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Digital TV switchover: Research methods and insights

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The purpose of this paper is to outline the types of research carried out and commissioned by Digital UK, and to highlight key insights targeted at any future projects or organisations looking to adopt a similar approach to research.

Quantitative analysis

1.1 – Switchover Tracker

To monitor the progress of switchover, Digital UK, with initial support from Ofcom, carried out a continuous survey of the UK population with 1,300 in-home, face-to-face interviews per month from 2006-2012. The survey was initially conducted by GfK NOP, before being handed over to Ipsos Mori in December 2009 after a mandatory tender process.

More than 65,000 people were interviewed for this 'tracker' survey across the UK. Interviews were carried out using CAPI (Computer Assisted Personal Interviewing), a methodology not often selected these days. This method was chosen to ensure we reached the more vulnerable audiences that would likely avoid or opt out of answering questions over the phone.

To ensure robust and reliable results we used two-month rolling data, which meant that even in the smaller TV regions we were reporting from sample sizes of at least 100.

The tracker was unusual in that we quite often needed to access those groups not usually targeted by commercial companies; and had to make sure we had a truly representative sample of them. It was important to review the group quotas as switchover progressed region by region.

1.1.1 – Knowing your audience

Segmentation research
At the start of the switchover programme in 2006, Digital UK commissioned two pieces of essential research through GfK and i2 media that focused on segmenting the UK population.

The GfK research was a consumer segmentation based on people's propensity to have digital TV and their attitudes towards change in general and switchover in particular.

Using initial data from the Digital UK Tracker, GfK NOP and i2 Media conducted a cluster analysis of the survey sample, using the 11 most discriminating attitudinal statements. From this they developed six clusters or segments, each of which have strong characteristics in relation to digital TV and switchover.

The analysis divided the UK population into six segments:

1. Cultured conservatives
2. Out and about families
3. Traditionalists
4. TV centrics
5. Rolling stones
6. Hi-tech consumers

The six ‘switchover segments’ were used to direct communications activity. Digital UK monitored the key metrics for each of these through a dedicated version of the switchover dashboard (an Excel spreadsheet of collated monthly tracker data), initially included in quarterly progress reports. The focus of these narrowed to highlight key metrics for ‘traditionalists’ vs. ‘all adults’. A description of each segment can be found in the appendix fig.1.

i2 media also did a separate study designed to understand how disabled, older and isolated audiences and people on low income would be affected by the switch to digital television. The insights obtained from the research continued to inform Digital UK’s broad range of communications activities. Early switchover information materials (such as versions in large print, Braille and simple language) were evaluated with their target users. Digital UK used the research (a) to feed into the development of Digital Switchover Help Scheme communications, and (b) to help shape Digital UK’s community outreach and practical assistance.

Prior to starting the bulk of our advertising campaign in the London TV region, it became apparent that there were two groups of particular interest:

1. **Minority ethnic (ME) communities** – tracker data showed the ‘non white British’ audience as typically tracking below the ‘white British’ audience. This could have been due to factors including difficulty understanding English and/or the efficacy of traditional media channels in reaching these audiences. To ensure we understood this audience, additional ‘ethnibus’ surveys were run – quantitative surveys targeted at ME respondents - using identical questions to the standard switchover tracker. This allowed us to frequently monitor the progress of the ME audience against the ‘white British’ audience and provide the communications team with a comprehensive data set to assess whether any additional advertising was needed.

2. **Flat dwellers** –the large number of flat dwellers in London (who might need to speak to a landlord to ensure they were ready for switchover) meant that interviewing these households was important. However, getting a large enough sample of this group was difficult since interviewers could not always get past the main entry door to gain access to individual flats. As a result there was a risk that output samples under-represented flat dwellers. To ensure a robust sample size, a quota of 50 flat interviews a month was introduced, allowing us to better monitor the performance of this target audience.

1.1.2 – Setting targets

Digital UK used tracker targets to monitor the progress of each switchover project along key metrics, ensuring that each was on track and taking remedial action if necessary.

The targets and associated error margins were refined throughout the entire switchover project to cater for adjustments to the marketing and communication strategy and/or lessons learned as and when a region completed switchover.

Fig.1 – Final Target Table

		Point from Switchover				
		-8 months	-5 months	-2 months	-1 week	+2 weeks
KPI	Switchover Awareness	90%	95%	99%	100%	n/a
	Date Understanding	40%*	30%	55%	75%	n/a
	Retune Understanding	n/a	n/a	30%	55%	70%
	Main Set Conversion	n/a	n/a	90%	95%	100%

year awareness
month awareness

1.2 - Maintaining quality insights

Informing the team

Two standard tracker-related emails were sent out to Digital UK staff and stakeholders each month, summarising how each region was tracking compared to the most relevant key target points.

Initial 'heads-up' update

The initial update was designed to act as an early indicator as to whether or not any alterations needed to be made to the existing contact strategy. It was sent only to those directly involved in regions.

Tracker dashboards update

The second email was sent out to a much wider audience. This was designed to provide a comprehensive update on the tracker, consisting of the latest monthly 'tracker dashboards'.

Each switchover region was designated a separate worksheet tab in an Excel file, with each one displaying collated tracker data for that project from set data periods throughout the switchover process. Each regional tab also contained a summary table akin to the table shown in section 1.1.2, highlighting performance against the most recent set of key metric targets.

Informing key stakeholders

Key stakeholders at Digital UK were kept up to date with timely research headlines every month. Senior staff and stakeholders were sent only the most relevant information, accompanied by an informal and brief summary of the results.

Web research

2.1 Google Analytics

Google Analytics was used to provide Digital UK's web team with monthly updates on:

1. The number of visits to and page views of each of seven Digital UK micro sites
2. The top traffic sources to the main Digital UK consumer site
3. The top content on the main Digital UK consumer site
4. Social network statistics
5. The top search engine keywords (sponsored and not sponsored) used to get to the Digital UK website

Reporting was done via a standard PowerPoint presentation, which was updated every month. Analysis tended to focus on the reasons for peaks and troughs in the day-to-day web traffic and shifts in the top content and traffic source charts, all of which was often driven by switchover-associated events.

2.2 – Pop-up surveys

Pop-up surveys were carried out on an ad hoc basis, using internet-based survey creator Survey Monkey. The purpose of such surveys was to gather feedback from our users on:

1. the type of information they were looking for
2. whether the information they were looking for was easy to locate
3. how helpful the respective information was

Given the goals of the pop-up surveys, it was essential that the survey appeared before visitors exited the site but after they had had chance to find the information they were looking for. This was achieved by using the average time visitors spent on our website, which was monitored using Google Analytics (see section 2.1).

Surveys would tend to run for a month, although the timeframe would change depending on how many responses we received. To ensure we achieved a sample of at least 1000 we tended to run surveys during peak times, mainly during switchover events.

Although pop-up surveys were used sparsely as a method of gaining customer feedback, they were actually a very cost effective form of research. Using an identical questionnaire at separate times throughout the switchover project allowed us to see how our visitor behaviour altered as they progressed through switchover.

2.3 – Other web research

Digital UK also commissioned a number of bi-yearly research projects to gather direct feedback from users on web content, design and usability. Actions associated with each of these projects helped shape the Digital UK website to become a hub of switchover-related information, which was both easy to find and easy to interpret.

Retail mystery shopping

3.1 - Role of the retailer

Research indicated that when looking for information or advice on switchover around one-fifth of people would ask a retailer (source: Digital UK switchover tracker, 2009 and July-September 2010).

While information was provided by Digital UK to retail management for business planning, it was essential that support and training was also made available at regional and branch level. This avoided information essential for branches not being passed down by Head Offices.

Consequently, the ‘digital tick’ logo could be relied on by consumers to indicate retailers providing accurate switchover information and support.

3.2 - Retail objectives

- Ensure electrical retailers had sufficient information to plan for switchover
- Ensure customer-facing staff were trained to deal with customer enquiries

- Ensure written materials available in shops and online were accurate and helpful

3.3 - Role of research

We decided to undertake mystery shopping to monitor the quality of information and advice being given by electrical retailers. While the nature of the research meant it would be an indicator rather than a definitive measurement, a frequency of three times per year provided early signs of possible gaps in retailer knowledge.

Benchmarks were set for the most important subjects (e.g. recording advice) as well as for the presence of point of sale information. By analysing a standard set of key metrics (see appendix fig.3), any areas of concern in a given switchover region could be identified and passed to the Retail Support Team calling on individual branches. The focus of training at store level within a region could then be adjusted to address potential problem areas and rectify any lack of understanding among staff. Progress was measured in the next wave of mystery shopping, as well as in ongoing reports from the Retail Support Team.

When sample sizes were sufficiently large, results were provided for specific retail chains, such as Dixons Retail or Comet. These were used with the retailer head offices to guide their communications to branches.

The mystery shopping was also used to reassure stakeholders that appropriate advice was being given in retail.

Roadshow mystery shopping

4.1 – Roadshow objectives

Digital UK ran an extensive programme of roadshows. Its objectives were:

- Provide direct face-to-face advice to viewers who need it
- Provide a visible aspect of Digital UK

4.2 - Role of research

The purpose of the roadshow mystery shopping was to assess whether staff were giving appropriate answers to queries from members of the public and the quality of service offered. Digital UK carried out two forms of research in each wave:

- Mystery shopping scenarios were created to assess staff responses to different commonly asked questions concerning switchover. A team of mystery shoppers visited a variety of roadshows across switching regions, both in the three months running up to switchover and on both switchover dates.

- Post visit questionnaires to actual customers. Members of the public leaving a Digital UK road show event were asked a number of questions concerning their visit to the road show. These covered the quality of service they received, whether their query was resolved and their overall satisfaction with the experience.

The results of each wave were given to the roadshow team to analyse further and implement any actions into future training sessions.

A really good insight for any project carrying out roadshow mystery shopping is to consider adding in post visit questionnaires to the methodology. This was a great way of gaining feedback from actual customers, which supplemented the results gained from the mystery shopping scenarios.

Advice line mystery shopping

5.1 – Advice line objectives

- Provide viewers with consistent, reliable advice about switchover.
- Supply information that upholds the Digital UK position of platform neutrality.
- Supply information that was relevant to the caller's needs.

5.2 - Role of research

Advice line mystery shopping was carried out once a quarter by GfK. Using a number of scenarios, which tended to be based around regional issues or replicate consumer concerns such as retuning, agents were assessed via telephone, email and web chat using a standard set of benchmarks compiled by Digital UK. Benchmarks were set against aspects of a call, such as handling, the greeting and exit, as well vital aspects of each scenario.

Results were collated into a standardised PowerPoint document and presented to both the Digital UK advice line team and MGt[1] managerial staff. The mystery shopping results were essential to the advice line as it provided an external validation of internal processes and information. The results influenced the focus of training sessions for the agents, and more general advice line processes.

Focus groups

6.1 – Focus group objectives

- To test the messaging across all communications was clear and concise, as well as been relevant to the various target audiences.
- To explore various sources of information and their impact (both Digital UK communications as well as other sources).
- To highlight issues and concerns (particularly region specific issues and overall variations).
- To monitor awareness and understanding of digital switchover and related attitudes, preparations and intentions.

6.2 – Methodology

Focus groups were typically carried out over 3 or 4 waves per switchover project. Although this was a national project, Digital UK tended to commission local agencies to mediate regional focus groups to take advantage of local knowledge. This was particularly important in regions like Northern Ireland, for example, where compiling a sample was made harder because of factors such as religion. Local agencies were also able to provide guidance on the key audiences to speak to and on the areas that were truly representative of the region.

Each wave would take place at a key milestone in the switchover process:

- At least 3 months out from switchover - to capture impact of initial communications campaign
- Just before switchover - to capture any last minute viewer concerns
- Just after switchover - to ensure all had successfully negotiated switchover

[1] Outsource contact centre partner

6.3 - Sample

Each group was made up of six to eight participants with at least one analogue TV set in the household. This meant that every participant still had to convert at least one set to digital and therefore had a role to play in the discussion. Groups were typically split by age demographic: 35-54s and 55+. However, there were some exceptional circumstances when we had to revise our segmentation methodology to cater for regional factors. The most notable example of this was in London, a region where we carried out a large volume of minority ethnic based research, given the regions multi-cultural make-up. Groups were split by ethnic group in an effort to identify which audience(s) was the most vulnerable.

6.4 – Reporting

Feedback from our regional focus groups played a big role in the design and messaging of Digital UK's communications. As with the tracker (see section 1.1.2), focus group results were reported in two waves:

- An initial brief email to the communications team, regional team and directors, which detailed the key headlines from each wave. This was designed to act as an early indicator to whether or not any actions needed to be put in place to amend the existing contact strategy and/or communications.
- A more in-depth report followed which was put together by the respective agency and supplemented by notes made by any of the Digital UK staff in attendance at the groups.

Key Insights

1. In a nationwide project such as switchover, constantly reviewing your chosen quota groups from project to project is essential to ensure data accurately reflects the demographic make-up of a given region.

2. Thorough segmentation is important when working on a project of this magnitude. Establishing the key attributes of each segment really helped to target our sources of information and communications material effectively

3. Do review and refine targets or error margins associated with key performance indicators. In the case of switchover, as we progressed through the project there were one or two cases where we confidently reported successful switchover of a particular region without exceeding one or two of the four tracker targets initially set. To accommodate for these rare cases, error margins/tolerance rates were sometimes increased, allowing Digital UK to reduce costs associated with aspects of switchover advertising and make savings.

4. It is important that qualitative research is carried out to support or dig into quantitative results. Focus groups, particularly among the more vulnerable audiences were often essential in helping us to understanding some of the trends from our monthly tracker data.
5. Ensuring that information sources, such as the advice line, roadshow and website were constantly assessed meant the information Digital UK provided was to a high and consistent standard.

Fig.1 – Description of Switchover Segments (based on research by i2 Media in 2006)

Cultured conservatives
Cultured conservatives make up 14% of the population but have below average multichannel television take-up at only 58%. They are more likely to be older (55+) and relatively upmarket. They are more likely to live in the Westcountry, Central or Yorkshire regions. They are indifferent to technology and particularly television, which they are likely to think is generally of poor quality. They are broadsheet newspaper readers who listen to BBC Radio 4 and love the arts. They will be well informed on current affairs, and are more likely to watch BBC One and BBC Two than other channels.

Out and about families
These tend to be young families (the parents are aged 25-44) who are ambitious and value being outdoors. They are not concentrated in any one region. They comprise 14% of the population and have above average take-up of multichannel television (89%), and probably have it for their kids. They are lighter TV viewers, but do try to keep up with technology and are heavy internet users. Their TV viewing is likely to be educational or geared towards their children (e.g. E4, Discovery, Smash Hits).

Traditionalists
Nearly one in five of the UK population would be a 'Traditionalist', and they are found predominantly in the STV, Border and Tyne Tees regions as well as in Wales. These are older people (65+), predominantly women, who are more likely to be in the lower C2 or DE socioeconomic groups and on low incomes that the Cultured Conservatives. One third live on their own. They also have low take-up of multichannel television (just 59%) but this is less to do with lack of interest (as is often the case for the Cultured Conservatives) and more because they are worried by new technology, averse to change, and attitudinally feel that 'there is little they can do to change their life'. They do, however, watch a lot of television, particularly BBC One, BBC Two and ITV1.

TV centrics
Like the 'Out and About Families' the 'TV Centrics' who make up nearly 31% of the population are also likely to be families, but they are unashamedly TV addicts. They have consistently one of the highest levels of multichannel television take up (91%) of any of the segments. They are more likely to be found in the Granada, Yorkshire and Tyne Tees TV regions, and Wales. They read tabloid newspapers and celebrity magazines. Their preferred TV viewing includes ITV1, ITV2, Five, Living TV and Sky Movies.

Rolling stones
Rolling Stones are the smallest segment at just 9% of the population. They are characterised by their life stage or circumstances. While they may like TV and want digital TV (they are relatively young and affluent) they may feel or actually be prevented from getting it because they are sharing with friends, renting, in flats or be divorcees living alone. They are more likely than other segments to be renting and/or living in flats, and two thirds live alone.

Hi-tech consumers
'Hi-tech Consumers' make up 12% of the population and have the highest level of multichannel TV take-up (at 94%). They live more often in the midlands and south of England (Central and Meridian TV regions). They can be of any age and very familiar with digital technology: it is likely that everything in their lives is digital and they love gadgets. They consume an array of media and are heavy internet users, and actually watch little TV.

Fig.2 – Retail mystery shopping regional target sheet

Tyne Tees target sheet at 6 months from switchover – March 2012 Retail Mystery Shopping

	DSO mentioned	DSO explained	VCR issue explained	Aerial upgrade mentioned	Options to go digital explained	Confidence of staff assisting with DSO
6 month benchmark (based on previous waves of mystery shopping)	85%	75%	50%	60%	80%	70%
Wave 14 mystery shopping results for Tyne Tees Fieldwork 6 months from the start of switchover	98%	95%	60%	76%	91%	83%
difference against 6 month benchmark	13%	20%	10%	16%	11%	13%