

Ofcom and Digital UK  
Switchover Tracker Survey

Switchover Progress Report  
Q4 2006

**digitaluk**

**Ofcom**  
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# Executive Summary

## Awareness & Understanding of Switchover

- The Q4 results of the Ofcom/Digital UK Switchover Tracker represent the third full quarter of metrics on consumer progress towards digital TV switchover now highlighting various trends in the sector for the different switchover metrics.
- National switchover awareness increased from 70 to 80 per cent in the last quarter following the Digital UK autumn communications campaign. With this rise in awareness Digital UK exceeded its own awareness target of 75% by 5 percentage points. Awareness of switchover is highest in the early switchover regions with levels of switchover awareness over 90% in Border (91%) and Westcountry (91%) and above 85% in Wales (85%) and Granada (87%).
- Awareness of the digital logo has been growing steadily quarter on quarter in the last year, with now almost 60% of the population (58%) aware of the digital tick logo and 64% of this growing base of respondents who have seen the logo understanding correctly what it means. With a target of 57% the performance of the logo also exceeded expectations from the last quarter.
- Understanding of digital switchover rose by 9pp from 52% in Q3 to 61% in Q4. Levels of understanding are higher in Border, Westcountry and Wales, but below average in Granada at 57%.
- Date awareness remains low, 53% of the UK population understand that the switchover timetable is from 2008 to 2012, but 31% are unsure when switchover is happening in their area. Improvements in date awareness have been made in all of the early switchover regions. However, Border is the only TV region where more than half of the population (57%) understand the specific year of switchover.

## Digital TV conversion and Intentions to convert

- In December Ofcom issued its Q3 2006 Digital Television Progress Report on take-up of digital TV. Q3 multichannel conversion was 74.8% which suggested a pronounced growth of 3.8pp primary TV set conversion in households from Q2 to Q3 of last year. The level of digital TV penetration stood at 73% at the end of quarter 3 2006
- The primary set conversion results of the Ofcom/Digital UK switchover tracker returned similar results in quarter 3 2006 with multichannel penetration of 76%. During the fourth quarter of 2006 the Ofcom/Digital UK switchover tracker suggests continuous growth of primary set conversion, with multichannel penetration including analogue cable households rising to 79%.

- Intentions to convert remained broadly stable. 91% said they had a definite plan to convert for switchover, and again just 2% said that they would not convert any of their existing sets. The number of resisters in Whitehaven which is less than a year away from the local switchover date stands at 0%, with no one surveyed in the area saying they would not convert for switchover.

### Attitudes to Digital Switchover

- Attitudes towards the policy of switchover are holding steady with around 7 in 10 people feeling positive or neutral about switchover. In Q2 this metric stood at 67%, saw a marginal improvement to 70% in Q3, and was 69% in Q4. 82% of the population feel comfortable with the actual process of switching over. However, 60% of the population felt they needed more information, and 15% said that they felt worried about the process.

### Communications module

- The autumn campaign helped to improve general levels of switchover awareness and logo awareness across all switchover regions. 56% of viewers have seen or heard any advertising about the digital TV switchover and 22% have read or seen news coverage about digital TV switchover. The biggest improvements were made in the Granada TV region (+23pp), where the TV, radio and press campaign was upweighted.
- The autumn campaign was considered just as informative and useful as the earlier May campaign, but was also seen as more enjoyable and less irritating to the audience. Similar to the May campaign both spots ('Look for the Logo' and 'Why wait') were seen as good ways to advertise switchover.

### Whitehaven: The first region to switch

- The first area in the UK to switch from analogue to digital television is Whitehaven and its surrounding area. With the switchover date less than one year away in October 2007, switchover awareness is almost universal in Whitehaven at 95%. General understanding of how to prepare for digital switchover is also high, with more than 3 in 4 adults (77%) knowing that they have to upgrade their TV equipment with some form of digital receiver.
- However, still a large number of people lack a more detailed appreciation of switchover. Only 7% understand that they will have to get digital TV on every set in their household and only 32% of the people in Whitehaven were able to quote the exact quarter of digital switchover. One in five of the Whitehaven population remains unsure when switchover is happening in their area.

### Digital switchover in rural areas

- Digital television ownership levels have remained constant among residents of rural areas, but both awareness and understanding of what

switchover means to rural residents have improved. In comparison to the urban population, rural residents have a significantly greater awareness and understanding of digital switchover issues.

### Digital switchover in the ITV Wales region

- As well as having historically higher DTV penetration, Wales also has higher levels of awareness of digital switchover and of understanding what this means to people. Behind Border (the first region due to switch), Wales has the highest level of knowledge among its residents of the switchover date, with over one quarter of Welsh people knowing that switchover will take place in 2009/2010 depending on their local transmitter.

**Chapter 1**

**The Dashboards – Q4 2006**

Quarterly results are presented on dashboards of progress:

(1) The Dashboard: By Regions

Key metrics for each switchover region, and the UK as a whole

(2) The Dashboard: By Consumer Groups

Key metrics provided for a range of demographic and consumer groups (see Appendix Two for a full Glossary of consumer group terms)

(3) The Dashboard: By Switchover Segment

Following a segmentation of the UK population for switchover, the dashboard reports the performance of the individual consumer segments across the key metrics. Detailed information on the switchover segments can be found in the Q3 2006 Switchover Progress Report.

Note that conversion figures on the dashboard are based on tracker data, and are therefore indicative only. The figures provided in Ofcom’s Quarterly Digital TV Progress Reports remain the authoritative guide to digital TV take-up. The Q3 2006 report shows that 73.3% of households have digital TV, and 74.8% have multi-channel TV (including analogue cable).

**How to read the dashboards**

**FIGURE 1 – NAVIGATING THE TRACKER DASHBOARDS**

The key switchover metrics – the responses to the most important questions from the Switchover Tracker survey that will be used to monitor progress by – are listed across the top of the dashboard [see appendix for further explanation of the key metrics]

The number of surveys achieved for each region or consumer group is listed in the ‘Base Size’ column

UK-wide national data is shown across the top line of both dashboards

The lined below are either for the switchover regions, or the selected consumer groups

	BASE SIZE	-1- Awareness		-2- Understanding			-3- Pos/veut attitude		-4- Intentions to convert			-5- Conversion				-6- Satisfact'n with digital TV
		↔ Switchover	↳ Logo	↔ What to do for DSO	↳ Update VCRs	↳ Regional date	↳ Overall opinion	↳ Personal comfort	↳ Convert at least one set	↳ Will not convert any set	↳ Analogue h/holds to convrt, 2m	↳ Primary set converted	↳ Other sets converted	↳ Full h/hold convrsion	↳ Total TV sets convrt	
<b>NATIONAL</b>	<b>1964</b>	80%	58%	61%	29%	11%	69%	82%	91%	2%	15%	79%	41%	45%	59%	78%
1 - Border	319	91%	69%	69%	32%	57%	71%	82%	90%	2%	17%	74%	42%	46%	58%	80%
2 - Westcountry	301	91%	64%	76%	32%	14%	72%	81%	96%	2%	16%	75%	33%	35%	52%	79%
3 - Wales	305	85%	62%	67%	30%	28%	65%	79%	87%	1%		82%	42%	51%	62%	82%
4 - Granada	324	87%	64%	57%	33%	19%	65%	79%	92%	1%	17%	79%	47%	45%	62%	77%
5 - West	61*	78%	55%	66%		5%	66%	87%	89%	3%		86%	37%	44%	59%	83%
6 - STV/Gramp	81*	87%	64%	63%	37%	12%	75%	80%	94%	4%		85%	34%	43%	56%	82%
7 - Central	108	84%	60%	74%	32%	4%	68%	80%	91%	3%		69%	32%	35%	51%	84%
8 - Yorkshire	101	75%	62%	45%	28%	5%	59%	85%	94%	4%		77%	39%	41%	59%	70%
9 - Anglia	79*	89%	68%	70%	27%	2%	72%	81%	90%	5%		82%	39%	49%	61%	84%
10 - Meridian	95*	80%	53%	64%	34%	16%	72%	83%	93%	1%		84%	36%	44%	58%	75%
11 - London	106	74%	54%	60%	20%	12%	74%	82%	91%	0%		78%	55%	55%	64%	79%
12 - Tyne Tees	52*	65%	39%	44%		13%	69%	79%							55%	
13 - Ulster	57*	44%	24%	30%		4%	46%	93%	70%	3%		69%		46%	60%	

Yellow cells contain data based on low sample sizes (under 100 surveys), and should therefore be treated with some caution

Cells are greyed out where the sample sizes are very low (less than 50 surveys), and the data is therefore considered unreliable and not shown

**(1) The Dashboard: By Regions**

	BASE SIZE	-1- Awareness		-2- Understanding			-3- Pos/neut attitude		-4- Intentions to convert			-5- Conversion				-6-
		-a- Switchover	-b- Logo	-a- What to do for DSO	-b- Update VCRs	-c- Regional date	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-c- Analogue h/holds to cnvrt 12m	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
<b>NATIONAL</b>	<b>1964</b>	80%	58%	61%	29%	11%	69%	82%	91%	2%	15%	79%	41%	45%	59%	78%
<b>1 - Border</b>	<b>319</b>	91%	69%	69%	32%	57%	71%	82%	90%	2%	17%	74%	42%	46%	58%	80%
<b>2 - Westcountry</b>	<b>301</b>	91%	64%	76%	32%	14%	72%	81%	96%	2%	16%	75%	33%	35%	52%	79%
<b>3 - Wales</b>	<b>305</b>	85%	62%	67%	30%	28%	65%	79%	87%	1%		82%	42%	51%	62%	82%
<b>4 - Granada</b>	<b>324</b>	87%	64%	57%	33%	19%	65%	79%	92%	1%	17%	79%	47%	45%	62%	77%
<b>5 - West</b>	<b>61*</b>	78%	55%	66%		5%	66%	87%	89%	3%		86%	37%	44%	59%	83%
<b>6 - STV/Gramp</b>	<b>81*</b>	87%	64%	63%	37%	12%	75%	80%	94%	4%		85%	34%	43%	56%	82%
<b>7 - Central</b>	<b>108</b>	84%	60%	74%	32%	4%	68%	80%	91%	3%		69%	32%	35%	51%	84%
<b>8 - Yorkshire</b>	<b>101</b>	75%	62%	45%	28%	5%	59%	85%	94%	4%		77%	39%	41%	59%	70%
<b>9 - Anglia</b>	<b>79*</b>	89%	68%	70%	27%	2%	72%	81%	90%	5%		82%	39%	49%	61%	84%
<b>10 - Meridian</b>	<b>95*</b>	80%	53%	64%	34%	16%	72%	83%	93%	1%		84%	36%	44%	58%	75%
<b>11 - London</b>	<b>106</b>	74%	54%	60%	20%	12%	74%	82%	91%	0%		78%	55%	55%	64%	79%
<b>12 - Tyne Tees</b>	<b>52*</b>	65%	39%	44%		13%	69%	79%							55%	
<b>13 - Ulster</b>	<b>57*</b>	44%	24%	30%		4%	46%	93%	70%	3%		69%		46%	60%	

Ulster: 6-month data (July-December 2006)

**(2) The Dashboard: By Consumer Groups**

	BASE SIZE	-1- Awareness		-2- Understanding			-3- Pos/neut attitude		-4- Intentions to convert			-5- Conversion				-6- Satisfact'n with digital TV
		-a- Switchover	-b- Logo	-a- What to do for DSO	-b- Update VCRs	-c- Regional date	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-c- Analogue h/holds to cnvrt 12m	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	
<b>NATIONAL</b>	<b>1964</b>	80%	58%	61%	29%	11%	69%	82%	91%	2%	15%	79%	41%	45%	59%	78%
<b>Male</b>	<b>940</b>	82%	60%	67%	36%	12%	73%	87%	93%	2%	17%	84%	44%	50%	64%	82%
<b>Female</b>	<b>1024</b>	77%	56%	55%	22%	11%	65%	77%	89%	3%	14%	74%	38%	41%	55%	75%
<b>16-24</b>	<b>200</b>	59%	62%	43%	24%	8%	77%	90%	92%	2%		81%	44%	48%	61%	87%
<b>65-74</b>	<b>250</b>	81%	49%	54%	35%	14%	67%	82%	84%	6%	18%	69%	29%	38%	51%	79%
<b>65+</b>	<b>443</b>	81%	46%	50%	35%	11%	65%	79%	82%	7%	12%	59%	25%	30%	44%	79%
<b>ABC1</b>	<b>868</b>	84%	58%	69%	33%	11%	74%	86%	94%	1%	17%	81%	42%	47%	60%	80%
<b>C2DE</b>	<b>1096</b>	76%	57%	53%	24%	11%	65%	78%	88%	3%	13%	77%	41%	44%	59%	77%
<b>Rural</b>	<b>388</b>	87%	57%	71%	31%	11%	64%	81%	92%	2%	20%	80%	32%	40%	54%	77%
<b>Urban</b>	<b>1576</b>	79%	58%	59%	28%	11%	70%	82%	91%	2%	14%	79%	43%	46%	61%	78%
<b>Low income</b>	<b>432</b>	74%	57%	50%	27%	10%	64%	73%	87%	4%	12%	74%	38%	44%	58%	69%
<b>BME</b>	<b>87*</b>	50%	67%	41%		13%	69%	89%	88%	0%		75%	56%	63%	67%	76%
<b>Non-English</b>	<b>73*</b>	42%	52%	21%		9%	53%	76%	85%	1%		68%	57%	59%	64%	68%
<b>Disabled</b>	<b>329</b>	76%	55%	49%	28%	9%	62%	73%	89%	6%	5%	71%	40%	34%	55%	72%
<b>Need assistance</b>	<b>129</b>	76%	47%	49%	25%	7%	43%	60%	79%	7%	7%	33%	4%	0%	22%	
<b>Hard to reach</b>	<b>914</b>	76%	60%	57%	28%	13%	69%	82%	91%	2%	18%	79%	40%	47%	59%	75%
<b>Living alone</b>	<b>367</b>	76%	47%	52%	33%	7%	61%	76%	86%	4%	7%	60%	23%	40%	48%	79%
<b>Families w/ children</b>	<b>591</b>	77%	57%	61%	26%	12%	64%	78%	92%	2%	15%	87%	44%	45%	61%	72%
<b>Rent private</b>	<b>185</b>	65%	62%	49%	20%	7%	72%	85%	93%	1%		76%	34%	52%	58%	87%
<b>Rent council</b>	<b>376</b>	75%	60%	52%	27%	11%	64%	78%	87%	2%	10%	79%	42%	49%	62%	75%
<b>House</b>	<b>1782</b>	81%	57%	63%	29%	11%	68%	81%	92%	2%	15%	79%	42%	44%	59%	78%
<b>Flat</b>	<b>152</b>	70%	63%	45%	23%	9%	75%	85%	88%	3%		77%	35%	55%	64%	84%
<b>HS - 75+</b>	<b>193</b>	81%	42%	45%	33%	7%	63%	75%	79%	7%	8%	45%	12%	19%	34%	77%
<b>HS - DLA/AA &lt;75</b>	<b>98*</b>	77%	55%	53%	26%	5%	59%	73%	92%	3%		79%	40%	34%	57%	76%

**(3) The Dashboard: By Switchover Segment**

\* Very small base size – data should be viewed as indicative only

\*\* Extremely small base size – data omitted

	BASE SIZE	-1- Awareness		-2- Understanding			-3- Pos/neut attitude		-4- Intentions to convert			-5- Conversion				-6- Satisfact'n with digital TV
		-a- Switchover	-b- Logo	-a- What to do for DSO	-b- Update VCRs	-c- Regional Date	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-c- Analogue h/holds to cnvrt 12m	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	
<b>NATIONAL</b>	<b>1964</b>	80%	58%	61%	29%	11%	69%	82%	91%	2%	15%	79%	41%	45%	59%	78%
<b>Cultured Conservatives</b>	<b>246</b>	84%	49%	60%	26%	10%	68%	82%	83%	6%	14%	58%	35%	33%	46%	60%
<b>Out-and-About Families</b>	<b>261</b>	77%	54%	65%	30%	10%	64%	79%	95%	2%		89%	48%	52%	66%	75%
<b>Traditionalists</b>	<b>418</b>	79%	54%	47%	28%	10%	55%	69%	84%	4%	14%	59%	27%	25%	43%	68%
<b>TV-Centrics</b>	<b>682</b>	81%	63%	64%	25%	14%	74%	86%	94%	1%		91%	41%	45%	63%	83%
<b>Rolling Stones</b>	<b>150</b>	61%	55%	47%	25%	8%	81%	86%	92%	0%		82%	46%	65%	71%	89%
<b>High-Tech Consumers</b>	<b>207</b>	89%	68%	82%	47%	11%	78%	91%	99%	0%		94%	58%	63%	75%	86%

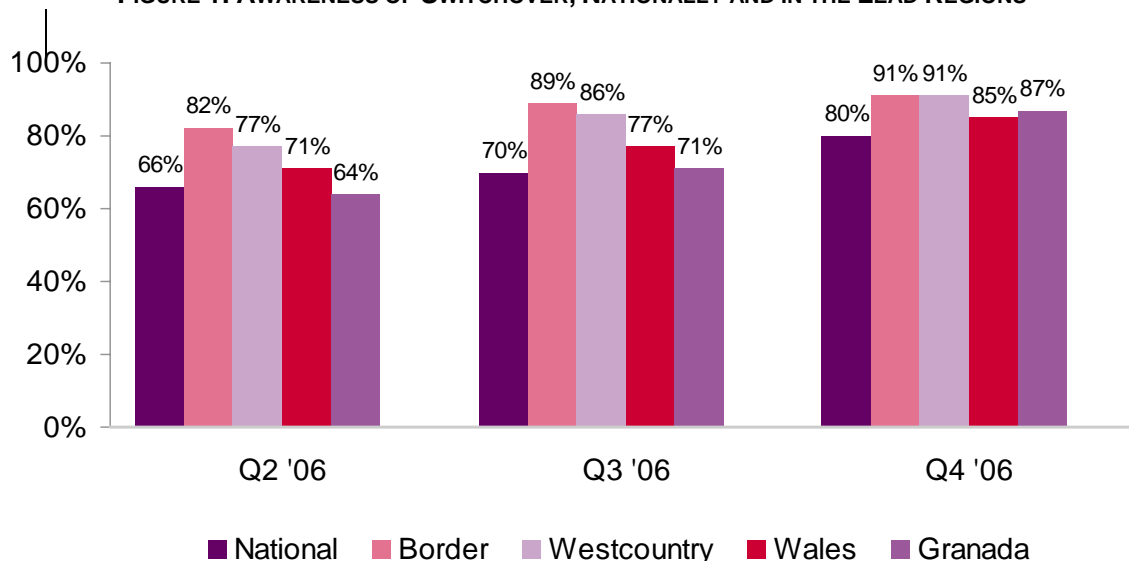
## Chapter 2

# The Q4 2006 Tracker Results

### Awareness of Switchover

- At the end of 2006 national awareness of switchover stood at 80%; a 10 percentage point (pp) increase over the previous quarter, and 20pp ahead of April 2006 results before Digital UK launched its communications and awareness was measured at 60%.
- The target awareness of 75% was exceeded by 5pp. Following a substantial campaign over the Autumn there is less communications activity planned for Q1 2007, so we don't expect to see significant improvement in the awareness metric for the coming quarter and the existing targets of 77% for Q1 and 80% for Q2 of this year will stand.
- Milestones were reached in the lead regions, with both Border and Westcountry surpassing 90% awareness for the first time (Border = 91%; Westcountry = 91%), and Wales and Granada both passing the 85% mark (Wales = 85%, Granada = 87%).

**FIGURE 1: AWARENESS OF SWITCHOVER, NATIONALLY AND IN THE LEAD REGIONS**



- The Whitehaven Tracker launched in Q4 2006 to monitor the progress of switchover in this lead region, due to switch in October of this year. At the end of 2006 awareness of switchover in Whitehaven was measured at 95%. It is our ambition to achieve 100% awareness prior to switchover, and we will be closely examining the Whitehaven results throughout the remainder of this year to understand what needs to be done to ensure that everyone is informed of the switchover.
- The growth in awareness during 2006 is very encouraging, and has been more rapid than expected. It does, however, highlight that whilst it may be relatively easy to drive up headline awareness, a detailed understanding

of the switchover process and its implications is much more difficult to develop.

- A second key awareness metric is recognition of the digital ‘tick’ logo, which now stands at 58%, in line with the 57% target. The logo is an important element of the switchover programme and its value grows as recognition of it increases. Nearly six in ten people now recognise it, and we are targeting logo awareness of 70% by the end of 2007.

### Understanding of Switchover

- Understanding of what you need to do for switchover grew in line with awareness; rising 9pp from 52% in Q3 to 61% in Q4.
- Understanding was markedly better in Border, Westcountry and Wales (all 67%+) but just below average in Granada (57%). Digital UK recognises that now awareness is well established there is more to do to develop understanding. In particular, communications in the coming year will seek to break down some of the common myths about digital TV, such as the still relatively common belief that getting digital means buying a new TV.
- In the Q3 report we discussed date understanding (knowing when switchover is happening in your region) in some detail. There has been some marginal but still statistically significant improvement in this metric from 8% in Q3 to 11% in Q4, and noticeable improvement in the lead regions where date information was incorporated in the Autumn campaign. Date understanding in Border rose from 49% to 57%, in Westcountry from 10% to 14%, in Wales from 15% to 28%, and in Granada from 8% to 19%. But Digital UK recognises that there is further work to do on communicating the date, and this will be a priority for our 2007 communications.

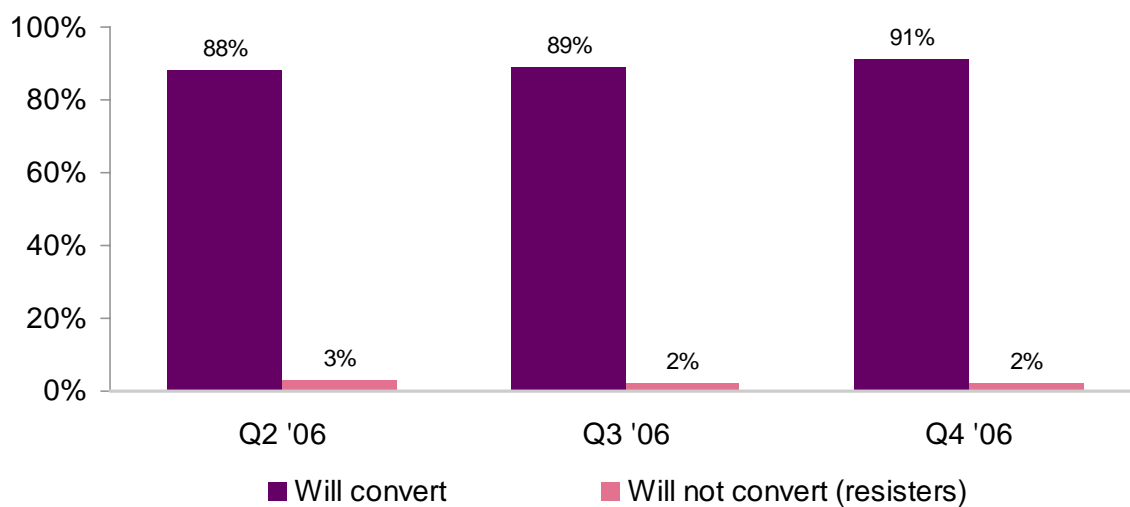
### Attitudes Towards Switchover

- Attitudes towards the policy of switchover are holding steady with around 7 in 10 people feeling positive or neutral about switchover (believing either that it is a good thing, or that it is ‘just one of those things’ to be getting on with). In Q2 this metric stood at 67%, saw a marginal improvement to 70% in Q3, and was 69% in Q4. It is significant that in Whitehaven, now only 9 months away from switchover, attitudes are very similar to those for the nation as a whole (69%). We are reassured that as switchover approaches attitudes towards switchover do not worsen. Rather, people seem to accept it and turn to practical questions of *how* to prepare themselves for switchover.
- Our second measure of attitudes is comfort with the actual process of switching over, and for the second quarter running eight out of ten people said that they were ‘OK’ with the idea of switchover and weren’t threatened by it (82% in Q4, up slightly from 79% in Q3). However, 60% did want more information, and 15% said that they felt threatened or worried by it

### Intentions to Convert

- Yet again intentions to convert remained broadly stable. 91% said they had a definite plan to convert for switchover, and again just 2% said that they would not convert (the difference between the two groups being those who 'don't know' what they are going to do).
- Encouragingly, in Whitehaven no one in the survey said that they would not convert for switchover. This reinforces the trend we have previously observed of the 'resister' group diminishing over time as the practical reality of switchover approaches.

**FIGURE 2: INTENTIONS TO CONVERT, Q2 2006 – Q4 2006**



## Chapter 3

# The Digital Switchover Help Scheme

### The Government's Digital Switchover Help Scheme

- In December 2006 the Department for Culture, Media and Sport confirmed the 'Digital Switchover Help Scheme', a scheme of support and assistance for the most vulnerable at switchover.
- The Scheme will act as a safety-net to help ensure that no one is left behind during the digital transition. It will address approximately 7 million eligible individuals, and should they choose to take up the Scheme, provide them with practical help in getting, installing and using their digital TV equipment.
- The eligible groups will be:
  - Those over 75;
  - The disabled on Disability Living Allowance or Attendance Allowance; and
  - Those registered blind or partially sighted.
- The support they will be provided with includes:
  - Equipment to convert one TV set (from any available platform);
  - Installation, including replacement of the aerial if required; and
  - User support to help familiarise people with the new controls and menus so that they are confident using their new digital TV.
- This service will incur a charge (expected to be £40) for most; but those on income support, Job Seekers' Allowance or pension credit will receive this assistance for free.

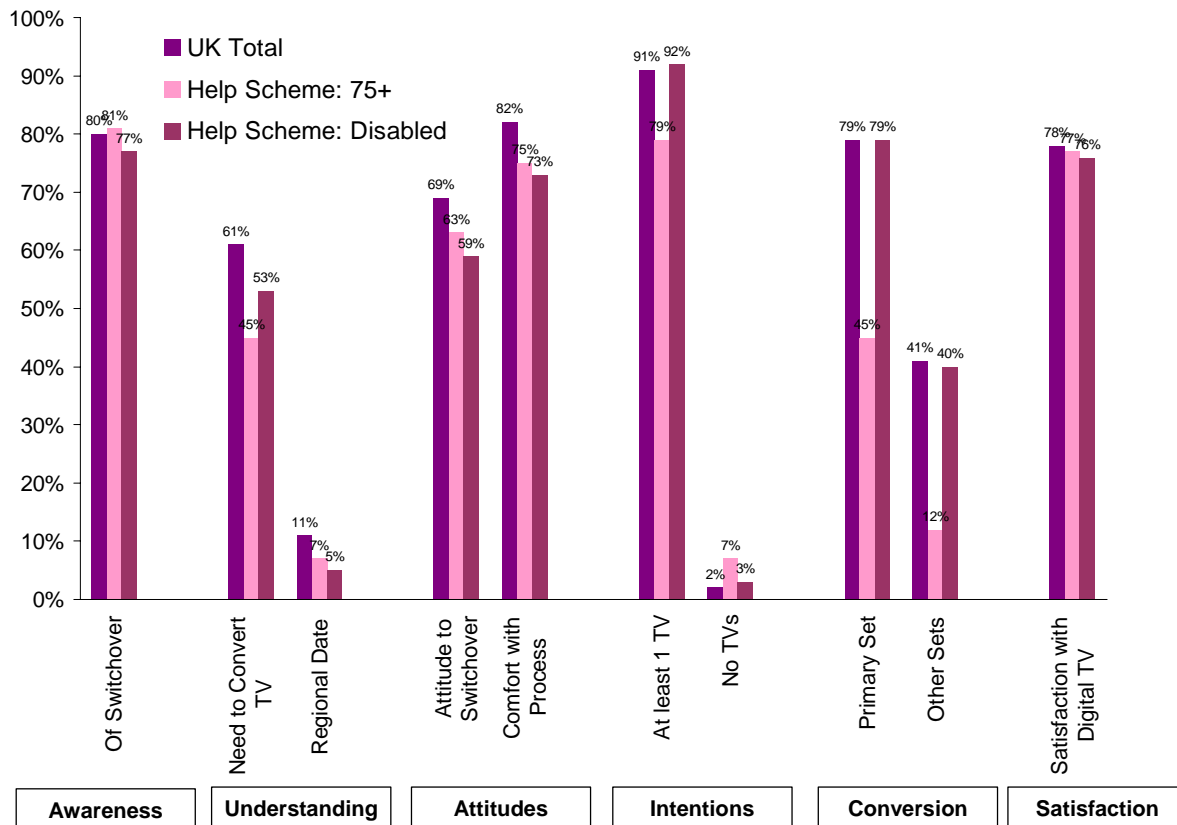
### Digital UK's role in the Digital Switchover Help Scheme

- The Government is in the process of procuring the agency or agencies that will run the Help Scheme. It has, however, been agreed that Digital UK will be responsible for raising awareness of the Help Scheme, in line with its general responsibilities for raising awareness of switchover.
- Digital UK is therefore developing plans to ensure that eligible individuals and their support networks (friends, families and carers) are well informed about the Scheme and how to apply for it. This process will start in Whitehaven in the Spring.

## Monitoring the Help Scheme

- Ofcom and Digital UK have been monitoring the progress of the groups eligible for the Help Scheme since the launch of the Switchover Tracker in April 2006. Every ‘consumer group’ dashboard breaks out those within the Help Scheme who are eligible either via being over 75 (labelled as HS-75+) or because there are in receipt of Disability Living Allowance or Attendance Allowance (labelled as HS-DLA/AA). We will continue to closely monitor these groups, and will seek to boost their sample size in the Tracker from April onwards.

**FIGURE 3 SWITCHOVER TRACKER RESULTS FOR THE HELP SCHEME GROUPS, Q4 2006**

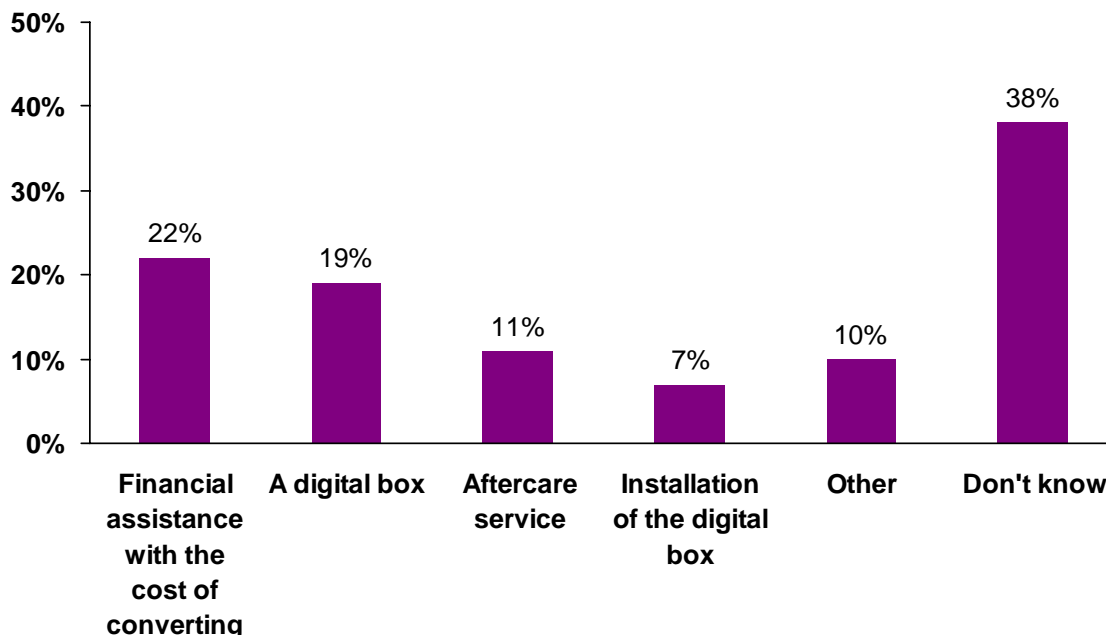


- In Q4 2006 the awareness of switchover amongst these groups was very similar to that for the UK population as a whole. 81% of the over-75s surveyed had heard of switchover, and 77% of the disabled group (compared to 80% nationwide).
- However understanding of what to do for switchover, and when it would be happening, was slightly below the norm amongst the disabled group, and substantially lower for those over 75. This substantiates the basis the Government has set out for the Scheme, and the issues they have identified amongst these groups, where some individuals will have significant difficulty getting, installing and using digital TV.
- Perhaps because of lower understanding, attitudes towards switchover were more negative than average amongst the over-75s and amongst the disabled. 29% of those over 75 years old felt switchover is unfair

compared to 26% amongst the population as a whole. Indicative figures for the disabled group suggest that 37% of them believe that switchover is unfair. When comparing the figures for personal attitudes and comfort with the switchover process for both groups, on average 15% of the UK feel either slightly worried or threatened by the switchover process. This figure rises to 18% amongst those 75 years and older and almost one quarter (24%) of the disabled group entitled to the Help Scheme feeling worried or threatened by digital switchover.

- Intentions to convert, and actual levels of conversion as measured by the Switchover Tracker, are broadly similar for the disabled group as for the population as a whole, but much lower for the over-75s. Less than half of over-75s have digital TV, and the ‘resister’ metric (those who say they will not convert for switchover) is 7% amongst this older group, far above the 2% average. Although our research has always shown that older and disabled people are very satisfied with digital television, and the Q4 Tracker data corroborates this with 77% of over-75s and 76% of the disabled group that already have digital television saying that it is better than their old analogue TV (in line with the 78% national average).
- On both the national Tracker and the Whitehaven tracker we now also monitor awareness of the Help Scheme itself. Nationally almost one quarter (24%) of the population are aware that the Government will be providing a scheme to help people with the switchover process and in Whitehaven almost one third of the local residents know about its existence (33%). The understanding of the kind of help that will be provided was only tested in Whitehaven: 22% believe that financial help will be provided under the scheme, 19% think recipients will receive a digital box and 11% expect some form of aftercare service to help people use the new equipment. A large part of the Whitehaven population does not know what exactly the scheme is going to cover. Other understanding issues have to be addressed around eligibility of the scheme, as 25% of Whitehaven residents believe that help is going to be provided for those parts of the population with low income.

**FIGURE 4 UNDERSTANDING OF THE DIGITAL SWITCHOVER HELP SCHEME**



## Chapter 4

# Impact of the Autumn Switchover Campaign

Between 7<sup>th</sup> of October and 25<sup>th</sup> of December Digital UK ran a medium weight communications campaign reaching 90% of the national audience, which was designed to raise awareness of digital switchover and encourage people to start their switchover preparations early. The campaign included:

- National television advertising on all the commercial terrestrial channels and airtime on national BBC TV channels, plus a selection of digital channels;
- TV advertising up weight in the North-West TV region (Granada) on BBC and ITV regional channels;
- National and regional radio airtime on BBC radio stations and commercial radio stations;
- Press advertising in local and regional newspapers advertising the Digital Switchkit, a digital TV solution for under £100;
- A detailed supplement inside the Christmas edition of the *Radio Times* and the *TV Times*;
- Distribution of 3.2 million switchover information leaflets to households in the North West TV region (Granada);
- Distribution of new Point of Sales material (leaflets, dispensers and other display materials) to 3,354 stores signed up to the digital ‘tick’ logo scheme and
- Targeted communications to tenants to help them prepare for digital switchover.

In the national and regional television campaign Digital UK ran two 30 minute spots over the course of 3 months showing the main character Digit AI lending a helping hand to people in their home and asking them “why wait for the switchover to get digital TV?”. The second spot pointed the audience to look for the logo when buying new television equipment during the Christmas period.

FIGURE 5 WHY WAIT AND LOOK FOR THE LOGO IMAGES

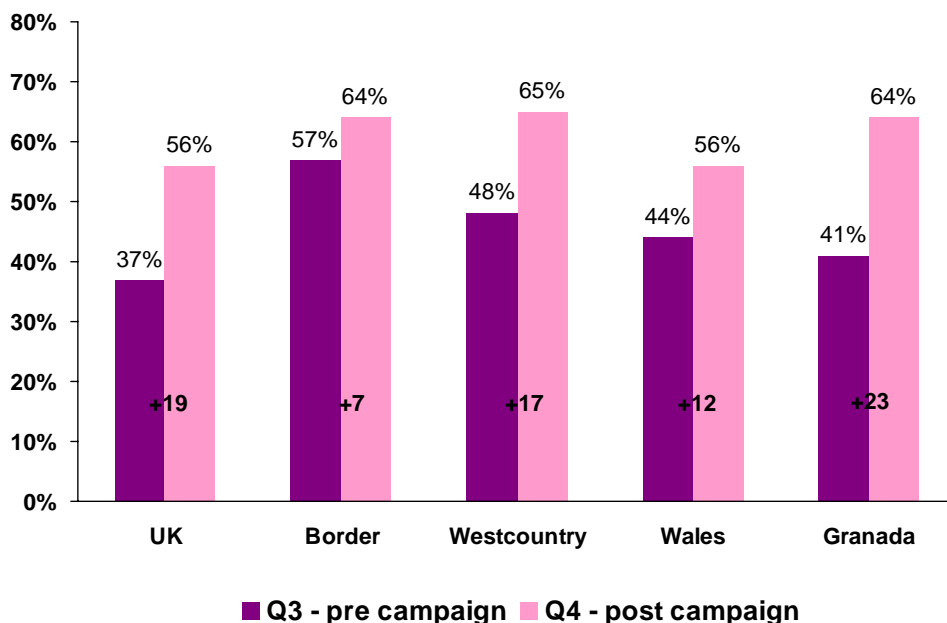


### Impact of the Autumn campaign

The Ofcom/Digital UK switchover tracker was used to measure the impact of the Digital UK campaign amongst the general population with additional questions focusing on perception of the communication materials and the messages received.

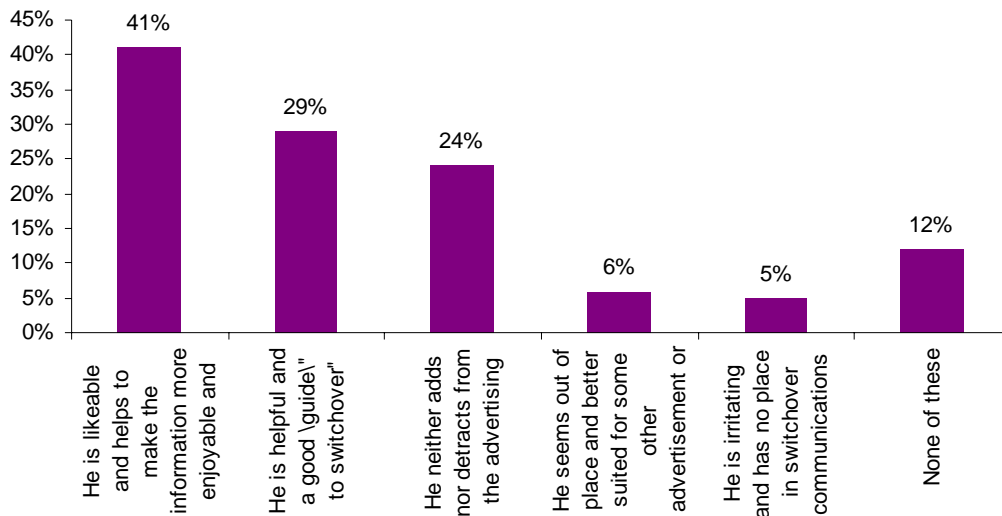
- In the quarter of the campaign 56% of all adults in the UK had seen some form of advertising about digital TV switchover, which is a 19pp improvement to the previous quarter. The biggest improvements were made in the Granada TV region (+23pp), where the TV, radio and press campaign was upweighted. Awareness of the Digital UK campaign is higher in the lead switchover regions than in the rest of the country.

**FIGURE 6 AWARENESS OF DIGITAL UK ADVERTISING BY SWITCHOVER REGION**



- Awareness of Digital UK grew 3 percentage points in the last quarter to 21% and 22% of the population had seen or heard news coverage about the switch to digital television compared to 16% in quarter 3 of last year
- As mentioned in previous chapters the autumn campaign helped to improve general levels of switchover awareness and logo awareness across all switchover regions. Understanding of what you need to do for digital switchover is also growing steadily among the UK population as a whole.
- Digit AI as the leading character in the campaign and present in all Digital UK materials is now recognised by almost 40% of the population and a majority found him a likable and helpful guide to switchover.

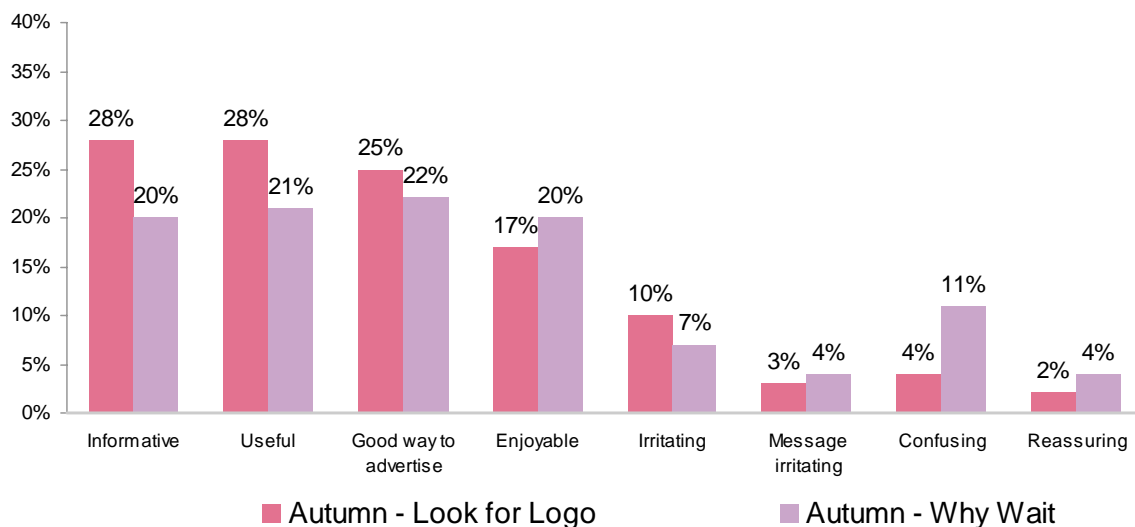
**FIGURE 7 LIKEABILITY OF DIGITAL**



**Comparison of different advertising material**

- After seeing either the 'Why wait' or the 'Look for the logo' spot the majority of the viewers agreed that the main message taken away from both ads was "to get ready for switchover". 71% of the population agree with this statement after having seen the why wait spot and 72% felt that this was the main message of the look for the logo ad.
- The autumn campaign was considered just as informative and useful as the earlier May campaign, but was also seen as more enjoyable and less irritating to the audience. Similar to the May campaign both spots ('Look for the Logo' and 'Why wait') were seen as good ways to advertise switchover.

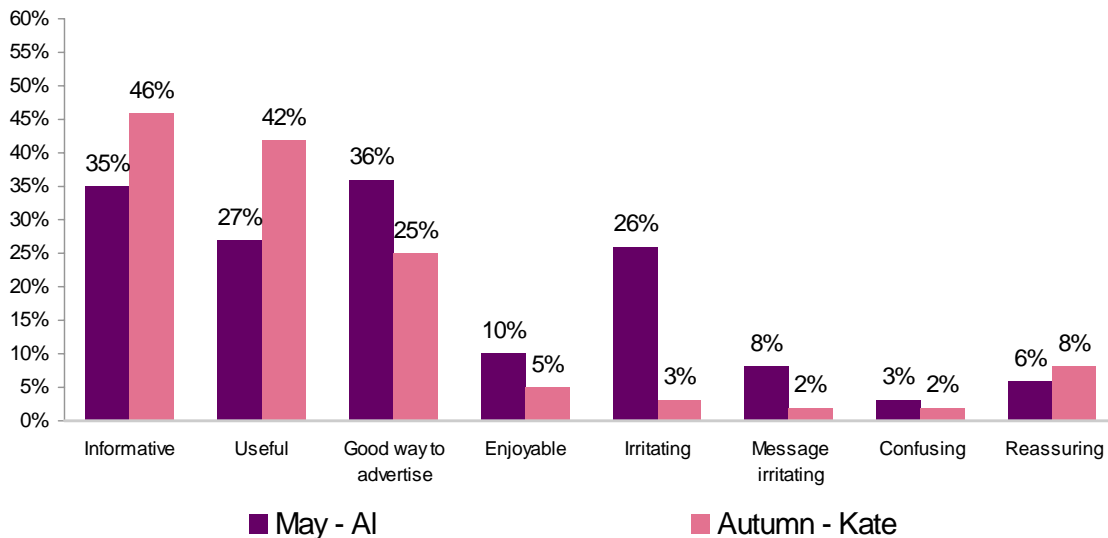
**FIGURE 8 PERCEPTION OF THE AUTUMN CAMPAIGN**



- The tracker also tested the effectiveness of other communications, including radio advertising and the information leaflet which was distributed in the North West (Granada) region.

- The radio campaign was seen as highly informative (46%) and useful (42%). Negative reactions to the campaign were very low and less than 3% found the ad irritating or confusing.
- Almost half of the population (49%) in the North West TV region found the leaflet had the right amount of information in it and nobody found the style or tone in the leaflet or the switchover message irritating. This compares to similar results of the door drop campaign in the other early switchover regions Border, Wales and Westcountry in May 2006.

**FIGURE 9: PERCEPTION OF THE RADIO CAMPAIGN**



### Planning of future Digital UK communications campaigns

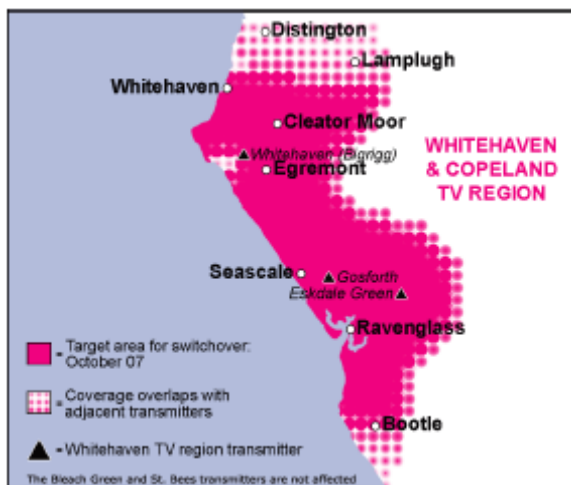
- When asked about the amount of information on digital switchover that people have received throughout the year nationwide 40% of the population feel they have received enough information on digital switchover. This figure is highest in Westcountry (46%), Border (45%) and Granada (44%) and lowest in Wales (36%).
- However, when asked what further information they would like, the most common response is 'more detail on the exact switchover date', with 30% asking for this. Other requests for information focus on the costs of switching over (asked for by 26%), information of the switchover Help Scheme (21%), information on aerial upgrades and qualified installers (20%), information why switchover is happening (19%) and information on the options to go digital (18%). This insight will inform Digital UK communications for the coming year.
- Digital UK is planning to build an ongoing media presence throughout the next year, using weekday sponsorship of a day time television programme as well as frequent appearances in TV listings and online marketing. In addition three campaigns are planned for the coming year including a second run of the 'why wait' campaign, a new infomercial on BBC channels during the summer and an Autumn/Christmas campaign.

## Chapter 5

# The first region to switch: Whitehaven tracker results

- The first area in the UK to switch from analogue to digital television is Whitehaven and its surrounding area, part of Cumbria in the Border TV region. The switchover date in Whitehaven has been brought forward to October 2007, in order to demonstrate the digital switchover process and gather learnings for the national programme starting at the end of 2008. Digital UK is managing the process in the area until its completion at the end of this year.

FIGURE 10: MAP OF WHITEHAVEN IN BORDER TV REGION



- A separate Whitehaven tracker survey – using the same methodology as the national Ofcom/Digital UK switchover tracker, but also exploring additional Whitehaven specific issues in detail – is used to monitor developments and switchover trends among the 25,000 households in the area. The region has a good mix of households spanning rural and urban areas and a reasonably representative demographic profile. The Whitehaven tracker survey has a sample size of 200 respondents, a quarterly reporting cycle and interviews spread evenly across the full length of the quarter.

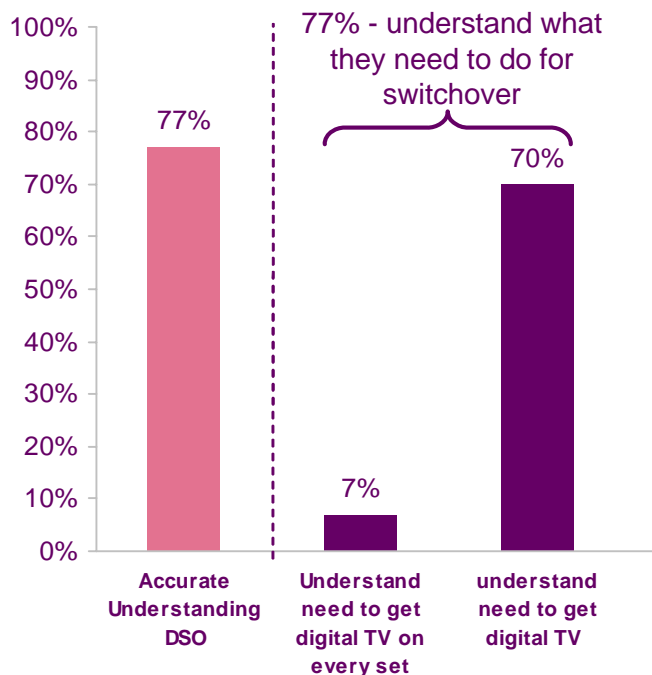
### Key switchover metrics

- The first results of the Whitehaven tracker survey give an encouraging overview of the situation in the area. With the switchover date less than one year away, awareness is almost universal: 95% of the Whitehaven population know that the change is happening, with high levels of awareness across all different age groups. Only the younger age group of

16 to 34 year olds is slightly less aware (90%) than the rest of the population.

- General understanding of how to prepare for digital switchover is also high in Whitehaven, with more than 3 in 4 adults (77%) knowing that they have to upgrade their TV equipment with some form of digital receiver. However, still a large number of people lack a more detailed appreciation of switchover. Only 7% understand that they will have to get digital TV on every set in their household, and just 39% understand that their analogue recording devices will also be affected by the switchover process if they currently record one programme while watching another.

**FIGURE 11: UNDERSTANDING OF DIGITAL SWITCHOVER**



- During the last quarter Digital UK informed people living in Whitehaven that digital switchover will happen in October 2007. Outdoor advertising in the form of large billboards encouraged residents to start their preparations early to ensure all their TV equipment was ready in time for switchover.

**FIGURE 12: OUTDOOR ADVERTISING FOR THE WHITEHAVEN SWITCHOVER DATE**



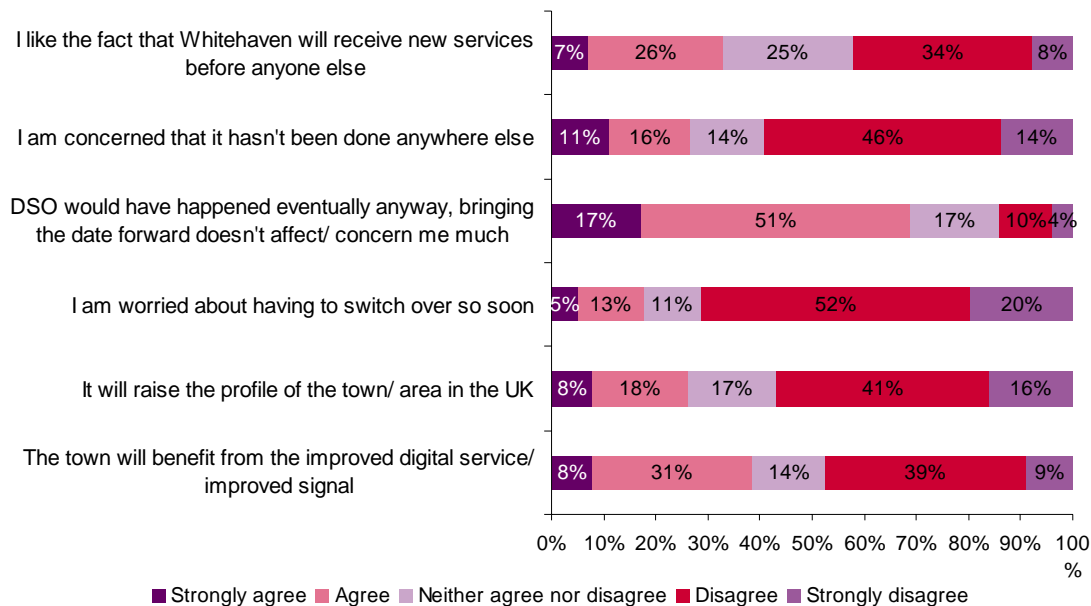
- During Q4 2006, 32% of the people in Whitehaven were able to quote the exact quarter of switchover, and altogether 62% knew that it was happening sometime in 2007. This compares to 57% understanding of the switchover years (2008 and 2008) in Border TV region and nationwide only 11% of the population knowing their respective switchover year. Nevertheless, one in five of the Whitehaven population remains unsure when switchover is happening in their area.
- As Whitehaven is currently not served directly by a main transmitter of the Border TV region, a digital terrestrial signal will become available in the whole area only after the analogue signal is switched off in October this year. At that point Freeview boxes connected to TV sets or integrated digital televisions will be able to receive a digital terrestrial signal. Until then Whitehaven residents have limited options to go digital: Satellite subscription or Freesat from Sky. Current conversion therefore remains at a lower level than for the UK as a whole. The national tracker indicates that 79% of the UK population had converted their primary TV set to digital in Q4 2006, whereas primary set conversion in Whitehaven was 73% during Q4 2006. This conversion deficit becomes more evident when comparing secondary set conversion figures. The Ofcom/Digital UK tracker survey shows 41% secondary set conversion nationwide (42% in Border), whereas conversion of other TV sets in Whitehaven and surrounding area remains at a significantly lower level at 28%.
- Though they are closer to switchover than elsewhere, the Whitehaven population's attitudes towards the change are in line with those in Border and nationally. Sixty nine percent of the Whitehaven population have a positive or neutral opinion about the process, saying that switchover is good for them or for the UK, or that it is something one has to get on with. Terrestrial-only households feel slightly more positive (73% positive/neutral) than digital households (68% positive/neutral), probably since the switchover will bring them digital TV free through their aerial for the first time.
- On a personal level, 84% of the Whitehaven population feel comfortable with the switchover process, compared to 82% both in Border and nationwide, with women feeling slightly more worried than men about the process of switching over.
- Although no one in our Whitehaven survey has said that they will not convert for the switchover, almost 40% of Whitehaven residents do not know exactly when they will upgrade their existing TV sets. Thirty five percent of analogue households in Whitehaven intend to convert before switchover (i.e. between Q4 2006 and Q3 2007) and a further 23% of analogue households intend to convert at switchover (i.e. in Q4 2007). The results indicate that there will be a significant conversion challenge during the last month before switchover and during the month when BBC 2 has moved to digital-only broadcasting.

- The first results of the Whitehaven tracker indicate that the majority of Whitehaven residents intend to convert their remaining analogue TV sets to the digital terrestrial TV platform. Thirty one percent say they will buy a Freeview set top box, and 16% intend to upgrade their current set to an integrated digital television, so gaining access to the Digital terrestrial TV platform. A further 14% intend to take up satellite TV for their remaining sets, and 6% are considering the Freesat service from Sky as an option.

### Whitehaven communications campaign

- Awareness of Digital UK in Whitehaven is more than twice as high (43%) than within the rest of the UK (21%). During the last year all households in Whitehaven and the surrounding area received two separate doordrop leaflets through their letter box with information about switchover happening in their area. The general Border leaflet was distributed in May 2006 and the Whitehaven-specific leaflet was delivered to every household in October last year, one year before the switchover date.
- In Q4 2006 more than half of all adults in Whitehaven felt that they had received enough information on digital switchover, although the need for more specific information remains in the area of switchover cost (23%), whether or not to get an aerial upgrade (19%) and detailed information around the Government’s switchover Help Scheme (15%). Currently one third of residents in Whitehaven and surrounding area are aware of the scheme, compared to less than one quarter awareness of the scheme nationwide. Generally Whitehaven residents believe strongly that digital switchover would have happened eventually anyway, and that bringing the date forward is not an issue for concern.

**FIGURE 13: WHITEHAVEN STATEMENTS**



## Chapter 6

# Digital Switchover Logo Update

The digital switchover logo is the ‘tick’ mark used on products and services that are switchover-ready:



The Logo scheme is used in 3 ways:

1. Promotions – Non-certification mark logo for use by Electrical retailers and other organisations (e.g. platforms) when promoting or explaining digital switchover
2. Products – as a certification mark for products provided by manufacturers and digital TV platforms to denote products and services which should work through switchover
3. People (1) – as a certification mark for use by aerial installers, accredited by the Registered Digital Installer scheme, launched in March 2006 ; and  
People (2) – as a certification mark which can be used by switchover-trained retail staff as part of the ‘Approved Digital Adviser Scheme’, launched in October 2006



### The promotional logo

- At January 2007 3,354 retail stores were signed up to the logo scheme, of which 29% were independent retail outlets, and representing 21% growth over the previous quarter (at October 2006 2,776 outlets were registered with the scheme).
- A further 40 industry associations, platforms, broadcasters and others were signed up to the scheme.

### The logo for products

- Four more manufacturers joined the scheme, taking the total to 44, and including all the major brands.

## The Registered Digital Installer Scheme

- The Registered Digital Installer (RDI) scheme has taken some time to get underway, but more installers are now coming through the scheme, and the Associate level scheme, with its lower barriers to entry, is proving more popular. We will update further in future reports.

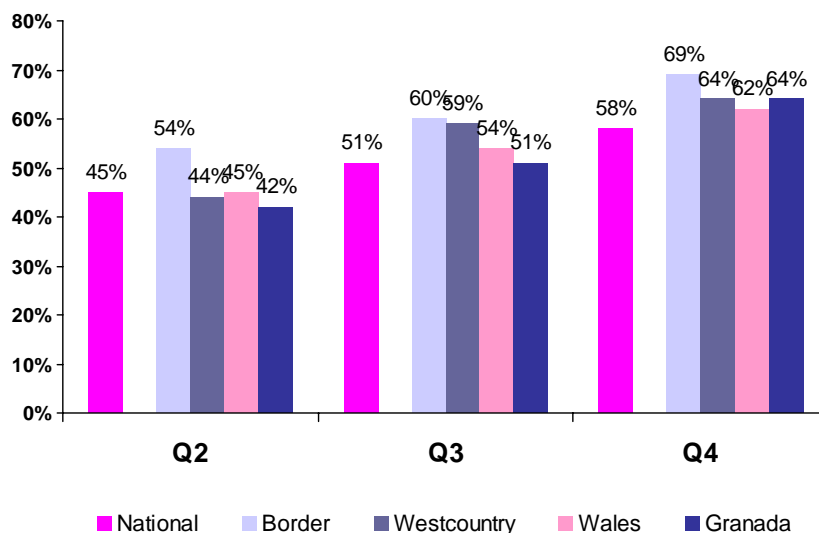
## The Digital Adviser Scheme

- At January 2007 (after 4 months of operation) a total of 340 retail staff had passed through the Digital Adviser Scheme, representing 85 retailers.

## Consumer Awareness and Understanding of the Logo

- We continue to monitor awareness and understanding of the digital tick logo; a critical element of switchover communications.
- For the second quarter running recognition of the logo has increased substantially: up from 51% in Q3 to 58% in Q4, and beating the target set for it of 57%. The target for Q1 2007 will be 60%. Logo recognition approached 70% in Border, and was 76% in Whitehaven.

**FIGURE 14: RECOGNITION OF THE SWITCHOVER LOGO**



- Accurate understanding of what the logo means was again stable in Q4 (Q2 = 62%, Q3 = 63%, Q4 = 64%). Although not substantially improving, this understanding is on a growing base of awareness, and so we don't believe is cause for concern.

**Chapter 7**

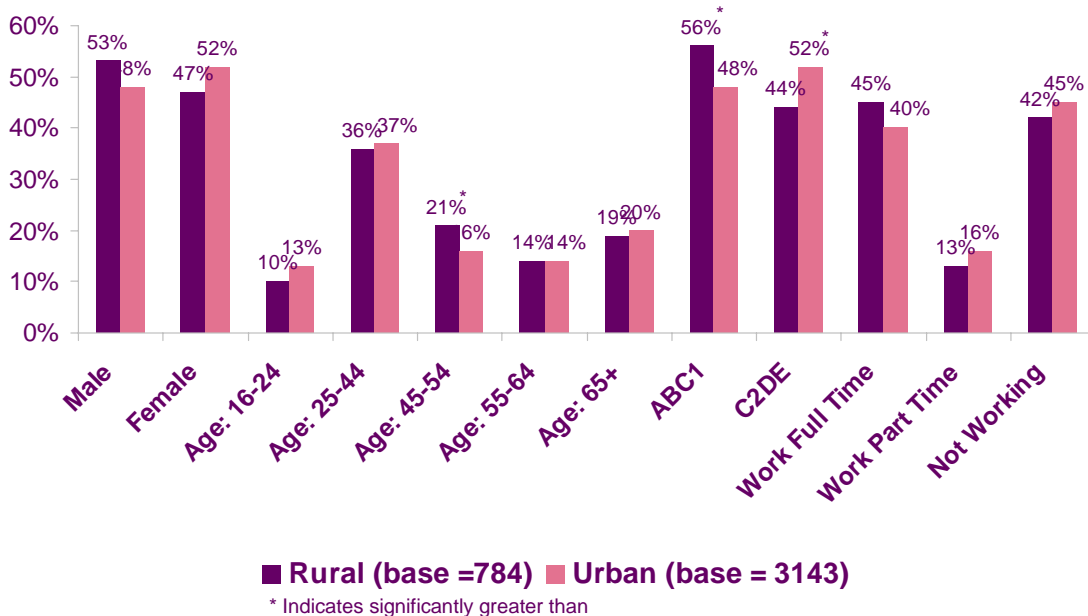
# IN FOCUS: People living in rural areas

- This section looks specifically at switchover issues among consumers living in rural areas. In summary digital television ownership levels have remained constant over the last few months among residents of rural areas, but both awareness and understanding of what switchover means to rural residents have improved. In comparison to the urban population, rural residents have a significantly greater awareness and understanding of digital switchover issues, perhaps partly because of their demographic profile (more male, middle aged and ABC1) – but also perhaps because of existing digital TV reception concerns in rural areas, which fosters greater awareness of TV issues. At switchover the digital terrestrial TV signal will be made available to virtually everyone in the UK.

**Demographic profile of the rural and urban population**

- Before detailing these findings it is useful to examine the demographic profile of those living in rural areas versus those living in urban areas in order to understand any influence on switchover metrics that any differences might have. The demographic tables below shows the profile of the urban versus rural populations and is based on Q3 and Q4 data combined, in order to provide a robust base.

**Figure 15: Demographic profile of rural versus urban UK residents (Q3/4 2006)**



- On examining the demographic profile it is clear that there are some differences between the rural and urban populations. For example, the rural population is marginally more male, significantly more middle aged (45-54) and significantly more ABC1 when compared to the urban population. This could be responsible, in part, for explaining higher levels of understanding of digital switchover issues.

### Digital TV conversion and switchover awareness

**Figure 16: Ownership of digital TV and awareness of digital TV switchover (Q4 2006)**

	<b>Ownership of digital television (primary set converted) %</b>	<b>Awareness of switchover %</b>
Base: 1964	79%	80%
All rural adults (n=388)	80%	87%
All urban adults (n=1576)	79%	79%

- Penetration of digital TV is similar among those from rural areas (80%) when compared with those from urban areas (79%). The level of ownership in rural areas is stable from Q3, where it also measured 80%
- There appears to have been some increase in ownership levels among urban respondents as this measure has seen an increase (up from 76% to 79% since quarter 3).
- Awareness of the term digital TV switchover lies at 87% among rural residents, significantly higher than the urban population (79%) – representing a figure that is the highest of all the consumer sub groups and one that has grown significantly from the previous wave (from 80% at Q3). This may be partially due to coverage/marginal reception issues for digital terrestrial and signal-quality problems for terrestrial television in rural areas – both of which drive higher interest in digital cable/satellite where reception problems are largely eradicated.
- Awareness has also grown among the urban population from 68% at Q3 to 79% at Q4.

## Understanding of digital switchover in rural households

**Figure 17: Correct understanding of term ‘digital TV switchover’**

	Understanding – what to do for switchover (unprompted) %
Base: 1964	61%
All rural adults (n=388)	71
All urban adults (n=1576)	59

- Respondents who were aware of the term ‘digital TV switchover’ were further asked what digital TV switchover meant to them in order to gauge understanding. Seven in ten (71%) rural respondents were able to respond correctly, stating any of the following:
  - I will need to get digital TV on every set
  - I need to get digital TV
- This represents a significant increase from 63% in the last quarter and significantly more rural than urban respondents have a general understanding of switchover.
- Awareness has also grown among the urban population from 68% at Q3 to 79% at Q4.

## Feelings towards switchover in rural households

**Figure 18: Attitudes and personal comfort with digital switchover in rural areas**

	General attitude	Personal Comfort
(Net positive/neutral response) Base: 1964	69%	82%
All rural adults (n=388)	64%	81%
All urban adults (n=1576)	70%	82%

- When asked about their personal opinion of the switchover process there was very little difference between the rural and urban scores (81% and 82% respectively feeling positive or neutral about the process).

## Chapter 8

# IN FOCUS: Wales

This section looks specifically at switchover issues among consumers living in the ITV Wales (formerly HTV Wales) region.

- ITV Wales, which is the third region after Border and the Westcountry to begin the switchover process in late 2009, currently appears to be on track to achieve a successful switchover. Digital TV take up has always been high in the region (indeed Wales as a nation has the highest digital television penetration of any country in the world) and the Welsh people have demonstrated above average awareness of switchover and understanding of the process.
- Awareness and conversion targets (set by Digital UK as a whole and for each switchover region) have been exceeded every quarter in 2006. Whilst there continue to be issues for Digital UK to address, e.g. building date understanding which will be particularly complex in a region with seven main transmitters switching over in a period of nine months, Digital UK feels that ITV Wales is currently well positioned. In addition to continued research through the switchover tracker, Digital UK's national manager for Wales, Gwenllïan Carr, is developing local stakeholder relationships in the area to help the implementation of the process.

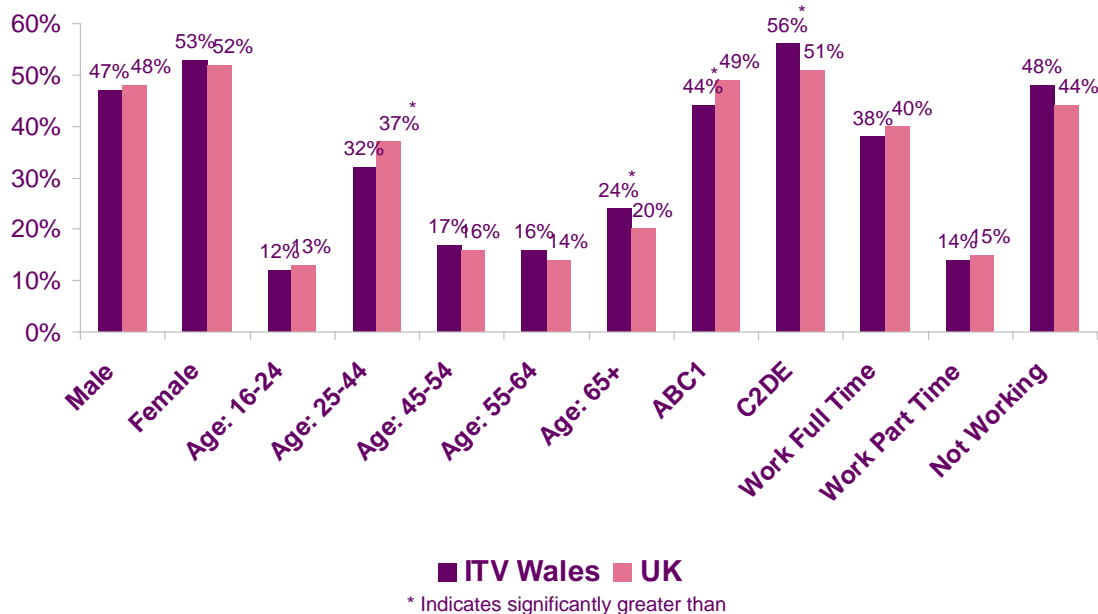
## National profile

- Before this chapter discusses the detail of the switchover metrics from the tracker it is useful to paint an overview of switchover issues in the ITV Wales region:
- Historically, Wales has had higher levels of digital TV penetration on main TV sets than the rest of the UK (82% versus 79%). Satellite penetration (predominantly driven by Sky) is higher than the national average (47% compared to 35% based on Q3 and Q4 data combined) and penetration of digital terrestrial is lower (23% compared to 29% based on Q3 and Q4 data combined). This is partially due to coverage/marginal reception issues for DTT and signal-quality problems for terrestrial television, mostly due to the geographical make-up of Wales – both of which drive higher interest in satellite, where reception problems are largely eradicated (other than bad weather).
- Satellite television not only provides high quality access to the terrestrial channels in areas that may have problems receiving them via analogue, but also offers the extended choice of the multi-channel environment. Extended channel choice is likely to be a driver for many as there are

higher proportions of heavy TV viewers in the ITV Wales region than the national average (24% compared to 17% based on Q3 and Q4 data combined) - this may be influenced by the age profile and the higher numbers of retirees, as well as a larger proportion of those who are not in work.

- As well as having marginally higher DTV penetration, Wales also has higher levels of awareness of the term ‘digital switchover’ and what this means to people. Behind Border (the first region due to switch), Wales has the highest level of knowledge among its residents of the switchover date, with over one quarter of Welsh people knowing that switchover will take place in 2009/2010 depending on their local transmitter.
- In terms of the demographic profile of those living in Wales versus the UK population, the demographic tables below shows the profile of both populations and is based on Q3 and Q4 data combined in order to provide a robust base.

**Figure 19: Demographic profile of Welsh versus UK residents (Q3/4 2006)**



- On examining the demographic profile it is clear that the major difference between Wales and the UK is the age profile. Wales has a significantly older population (adults aged 55+) than the rest of the UK. This is correlated with a higher proportion of residents than the UK average falling into the ‘not working’ category – driven largely by those on retirement (31% retired in Wales versus 25% nationally).
- Additionally (although not mirrored in social grade) Wales has a smaller number of high-income earners, again a likely reflection of the skew towards an older/retired workforce, whose pensions lower average earnings.

## Digital TV conversion and switchover awareness in Welsh households

**Figure 20: Ownership of digital TV and awareness of digital TV switchover**

	Ownership of digital television (primary set converted)	Awareness of digital switchover
	%	%
All UK adults (n=1964)	79	80
All Welsh adults (n=305)	82	85

Shaded boxes indicate significantly greater than

- Penetration of digital TV is slightly higher in Wales (82%) than the national average (79%).
- There has been some increase in digital television ownership levels among both Welsh and all UK residents since Q3, with Wales rising from 79% to 82% and the UK rising from 76% to 79%.
- Awareness of the term digital TV switchover lies at 85% among Welsh residents, compared to 80% for the national average. Both the Welsh and the UK figures have increased significantly since Q3 – Wales from 77% to 85%, the UK from 70% to 80%.

## Understanding of digital switchover in Welsh households

**Figure 21: Correct understanding of term ‘digital TV switchover’**

	General understanding (unprompted)
	%
All adults (n=1964)	61
All Welsh adults (n=305)	67

Shaded boxes indicate significantly greater than

- Respondents who were aware of the term ‘digital TV switchover’ were further asked what digital TV switchover meant to them, in order to gauge understanding. Two-thirds (67%) of Welsh respondents were able to respond correctly, stating any of the following – 6 percentage points about the average for the UK.
  - *I will need to get digital TV on EVERY set*
  - *I will need a digital box/digibox/digital receiver or a digital TV*
  - *I will need a digital service provider such as Freeview, Sky or Cable*

- The Welsh Q4 figure represents a significant increase from 54% measured at the last quarter (Q3). The UK figure has also increased from 52% (to 61%) since the last wave.

### Awareness of the regional date of switchover in ITV Wales

**Figure 22: Correct switchover date known**

	Correct switchover date known %
All UK adults aware of their own switchover date (n=1964)	11
Wales (n=305)	28
Border (n=319)	57
West Country (n=301)	14
Granada (n=324)	19

- Wales is due to switch over in 2009/10 – one of the earlier areas to switch along with Border (2008/9), West Country (2009) and Granada (2009). The table above indicates that, other than Border (the first switchover region which has received the most intense activity), Wales has the highest level of date awareness among its residents, with over one quarter of Welsh people knowing that switchover will take place in 2009/2010.

### Feelings towards digital switchover in Welsh households

**Figure 23: Attitudes and personal comfort with digital switchover in Wales**

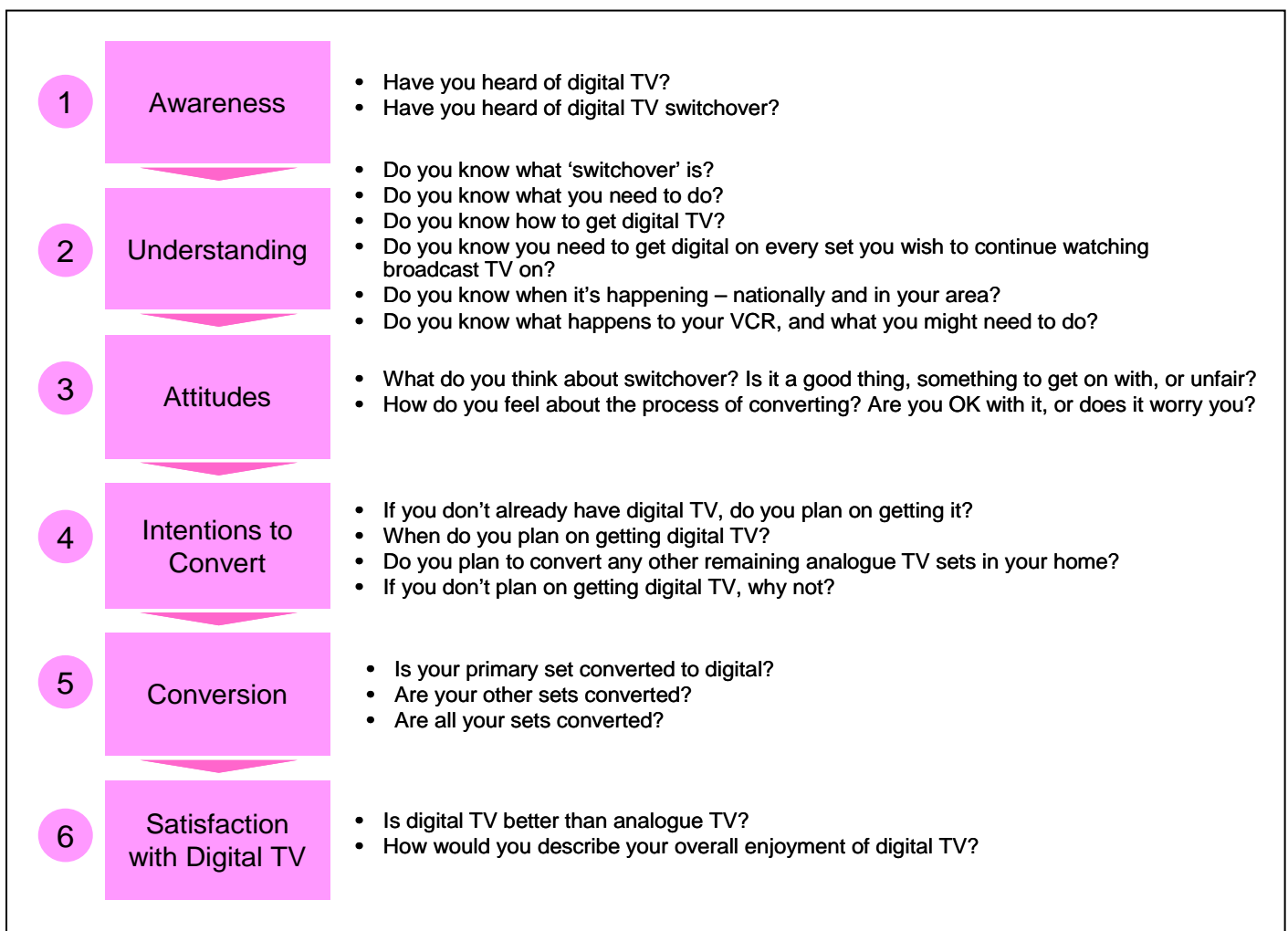
	Overall opinion %	Personal comfort %
(Net positive/neutral response)		
All adults (n=1964)	69	82
All Welsh adults (n=305)	65	79

- Welsh households had lower net positive or neutral responses (65%) on this question than the total UK population (69%) – a modest difference that does not necessarily suggest Welsh residents have more reservations towards switchover. In fact their higher levels of take-up and understanding suggest otherwise.
- When asked about their personal comfort with the switchover process, again, there was very little difference between the Welsh and total UK scores (79% and 82% respectively).
- There has been very little change on these measures for both Wales and the UK overall since the last wave.

## APPENDIX ONE: About the Switchover Tracker

- On 3 April 2006 Ofcom and Digital UK launched a continuous tracking study, the 'Switchover Tracker', to monitor the UK's conversion to digital television for switchover. More than 8,300 households will be surveyed, face-to-face during 2006/07 and the quarterly results will be the key tool by which progress towards switchover is assessed<sup>1</sup>.
- The questionnaire is designed to track the following six dimensions:

FIGURE 24 – THE SIX MEASURES ON THE OFCOM & DIGITAL UK SWITCHOVER TRACKER



- The Tracker is conducted in all switchover regions, and samples are boosted in each region three years out from switchover. For the current

<sup>1</sup> The Department of Trade and Industry made a one-off contribution to the tracker to boost the April survey.

year, therefore, Border, Westcountry, Wales and Granada are all boosted to each achieve at least 300 respondents per quarter. The remaining regions are sampled in line with their proportion of the national population<sup>2</sup>.

- The sample includes the full range of consumer groups, including those who may have some difficulty with switchover, including: older people, people with disabilities, those in rural areas, black and minority ethnic groups people living on their own and those living in different types of property e.g. rented accommodation (private or social housing), and in multiple-dwelling units. See the Glossary at Appendix Two for a full explanation of these terms.
- The sample also includes those who will, at switchover, be eligible for the Digital Switchover Help Scheme: the over 75s and the severely disabled (those on Disability Living Allowance, Attendance Allowance, or the registered blind or partially sighted).

### The Dashboards

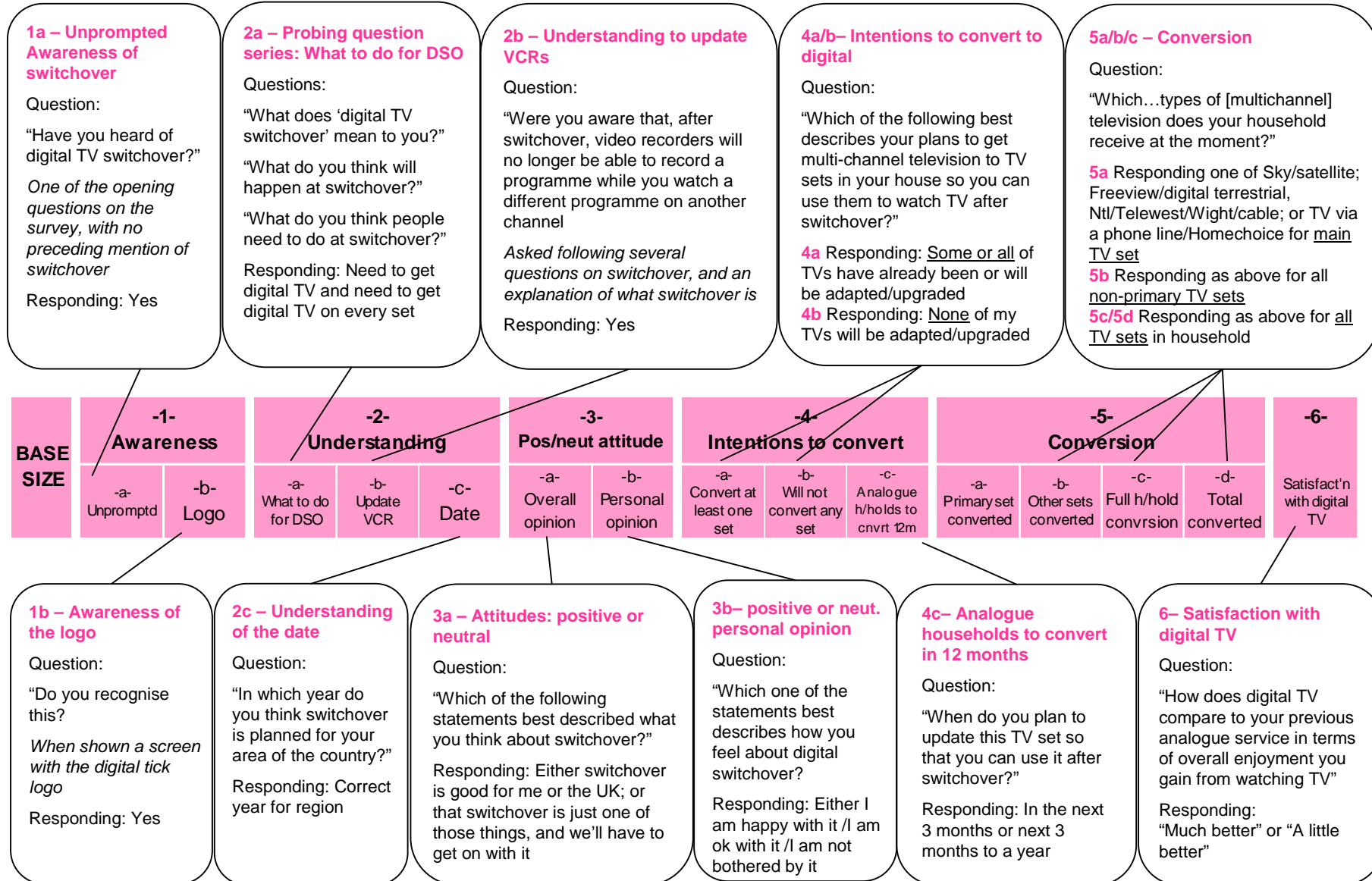
- Summary Tracker results are provided in the ‘dashboards’ of progress towards switchover:
  - (1) The Dashboard: By Regions – which summarises results of each of the key metrics for each of the switchover regions, and at a national level
  - (2) The Dashboard: By Consumer Groups – which provides key metrics for different consumer groups including standard demographic breakdowns but also with a focus on hard to reach groups (see Appendix Two for a Glossary explaining the consumer group terms)
  - (3) The Dashboard: By Segment - showing tracking metrics for the six switchover segments (see Q3 Switchover Progress Report for detailed description of these segments)

The key metrics listed across the top row of the dashboard relate to the most important questions on the Tracker that act as a guide to progress. The actual questions they represent are explained on the diagram on the following page.

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<sup>2</sup> Note that Ulster, as the smallest region in population terms (other than Border, which is being heavily boosted), does not currently collect enough surveys each quarter to report on a quarterly basis. Data for Ulster will be provided every six months, and the region, like all others, will be boosted three years out from switchover.

**FIGURE 25 – EXPLANATION OF THE ‘KEY METRICS’ SHOWN ON THE TRACKER DASHBOARDS**



## The Tracker Module

In addition to the standard question set described above, each quarter the Tracker will have a sub-set of questions on a current topic. The topic for Q4 tested the effectiveness of Digital UK's autumn communications campaign. The module for Q1 2007 will be on the use of analogue and digital recording devices.

## Tracker Methodology

The Ofcom & Digital UK Switchover Tracker Survey is conducted by GfK NOP using a face-to-face CAPI (computer assisted personal interviewing) methodology.

### Sample Sizes

During Q4 2006 the Tracker interviewed 1964 households:

- 649 in October
- 661 in November; and
- 654 in December.

The total Tracker sample for the first year will be approximately 8,400 interviews.

### Regional Sample Sizes

The Tracker will boost each switchover region three years out from its switchover date (as regional communications and support activity commences) to a minimum of 300 per quarter to enable detailed analysis of those regions.

During the first year this means that Border, Westcountry, Wales and Granada will achieve c.300 interviews per quarter, or 1,200 interviews each over the course of the year.

All other regions will be sampled in proportion to their percentage of the total UK population. Due to their size Central and London will register over 100 interviews per quarter; all others should register the minimum reporting requirement of 50 interviews (below which data is considered unreliable and will not be listed), except Ulster, where only 24 interviews per quarter will be achieved. Until Ulster is boosted (in 2009) data for this region will be reported every six months.

National data is weighted to reflect the regions in their correct incidence (age, gender and social class), ensuring that data from any one boosted region does not skew the national picture.

### Consumer Group Sample Sizes

The Tracker currently uses standard demographic quotas to achieve a sample that is representative of the UK as a whole (see below).

### *Sampling Method*

The sample selection uses a Random Location sample design, utilising census data and the current Postal Address file to generate street listings and quota sheets for interviewers. Postcode sectors are used to determine sample points within each ITV region.

The sample of 16+ adults is divided with quotas on age, gender and working status, to reflect the demographic profile of each ITV region.

Interviews for each wave take place at addresses from those supplied (constituency name and sample number are recorded on each script in order to monitor quotas), with each wave of interviews spread evenly across four weeks of fieldwork.

To ensure consistency with trend data, the sample design is the same across all waves.

### *Post-survey weighting*

Given that the sample is controlled by quotas, the final demographic profile should be fairly close to that of the target population. However, the sample is examined post fieldwork to ensure that the profile is as it should be. The sample will, if necessary, be weighted in order to ensure that it is representative in terms of known population data on age, sex, social class.

## APPENDIX TWO: Glossary of Terms

ABC1	Higher socioeconomic groups [higher (A) intermediate (B) or junior (C1) managerial, professional or administrative occupations or students]
C2DE	Lower socioeconomic groups [skilled (C2) and semi or unskilled manual workers (D), pensioners, the retired and casual workers (E)]
Rural	Those living in areas with population density of less than 3 people per hectare
Urban	Those living in areas with population density of more than 3 people per hectare
Low Income	Those on less than 60% of national median income; less than £13,500 p.a.
BME	Black and minority ethnic groups
Non-English	Those whose first language is not English
Disabled	Those citing health problems or disabilities that mean they have difficulties with everyday tasks
Need assistance	Those living alone with terrestrial on any set who would neither install Freeview themselves, nor ask someone in their house for help
Hard to reach	Those under the age of 75 in the following groups: 65-74, Low income, BME, Non-English, Disabled (but not receiving DLA/AA), those living in rural areas, and those with terrestrial on any TV set who are not sure who they would ask for help with installing Freeview
Living on Own	Those living in single person households
Disabled DLA/AA	Disabled people on Disability Living Allowance or Attendance Allowances (and therefore eligible for the Targeted Help Scheme)