Digital UK and Ofcom
Switchover Tracker Survey

Switchover Progress Report
Q2 2008

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Executive Summary

- This report summarises the results of the Digital UK & Ofcom Switchover Tracker during Q2 (April-May) 2008. Switchover Tracker data is used to measure national and regional progress to switchover across various key metrics such as awareness and understanding of the change among consumers, as well as actual take-up of digital TV.
- Included within this report are chapters on key Tracker results and a summary of Switchover Help Scheme metrics. Two additional In-Focus chapters review switchover in the West TV region, which switches to digital in 2010, and look at switchover readiness among minority ethnic groups.

Digital TV Conversion

- On 3 October 2008 Ofcom issued its Q2 2008 Communications Market Digital Progress Report on the take-up of digital TV, stating that 88% of homes had multichannel TV at June 2008. This includes a very small proportion of homes (estimated 0.1%) that receive TV via analogue cable (who will not be affected by the digital switchover).
- This represented a 0.8 percentage point growth in multichannel TV over the quarter. Fewer main sets are now being converted each quarter, but digital TV take-up on secondary sets continues to grow consistently and stood at 55% at the end of quarter two.
- The Switchover Tracker showed flat main TV set conversion in Q2 2008. 83% of UK homes had their main TV set converted to digital and a further 2% of UK homes had a digital secondary set but continued to watch analogue TV on their main TV set. In line with Ofcom's findings, the Switchover Tracker found increased levels of digital TV take-up on secondary sets (57%, up 5pp).
- During the last year 9% of all TV sets were converted to digital. The Switchover Tracker recorded seven out of ten (70%) of all TV sets as digital at the end of Q2 2008 compared to 61% in Q3 2007. However, approximately 18 million TV sets, 30% of all TVs in the UK remain analogue. Full household conversion increased 10 percentage points in the last year, from 47% in Q3 2007 to 57% in Q2 2008.
- Conversion grew in most of the early switching regions and take-up in Wales and Granada reached 90% for the first time. In Wales 90% of homes owned a digital main set and in Granada take-up rose to 91%.

Q2 2008 Switchover key metrics

- National switchover metrics decreased marginally in Q2 2008, but continued to grow in the early switching regions. 89% of the UK population had heard of digital switchover, and awareness levels were almost universal in the early switching regions: Border and West Country (both 98%) and in Wales and Granada (both 94%). Understanding of what to do for switchover stood at 68% nationally. National movements of key metrics were mostly within the statistical error margins of the Switchover Tracker Survey.

- Trend analysis of key metrics in the regions shows that a reasonably consistent pattern of growth, linked with Digital UK's activity, is developing in each region.

The Switchover Help Scheme

- The Switchover Help Scheme offers eligible people equipment to convert one TV, installation and a demonstration of how it works, and someone to call while they are getting used to it. The Help Scheme becomes available and is promoted in each region 7 months before switchover starts, so awareness of the Scheme is inevitably low in areas that are several years from switchover. Nationally 31% of the population had heard about the Switchover Help Scheme in Q2 2008, but for Border this proportion increased to 55%, and in West Country to 42%.

In Focus: Ethnic minority groups and switchover

- Take-up of digital TV among ethnic minority groups is high and in line with the White parts of the population. The vast majority (86%) of Black Asian and Minority Ethnic (BAME) households have already converted at least one TV set to digital. Second TV set conversion among ethnic minority households has improved from June 2007 to June 2008 (+5pp). 57% of second sets in BAME households are now converted to digital.
- Despite growth in awareness and understanding significant gaps between the White parts of the population and ethnic minority groups persist and have not substantially closed over the past year. BAME lag the White population by 31 percentage points on switchover awareness and by 30 percentage points on understanding. Reaching ethnic minority audiences continues to be a priority for Digital UK.
- Ethnic minority groups in the North West of England (one of the first regions to switch) are better prepared for switchover than the rest of the UK. 90% of BAME respondents in the North West already have digital TV on their main set (vs. 86% nationally) and awareness stands at 67% (compared to 62% nationally).
- Awareness of the different options to go digital and particularly awareness of Freeview is significantly lower among ethnic minority audiences.

In Focus: Switchover preparations in the West TV region

- The West TV region will be the fifth TV region to switch to digital from Q1 2010. In Q2 2008, with more than eighteen months to go until switchover, all key switchover metrics are tracking well above the national averages.

- Switchover awareness is almost universal (97% vs. 89% nationally) and more than three-quarters of the population understand what they have to do to prepare (76% vs. 68% nationally). Almost nine out of ten (88%) of homes served by the transmitters in the West region use digital TV on their main TV sets and more than half of households (58%) are fully digital.
- In comparison to the rest of the UK, people living in the West TV region have higher levels of understanding of switchover. Almost six out of ten (57%) of the West population score 60 points or above on the Detailed Switchover Understanding Index compared to 47% nationally.

Chapter 1

The Dashboards – Q2 2008

Quarterly results are presented on dashboards of progress:

(1) The Dashboard: by Regions and Project
Key metrics for each switchover region, for projects (sub-regions) in each region and for the UK as a whole.

(2) The Dashboard: by Consumer Groups
Key metrics provided for a range of demographic and consumer groups.

(3) The Dashboard: by Switchover Segment
Key metrics for Digital UK's switchover consumer segments (see Q2 2006 for further details)

Note that conversion figures on the dashboard and contained in this report are based on Switchover Tracker data. The figures provided in Ofcom's Quarterly Digital TV Progress Reports remain the authoritative guide to national digital TV take-up. The Q2 2008 Ofcom report shows that 88% of households now receive multichannel TV on their primary set (87.9% digital).

How to read the dashboards

FIGURE 1.1 – NAVIGATING THE TRACKER DASHBOARDS

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

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]

	BASE SIZE	-1- Awareness			-2- Understanding				-3- Pos/neut attitude		-4- Intentions to convert		-5- Conversion				-6-
		-a- Switchover	-b- Logo	-c- Help Scheme	-a- What to do for DSO	-b- Update VCRs	-c- Switchover year	-d- Detailed underst index	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold conversion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
NATIONAL	2819	90%	83%	32%	70%	47%	27%	48%	78%	88%	94%	1%	86%	52%	57%	69%	75%
1 - Border	490	99%	89%	54%	87%	56%	60%	74%	77%	91%	95%	0%	83%	52%	57%	67%	76%
1a - Selkirk	222	99%	90%	56%	91%	48%	77%	83%	80%	96%	95%	1%	82%	46%	55%	64%	74%
1b - Caldbeck	268	99%	89%	53%	84%	61%	46%	67%	74%	87%	95%	0%	84%	57%	58%	70%	78%
2 - Westcountry	314	95%	85%	41%	79%	61%	44%	66%	76%	88%	97%	1%	84%	51%	55%	68%	74%
3 - Wales	312	92%	81%	32%	73%	47%	50%	59%	75%	87%	94%	0%	88%	57%	60%	71%	79%
4 - Granada	308	95%	89%	36%	73%	51%	44%	60%	72%	84%	96%	0%	86%	60%	61%	73%	72%
5 - West	212	93%	84%	38%	80%	50%	25%	49%	72%	92%	93%	2%	86%	60%	64%	74%	75%
6 - STV North	155	91%	87%	24%	58%	34%	40%	46%	81%	86%	91%	1%	75%	37%	53%	59%	80%
7 - STV Central	160	92%	90%	41%	70%	57%	40%	54%	83%	92%	93%	0%	82%	51%	53%	67%	84%
8 - Central	103	94%	86%	32%	74%	54%	21%	52%	74%	84%	95%	0%	84%	49%	56%	68%	72%
9 - Yorkshire	103	91%	90%	31%	74%	55%	13%	42%	74%	94%	97%	0%	94%	55%	56%	71%	65%
10 - Anglia	79*	91%	87%	23%	70%	39%	20%	50%	83%	89%	93%	1%	89%	50%	59%	71%	86%
11 - Meridian	96*	92%	80%	31%	70%	43%	26%	45%	85%	93%	96%	0%	84%	57%	61%	70%	76%
12 - London	408	83%	75%	34%	63%	43%	19%	48%	78%	85%	90%	1%	83%	43%	52%	65%	78%
13 - Tyne Tees	55*	92%	85%	20%	63%	40%	37%	47%	75%	86%	98%	0%	87%	49%	57%	68%	
14 - Ulster	56*	76%	46%	14%	52%	11%	13%	13%	94%	100%						61%	

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

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

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

* 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-
		-a- Switchover	-b- Logo	-c- Help Scheme	-a- What to do for DSO	-b- Update VCRs	-c- Switchover year	-d- Detailed underst index	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
NATIONAL	3444	89%	81%	31%	68%	43%	31%	47%	81%	89%	92%	2%	83%	57%	57%	70%	76%
1 - Border	490	98%	87%	55%	82%	50%	59%	70%	77%	93%	96%	1%	82%	56%	58%	68%	67%
1a - Scottish Borders	158	99%	92%	59%	92%	42%	76%	80%	86%	97%	97%	0%	88%	52%	55%	68%	51%
1b - Caldbeck	332	97%	85%	53%	77%	54%	51%	65%	73%	91%	96%	1%	80%	58%	59%	68%	76%
2 - West Country	417	98%	89%	42%	83%	56%	66%	75%	77%	89%	96%	1%	82%	52%	53%	67%	76%
2a - West Country A	215	97%	90%	42%	83%	55%	65%	74%	75%	88%	95%	1%	78%	51%	54%	65%	70%
2b - West Country B	202	99%	87%	42%	83%	56%	68%	77%	78%	89%	98%	1%	86%	53%	51%	68%	82%
3 - Wales	402	94%	84%	32%	72%	46%	39%	75%	79%	88%	94%	1%	90%	52%	54%	70%	78%
3a - West Wales	174	96%	85%	25%	75%	42%	41%	76%	83%	91%	95%	1%	94%	55%	55%	72%	80%
3b - North Wales	86*	91%	83%	35%	64%	51%	44%	76%	78%	85%	91%	2%	90%	49%	55%	69%	80%
3c - Blaenplwyf	51*	94%	88%	41%	81%	61%	30%	74%	71%	91%						76%	
3d - South Wales	91*	93%	83%	39%	69%	42%	33%	70%	77%	84%	96%	0%	82%	46%	50%	63%	75%
4 - Granada	307	94%	82%	38%	74%	53%	45%	63%	80%	91%	94%	1%	91%	60%	57%	74%	75%
5 - West	311	97%	84%	37%	76%	50%	34%	56%	78%	91%	94%	1%	88%	55%	58%	71%	74%
6 - STV North	315	91%	86%	28%	65%	39%	49%	54%	81%	91%	95%	2%	79%	49%	54%	66%	80%
7 - STV Central	311	91%	88%	38%	72%	55%	45%	57%	83%	93%	96%	0%	92%	61%	62%	77%	73%
8 - Central	106	93%	87%	26%	71%	40%	19%	39%	84%	89%	92%	1%	87%	59%	63%	74%	70%
9 - Yorkshire	105	87%	85%	33%	66%	41%	20%	40%	72%	87%	92%	0%	81%	48%	45%	63%	77%
10 - Anglia	96*	84%	79%	21%	51%	42%	24%	27%	88%	89%	89%	5%	57%	47%	46%	53%	80%
11 - Meridian	101	96%	78%	30%	78%	55%	27%	55%	74%	84%	93%	2%	86%	66%	65%	76%	78%
12 - London	404	79%	78%	28%	63%	33%	23%	38%	82%	88%	91%	3%	83%	51%	55%	67%	76%
13 - Tyne Tees	49**													86%		89%	
14 - Ulster	30**																

(2) The Dashboard: by Consumer Groups

* 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-
		-a- Switchover	-b- Logo	-c- Help Scheme	-a- What to do for DSO	-b- Update VCRs	-c- Switchover year	-d- Detailed underst index	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
NATIONAL	**3444**	89%	81%	31%	68%	43%	31%	47%	81%	89%	92%	2%	83%	57%	57%	70%	76%
Analogue	**447**	81%	68%	21%	49%	35%	32%	34%	73%	80%	73%	8%	0%	21%	0%	7%	
Digital	**2791**	90%	84%	32%	71%	45%	30%	49%	82%	91%	96%	0%	100%	60%	68%	80%	76%
Male	**1693**	88%	83%	35%	70%	50%	30%	53%	84%	92%	94%	1%	87%	62%	63%	75%	78%
Female	**1751**	89%	80%	27%	67%	37%	31%	40%	77%	87%	90%	3%	80%	52%	52%	66%	74%
16-24	**355**	84%	91%	29%	62%	31%	20%	39%	77%	95%	93%	1%	86%	67%	65%	76%	83%
65-74	**463**	93%	73%	37%	59%	51%	43%	49%	77%	83%	94%	2%	74%	41%	42%	57%	77%
ABC1	**1553**	92%	81%	35%	74%	44%	31%	50%	83%	91%	95%	1%	86%	61%	60%	73%	75%
C2DE	**1891**	86%	81%	26%	63%	43%	30%	44%	79%	87%	90%	2%	81%	52%	54%	67%	77%
Rural	**528**	91%	78%	36%	74%	40%	31%	45%	78%	93%	94%	1%	84%	62%	57%	73%	80%
Urban	**2802**	89%	82%	30%	67%	44%	30%	47%	81%	89%	92%	2%	83%	56%	57%	70%	75%
Low income	**693**	83%	73%	22%	58%	42%	30%	41%	79%	84%	90%	1%	78%	46%	56%	65%	79%
BAME	**278**	63%	68%	20%	42%	28%	14%	26%	79%	83%	82%	4%	77%	49%	61%	67%	76%
Non-English	**190**	53%	59%	18%	30%	21%	10%	20%	73%	80%	80%	8%	75%	48%	67%	67%	68%
Disabled	**569**	87%	74%	28%	62%	45%	33%	44%	72%	81%	88%	4%	80%	51%	54%	66%	76%
Need assistance	**169**	80%	65%	14%	39%	25%	34%	20%	71%	81%	69%	8%	24%	3%	0%	16%	72%
Hard to reach	**1542**	86%	78%	28%	63%	41%	30%	43%	80%	86%	93%	2%	82%	50%	56%	67%	78%
Living alone	**678**	85%	69%	26%	58%	41%	32%	39%	77%	86%	87%	3%	67%	37%	49%	57%	75%
Families w/ children	**1026**	91%	87%	29%	72%	40%	32%	50%	82%	89%	95%	1%	92%	58%	60%	73%	76%
Rent private	**422**	81%	78%	25%	60%	38%	18%	41%	82%	91%	93%	1%	81%	58%	63%	72%	73%
Rent council	**730**	82%	79%	21%	55%	34%	27%	37%	80%	87%	86%	3%	78%	45%	55%	65%	80%
House	**2894**	91%	82%	32%	70%	44%	32%	48%	81%	90%	94%	1%	85%	58%	56%	70%	76%
Flat	**528**	77%	80%	24%	57%	38%	24%	39%	79%	86%	87%	3%	78%	47%	61%	68%	75%
SHS - 75+	**310**	79%	56%	22%	48%	38%	28%	27%	76%	87%	77%	3%	60%	37%	44%	53%	64%
SHS - DLA/AA <75	**179**	90%	75%	22%	55%	44%	31%	46%	74%	80%	92%	2%	89%	58%	55%	73%	88%

(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-
		-a- Switchover	-b- Logo	-c- Help Scheme	-a- What to do for DSO	-b- Update VCRs	-c- Switchover year	-d- Detailed underst index	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
Cultured Conservatives	**448**	93%	76%	37%	74%	44%	42%	51%	70%	87%	92%	3%	75%	47%	50%	62%	61%
Out-and-About Families	**464**	92%	86%	37%	76%	44%	40%	58%	81%	92%	94%	1%	89%	55%	57%	70%	71%
Traditionalists	**615**	90%	77%	30%	61%	41%	48%	49%	71%	81%	91%	1%	72%	45%	42%	58%	68%
TV-Centrics	**1179**	94%	91%	39%	76%	50%	50%	65%	83%	93%	96%	1%	95%	61%	60%	75%	81%
Rolling Stones	**308**	86%	83%	39%	71%	44%	38%	55%	85%	92%	91%	2%	76%	44%	57%	64%	80%
High-Tech Consumers	**430**	94%	88%	42%	82%	50%	41%	63%	86%	95%	96%	1%	96%	67%	68%	80%	77%

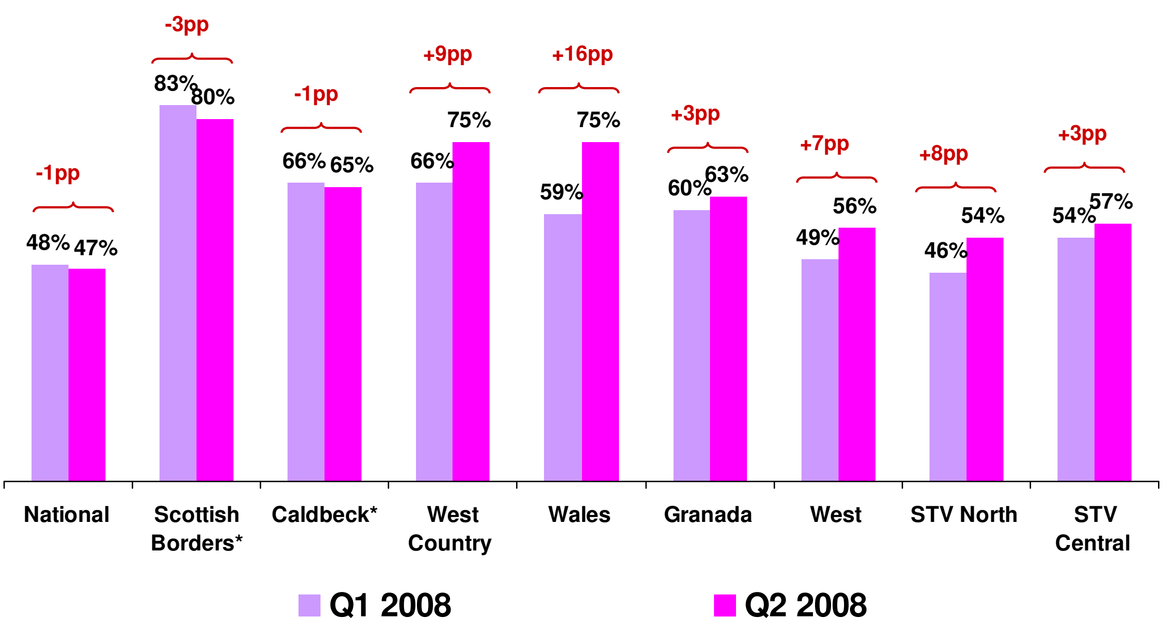
Chapter 2

The Q2 2008 Switchover Tracker Results

Switchover key metrics: Awareness and Understanding

- National switchover metrics decreased marginally in Q2 2008, but continued to grow in the early switching regions. 89% of the UK population had heard of digital switchover, and awareness levels were almost universal in the early switching regions: Border and West Country (both 98%) and in Wales and Granada (both 94%). Understanding of what to do for switchover stood at 68% nationally.
- Understanding of what to do for the digital switchover stood at 68% nationally. Understanding is highest in Scottish Borders switching in November this year, where more than nine out of ten (92%) people knew that they have to get digital TV to continue watching television after switchover.

FIGURE 2.1: GROWTH OF DETAILED SWITCHOVER KNOWLEDGE[1] IN FIRST SEVEN REGIONS



* sub-regional breaks for the Border TV region

Source: Digital UK & Ofcom Switchover Tracker Q1 2007 to Q2 2008
Sample size: Q1 2008 (2819); Q2 2008 (3444)

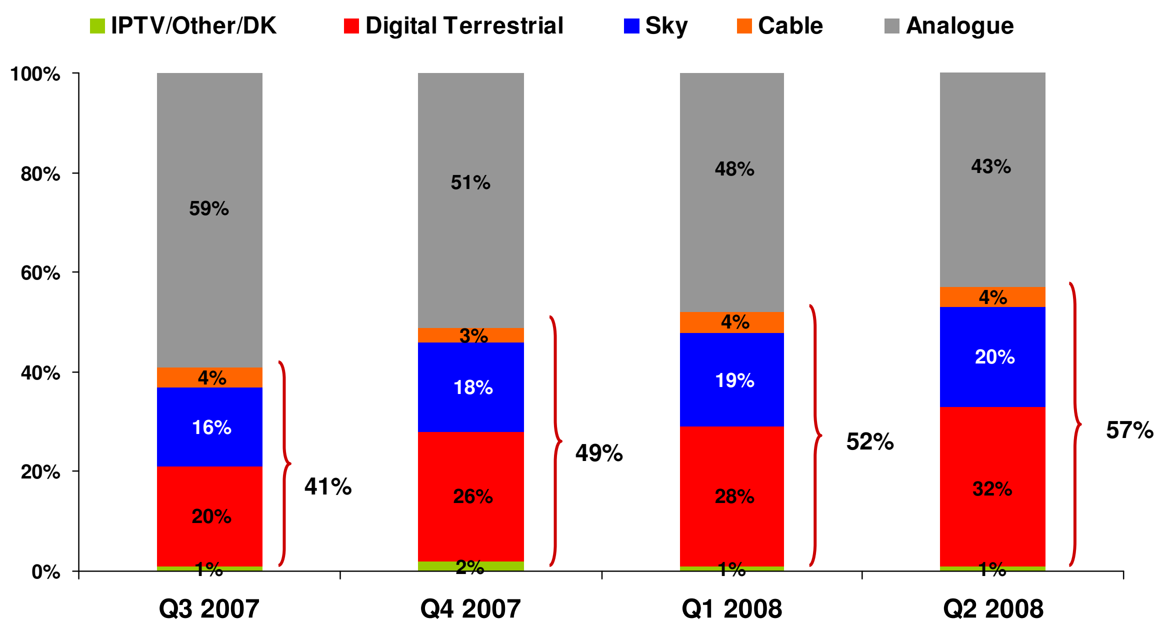
[1] A detailed definition of the Detailed Switchover Understanding Index can be found in appendix A of this report. The index combines results from individual questions about (1) understanding of the options to go digital, (2) knowledge of the regional switchover date, (3) understanding that VCRs will have limited functionality after switchover, (4) awareness that all TV sets have to be converted to digital and (5) understanding of potentially having to upgrade an aerial for switchover into a score that can be measured on the index.

- Results for the Detailed Understanding Index, which combines various individual indicators of understanding of switchover, also shows that less than half of the population (47%) have detailed understanding of the implications of switchover, e.g. knowledge that recorders will be affected by switchover (43%) or that they might have to get an aerial upgrade if their TV aerial is a in bad condition. However, in regions where Digital UK has increased its information campaign, understanding has improved throughout. In Border 70% (80% Scottish Borders and 65% Caldbeck) have detailed understanding, and three quarters of the population in West Country and Wales (75%) score highly on the switchover understanding index (improvements of +15pp in Wales and +9pp in West Country).

Digital TV conversion

- In Q2 83% of UK households surveyed on the Switchover Tracker had converted their main TV set to digital. A further 2% of analogue main set homes already owned a converted digital secondary set, but continue to watch analogue TV on their main TV in their home.
- Over the last year digital TV conversion on secondary TV sets increased by 16 percentage points, from just over four in ten to almost six in ten. The majority of the growth was on the digital terrestrial platform. From Q3 2007 to Q2 2008 Freeview take-up on secondary sets in UK homes grew by more than half from 20% to 32% (a 12pp increase). Take-up of digital satellite services on secondary sets also improved with increases of almost a quarter from 16% take-up in Q3 2007 to 20% in Q2 2008.

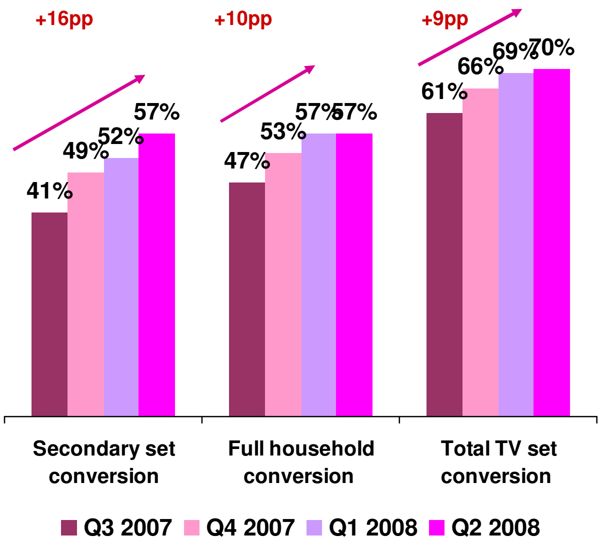
FIGURE 2.2: Q3 2007 TO Q2 2008 PLATFORM TAKE-UP ON SECONDARY TV SETS



Source: Digital UK & Ofcom Switchover Tracker Q3 2007 to Q2 2008
Sample size: 2829 (Q3 2007) 2830 (Q4 2007) 2819 (Q1 2008) 3444 (Q2 2008)

- During the last year 9% of all TV sets were converted to digital. The Switchover Tracker recorded seven out of ten (70%) of all TV sets as digital at the end of Q2 2008 compared to 61% in Q3 2007. However, approximately 18 million TV sets, 30% of all TVs in the UK remain analogue. Full household conversion increased 10 percentage points in the last year, from 47% in Q3 2007 to 57% in Q2 2008.

FIGURE 2.3: Q3 2007 TO Q2 2008 CONVERSION GROWTH – SUBSEQUENT SETS AND ALL SETS

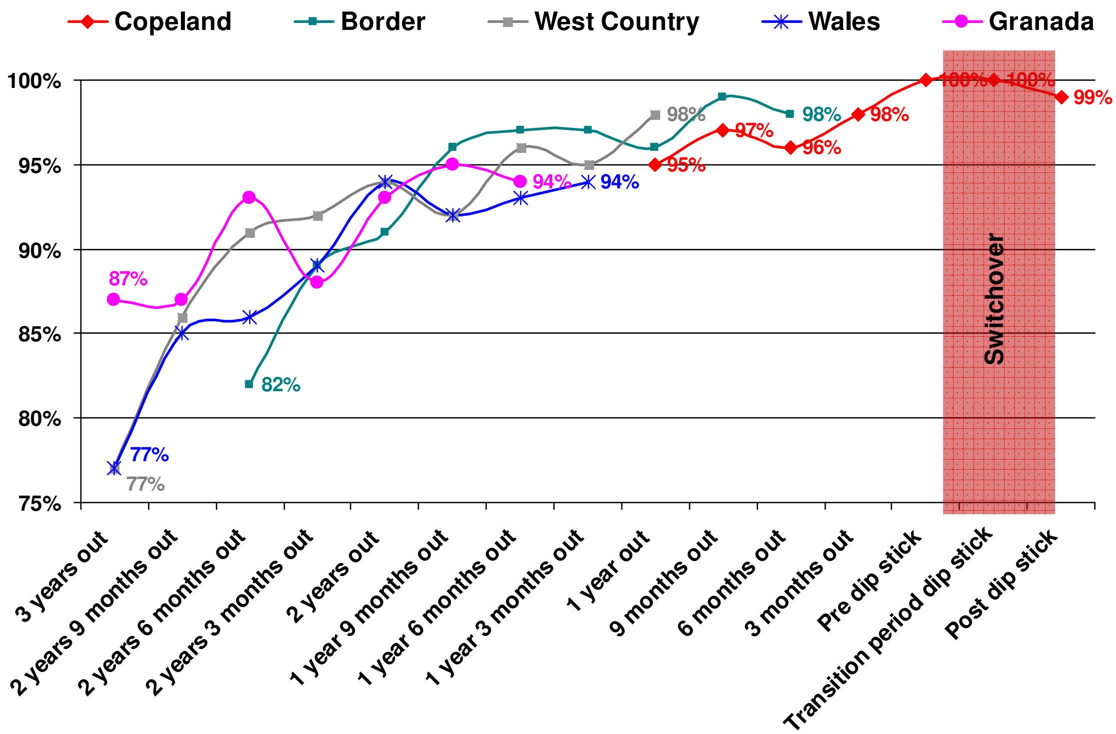


Source: Digital UK & Ofcom Switchover Tracker Q3 2007 to Q2 2008
Sample size: 2829 (Q3 2007) 2830 (Q4 2007) 2819 (Q1 2008) 3444 (Q2 2008)

A typical pattern of growth in awareness and understanding is emerging

- Trend analysis of key metrics in the regions shows that a reasonably consistent pattern of growth, linked with Digital UK's activity, is developing in each region.
- Encouragingly awareness and understanding in most of the early switching regions is already as high or above the levels recorded in Copeland which switched to digital broadcasting at the end of last year. Despite different starting points of awareness and understanding at three years out, regional metrics move closely together after the start of the regional switchover campaigns. At two years out from the first regional switchover all four regions were within four percentage points range for switchover awareness.
- Switchover awareness in Copeland one year out from switchover stood at 95%; Scottish Borders awareness was 97% at that point in time and West Country awareness stands at 98% at one year out in Q2 2008.
- The pattern of growth in switchover understanding roughly follows that for awareness, but starting at a lower level.

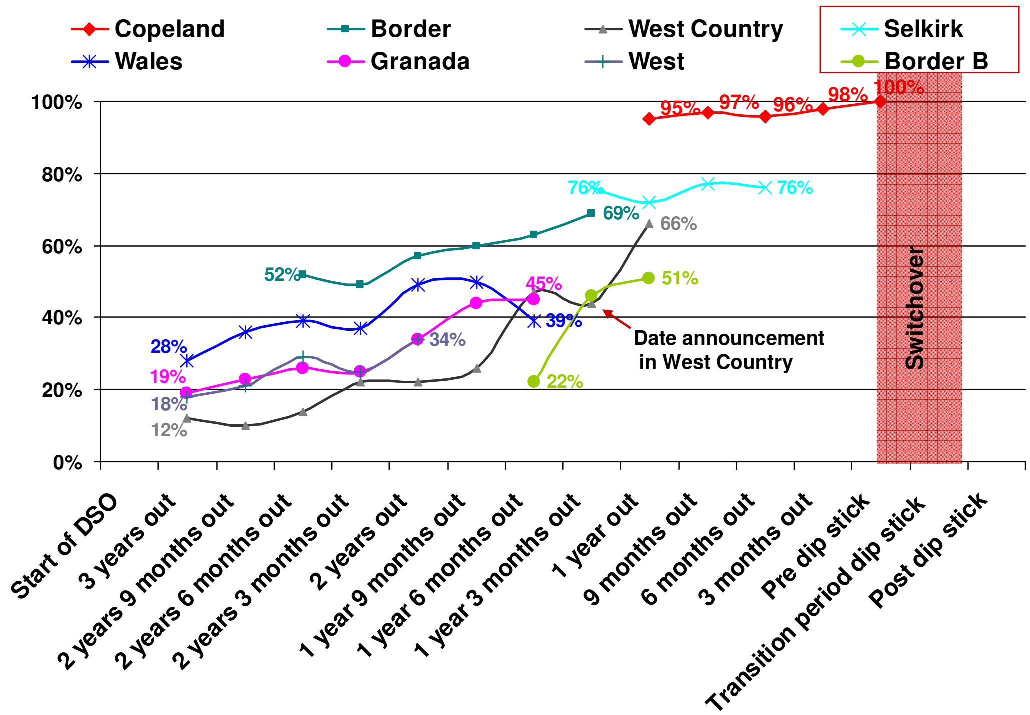
FIGURE 2.4: SWITCHOVER AWARENESS TRENDS IN EARLY SWITCHING REGIONS



Source: Digital UK & Ofcom Switchover Tracker Q2 2006 to Q2 2008
Sample size: National (2522, 1964, 1956, 2448, 2829, 2830, 2819, 3444); regional over 300 per quarter

- Between one year and eight months out switchover dates are announced in each region. This results in a significant uplift in date awareness. During Q2 2008 switchover dates were announced in West Country and Wales. In both regions understanding of the switchover year increased significantly during the quarter. West Country awareness of the year grew to 66% (up 21pp) and in Wales awareness that switchover will happen in 2009 and 2010 grew by 18 percentage points to 68%.
- Wales date awareness appears to decline, because in previous quarters both 2009 and 2010 were allowed as “correct” years for switchover (switchover in Wales straddles both years). From Q2 2008 onwards the Tracker can now identify those respondents in areas switching in 2009 and those switching in 2010. This results in a more accurate understanding of the year metric going forward.

FIGURE 2.5: UNDERSTANDING OF THE YEAR TREND IN EARY SWITCHING REGIONS



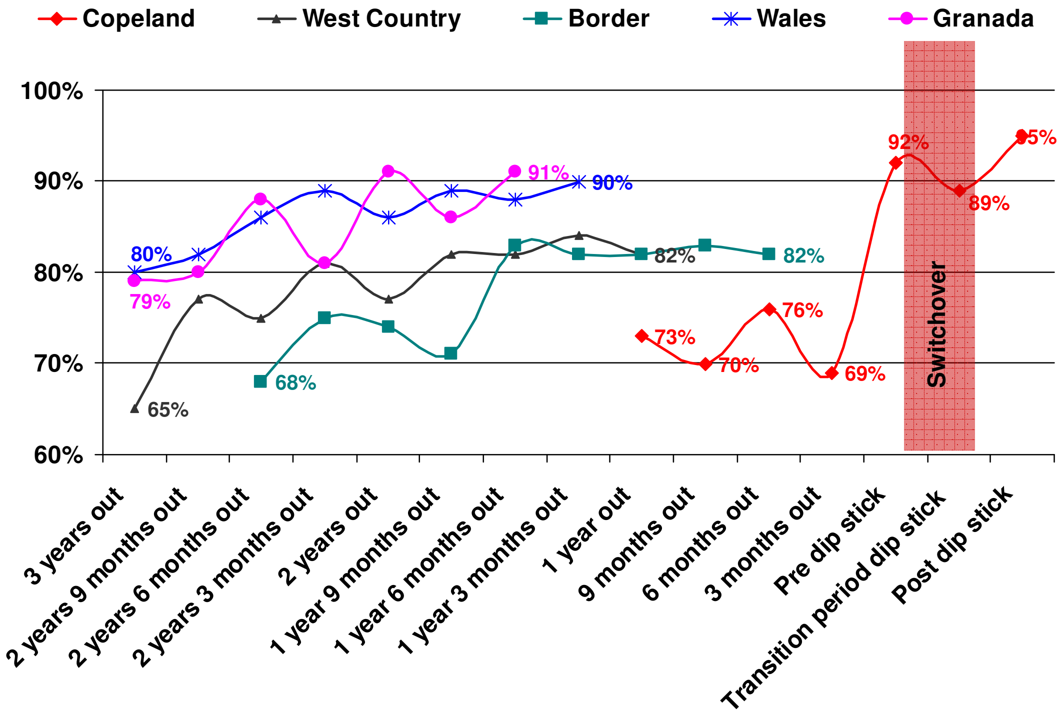
Source: Digital UK & Ofcom Switchover Tracker Q2 2006 to Q2 2008
Sample size: National (2522, 1964, 1956, 2448, 2829, 2830, 2819, 3444); regional over 300 per quarter

- In Scottish Borders, the area due to switch in November 2008, three quarters of the population (76%) know that switchover happens later this year and 53% knew the month of switchover (November 2008) but only 11% knew the exact date (6 November).
- Knowledge of the month or exact switchover date increases substantially close to switchover. 21% in West Country A (the Beacon Hill and Stockland Hill transmitter groups, switching in April and May 2009) and 10% of Cumbria and south west Scotland, served by the Caldbeck transmitter (switching in June 2009) are aware of their switchover between April and June next year. 19% in West Country B (the Caradon Hill, Redruth and Huntshaw Cross transmitter groups, switching in July and August 2009) know that they switch between July and September. Knowledge of the quarter of switchover in the next regions to switch, Wales and Granada, is lower than 10%.

Main set conversion developments over time

- Conversion grew in most of the early switching regions and take-up in Wales and Granada reached 90% for the first time. In Wales 90% of homes owned a digital main set and in Granada take-up went up to 91%.

FIGURE 2.6: MAIN TV SET CONVERSION TREND ANALYSIS IN EARLY SWITCHING REGIONS



Source: Digital UK & Ofcom Switchover Tracker Q2 2006 to Q2 2008
Sample size: National (2522, 1964, 1956, 2448, 2829, 2830, 2819, 3444); regional over 300 per quarter

- Note that fluctuations in regional digital TV take-up, similar to those reported in the Granada region over the last year (see graph above), should be stabilised in the future through the new weighting profile which takes account of platform availability by switchover region (see chapter 6 for more details).

Chapter 3

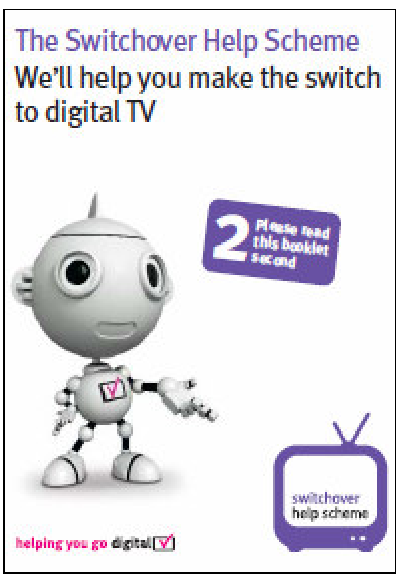
The Switchover Help Scheme

- It is estimated that up to seven million people in the UK will be eligible for the Help Scheme. People are eligible if they are aged 75 years or more, or if they are registered blind or partially sighted. Also eligible are people who get (or could get) Attendance or Constant Attendance Allowance, Mobility Supplement, or Disability Living Allowance.
- The Help Scheme offers eligible people equipment to convert one TV, installation and a demonstration of how it works, and someone to call while they are getting used to it. The Help Scheme asks for a contribution of £40, or provides help free if the eligible person is also on income benefits.
- The Switchover Help Scheme is managed by a subsidiary of the BBC and delivered by service provider eaga plc. Generic communications are delivered by Digital UK.

The Switchover Help Scheme in Scottish Borders

- The Switchover Help Scheme launched in Scottish Borders in April 2008 where around 16,000 people are eligible. Starting at the end of June 2008, the Help Scheme mailed an 'options pack' to all eligible people living in the area served by the Selkirk transmitter and its relays. The options pack informed recipients that they were eligible for the Help Scheme, what the Help Scheme provides and details of how to get help.
- At the end of Q2 2008 Digital UK began targeted communications in the Scottish Borders around the Help Scheme, including radio, press and online advertising.

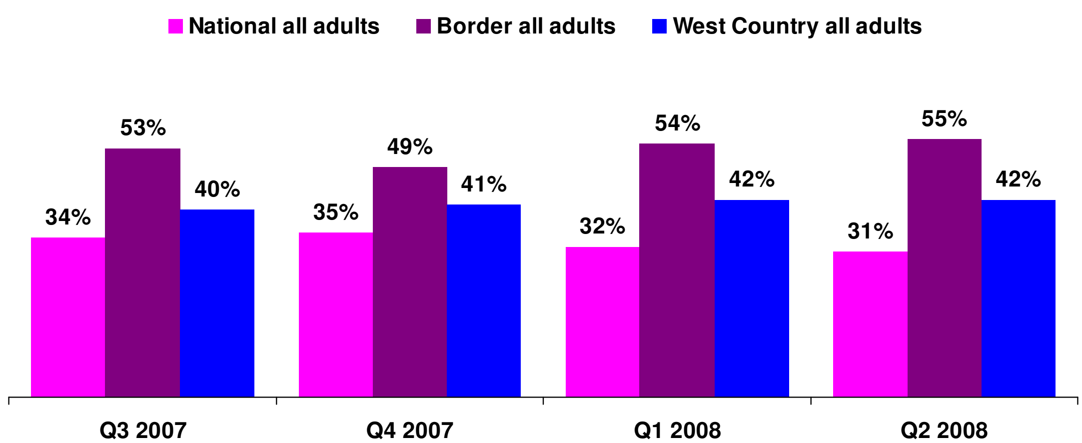
FIGURE 3.1: SCOTTISH BORDERS OPTIONS PACK BOOKLET AND ADVERT



Awareness of the Switchover Help Scheme

- The Help Scheme will be launched on a regional basis starting approximately eight months before a region is due to switch. At the end of Q2 2008 the only area where a full range of communications had begun was that served by the Selkirk transmitter and its relays in the Scottish Borders.
- Despite this, in Q2 2008 31% of all UK adults were aware that there will be assistance with switchover for certain groups and more than half (55%) of all adults across the Border TV region were aware of the Help Scheme. Awareness was somewhat lower (42%) in West Country, the second region to switch starting in April 2009. A national TV campaign is to run on BBC TV this autumn and should boast national awareness.

FIGURE 3.2: NATIONAL AND REGIONAL AWARENESS OF THE SWITCHOVER HELP SCHEME

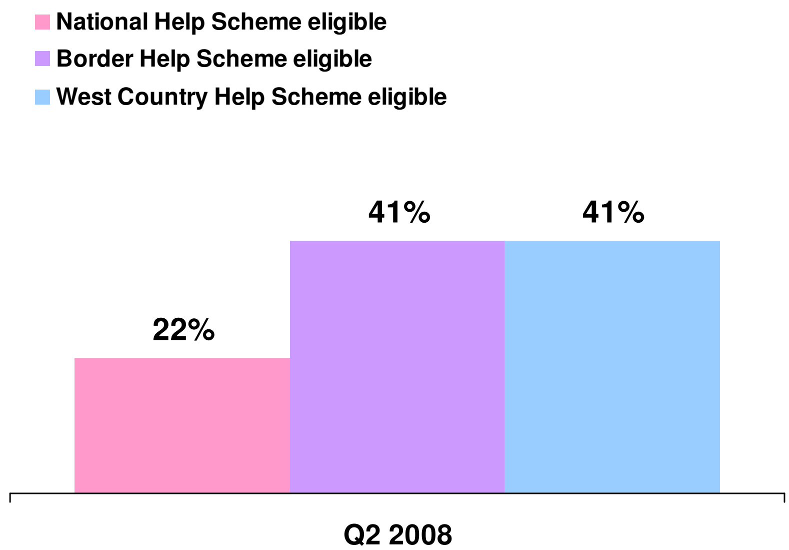


Source: Q2 2008 Digital UK & Ofcom Switchover Tracker
Sample size: National (2829, 2830, 2819, 3444); Border (485, 483, 490, 490) West Country (306, 306, 314, 417)

- One year from switchover we increase the number of Help Scheme eligible respondents that we interview on the Switchover Tracker, asking them an additional 5 minutes of questions at the end of the main questionnaire. In Q2 2008 we had an increased sample of Help Scheme eligible respondents in both Border and West Country.
- In Q2 (April, May and June) 2008 41% of those eligible for the Help Scheme in Border were aware that there would be assistance for certain groups. When asked directly whether or not they think they are eligible for the Switchover Help Scheme 37% of eligible respondents in Border said that they thought they were eligible, 39% didn't think they were eligible and 24% answered "don't know".
- While awareness of the Help Scheme in the Border region is higher among all adults than those eligible for the scheme; in West Country (the next region to switch after the Scottish Borders) awareness of the Help Scheme among all adults and those eligible for assistance is virtually the same (42% and 41%).

- We would expect to see awareness of the Help Scheme rise among eligible individuals in Q3 (July, August and September) when everyone would have received their options pack.

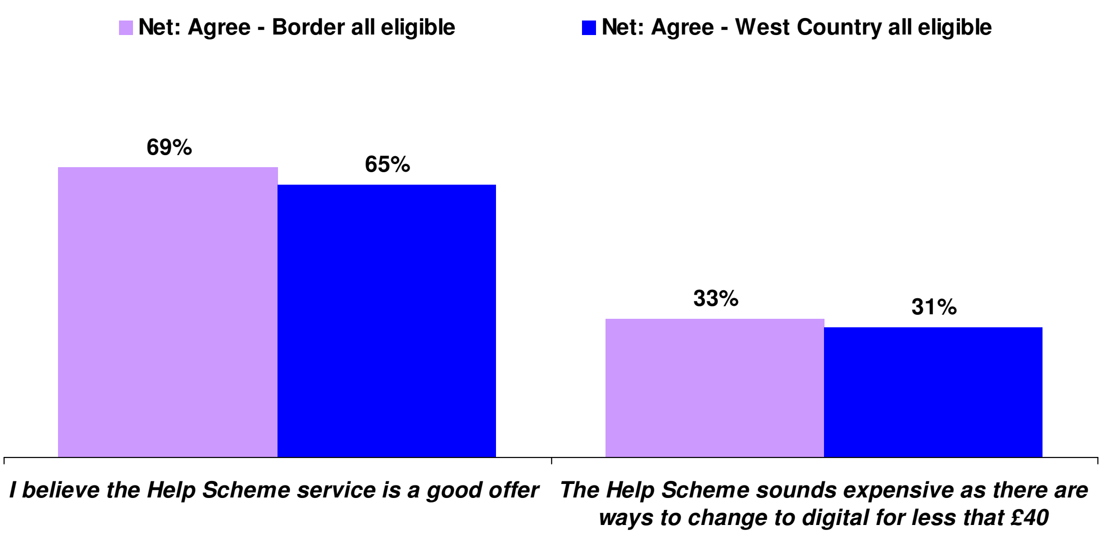
FIGURE 3.3: AWARENESS OF THE SWITCHOVER HELP SCHEME AMONG ELIGIBLE PEOPLE



Source: Q2 2008 Digital UK & Ofcom Switchover Tracker / Q2 2008 Digital UK/SHS Help Scheme Boost
Sample size: Help Scheme eligible: National (489) Border (207) West Country (194)

- We asked eligible respondents a number of questions about their attitudes towards the Help Scheme and associated issues. Two thirds (67%) believe that the Help Scheme is a good offer. Those closer to switchover were more likely to believe that the Help Scheme is a good offer.

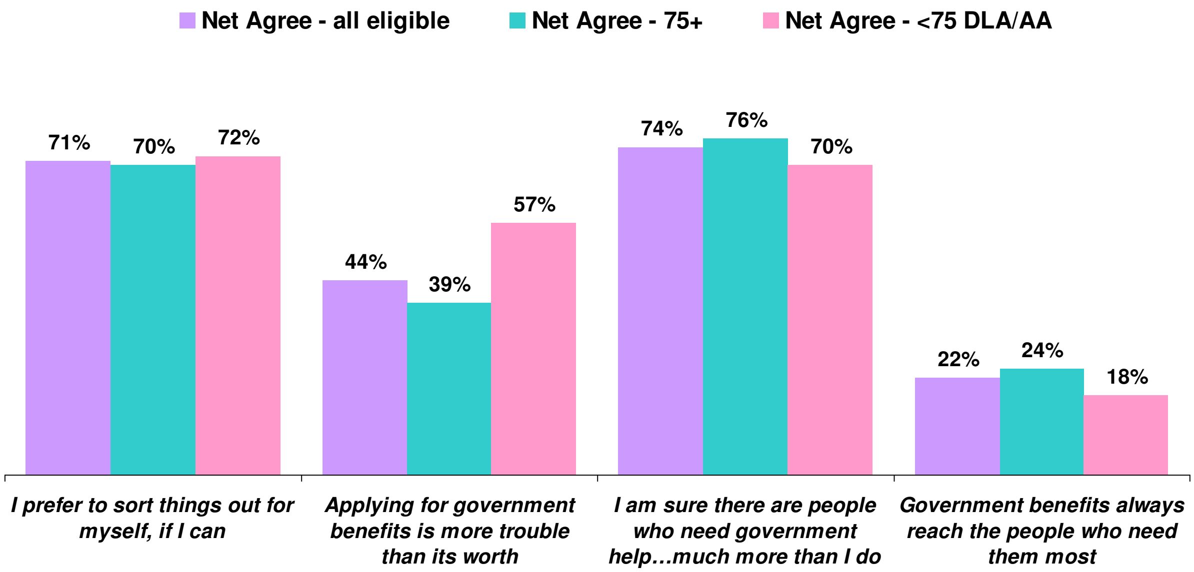
FIGURE 3.4: ATTITUDES TO THE COSTS OF THE SWITCHOVER HELP SCHEME IN EARLY REGIONS



Source: Q2 2008 Digital UK/SHS Help Scheme Boost
Base: Help Scheme eligible respondents in Border (181) West Country (170)

- Results also suggest that a significant proportion of those eligible for the Help Scheme may prefer to make their own arrangements for switchover, rather than opting in to the Scheme; 71% prefer to sort things out for themselves if they can and 74% feel that there are other people who need government assistance much more than they do.
- There was little difference between those aged 75 or over and those under 75 and in receipt of disability benefits when it came to how likely they were to "prefer to sort things out for themselves". But those aged 75 or over were more likely to think that there are other people who need government help with the switch to digital much more than they do.

FIGURE 3.5: ATTITUDES TO THE SWITCHOVER HELP SCHEME BY ELIGIBLE GROUP



Source: Q2 2008 Digital UK/SHS Help Scheme Boost
Base: All Help Scheme eligible respondents in Border (181) and West Country (170)

Chapter 4

IN FOCUS: Ethnic Minority Groups

- Digital UK commissioned a follow up study of the switchover readiness of Black, Asian and Minority Ethnic groups (BAME) with the independent specialist research agency Ethnic Focus. 980 face-to-face interviews were carried out nationwide during June 2008. Sample sizes were boosted to 284 respondents in the North West region to allow detailed analysis by ethnic minority group in this early switchover region (roughly equivalent to the Granada TV region).
- Results from White British respondents of the Switchover Tracker survey who answered the same questions during May 2008 are used for comparison.

Summary

- Take-up of digital TV among ethnic minority groups is high and in line with the White parts of the population. The vast majority (86%) of Black Asian and Minority Ethnic (BAME) households have already converted at least one TV set to digital. Second TV set conversion among ethnic minority households has improved from June 2007 to June 2008 (+5pp). 57% of second sets in BAME households are now converted to digital.
- Despite growth in awareness and understanding significant gaps between the White parts of the population and ethnic minority groups persist and have not substantially closed over the past year. BAME lag the White population by 31 percentage points on switchover awareness and by 30 percentage points on understanding. Reaching ethnic minority audiences continues to be a priority for Digital UK.
- Ethnic minority groups in the North West of England (one of the first regions to switch) are better prepared for switchover than the rest of the UK. 90% of BAME respondents in the North West already have digital TV on their main set (vs. 86% nationally) and awareness stands at 67% (compared to 62% nationally).
- Awareness of the different options to go digital and particularly awareness of Freeview is significantly lower among ethnic minority audiences.

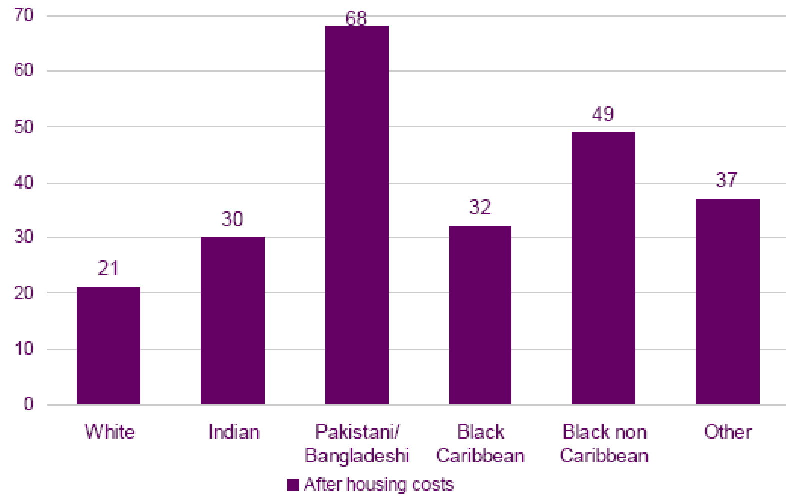
Background on ethnic minority groups

- The 2001 Census established that 7.9% of the UK population belonged to an ethnic minority group (around 4.5 million people in the UK). The BAME population has since increased by 1.3 percentage points, to represent 9.2% of the UK population in 2006[2].

[2] Annual population estimates, Office for National Statistics (ONS)

- BAME parts of the population are more likely to live in urban areas in England than in any other UK nation or region. In 2001, 96.2% of all people with an ethnic minority background in the UK lived in England; only 3.8% lived in Wales, Scotland or Northern Ireland. Nearly half (45%) live in the London region, where they comprise 28.8% of all residents.
- Higher levels of unemployment and lower average income are likely to result in lower levels of disposable income. Unemployment rates and low levels of income are more broadly spread among BAME groups than their White British counterparts.

FIGURE 4.2: HOUSEHOLDS ON LOW INCOME BY ETHNIC MINORITY GROUP

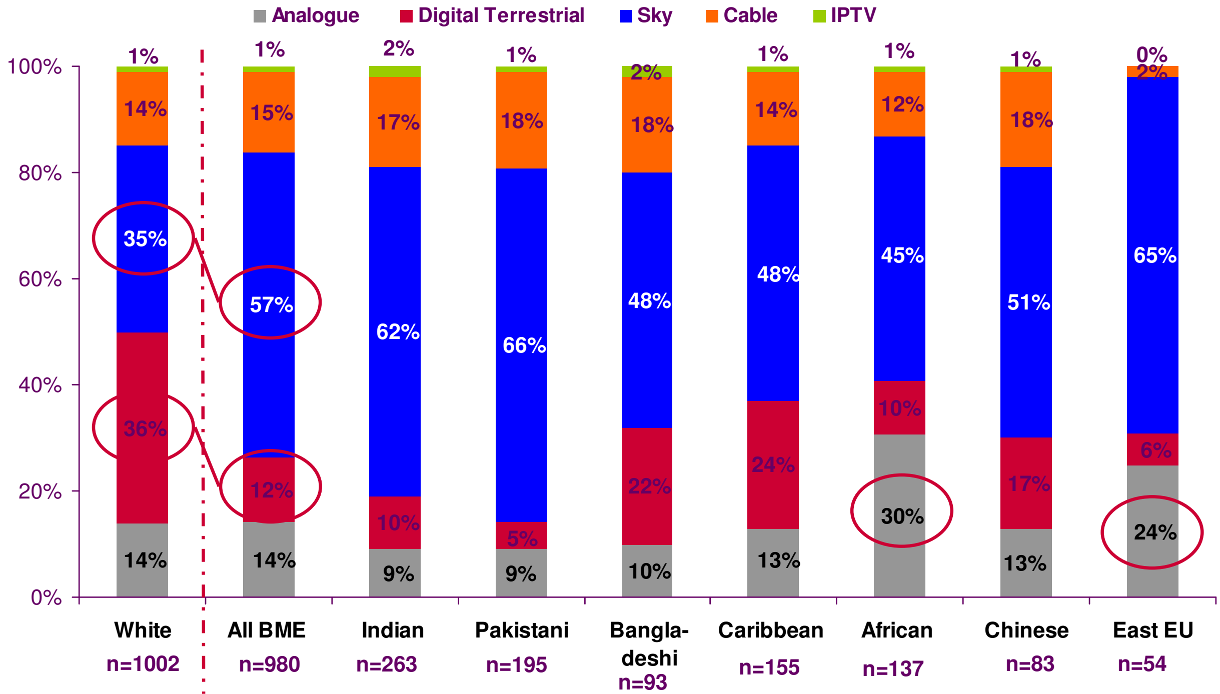


Source: Family Resources Survey 2000/1, Department for Work and Pensions

Digital TV take-up

- Main set conversion is the same level among BAME households (86%) and among the White population (86%). Take-up of subscription based digital television services like Sky and Virgin Media is significantly higher, whilst take-up of Freeview remains much lower; less than half of the average of the White population (12% BAME vs. 36% White).
- Most BAME groups have very similar levels of take-up, but the African and Eastern European communities are lagging behind.
- A similar survey was conducted in 2007, and year-on-year improvements in main set conversion have been achieved across almost all ethnic minority groups. The biggest improvements were made among the Eastern European audience (+12pp) and the Chinese audience (+13pp).
- Digital TV take-up among all ethnic minority groups in the North West region is higher than the national average. Conversion among Indian and Bangladeshi groups in the North West was 100% among those interviewed.

FIGURE 4.1: DIGITAL TV TAKE-UP ON MAIN TV SETS BY ETHNIC MINORITY GROUP



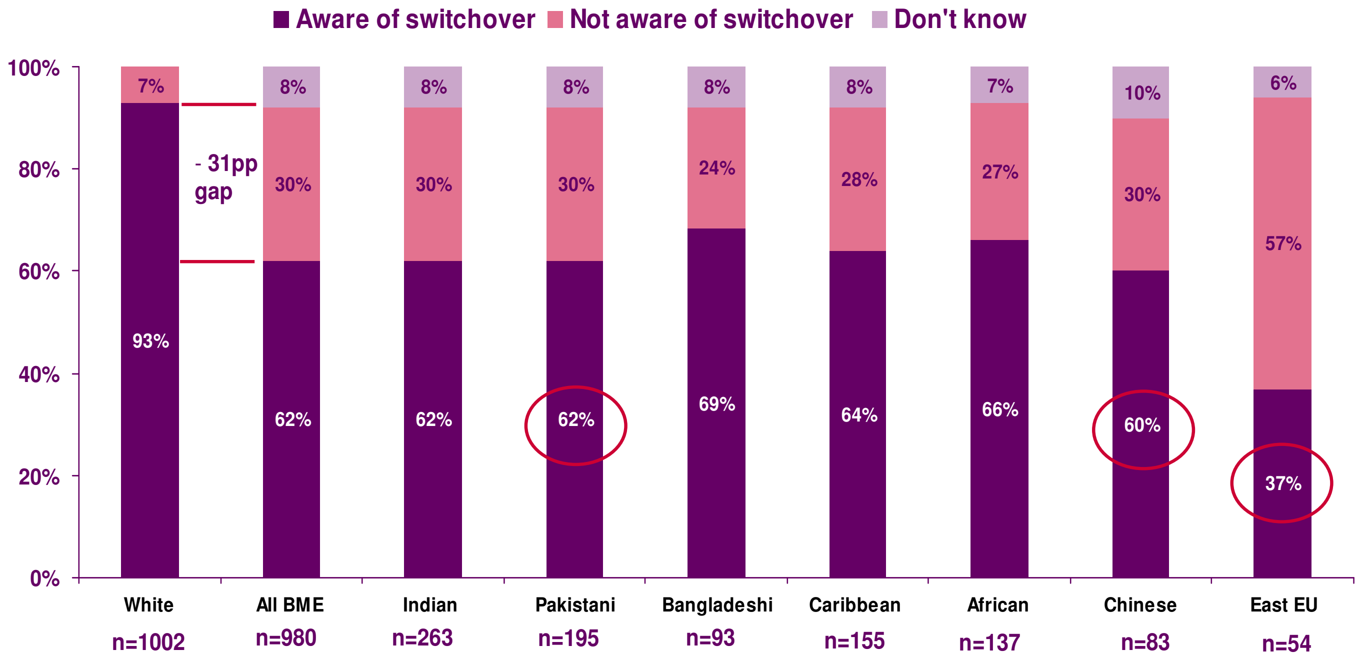
Source: June 2008 Ethnibus survey and May 2008 Digital UK & Ofcom Switchover Tracker
Base: White (1002), all BAME (980), Indian (263), Pakistani (195), Bangladeshi (93), Caribbean (155), African (137), Chinese (83), Eastern European (54)

- June 2008 results show higher levels of take-up on second sets in BAME households than the previous year. (57% conversion vs. 53% among White tracker respondents). Last year's results still showed a conversion gap on second sets in BAME homes (-14pp), but this gap has since closed. Take-up of satellite TV on second sets in BAME households is significantly higher.
- 93% of satellite users in BAME households are subscribing to satellite services from Sky rather than alternative satellite providers.

Awareness and understanding among ethnic minority groups

- Switchover awareness measures have improved over the last year, but there still remains a 31pp awareness gap between White and minority ethnic parts of the population. In 2007 this awareness gap was -33pp. Just over six out of ten (62%) had heard about switchover compared to 93% awareness among White British tracker respondents in May 2008.
- This second round of research highlighted again that language issues can be a barrier to being aware of switchover, but levels of switchover awareness also are lower than the national average among BAME respondents who consider English their first language. At 67% they are 26pp less aware of switchover than the White British group. The biggest increase in awareness from 2007 to 2008 results has been a 9pp improvement in switchover awareness among BAME respondents with English as their second language.

FIGURE 4.3: SWITCHOVER AWARENESS BY ETHNIC MINORITY GROUP



Source: June 2008 Ethnibus survey and May 2008 Digital UK & Ofcom Switchover Tracker
Base: White (1002), all BAME (980), Indian (263), Pakistani (195), Bangladeshi (93), Caribbean (155), African (137), Chinese (83), Eastern European (54)

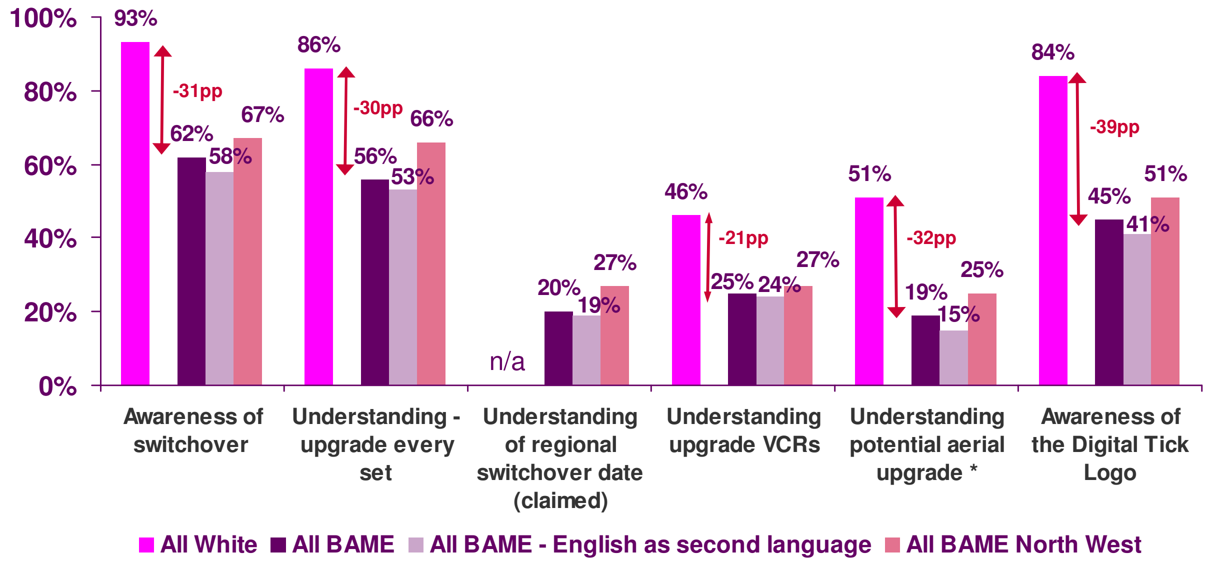
- Year on year improvements in switchover awareness have been achieved across most ethnic minority groups. The biggest improvements were made among the Pakistani audience (+20pp) and among the African audience (+7pp). Chinese (-2pp) and Eastern European (-7pp) audiences are less aware of switchover than a year ago[3].

Understanding of the implications of digital switchover

- Understanding measures for ethnic minority groups lag on average around 30pp behind results for White audiences.
- Understanding that all TV sets need to be upgraded for switchover is still less well understood among BAME groups (30pp behind the average for White British people, 86% vs. 56%).
- One fifth (20%) of all BAME respondents claims to be aware of the date when digital switchover starts in their region. Because the accurate start of regional switchover dates cannot be determined for a national sample, we are unable to validate this claimed understanding of regional switchover dates.
- One quarter (25%) of BAME groups are aware that recording devices will have limited functionality after switchover compared to almost half (46%) of the White population.

[3] please note the smaller sample size for the Bangladeshi, Chinese and Eastern European groups

FIGURE 4.4: UNDERSTANDING GAPS OF ETHNIC MINORITY GROUPS



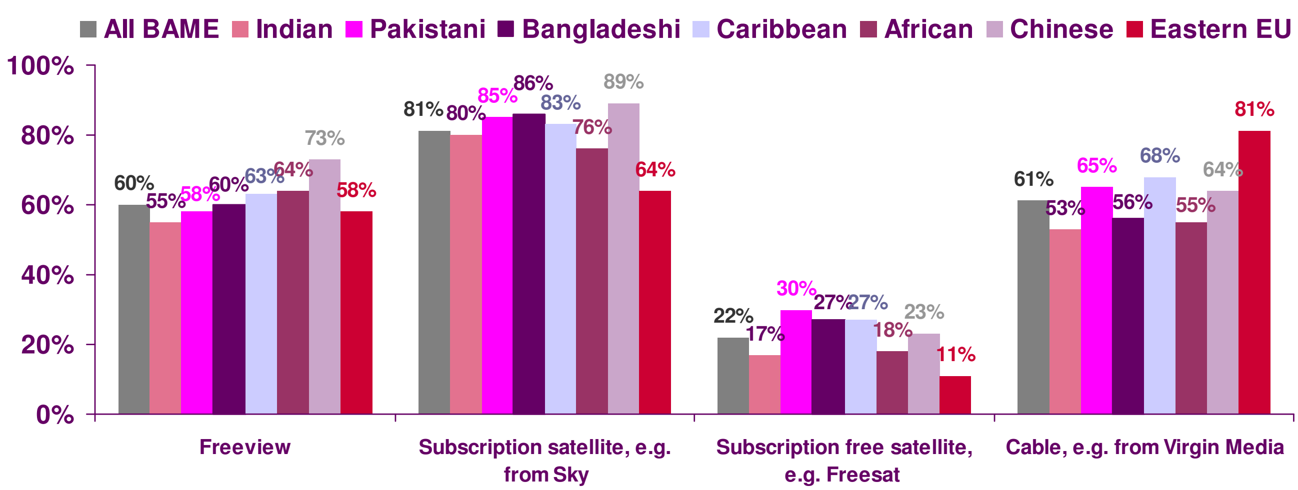
Source: June 2008 Ethnibus survey and May 2008 Digital UK & Ofcom Switchover Tracker
Base: White (1002), all BAME (980)

- Encouragingly, awareness and understanding results among BAME audiences are higher in the North West TV region compared to the rest of the UK.

Understanding the options to go digital

- Ethnic minority groups have significantly lower awareness and understanding of Freeview (-29pp) and cable services (-22pp) as options to go digital compared to the national average. Indian (55%), Pakistani (58%) and Eastern European (58%) are the least aware of Freeview as a digital TV platform and Chinese (73%) are the most aware.

FIGURE 4.5: PLATFORM AWARENESS BY ETHNIC MINORITY AUDIENCES



Source: June 2008 Ethnibus survey and May 2008 Digital UK & Ofcom Switchover Tracker
Base: White (1002), all BAME (980), Indian (263), Pakistani (195), Bangladeshi (93), Caribbean (155), African (137), Chinese (83), Eastern European (54)

Chapter 5

IN FOCUS:
The West TV region

West TV region summary

- The West TV region will be the fifth TV region to switch to digital from Q1 2010. In Q2 2008, with more than eighteen months to go until switchover, all key switchover metrics are tracking well above the national averages.
- Switchover awareness is almost universal (97% vs. 89% nationally) and more than three-quarters of the population understand what they have to do to prepare (76% vs. 68% nationally). Almost nine out of ten (88%) of homes served by the transmitters in the West region use digital TV on their main TV sets and more than half of households (58%) are fully digital.
- In comparison to the rest of the UK, people living in the West TV region have higher levels of understanding of switchover. Almost six out of ten (57%) of the West population score 60 points or above on the Detailed Switchover Understanding Index compared to 47% nationally.

Background to the West TV region and its transmitter groups

- Covering around 743,000 households the West TV region is one of the more sparsely populated regions in the UK. The West TV region is located in the west of England bordering both Wales and the West Country TV regions in on its western side, the Central TV region in the north and finally the Meridian TV region on its eastern and southern side. The main towns in the region are Bristol, Bath and Swindon.

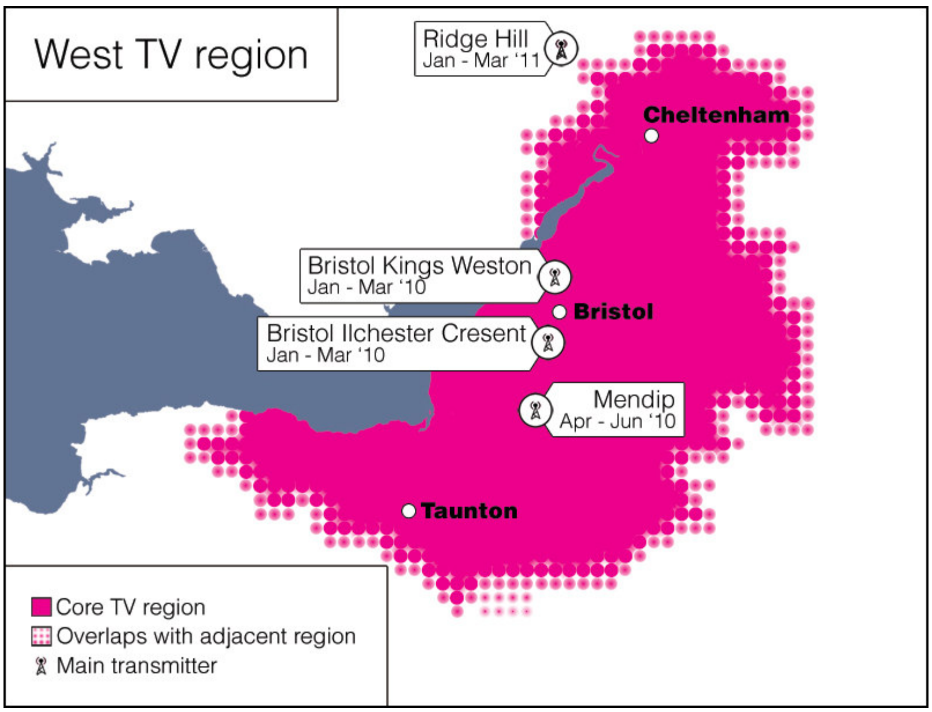
FIGURE 5.1: SWITCHOVER DATES FOR THE WEST REGION'S MAIN TRANSMITTER GROUPS

	Main transmitter group	Area served	Switchover date
(1)	Bristol Relays	serving parts of Bristol	Q1 2010
(2)	Mendip	serving parts of Somerset, Wiltshire, Gloucestershire and Bristol	Q2 2010
(3)	Ridge Hill (West)	serving the Cheltenham and Gloucester area	Q1 2011

- The largest parts of the TV region are served by two main transmitter groups, the Bristol relays serving parts of Bristol and the Mendip transmitter group serving Somerset, west Wiltshire, south-west Gloucestershire and parts of Bristol. The Bristol relays are due to switch in the first quarter of 2010 and the Mendip transmitter group will follow shortly after in Q2 2010. An additional 59 relay transmitters are fed by the two main transmitters. These will also be upgraded to digital broadcasting at the same time.

- One additional transmitter serving the West TV region is Ridge Hill (West) serving the Cheltenham and Gloucester area. It is physically located in the Central TV region, but part of the transmission from this transmitter helps to cover a transmission gap in the West TV region of around 100,000 households in the north of the region. The Ridge Hill transmitter group is switching to digital in quarter one of 2011.

FIGURE 5.2: WEST TV REGION MAP WITH ITS TRANSMITTER GROUPS



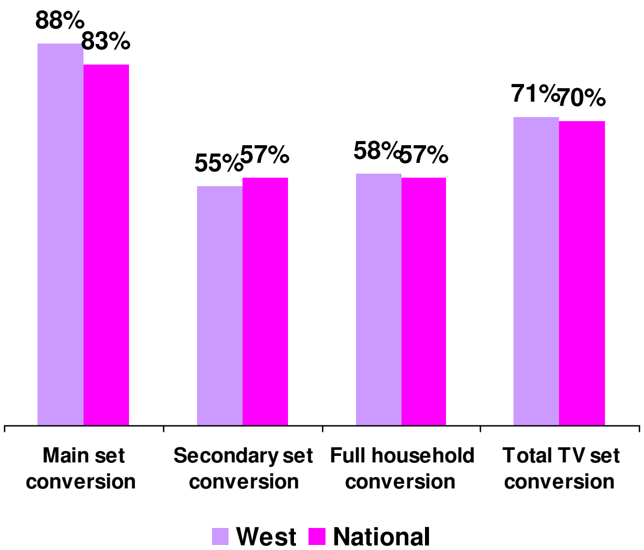
- Currently 81% of homes in the West TV region can already receive a digital terrestrial TV signal. This is significantly higher than the nationwide average of 73% that can currently receive a Freeview signal. Digital terrestrial coverage will extend to virtually every home at switchover and 94% of the West population will be able to receive the full range of Freeview channels after all broadcasting has migrated to digital.

Digital TV take-up

- The current levels of digital TV take-up in the West TV region are very encouraging. At the end of Q2 2008 almost nine out of ten households in the region had already converted at least one of their TV sets to digital (88%), five percentage points above the national average at 83%. Take-up of Freeview on main TV sets is slightly higher than across the UK (36% compared to 33% nationally).

- Conversion levels for secondary TV sets and full household conversion are in line with the national levels. At the end of Q2 2008 55% of secondary sets were converted to digital, compared to 57% nationally and 58% of homes in West had converted all of their TV sets to digital, slightly above the national average of 57%.

FIGURE 5.3: DIGITAL TV CONVERSION IN THE WEST TV REGION

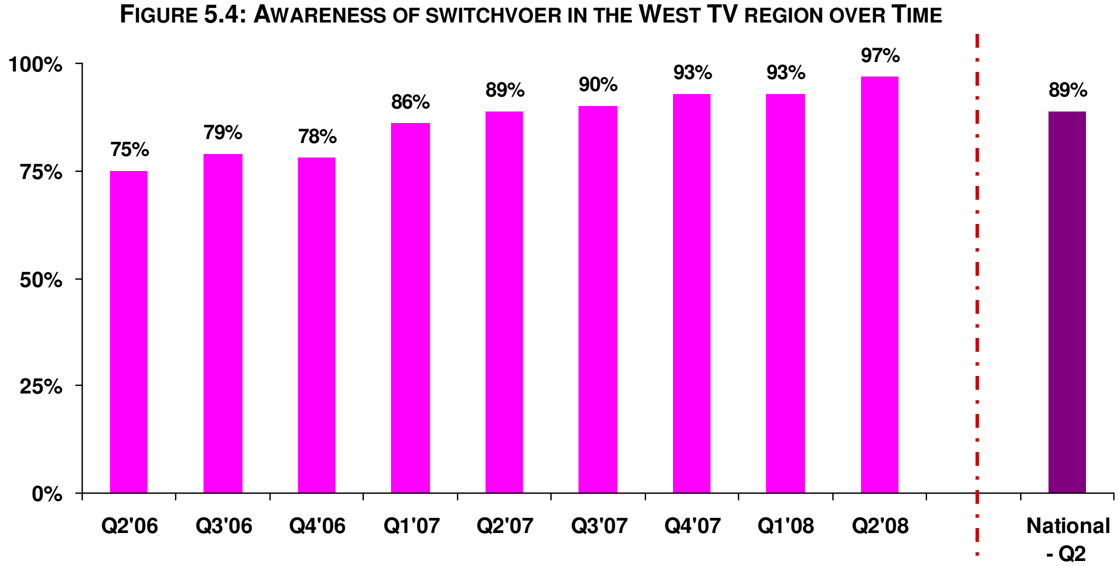


Source: Q2 2008 Digital UK & Ofcom Switchover Tracker
Sample size: National (3444), West (311)

Awareness and Understanding of digital switchover

- There has been a steady increase in switchover awareness in the West TV region since monitoring started in Q2 2006. At the end of Q2 2008 almost everybody in the region (97%) was aware of the change.

FIGURE 5.4: AWARENESS OF SWITCHVOER IN THE WEST TV REGION OVER TIME



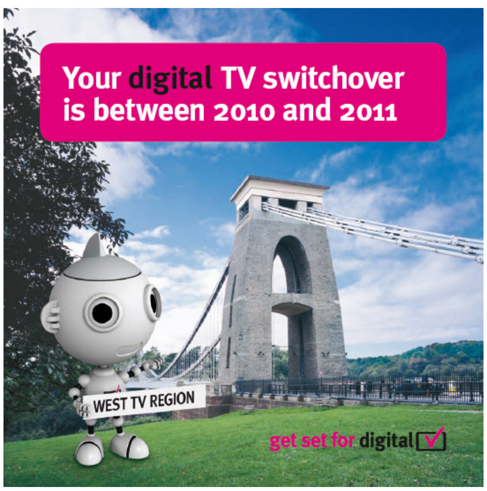
Source: Q2 2006 to Q2 2008 Digital UK & Ofcom Switchover Tracker
Sample size National (3,444), West (80, 57, 61, 55, 303, 208, 202, 212, 311)

- A series of understanding questions on the Tracker probe respondents' highest level of understanding: what they have to do to prepare for switchover. In Q2 2008 more than three quarters of the population 76% knew what they had to do to continue watching television after switchover. This proportion is higher in the West TV region than in Wales, although switchover in Wales will start in the middle of next year, much earlier than the first switchover in West.

Digital UK activity

- As the first switchover date for this region is still quite far off, Digital UK activity in the West TV region has been limited to date. The consumer campaign started in the middle of 2007 when all households received a postcard alerting them that switchover is happening in 2010 and that they will have to prepare for this change.

FIGURE 5.5: WEST TV REGIONS 2.5 YEARS OUT FROM SWITCHOVER LEAFLET



- Digital UK's regional manager in the West TV region, Bill Taylor, has written to MPs, local authorities and community leaders informing them of the switchover timetable for the Bristol, Mendip and Ridge Hill West transmitters. Media work includes a series of live phone-ins on BBC radio in Gloucester and Swindon. Newspapers in the region have given wide coverage to digital TV switchover, including a series of five double-page feature articles in the Swindon advertiser. Tanya Mills and Frances Kneller are organising information days for housing groups. Later in the year David Farwig will begin his outreach work with parish councils, Women Institutes (WIs) and other community organisations.

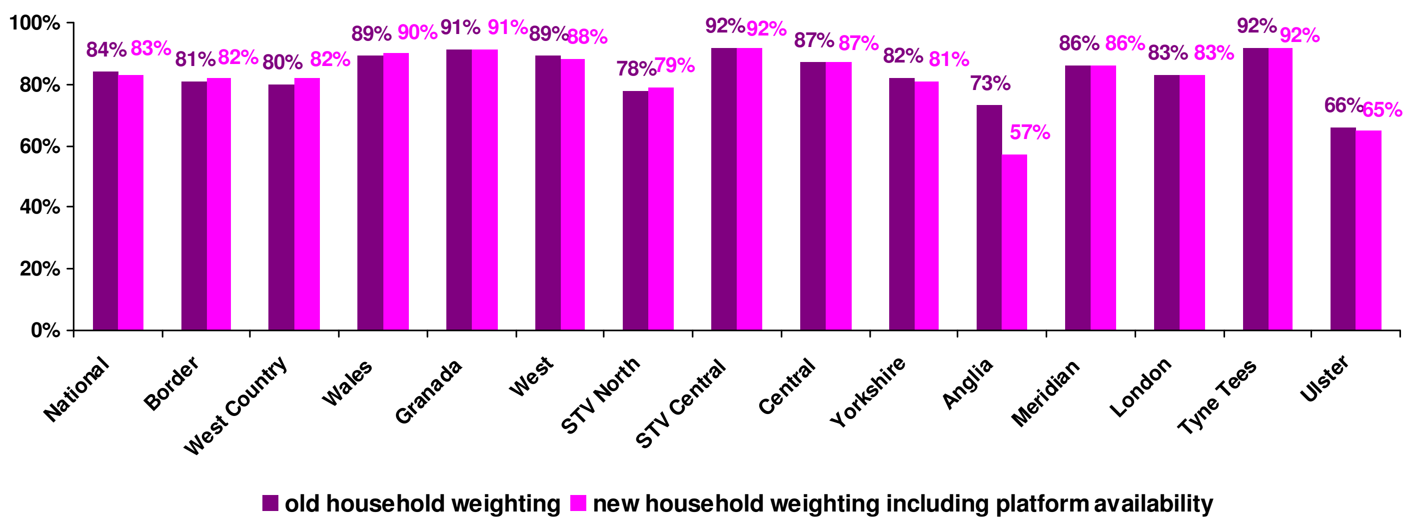
Chapter 6

Switchover Tracker: Q2 2008 methodology review

Digital TV platform availability weighting profile

- In order to provide the most accurate data for national and regional conversion data, the Switchover Tracker introduced a new weighting profile in Q2 2008. In addition to the standard weighting profile based on age, gender, social class and working status Tracker data is now also weighted to accurately reflect regional digital TV platform availability.
- Previous analysis had shown that movements in conversion data quarter-on-quarter can be attributed to interviewing in regions where cable or DTT coverage is patchy or inconsistent. Depending on where interviews were conducted, in some quarters the Tracker had over-proportionately sampled within coverage areas and in other quarters had sampled too little in these areas when compared with average coverage for the region as a whole.
- To correct this error a new weighting profile has been applied to Q2 data, additional weights have been applied to the data to ensure that interviews completed in each region reflect the proportion of households in each area capable of receiving cable and/or DTT.

FIGURE 6.1: MAIN SET CONVERSION WEIGHTING ANALYSIS



- In comparison with the old household weighting profile used for Switchover Tracker conversion data, the new weighting brings down main set conversion results by one percentage point.

- In most of the regions the effect of the new weighting is minor, but in some regions, especially with small sample sizes, the weighting can make a significant difference. In Q2 the new weighting had the biggest impact on digital TV conversion in the Anglia TV region. The old weighting overstated main set conversion in Anglia by 16 percentage points. According to the old weighting 73% of homes had access to digital TV in Q2, which had to be corrected to 57% of homes converted with the new weighting profile in place.

Changes to the sampling frame

- From Q4 2008 onwards, information on cable and DTT availability within each region will be included within the sample frame, to ensure that the interviews completed within each region are representative not only in terms of demographics but also in terms of platform availability. This will serve to stabilise conversion figures over time.
- The Switchover Tracker sampling methodology guarantees a national and regional representative sample based on the following factors: Age, gender, social class, working status, household size and from Q4 2008 onwards, digital TV platform availability.

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 6,400 households were surveyed face-to-face during 2006, around 10,000 households were surveyed during 2007, and 13,000 households will be surveyed during 2008. The quarterly results are used as the key tool by which progress towards switchover is assessed.
- The questionnaire is designed to track the following six dimensions:

FIGURE 7.1 – THE SIX MEASURES ON THE OFCOM & DIGITAL UK SWITCHOVER TRACKER

1	Awareness	• Have you heard of digital TV? • Have you heard of digital TV switchover?
2	Understanding	• Do you know what 'switchover' is? • Do you know what you need to do? • Do you know how to get digital TV? • Do you know you need to get digital on every set you wish to continue watching broadcast TV on? • Do you know when it's happening – nationally and in your area? • Do you know what happens to your VCR, and what you might need to do?
3	Attitudes	• What do you think about switchover? Is it a good thing, something to get on with, or unfair? • How do you feel about the process of converting? Are you OK with it, or does it worry you?
4	Intentions to Convert	• If you don't already have digital TV, do you plan on getting it? • When do you plan on getting digital TV? • Do you plan to convert any other remaining analogue TV sets in your home? • If you don't plan on getting digital TV, why not?
5	Conversion	• Is your primary set converted to digital? • Are your other sets converted? • Are all your sets converted?
6	Satisfaction with Digital TV	• Is digital TV better than analogue TV? • How would you describe your overall enjoyment of digital TV?

- The Tracker is conducted in all switchover regions, and samples are boosted in each region two and a half years out from switchover. In 2006 Border, West Country, Wales and Granada were boosted to each achieve at least 300 respondents per quarter. From April 2007 onwards two additional regions, West and the two STV regions, received an additional boost to enable monthly reporting. From July 2007, a further boost was set up within Border in order to increase sample size within the area covered by the Selkirk transmitter. The remaining regions are sampled in line with their proportion of the national population[4].

- 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 those registered blind or partially sighted). From October 2007 onwards all respondents in Border identified as eligible for the Digital Switchover Help Scheme were asked to answer an additional section of questions relating to the scheme. Additional interviews were carried out among the over 75s and severely disabled respondents in Border, to boost the sample size.

The Dashboards

- Summary Tracker results are provided in the 'dashboards' of progress towards switchover:
  (1) The Dashboard: By Regions and Transmitter groupings – which summarises results of each of the key metrics for each of the switchover regions and sub-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.

[4] 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 7.2 – EXPLANATION OF THE 'KEY METRICS' SHOWN ON THE TRACKER DASHBOARDS

1a – Unprompted Awareness of switchover

Question:

"Have you heard of digital TV switchover?"

One of the opening questions on the survey, with no preceding mention of switchover

Responding: Yes

2a – Probing question series: What to do for DSO

Questions:

"What does 'digital TV switchover' mean to you?"

"What do you think will happen at switchover?"

"What do you think people need to do at switchover?"

Responding: Need to get digital TV or need to get digital TV on every set

2b – Understanding VCRs

Question:

"Were you aware that, after switchover, video recorders (that have not been updated in some way) will no longer be able to record a programme on one channel while you watch a different programme on another channel?

Responding: Yes

3a – Attitudes: positive or neutral

Question: "Which of the following statements best described what you think about switchover?"

Responding: Either switchover is good for me or the UK; or that switchover is just one of those things, and we'll have to get on with it

3b– positive or neut. personal opinion

Question:

"Which one of the statements best describes how you feel about digital switchover?

Responding: Either I am happy with it /I am ok with it /I am not bothered by it

5a/b/c/d – Conversion

Question:

"Which…types of [multichannel] television does your household receive at the moment?"

5a Responding one of Sky/satellite; Freeview/digital terrestrial, Ntl/Telewest/Wight/cable; or TV via a phone line/Homechoice for <u>main TV set</u>
5b Responding as above for all <u>non-primary TV sets</u>
5c/5d Responding as above for <u>all TV sets</u> in household

BASE SIZE	-1- Awareness			-2- Understanding				-3- Pos/neut attitude		-4- Intentions to convert		-5- Conversion				-6-
	-a- Switchover	-b- Logo	-c- Help Scheme	-a- What to do for DSO	-b- Update VCRs	-c- Switchover year	-d- Detailed underst index	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV

1b – Awareness of the logo

Question:

"Do you recognise this?"

When shown a screen with the digital tick logo

Responding: Yes

1c – Awareness of Switchover Help Scheme

Question:

"Were you aware that there will be assistance for certain groups of the population to prepare for digital switchover?"

Responding: Yes

2c – Understanding of the date

Question:

"In which year do you think switchover is planned for your area of the country?"

Responding: Correct year for region

2d – Detailed understanding index

The understanding index is a weighted index that summarises people's detailed understanding of switchover.

Understanding options to go digital / Understanding of regional switchover date / Understanding that aerials might need upgrading for switchover / Understanding that every TV set needs upgrading for switchover / Understanding that VCRs are affected by switchover

4a/b– Intentions to convert to digital

Question: "Which of the following best describes your plans to get multi-channel television to TV sets in your house so you can use them to watch TV after switchover?"

4a Responding: <u>Some or all</u> of TVs have already been or will be adapted/upgraded
4b Responding: <u>None</u> of my TVs will be adapted/upgraded

6– Satisfaction with digital TV

Question:

"How does digital TV compare to your previous analogue service in terms of overall enjoyment you gain from watching TV"

Responding: "Much better" or "A little better"

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 Q2 2008 module tested questions about whether respondents needed help or will need help with choosing, installing and learning to use Digital TV services. This was to inform an extra segmentation project, carried out in order to segment Help scheme respondents.

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 Q2 2008 the Tracker interviewed 3444 households:

- 1141 in April
- 1150 in May; and
- 1153 in June.

During Q2 2008, an additional 181 respondents in Border and 170 in West Country were identified as eligible for the Digital Switchover Help scheme (the over 75s and those on Disability Living Allowance, Attendance Allowance, or the registered blind or partially sighted) and interviewed about the Help Scheme.

The total Tracker sample for the second calendar year (Q2 2007 to Q1 2008) was approximately 11,000 interviews. In the third calendar year of research (Q2 2008 to Q1 2009) this will increase to around 14,000 interviews, as a number of regions will be boosted 3 years out from switchover.

Regional Sample Sizes

The Tracker will boost each switchover region at least 2 and a half years out from its switchover date (as regional communications and support activity commences) to a minimum of 300 interviews per quarter to enable detailed analysis of those regions. Further regional boosting for a more granular view transmitter by transmitter is agreed closer to the actual switchover date for each ITV region individually.

During this second year of switchover monitoring this means that West Country, Wales, Granada, West and STV North/Central achieved c.300 interviews per quarter, or 1,200 interviews each over the course of the year. From Q3 2007 onwards, Border, the first region to switch was boosted on its individual main transmitter regions, Caldbeck and Selkirk. Over one quarter (around 450 interviews) will be achieved throughout Border – 1,800 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 around 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 (by 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. In Q3 2007, a quota on flats was included in order to further ensure the representative nature of each sample point.

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, ITV region and digital TV platform availability.

Several different weighting factors are used depending on the particular population that is being investigated. Quotas and one set of weights are set at the individual level. Within face-to-face interviewing, it is given that the fewer people in the household, the less likely they are to be home and available to be interviewed. Therefore a household weighting factor (which in addition to matching the national profile also corrects for number of people in household) is used to achieve an accurate reading of household measures, such as number and type of televisions within the household.

Furthermore, separate individual and household weights are applied to the segmentation model. Quotas by segment are not possible, and so these additional weights correct for differences in the demographic composition of each segment. This allows for comparability over time, and ensures that differences in measures within segment over time are not down to differing segment profiles.

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.
BAME	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, BAME, 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)