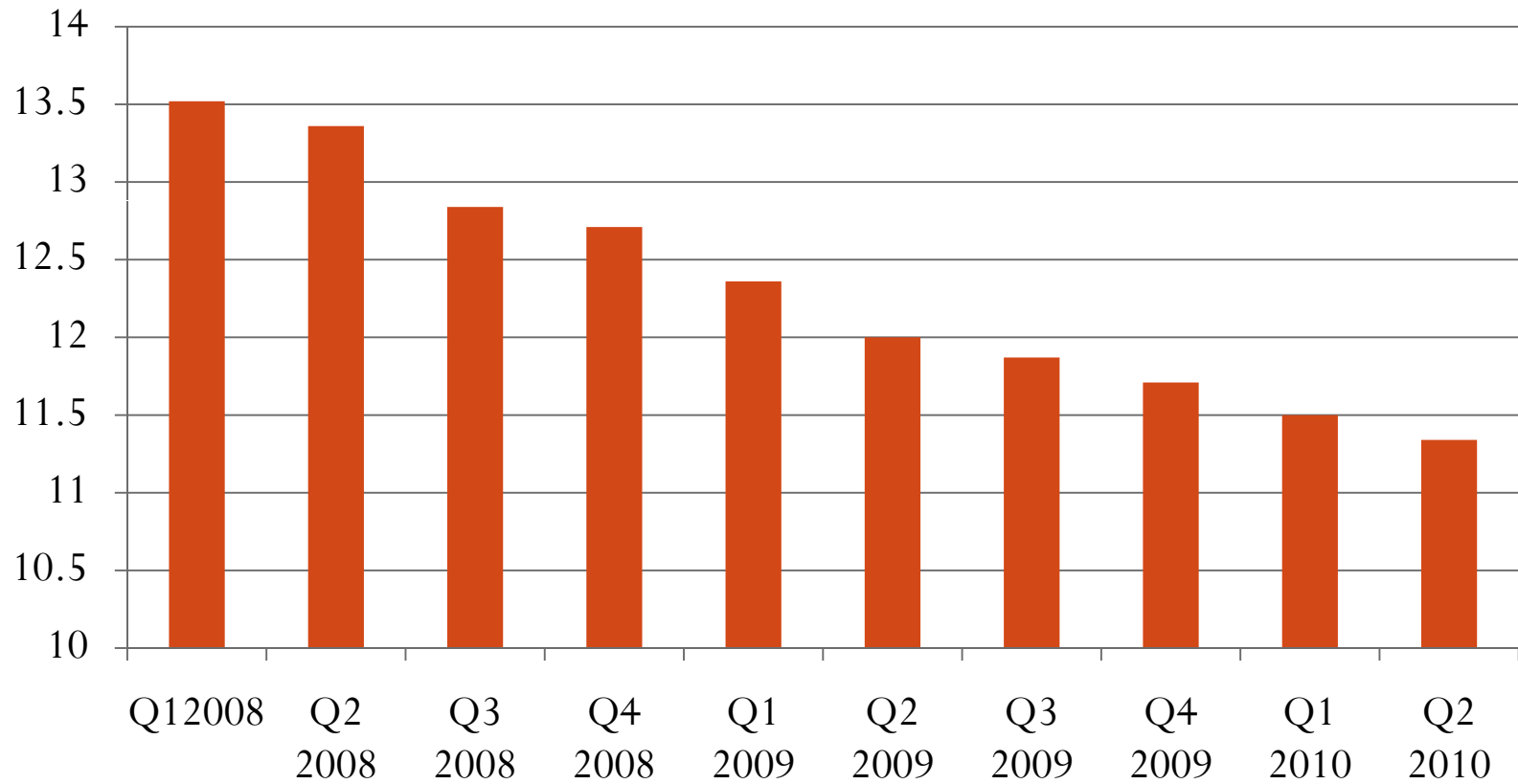
**October 2, 2009**

# Background

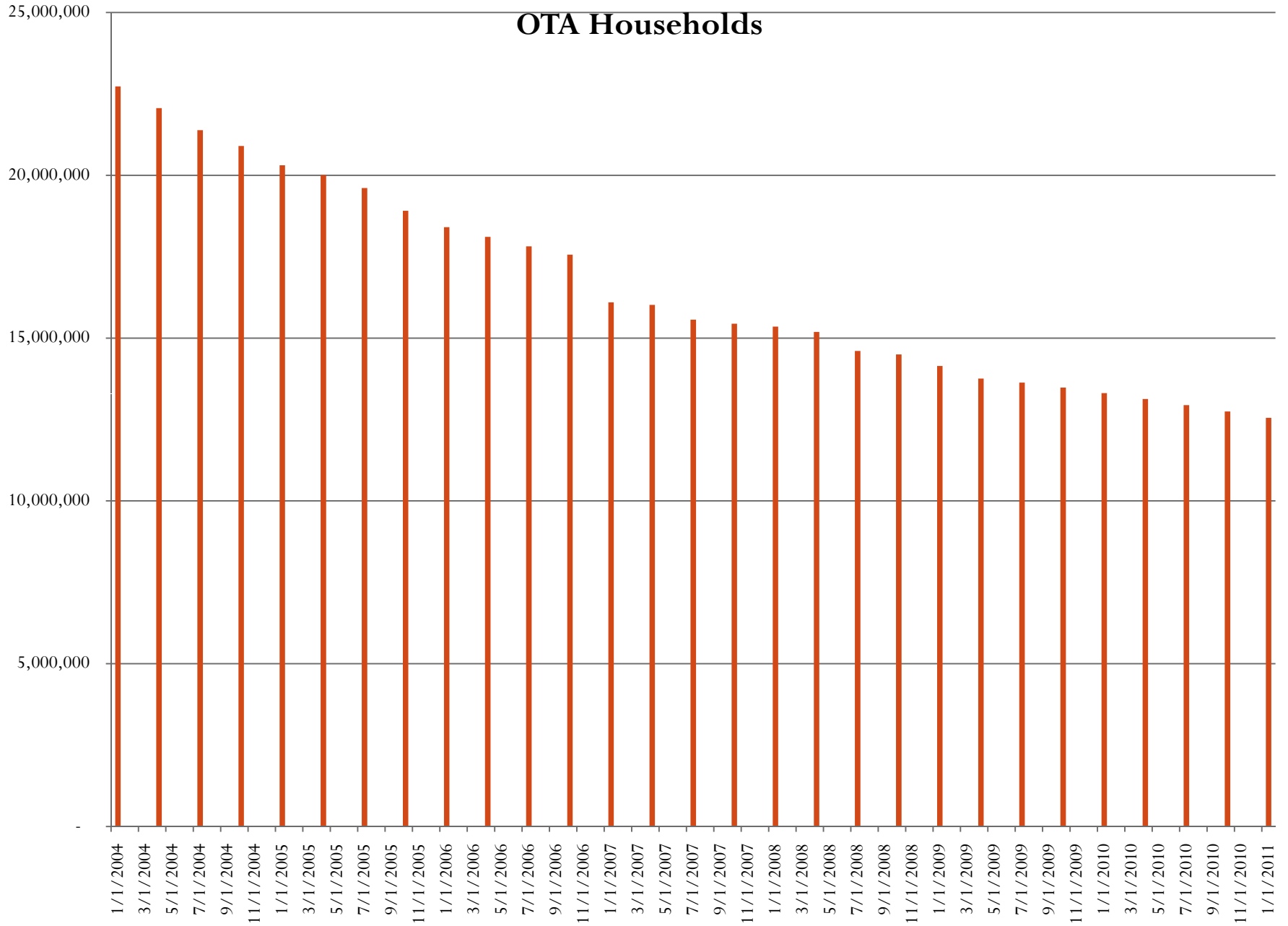
- Centris started tracking OTAs in late 2007
- Centris produced tracking study for CTAM (2008-2009)
- Centris estimated whether or not a location would be able to receive a digital signal – in doing so raised the antenna issue –and of course incurred the wrath of NAB, FCC etc
- Centris tracks the video market – 20,000 survey per month
- Since Q1 2009 Centris is tracking “flow share”

# Over-the-Air Penetration Rates

**Rate**



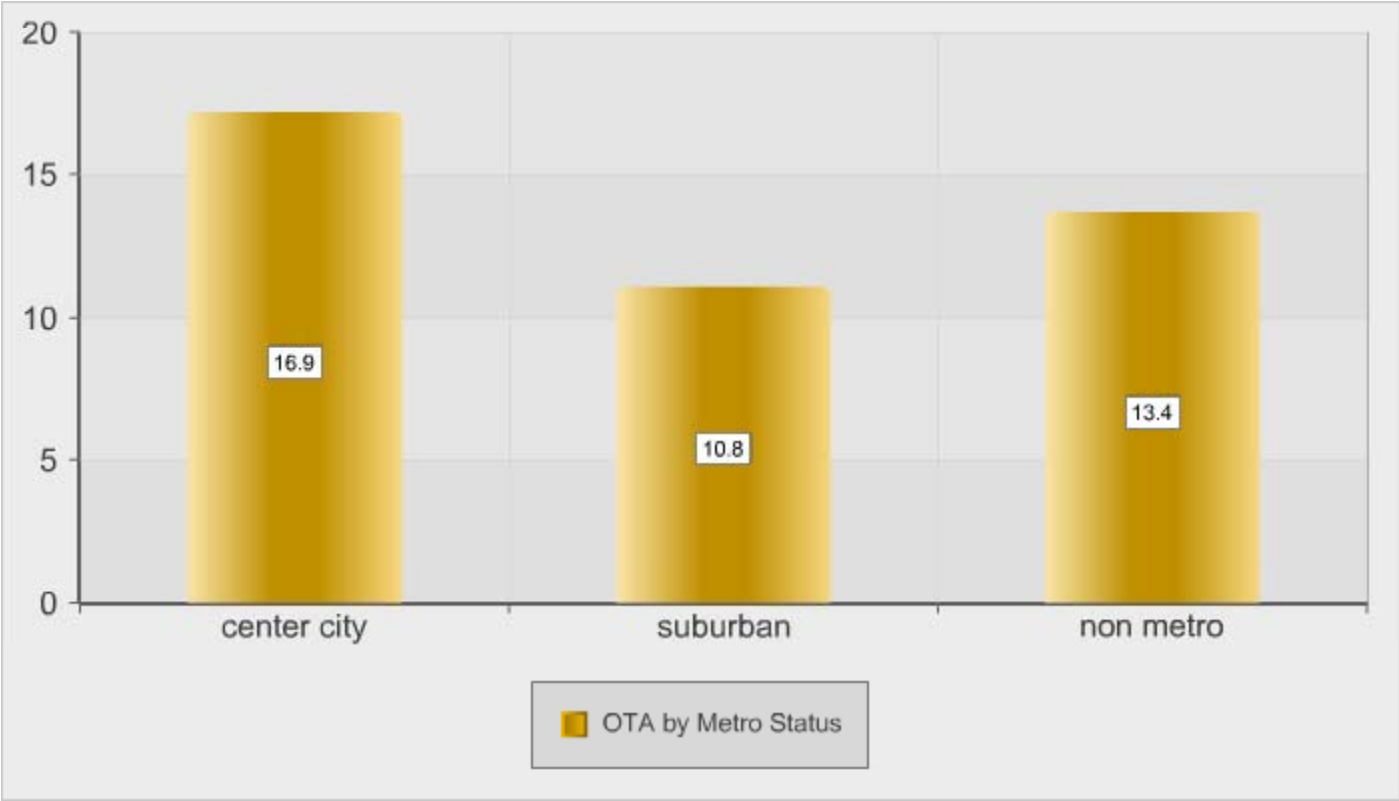
# OTA Households



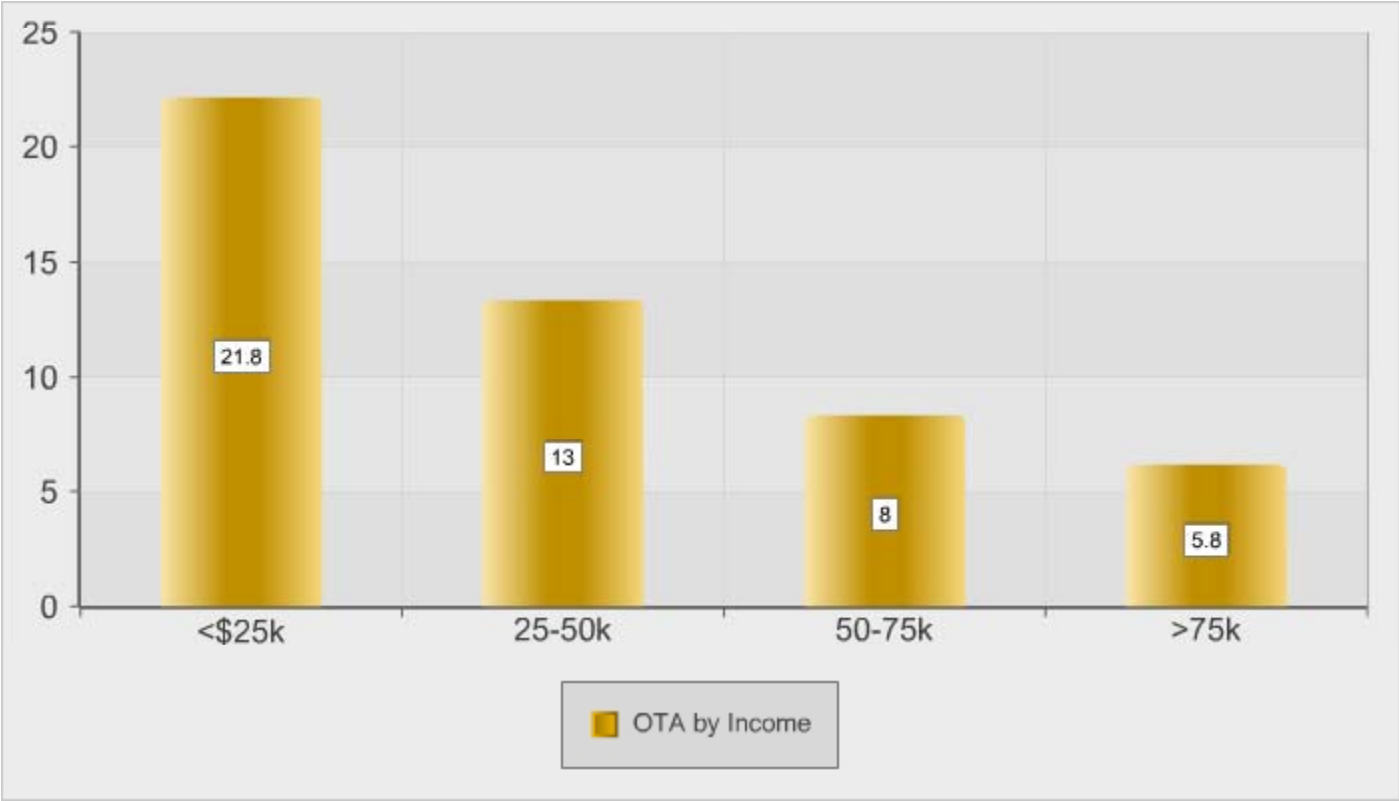
# Profile of OTA Households

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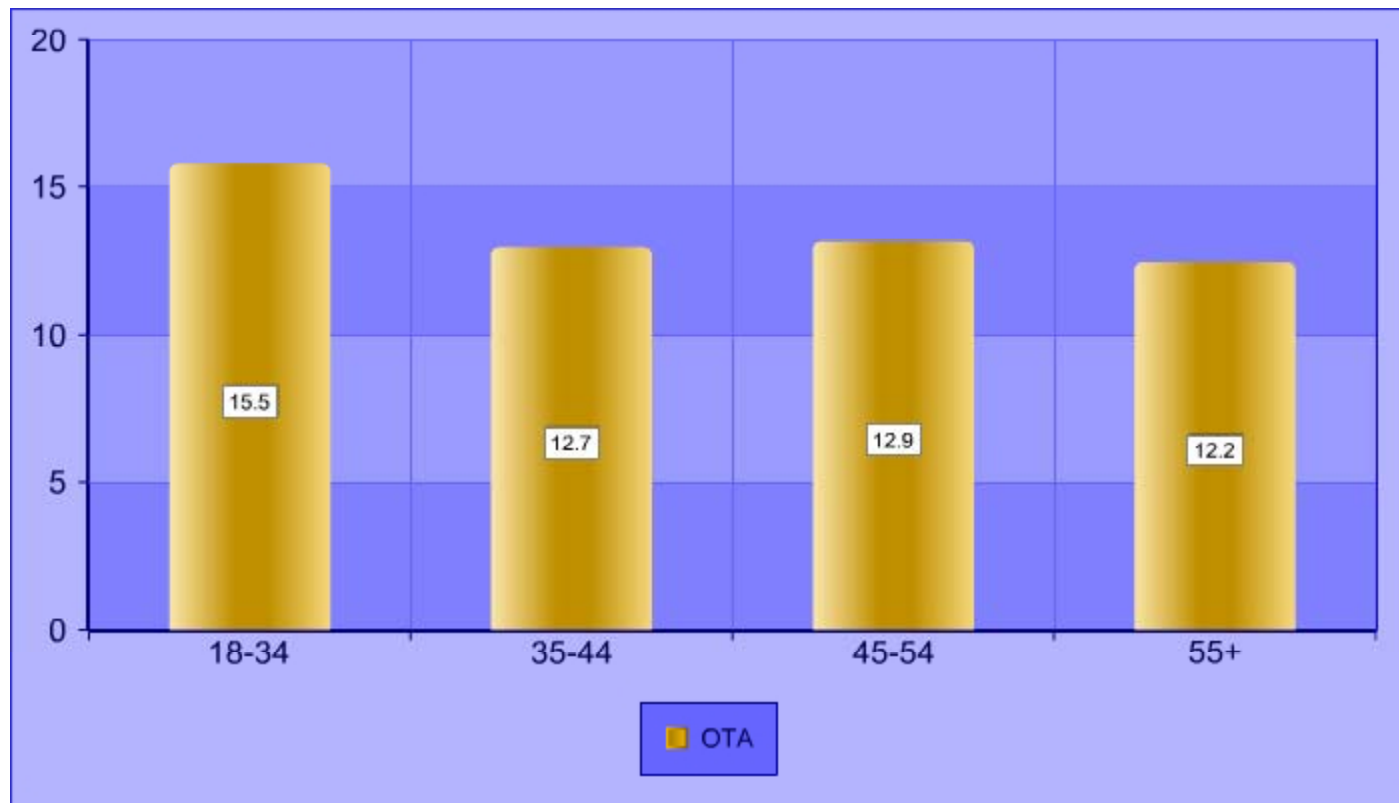
# OTA by Metro Status



# OTA by Income

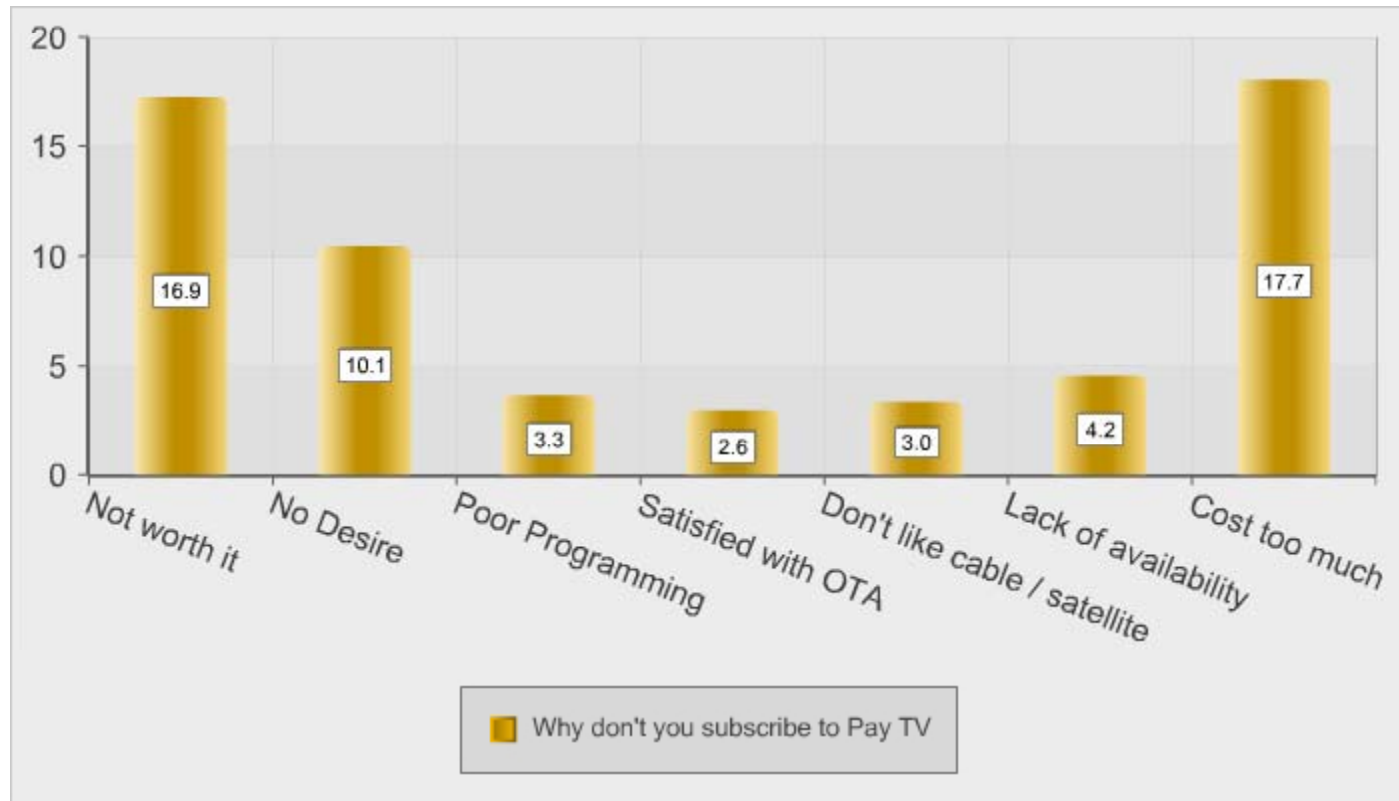


# OTA by Age





# OTA by Reason



# Flow Share

- Q1 to Q2 2009
  - Approximately 491,000 OTAs switched to Pay TV
    - 16.5% Switched to Satellite
    - 1.3% Switched to Fiber
    - Remainder to Cable
  - Cable is 55% of Pay TV
  - Satellite 27% of Pay TV
  - Fiber 3% of Pay TV

# OTA Detail

- 27,000 OTA households that moved stayed OTA
- Change Q1 to Q2 change -311,245
- Q2 OTA households 13,755,737
- Q1 OTA households 14,143,265

# Finally

- Cable companies did not see this group as a preferred segment – they churn, are very price sensitive, do not like bundles, want mostly analog
- Satellite companies did not see the OTA segment as a significant part of their growth