

2000 SAP Channel Survey

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Executive Summary

- Nearly three-in-four stations (70%) are equipped to broadcast in BTSC stereo. About one-in-four (24%) are broadcasting on their SAP channel.
- Stations in market size groupings 1-10, 11-25 and 26-50 are more likely to broadcast on their SAP channel (45%, 35%, and 27% respectively) than stations in market size groupings 51-75, 76-100, and 101+ (7%, 14%, and 9%) respectively. This finding mirrors the results of stations that are equipped to broadcast in BTSC stereo audio and broadcast on SAP.
- The most often cited uses for the SAP channel include: Spanish language programming (n=42), weather updates (n=13), network programming (n=12), and promo feeds to stations (n=11).
- Seven-in-ten respondents stated that their stations do not use the PRO channel, while 28% of respondents do.
- While more than half of stations in markets 1-10 and 11-25 (57% and 54% respectively) use their PRO channel, only one-third of stations in markets 26-50 and 51-75 (33% and 36% respectively) do so. One-quarter of stations in markets 76-100 used their PRO channel whereas only 15% of stations in markets 101 and higher use it.
- IFB was the most cited use for the PRO channel (n=102), followed by cueing (n=29).

Introduction

Overview

The following report presents the results of a recent survey concerning television stations' use of the SAP and PRO channels. A brief one-page facsimile survey was sent to the attention of Chief Engineers at all 1,111 commercial television stations with known fax numbers.

Methodology

The surveys were faxed in December 1999. A "second request" fax was sent one week after the initial deadline to chief engineers. We received 554 completed surveys, yielding a response rate of 52.8%. A copy of the survey is attached as Appendix A.

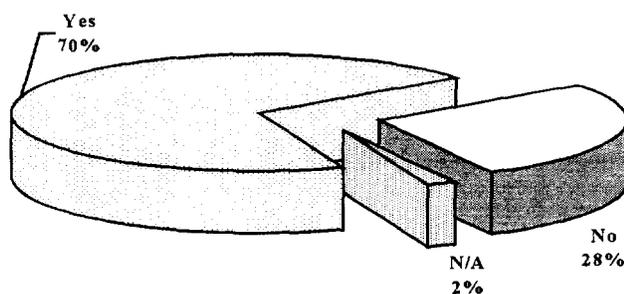
Because this is an attempted census, there is no way to estimate sampling error. More than half (52.8%) of the chief engineers at commercial television stations participated in the survey (total) and there may be differences with the remaining half (47.2%) who did not respond.

Primary Findings

BTSC Stereo

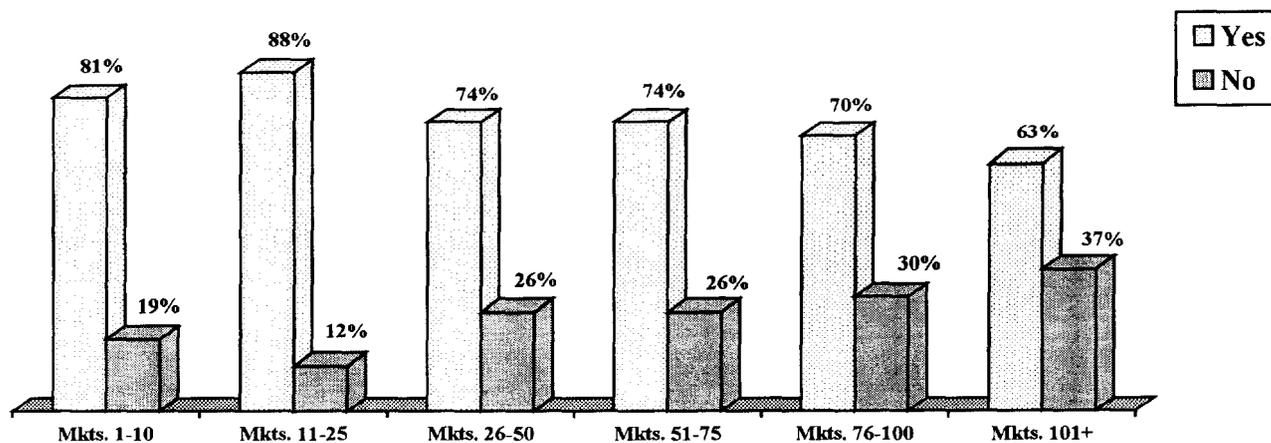
Seven-in-ten respondents stated that their station is **equipped to broadcast in BTSC Stereo**, while slightly more than one-quarter (28%) of respondents stated that their station is not equipped to do so.

Figure 1: Stations Equipped to Broadcast in BTSC Stereo (all stations)



When respondents are broken-down by their respective market groupings, **more than 80% of all stations in markets 1-25 are equipped to broadcast in BTSC stereo**. Three-quarters of stations in markets 26-75 are equipped to broadcast in BTSC, while markets 76 and higher have fewer stations equipped to broadcast in BTSC (although still a majority of 63% or more).

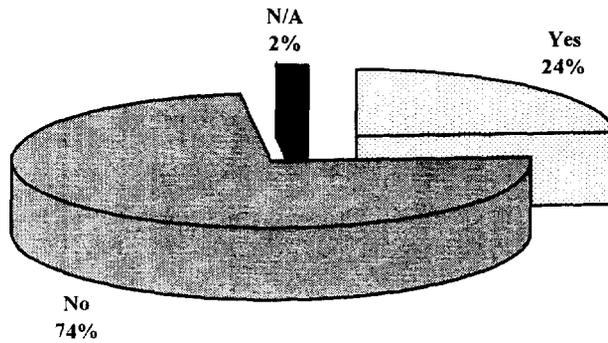
Figure 2: Stations Equipped to Broadcast in BTSC Stereo (all stations by market)



SAP Channel

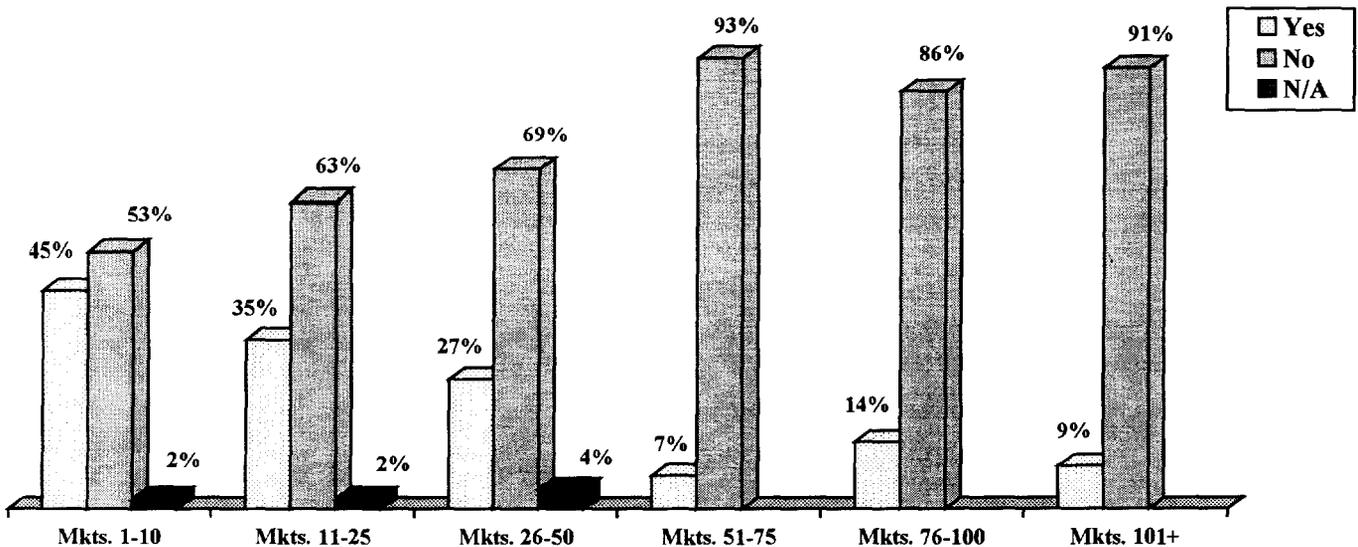
One-quarter (24%) of all respondents indicated that their station **broadcasts on their SAP channel**, whereas the remaining three-fourths (74%) do not.

Figure 3: Stations Broadcasting on Their SAP Channel (all stations)



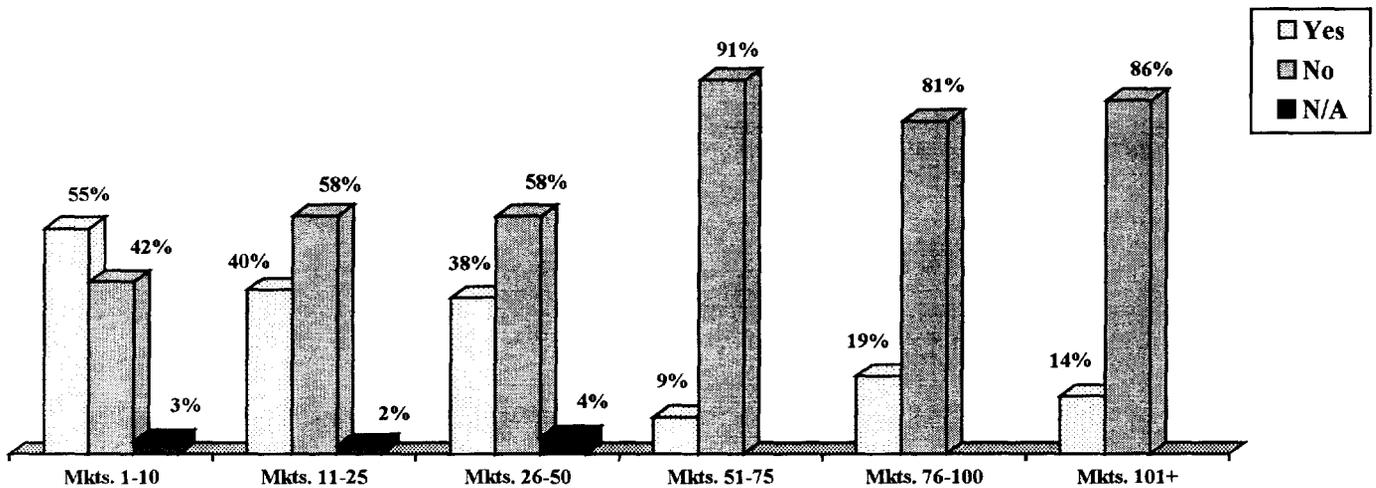
In general, stations in **larger markets are more likely** to broadcast on their SAP channel. In the largest market grouping (markets 1-10), 45% of stations broadcast on their SAP channel, and 35% of responding stations in markets 11-25 broadcast on their SAP channel. This finding contrasts sharply with responding stations in markets 101+, where only nine percent of stations broadcast on their SAP channel.

Figure 4: Stations Broadcasting on Their SAP Channel (all stations by market)



Of those stations that are equipped to broadcast in BTSC stereo audio, more than half (55%) of stations in markets 1-10 broadcast on their SAP channel, while four-in-ten stations in markets 11-25 do so. A majority of stations in markets 51 and higher do not broadcast on their SAP channel, even though they are stereo compatible.

**Figure 5: Stations Broadcasting on SAP
(by market, those stations equipped to broadcast in BTSC stereo audio)**



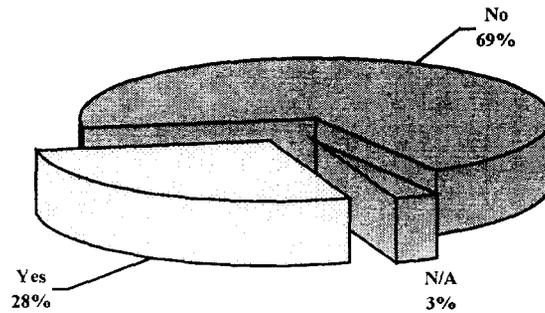
When asked to describe how their station uses the SAP channel, their answers can be classified as follows:

- Spanish language programming (n = 42)
- Weather updates (n = 13)
- Network programming (n = 12)
- Promo feeds to stations (n = 11)
- Local programming (n = 9)
- Mono programs (n = 9)
- Audio feeds (n = 2)
- SAP explanation (n = 1)
- Reading services for the blind (n = 1)

PRO Channel

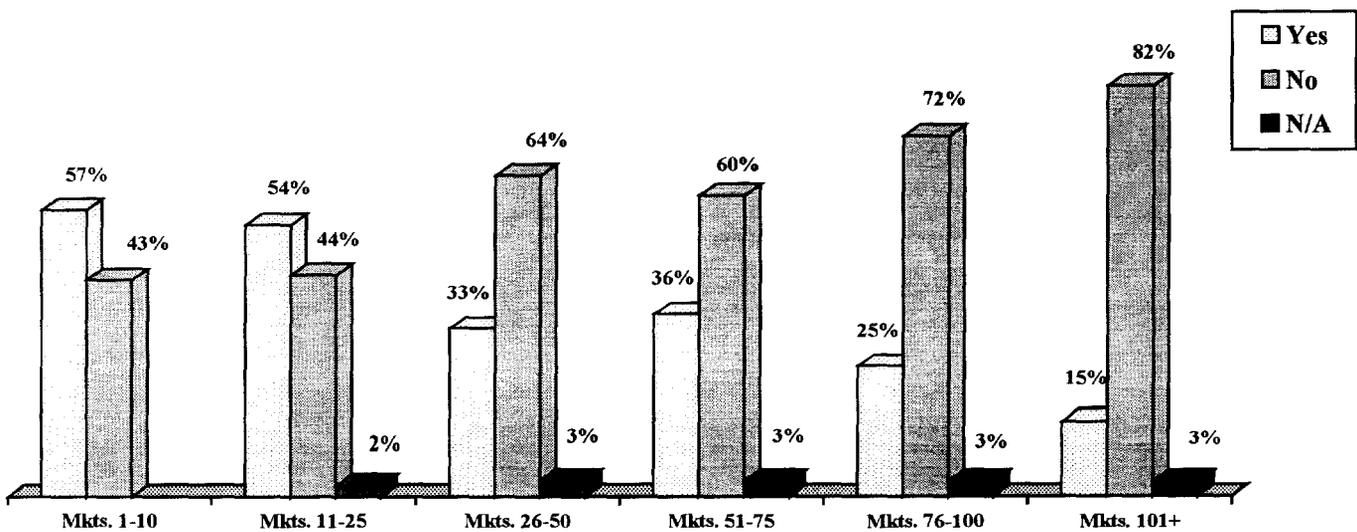
Slightly more than **two-thirds (69%)** of respondents stated that their station does not use the **PRO channel**, while one-quarter (28%) of responding stations do.

**Figure 6: Stations Using Their PRO Channel
(all stations)**



When broken-down by market, we find that **more than half of the stations in markets 1-25 use their PRO channel**.

**Figure 7: Stations Using PRO Channel
(all stations by market)**



When asked to describe how their station uses the PRO channel, their answers can be classified as follows:

- IFB (n = 102)
- Cueing (n = 29)
- ENG (n = 6)
- Remote control (n = 5)
- Telemetry (n = 3)
- DTMF (n = 3)
- Control of remote microwave sites (n = 2)
- Transmitter remote control telemetry (n = 1)
- Off-air monitoring (n = 1)
- Data transmission of weather warnings (n = 1)
- Control format (n = 1)
- Transmit data (n = 1)
- Relay WAS radio station to remote site (n = 1)
- Return demand/off-air (n = 1)
- Live shots (n = 1)
- IRL news scanner audio return from XMTR (n = 1)

APPENDIX

Attention Chief Engineer: **WE NEED YOUR HELP!**



Dear Chief Engineer,

SAP Channel Survey December 1999

The NAB is conducting this brief survey of the use of the Secondary Audio Programming (SAP) channel in order to better understand the state of this technology at television stations. We need your assistance in helping us to serve the broadcasting industry. The information compiled will be held in the **STRICTEST CONFIDENCE**. Information will only be published in aggregate form and individual station information will not be made available to anyone. Please return via fax to (202) 775-4981 or 775-2980 **no later than Friday, December 17, 1999**. If you have any questions regarding this survey, please contact Chris Ely, NAB Research and Planning Department at (202) 429-5390. Thank you!

Station Call Letters: _____ - TV Name: _____ Phone: _____

1. Is your station currently equipped to broadcast in BTSC stereo audio? Yes No

If Yes:

1A. Are you broadcasting on your Secondary Audio Programming (SAP) channel? Yes No

1B. If Yes, How is SAP being used? (please explain) _____

2. Are you using your PRO (Professional) channel? Yes No

If Yes:

2A. How is PRO being used? (please explain) _____

**Please fax this completed survey by December 17, 1999 to:
(202) 775-4981 or (202) 775-2980.
Thank You!**