Digital UK and Ofcom Switchover Tracker Survey

Switchover Progress Report Q1 2008

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Contents

Executive Summary

- This report summarises the results of the Digital UK/Ofcom Switchover Tracker during Q1 (January-March) 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 their intentions to convert and actual digital TV conversion.
- Included within this report are chapters updating on switchover preparations in the lead regions, and a summary of developments around the Switchover Help Scheme. Two additional In-Focus chapters analyse switchover preparations in the West Country which switches to digital between April and September 2009, and a review of key metrics for people who need assistance with the transition from analogue to digital TV.
- In Q1 2008 switchover awareness peaked to a new all time high of nine out of ten people in the UK (90%), up 1percentage points from Q4. More people than ever before (70%) understood what they needed to do to prepare for switchover. Following strong sales during the Christmas season and in the beginning of this year digital TV take-up increased across the board by 3 percentage points. Main set conversion rose to 86% of UK households.
- Key metrics in the first four switchover regions (Border, Wales, West Country and Granada) are on track and even exceed the results recorded in Copeland one year out from its switchover date.

Digital TV Conversion

- On 27th March 2008 Ofcom issued its Q4 2007 Communications Market Progress Report on the take-up of digital TV. At the end of the year 2007 the proportion of homes with digital TV on their primary set stood at 86.7%. Additionally, almost 1% of homes (0.9%) currently receive TV via analogue cable, bringing the overall UK multichannel audience to almost 88% (87.6%).
- This growth in the multichannel TV market indicates a further decrease in the analogue terrestrial main set audience by 1.5 percentage points from Q3 2007. Most recent conversion results from the Q1 Digital UK/Ofcom Switchover Tracker suggested 3 percentage points growth of primary set conversion during both the last quarter of 2007 and the first quarter of 2008. With the result of 86% main set conversion the two sources for digital TV take-up are now again closely aligned.
- Like Ofcom's report the Switchover Tracker also recorded increased levels of digital TV take-up on secondary sets as well as full household conversion. At the end of Q1 2008 57% of all UK homes had converted all of their TV sets to digital.

Switchover key metrics in 2007

- During Q1 2008 switchover awareness, general understanding and main TV set conversion recorded their highest ever quarterly results. Nine out of ten nationally were aware of the change and seven out of ten knew that they will have to take action and get digital TV to prepare for switchover.
- A comparative trend analysis of the levels of preparation in the early regions shows that the early regions (Border, Wales, West Country and Granada) are on track for switchover. Awareness, understanding and conversion results mostly exceed the results recorded in Copeland one year out from switchover when monitoring started in the area.
- Detailed understanding of switchover is still significantly lower than awareness and general understanding. Nationally still less than one third of the population (27%) know in which year the change is happening in their area. However, this proportion is significantly higher in most of the early switchover regions.
- The regional distribution of detailed understanding measured through the Detailed Switchover Understanding Index[1] reflects the level of engagement that Digital UK has made with individual switchover regions over the recent years and months. The proportion of people with good detailed understanding of the implications of switchover is highest in the Scottish Borders area which is switching to digital in November this year, where more than eight out of ten people (83%) have acceptable or high levels of detailed understanding.
- 15% of the population cannot name any correct digital TV options when asked. While younger audiences have a better understanding of how to go digital, older audiences especially people 75 and older struggle to name a digital TV provider. In Q1 2008 more than one third of 75+ year olds (38%) and more than a quarter (27%) of those aged 65 to 74 could not name a correct digital TV provider or a way to get digital TV. An advertising campaign explaining the digital TV options will be launched later in the year to address this issue.

The Switchover Help Scheme: UK wide and in Border

- Awareness of the Switchover Help Scheme among the general population has hovered at around 33% for the past 4 quarters. Again, in Q1 2008 32% had heard of the Switchover Help Scheme, although the Help Scheme has yet to be communicated in any great detail across the country.
- In Border, the first full region of the country to switch, more than half of all adults (54%) are now aware that there will be assistance for those aged 75 and over, those registered blind or partially sighted and for people with certain disabilities. Targeted and above the line communications regarding

[1] Please see chapter 2 for a detailed explanation of the Detailed Switchover Understanding Index.

the Switchover Help Scheme are due to start in earnest in Border in June 2008.

Analogue and digital text services and switchover

- In January and February 2008 the Digital UK/Ofcom Switchover Tracker tested awareness and usage of analogue and digital text services, and explored attitudes towards the loss of analogue text services at switchover. Results show that analogue text services are still widely used and appreciated by their audience, because people feel familiar with the service. However, users of digital text services are increasing and they access the service more frequently than users of analogue text.
- Nearly nine out of ten respondents (89%) felt positive or neutral about the change from analogue to digital text services.

In Focus: People who need help with switchover

- While many people find the transition from analogue to digital easy and have already made the switch if they can, some parts of the population will need further assistance with the switchover process. The Switchover Tracker identified this key audience as those who live on their own and who feel that they would have to turn to somebody outside of their home for help switching their equipment to digital. This group makes up 5% of the population. They are more likely to be female (77%), older (47% are 75+), disabled (47%) and on lower incomes (28%). TV is very important for this audience, with 1 in 3 (30%) heavy viewers – almost double the UK average. A significant proportion of this group will qualify for additional help through the Switchover Help Scheme.[2]
- Awareness and understanding of switchover among those who will need help with the change are lower than national figures. While results for switchover awareness track only slightly below the national average (86% vs. 90% nationally in Q1 2008) a larger gap exists in understanding (58% vs. 70% nationally). However, both awareness and understanding gaps for this group have narrowed over time.

In Focus: Switchover preparations in the West Country and its transmitter groups

- At the end of Q1 2008, with little more than one year to go until switchover starts in the West Country, the preparations are going well. People in the area have higher levels of switchover awareness (95%) and understanding (79%) than Copeland residents had at that point in time. More than eight out of ten (84%) of West Country homes already use digital TV on at least one of their TV sets and more than half of households (55%) are fully digital.
- In comparison to the rest of the UK people living in the West Country have higher levels of detailed understanding of switchover. More than two thirds

[2] See chapter 2 for more information on the Switchover Help Scheme

of the West Country population (66%) score 60 points or above on the Detailed Switchover Understanding Index.

- However, with around four out of ten people in the West Country aware that their region is switching to digital in 2009, more will be done to raise date awareness in the transmitter group areas of the TV region. Currently only 5% of the people living in West Country A (Beacon Hill and Stockland Hill main transmitter groups) understand that their area of the country is switching to digital in Q2 2009 while one in ten people (11%) living in West Country B (Huntshaw Cross, Redruth and Caradon Hill main transmitter groups) know that their switchover date is in Q3 2009. We expect to see these numbers rise following the 8th April date announcement for Beacon Hill and Stockland Hill.
- In Q1 2008, 61% of people in the West Country were aware that their recorders will be affected by the switchover. This proportion is considerably higher than it was one year out from switchover in Copeland (39% in Q4 2006).

Chapter 1

The Dashboards – Q1 2008

Quarterly results are presented on dashboards of progress:

(1) The Dashboard: by Regions and Transmitter Groupings
Key metrics for each switchover region, for transmitter groupings 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
Following a segmentation of the UK population for switchover, the dashboard reports the performance of the individual consumer segments. 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 Q4 2007 report shows that 86.7% of households now receive digital TV on their primary set and 87.6% have multi-channel TV (including the proportions of homes with analogue cable).

How to read the dashboards

FIGURE 1.1 – 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

	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	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	**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%	43%	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%	

(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	**2819**	90%	83%	32%	70%	47%	27%	48%	78%	88%	94%	1%	86%	52%	57%	69%	75%
Analogue	**366**	85%	72%	30%	58%	39%	29%	39%	65%	73%	85%	2%	0%	22%	0%	8%	
Digital	**2297**	92%	86%	32%	72%	49%	28%	52%	80%	90%	96%	0%	100%	54%	67%	77%	75%
Male	**1327**	91%	84%	34%	72%	53%	26%	53%	80%	90%	95%	1%	86%	55%	61%	71%	76%
Female	**1492**	90%	82%	30%	67%	41%	29%	44%	75%	86%	93%	1%	85%	49%	53%	66%	74%
16-24	**307**	79%	88%	26%	62%	34%	17%	36%	81%	90%	93%	0%	88%	52%	61%	70%	83%
65-74	**315**	92%	77%	37%	66%	54%	34%	52%	78%	88%	96%	1%	81%	48%	53%	66%	73%
ABC1	**1353**	93%	83%	40%	74%	51%	27%	53%	79%	89%	95%	1%	88%	54%	58%	71%	76%
C2DE	**1466**	88%	83%	24%	66%	42%	28%	44%	76%	87%	94%	1%	83%	49%	56%	67%	74%
Rural	**508**	93%	82%	35%	74%	48%	30%	48%	77%	88%	96%	1%	85%	49%	52%	65%	72%
Urban	**2311**	90%	83%	31%	69%	47%	27%	49%	78%	88%	94%	1%	86%	52%	58%	69%	76%
Low income	**582**	87%	82%	26%	64%	45%	30%	45%	78%	81%	94%	0%	78%	39%	57%	63%	73%
BME	**227**	61%	74%	27%	46%	34%	14%	32%	74%	88%	91%	1%	80%	58%	65%	72%	73%
Non-English	**158**	50%	67%	22%	33%	25%	11%	21%	67%	86%	88%	1%	74%	48%	66%	68%	69%
Disabled	**429**	90%	82%	32%	63%	50%	33%	46%	70%	81%	92%	1%	81%	56%	58%	70%	69%
Need assistance	**117**	86%	70%	26%	58%	43%	28%	35%	68%	70%	90%	2%	38%	12%	0%	27%	
Hard to reach	**1294**	85%	81%	30%	64%	46%	27%	44%	76%	87%	93%	1%	82%	49%	57%	67%	74%
Living alone	**533**	90%	77%	34%	66%	46%	29%	44%	73%	84%	93%	0%	73%	43%	57%	63%	75%
Families w/ chidren	**914**	92%	85%	29%	72%	44%	27%	47%	78%	89%	95%	1%	90%	51%	53%	67%	74%
Rent private	**346**	81%	84%	24%	60%	33%	17%	32%	75%	87%	91%	1%	80%	45%	57%	66%	73%
Rent council	**598**	88%	81%	19%	62%	40%	27%	42%	74%	85%	93%	1%	81%	48%	59%	67%	75%
House	**2366**	91%	84%	33%	71%	48%	28%	50%	78%	89%	95%	1%	88%	53%	57%	70%	74%
Flat	**448**	85%	80%	26%	60%	38%	24%	39%	77%	84%	92%	0%	76%	38%	59%	64%	78%
THS - 75+	**253**	85%	63%	31%	53%	44%	31%	34%	71%	80%	94%	1%	67%	30%	36%	51%	56%
THS - DLA/AA <75	**132**	85%	88%	26%	62%	44%	27%	41%	75%	89%	91%	1%	83%	63%	59%	73%	80%

(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- Sw itcho ver	-b- Logo	-c- Help Scheme	-a- What to do for DSO	-b- Update VCRs	-c- Sw itchov er 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 converte d	-b- Other sets converte d	-c- Full h/hold convrsio n	-d- Total TV sets cnvrt	Satisfact'n with digital TV
Cultured Conservatives	**350**	92%	75%	39%	68%	48%	39%	50%	70%	87%	93%	1%	77%	47%	54%	63%	66%
Out-and-About Families	**391**	92%	87%	33%	77%	43%	32%	52%	80%	91%	94%	2%	91%	48%	55%	67%	77%
Traditionalists	**524**	91%	78%	33%	63%	43%	41%	49%	67%	78%	90%	1%	74%	40%	44%	57%	69%
TV-Centrics	**995**	94%	91%	38%	78%	54%	42%	62%	80%	91%	96%	0%	92%	61%	59%	74%	82%
Rolling Stones	**238**	86%	81%	38%	71%	43%	28%	47%	77%	90%	94%	1%	82%	53%	64%	71%	82%
High-Tech Consumers	**321**	94%	89%	45%	81%	56%	36%	64%	84%	95%	97%	0%	95%	61%	65%	77%	78%

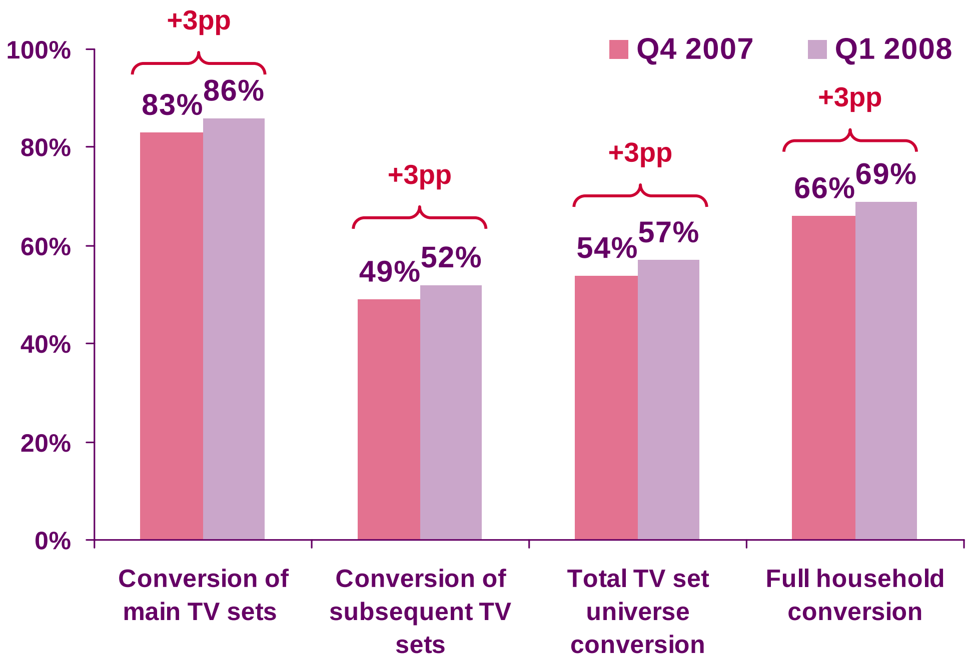
Chapter 2

The Q1 2008 Switchover Tracker Results

Switchover key metrics

- During the first quarter of 2008 awareness and understanding of digital switchover continued to grow nationally and in many of the early switchover regions. At the end of March 2008 national switchover awareness peaked at nine out of ten people (90%) aware that the change from analogue to digital is happening. At the same time seven out of ten (70%) had a general understanding of how to prepare for the change.
- Alongside growing levels of awareness and understanding digital TV take-up increased during the first quarter of 2008. Following the Christmas season at the end of last year and the sales in the beginning of the year all Digital UK/Ofcom Switchover Tracker conversion figures show a marked increase for Q1 2008. Main set TV conversion increased to 86% of UK households with access to digital TV (up 3 percentage points quarter on quarter). This result brings the Switchover Tracker take-up figures in line with Ofcom's Q4 2007 Digital TV Update which reported 86.7% of UK households with digital TV in March this year.

FIGURE 2.1: Q4 2007 TO Q1 2008 CONVERSION GROWTH



Source: Digital UK/Ofcom Switchover Tracker Q4 2007 to Q1 2008
Sample size: 2830 (Q4 2007) 2819 (Q1 2008)

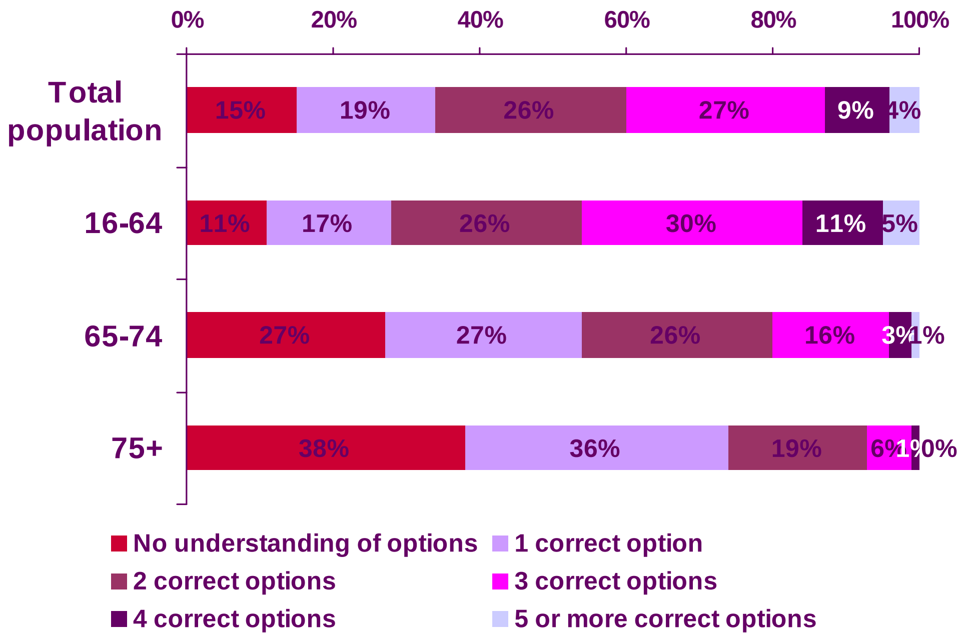
- Secondary TV set conversion increased in line with main set conversion by 3 percentage points during the first quarter of 2008. More than half of all secondary TV sets in UK homes can now receive a digital TV signal (up from 49% in Q4 2007 to 52% in Q1 2008). With this increase more than two out of three TVs in the UK are now converted to digital (69%, up 3 percentage points).

- Looking at TV conversion by household, 57% of UK homes have converted all of their TVs to digital and are fully prepared for the switchover (up 3 percentage points from the previous quarter).

Early switchover regions have higher detailed understanding

- With almost universal awareness and high levels of general understanding of switchover among the population, knowledge gaps remain around detailed understanding of when and how switchover will change the way people receive TV in the future. Nationally still less than one third of the population (27%) know in which year the switchover is happening in their area. Only in some of the lead regions this proportion is significantly higher. In the Selkirk transmitter group area, which is part of the Border TV region, switching over in November 2008, 77% know that switchover happens this year.
- Although the majority of people (85%) can name at least one option to go digital, the variety of options ofhow to get digital TV is not clear to everybody. 15% of the population cannot name any digital TV options when asked and a further 19% can only name one option. While younger audiences have a better understanding of how to go digital (only 11% of those 64 or younger cannot name any digital TV options) older audiences especially people 75 and older struggle to name a digital TV provider. In Q1 2008 more than one third of 75+ year olds (38%) and more than a quarter (27%) of those aged 65 to 74 could not name a digital TV provider or a way to get digital TV.

FIGURE 2.2: UNDERSTANDING OF THE OPTIONS TO GO DIGITAL BY AGE GROUP



Source: Digital UK/Ofcom Switchover Tracker Q1 2008
Sample size: 2819

- Options to go digital are better understood in early switchover regions and also in highly populated areas of the UK where many digital TV options are available and where most of the digital TV providers focus their marketing activity. In the Border TV region less than one in ten (9%) of the population cannot name one correct option to convert their TV to digital (vs. 13% nationally). In the other early switching regions the proportion of people with no understanding digital TV options stands at 10% in West Country, 11% in Wales and 12% in Granada.
- Sky services or satellite TV remains the best understood way to get digital TV with 67% of the population mentioning this service unprompted. Awareness of Freeview or digital TV through the aerial stands at 60%, and 43% of the population recall cable TV services like Virgin Media. The oldest respondents (75+) however are more likely to recall Freeview or digital TV through the aerial than Sky or satellite TV, with 29% aware of satellite services and 42% aware of Freeview. Generally people are more likely to recall the brand names of digital TV providers than the technical description of how the TV signal is being received, i.e. “satellite TV” or “TV through the aerial”.
- A number of the other impacts of switchover are still little understood in many parts of the UK. These include changes to recorder functionality and awareness of potential aerial upgrades. UK-wide less than half of the population (47%) are aware that video recorders will have limited functionality after the change and will not be able to record one programme while watching another. Similarly only 51% of those with analogue TV sets are aware that they will have to test their old aerial infrastructure to see whether it remains in good enough condition to receive a digital TV signal. The fact that all TVs need to be upgraded for the change is widely understood throughout the UK (81%).

The Detailed Switchover Understanding Index

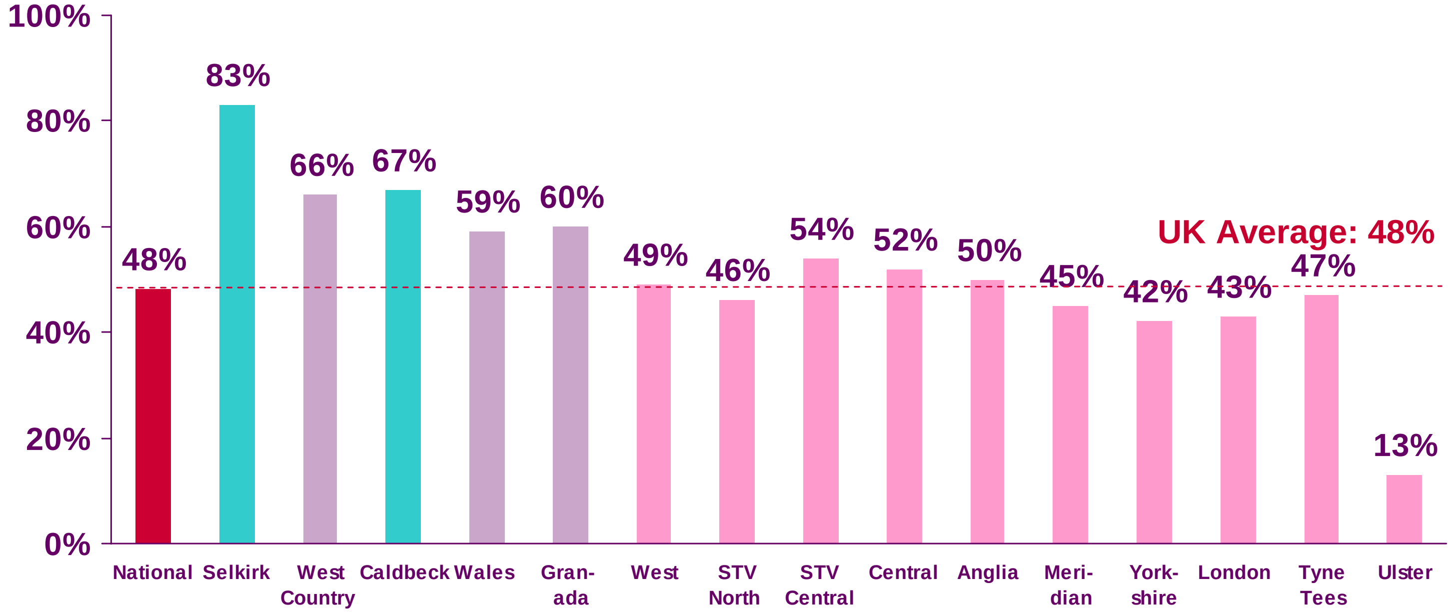
- In order to compare levels of detailed understanding of the impacts of switchover a Detailed Switchover Understanding Index has been developed. It is a combined metric created from the key indicators of understanding of switchover as outlined above. On the index each respondent receives an individual score between 0 and 100 based on his or her answers during the Switchover Tracker interview. The score is determined by the following metrics in the survey:

  (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
  (5) understanding of potentially having to upgrade an aerial for switchover

- The individual metrics within the index are weighted according to their importance. Correct understanding of the options to go digital and the knowledge of the year when the region is switching over are upweighted as the most essential pieces of information. They account for 60% of the score, 30% each. Understanding that switchover also impacts on recorder functionality accounts for 20% of the score, while knowing that all TV sets need to be upgraded and that people might have to consider an aerial upgrade count for 10% each.

- By definition respondents scoring between 60 and 100 points on the index are considered to have an acceptable understanding of the detail of switchover. The metric on the dashboard represents this proportion for the UK as a whole (48%) as well as by region or by consumer group.

FIGURE 2.3: REGIONAL DIFFERENCES IN ACCEPTABLE LEVELS OF DETAILED UNDERSTANDING OF SWITCHOVER IN ORDER OF THE SWITCHOVER TIMETABLE



Source: Digital UK/Ofcom Switchover Tracker Q1 2008
Sample size: 2819

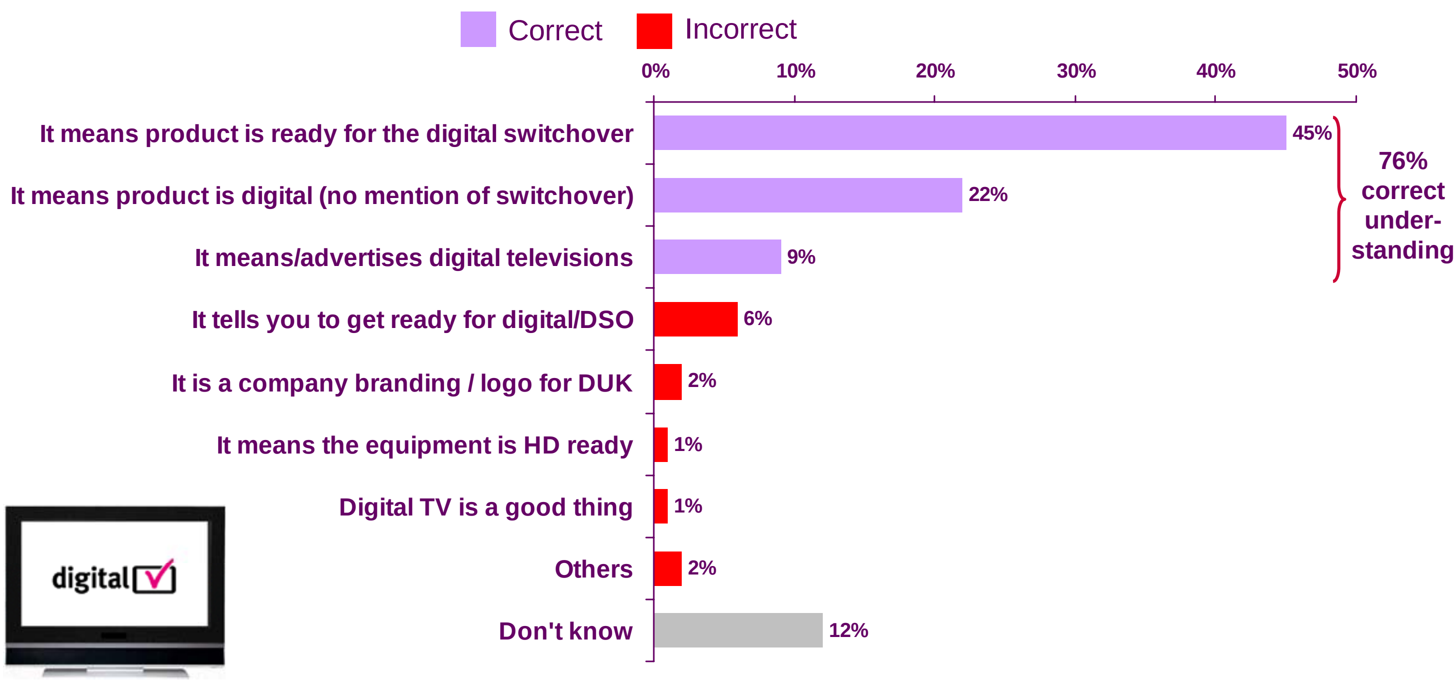
- The regional distribution of detailed understanding reflects the level of engagement that Digital UK has made with individual switchover regions over the recent years and months. In the Selkirk transmitter group area more than eight out of ten people (83%) have acceptable or high levels of detailed understanding. The Caldbeck transmitter group as well as West Country results show levels of detailed understanding for two thirds of their population against the national average of 48%. Late switching regions like London (43%) Yorkshire (42%) and Tyne Tees (47%) have levels of detailed understanding that are below the national average for Q1 2008.

‘Digital tick’ logo awareness and understanding

- As part of its information campaign Digital UK promotes the ‘digital tick’ logo which is used as a kitemark on products and services that will work through switchover. Retailers and manufacturers throughout the UK can apply for a license to use the logo on product packaging and to receive point of sale material to distribute in individual shops. Following the most recent advertising campaign in Q4 2007, awareness of the logo had grown to three quarters of the population (76%) who recognise the logo when shown. In Q1 2008 awareness of the logo grew further with now more than eight out of ten (83%) people in the UK aware of the logo.

- With more digital TV products becoming available the logo is an important element of the switchover programme as it helps consumers purchase the right type of digital TV equipment at the point of sale. As recognition grows people also increasingly understand what the 'digital tick' logo means. In March of this year the Switchover Tracker measured that three quarters of those aware of the logo had a correct understanding what it means.

FIGURE 2.4: UNDERSTANDING OF THE 'DIGITAL TICK' LOGO



Source: Digital UK/Ofcom Switchover March 2008
Sample size: 780

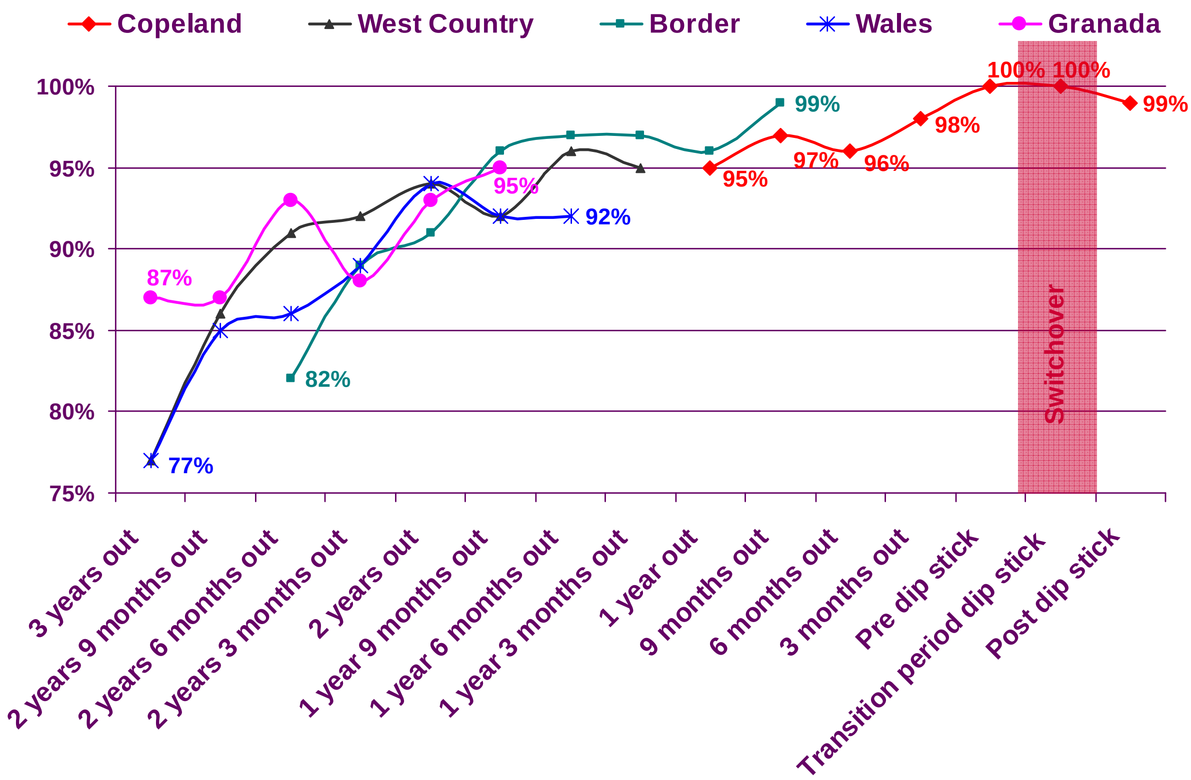
Trend analysis of switchover metrics in early switching regions

- Over the last two and a half years the switchover information campaign led by Digital UK focused on the preparation of the early switchover regions for their individual switchover dates in the rollout programme. During this time major growth in awareness and understanding of switchover was achieved throughout the UK and in the early switching regions. Comparing the trends of key metrics in the context when switchover is happening in each of the regions Tracker data shows a consistent pattern of preparation in awareness and understanding growth.
- Encouragingly awareness and understanding in most of the early switching regions is already higher than at the starting point of monitoring in Copeland which switched to digital broadcasting at the end of last year. Switchover awareness in Copeland one year out from switchover stood at 95%. Switchover Tracker results show awareness levels in the Border switchover region at 96% one year out from switchover with levels rising to

99% awareness in Q1 2008 with 9 months to go until switchover in November 2008.

- At 1 year and 3 months out from when switchover starts in West Country 95% of the people living in the area are aware of the change. Awareness in the Granada TV region currently also stands at 95% with 1 year and 9 months to go until the switchover of the Winter Hill transmitter group. Awareness of switchover in Wales is currently tracking slightly below its target; with one and a half years to go until the first switchover in West Wales awareness levels are at 92% in Q1 2008.

FIGURE 2.5: SWITCHOVER AWARENESS TRENDS IN EARLY SWITCHING REGIONS

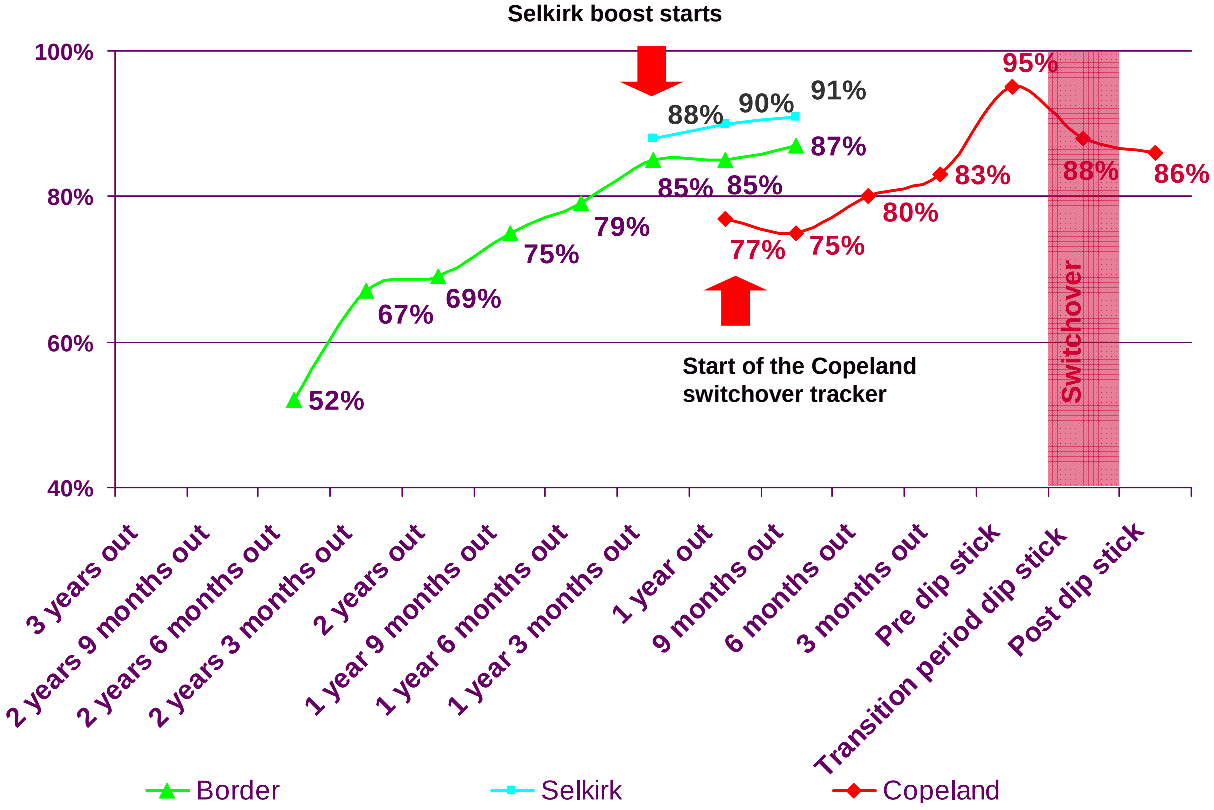


Source: Digital UK/Ofcom Switchover Tracker
Sample size: National (2522, 1964, 1956, 2448, 2829, 2830, 2819); regional over 300 per quarter

- The pattern of switchover understanding growth in preparation to switchover looks very similar to switchover awareness developments. At the start of monitoring, one year out from switchover 77% of the Copeland population had a general understanding how to prepare for the switchover. Nine months from when switchover starts in the Border TV region already almost nine out of ten residents in the area (87%) understand that they have to get digital TV on at least one of their TV sets in their home.
- Digital UK is encouraged by the levels of understanding in Border and in the other early switching regions. Understanding currently stands at 79% in West Country (1 year and 3 months out from switchover) and in both Wales (one and a half years out from its first switchover) and Granada

(one year and nine months out from the local switchover) understanding of what to do is recorded at 73%.

FIGURE 2.6: SWITCHOVER UNDERSTANDING TRENDS IN BORDER AND THE SELKIRK TRANSMITTER GROUP

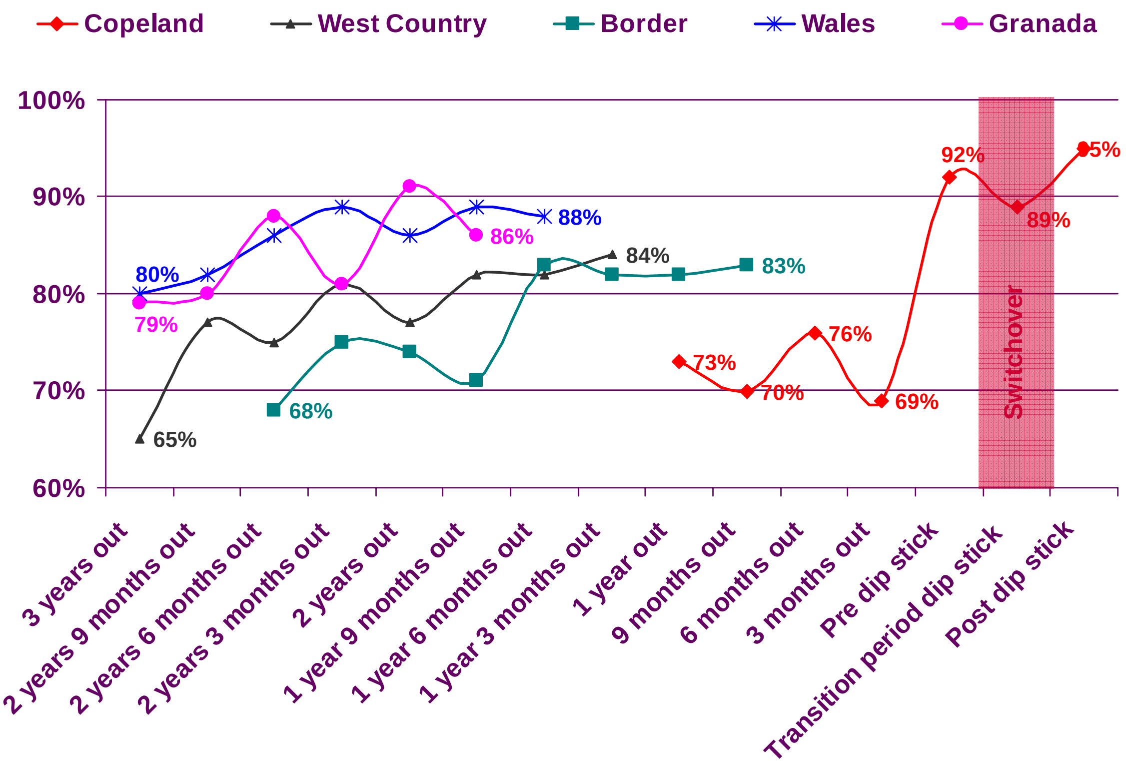


Source: Digital UK/Ofcom Switchover Tracker
Sample size: National (2522, 1964, 1956, 2448, 2829, 2830, 2819); regional over 300 per quarter

- Comparing understanding results on transmitter group level in Border shows that understanding levels are even higher among residents served by the Selkirk transmitter group, which is preparing for its switchover in November 2008. In Selkirk more than nine out of ten people (91%) understand what they have to do to prepare for switchover in their area.

- Main set conversion in all of the early switching regions already tracks above the levels of primary TV set conversion in Copeland before switchover. Unlike in Copeland where a digital terrestrial TV signal was not available until switchover, the availability of a DTT signal in large parts of the early switching region encourages early take-up, and in most regions main set conversion is growing as the region moves closer to switchover.

FIGURE 2.7: MAIN SET CONVERSION TRENDS IN EARLY SWITCHOVER REGIONS



Source: Digital UK/Ofcom Switchover Tracker
Sample size: National (2522, 1964, 1956, 2448, 2829, 2830, 2819); regional over 300 per quarter

Chapter 3

Analogue and Digital Text Services and Switchover

- In January and February 2008 the Digital UK/Ofcom Switchover Tracker module tested awareness and usage of analogue and digital text services, and explored attitudes towards the loss of analogue text at switchover.
- Text services are available on digital and analogue television. The BBC provides both analogue Ceefax and digital BBCi (red button) services, and the commercial broadcasters offer analogue and digital Teletext. Analogue text services will cease at switchover. The Tracker module was designed to test the likely consumer response to the loss of the analogue text services at switchover.

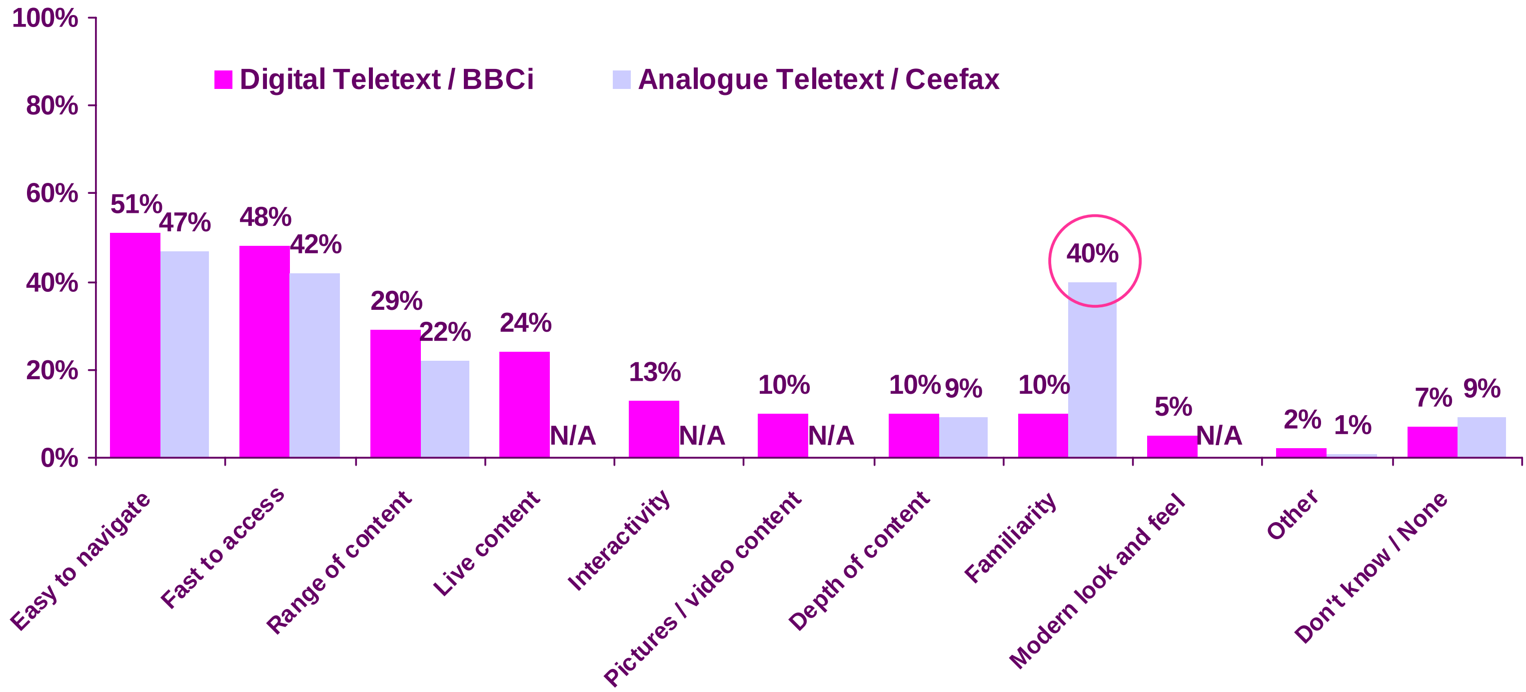
More people have used analogue text but digital services are accessed more frequently.

- The results of the Q1 Tracker module support other research sources that suggest analogue text services are still popular among its users. More than 60% of adults in the UK say they have used analogue text services (64% Teletext and 60% Ceefax) while around one in four of say they have used digital text services in the past (40% Digital Teletext and 44% BBCi). However, digital text users access the services more frequently than analogue text service users. While 73% of digital text service users claim to access the service at least once a month, less than half of analogue text users claim to access the service as frequently as that (47% analogue Teletext and 43% analogue Ceefax).
- Across the analogue and digital services similar content areas are accessed and valued by text users. The most popular choices are weather forecasts, sports results, lottery results and news content.

Analogue text users feel loyal and familiar with the services

- Ease of navigation and speed of the service are important to users of both analogue and digital text services. 51% of digital text users think navigation is a key feature of digital text vs. 47% among analogue users. 48% of digital text users think it is a key element of digital text that content is fast to access against 42% for analogue users. The main difference for analogue vs. digital text services is that analogue users value their familiarity with the service.

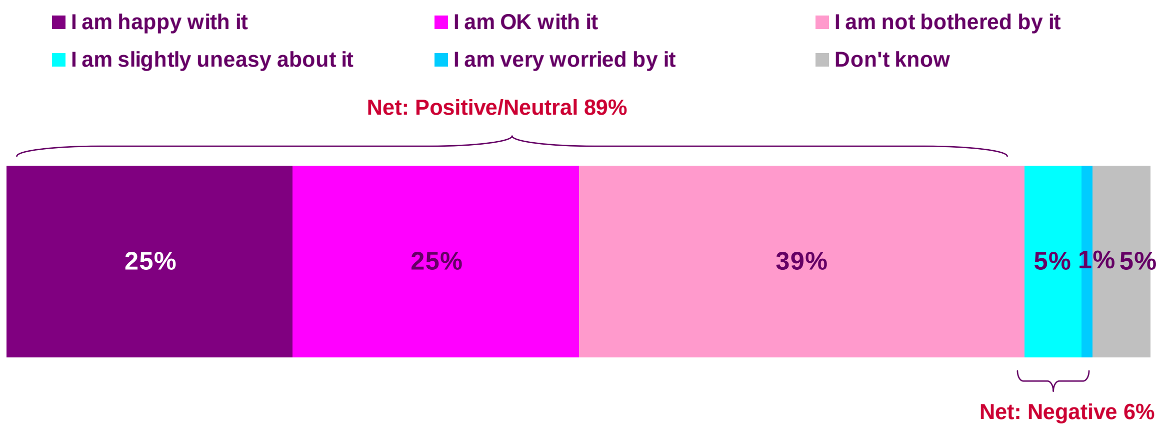
FIGURE 3.1: APPEAL OF ANALOGUE AND DIGITAL TEXT SERVICE FEATURES AMONG USERS



Source: Digital UK/Ofcom Switchover Tracker January to February 2008
Sample size: 632 (digital text users) 641 (analogue text users)

- 12% of the digital TV audience say they sometimes turn off their digital box on purpose to access analogue text services instead. Among those who use text services more than once a month this proportion increases to 27%.
- Nearly nine out of ten respondents felt positive or neutral about the change from analogue to digital text services when the service ceases to exist after switchover. While 50% felt that this change was a positive one, a further 39% of UK adults had a neutral opinion. Only a minority of people felt negative about the change, with 5% feeling slightly uneasy and only 1% directly worried about this development. Even among users of the analogue service the proportion of people feeling negative did not grow over 10%.

FIGURE 3.2: CONSUMER ATTITUDES TOWARDS THE LOSS OF ANALOGUE TEXT SERVICES AT SWITCHVOER



Source: Digital UK/Ofcom Switchover Tracker January to February
Sample size: 1880

- The majority of services most frequently used on analogue text services are also available on digital Teletext and BBCi. 60% of users of analogue text who say they will miss the analogue text services feel confident that they will use the digital text alternative instead. Other people will seek the information in alternative sources like the internet or the local newspaper (e.g. 28% weather forecast on the internet).

Chapter 4

The Switchover Help Scheme in Border and the UK

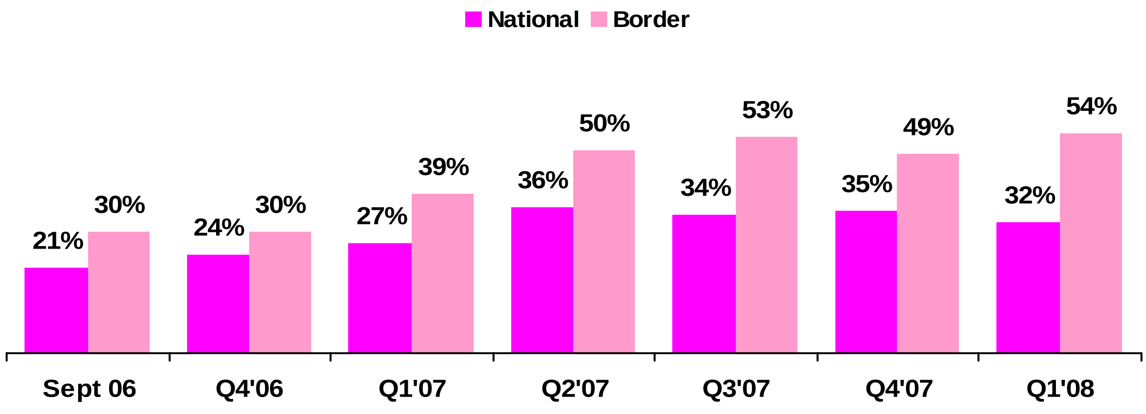
- It is estimated that about 7 million people in the UK will be eligible for the Help Scheme through the switchover period. People are eligible if they are aged 75 years or more, or if they are registered blind or partially sighted. Also eligible are people who get (or could get) Attendance or Constant Attendance Allowance, Mobility Supplement, or Disability Living Allowance.

Awareness of the Switchover Help Scheme

- Awareness of the Switchover Help Scheme among the general population has hovered at around 33% for the past 4 quarters. This is unsurprising as there has been only limited communication about the Help Scheme across the country. In Q1 2008 32% of all respondents were aware of the Help Scheme.

- In Border, the next region of the country to switch, a much higher proportion are aware of the Help Scheme; more than half of all adults (54%) are now aware that there will be assistance for certain groups. Targeted and above the line communications regarding the Help Scheme are due to start in earnest in Border in June 2008.

Figure 4.1: Awareness of the Help Scheme nationally and in Border over time



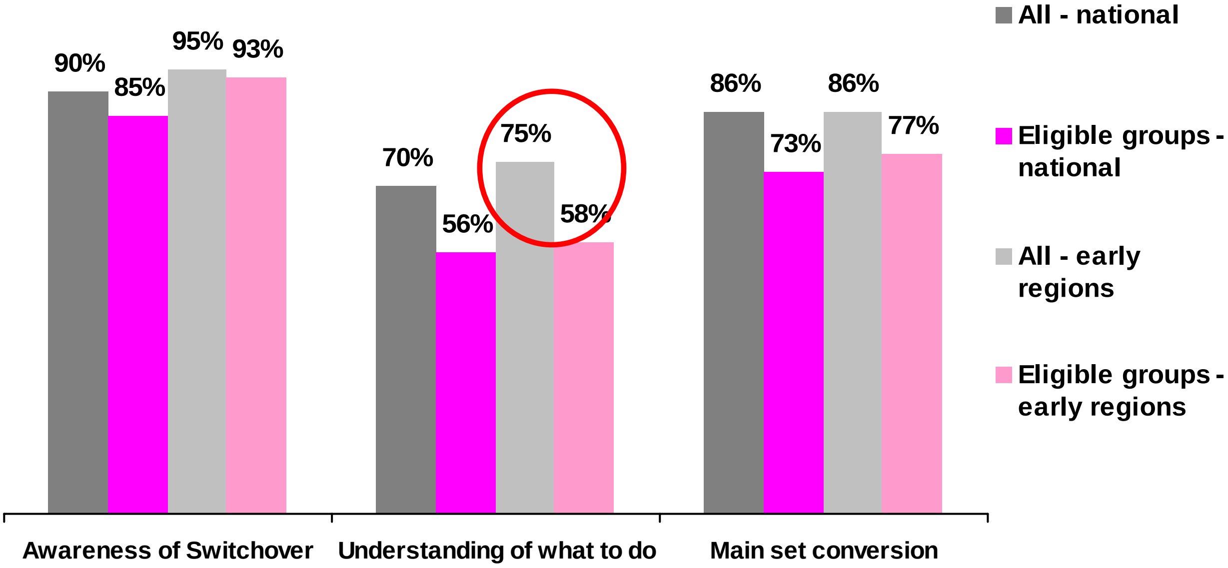
Source: Digital UK/Ofcom Switchover Tracker
Sample size: National (659, 1964, 1956, 2448, 2829, 2830, 2819); Border (104, 319, 325, 322, 485, 483, 490)

Awareness and Understanding of Switchover and Digital TV Conversion among the Switchover Help Scheme eligible

- Nationally, those eligible for the Help Scheme continue to report lower levels of switchover awareness, understanding and especially conversion than the population in general. This is perhaps not surprising given the demographic profile of the Help Scheme eligible groups, and is part of the reason why the Help Scheme has been developed to support them.

- When we look only at respondents in early switching regions (Border, West Country, Wales and Granada), the gaps in awareness and main set conversion between all respondents and eligible respondents decrease compared with those nationally. However, the gap in understanding is still significant; only 58% of eligible respondents in the early switching regions understand what they need to do for switchover compared with 75% of all respondents in the early switching regions (a gap of 17 percentage points).

Figure 4.2: Q1 2008 key measures



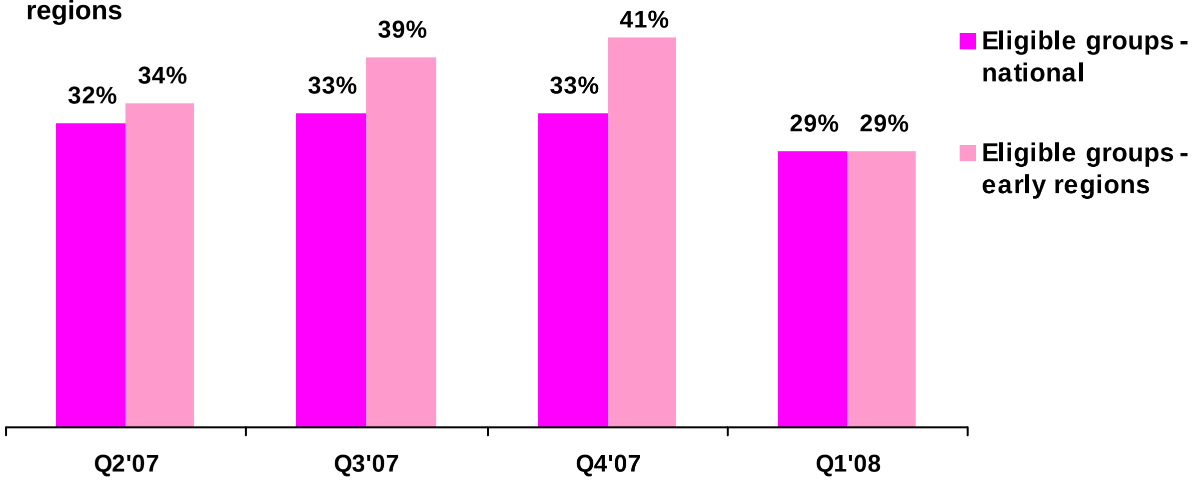
Source: Digital UK/Ofcom Switchover Tracker Q1 2008
Sample size: 2819

Awareness and Understanding of the Switchover Help Scheme among the Help Scheme eligible

- Nationwide awareness that there will be assistance among those who will be eligible for the Help Scheme peaked at the time of digital switchover in Copeland, a reflection of the wide media coverage of the event (including the Help Scheme in the area). Since then awareness of the Help Scheme has fallen slightly among all of those eligible (- four percentage points from 33% to 29%) and more significantly among those eligible in the early switching regions. Here awareness of the Help Scheme is now in line with the national figure for eligible groups at 29%, a drop of 12 percentage points from Q4 2007.
- Prior to communications targeted at those eligible awareness of the Help Scheme is lower among eligible groups than the population as a whole.

This occurs both nationally (overall awareness 32% vs. 29% among eligible groups) and in the early switching regions (overall awareness 37% vs. 29% among eligible groups).

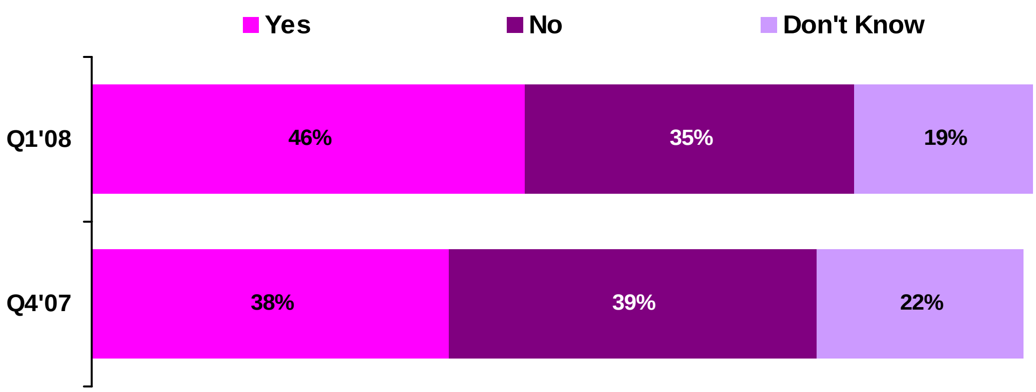
Figure 4.3: Awareness of the Help Scheme over time nationally and in early switching regions



Source: Digital UK/Ofcom Switchover Tracker Q2'07 to Q1'08
Sample size: Help Scheme eligible groups (385, 424, 381, 389) Early regions (219, 242, 207, 210)

- This limited awareness and understanding of the Help Scheme is also present in Border, the next region to switch, where only 46% of those eligible for the Switchover Help Scheme are aware of their eligibility. This was however a noticeable improvement, of nine percentage points, on Q4 2007 awareness of eligibility (38%).
- Looking at current levels of awareness, those aged 75 or more are slightly more likely to be aware that they will be eligible for the Help Scheme (49%) while those under 75 and in receipt of DLA/AA are less likely to be aware that they are eligible (37%).

Figure 4.4: Understanding of respondents whether they are eligible



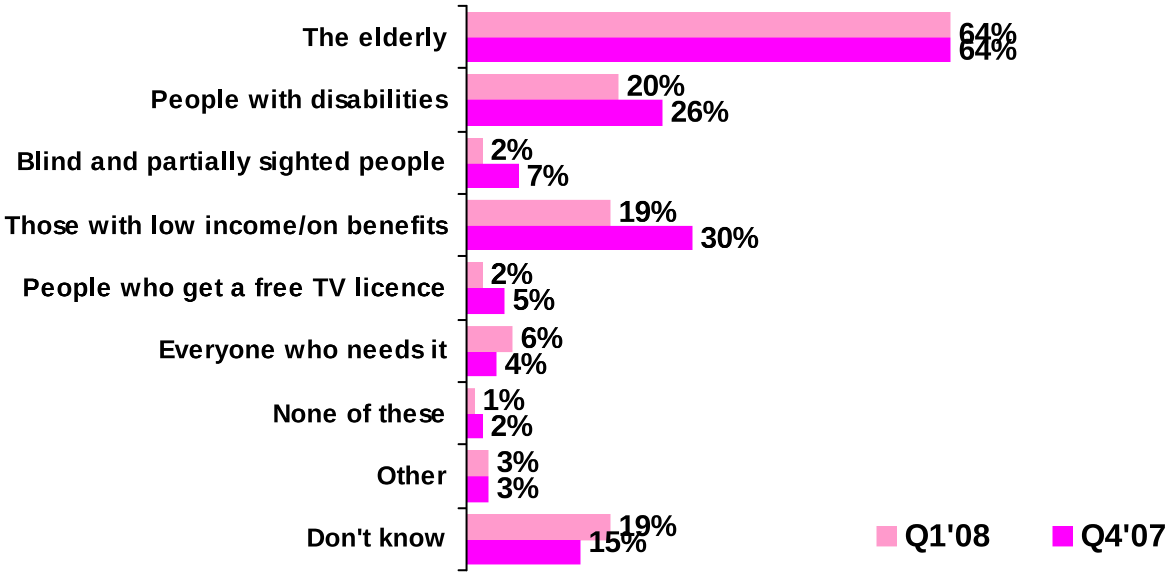
Source: DUK/Ofcom Switchover tracker - Border Help Scheme Boost
Base: All eligible respondents. Q4 2007 (208); Q1 2008 (206)

- When asked who they think will be eligible for the Switchover Help Scheme two thirds of eligible respondents in Border (64%) correctly mention the elderly and a further 20% those with disabilities. In Q1 2008

19% thought that those with a low income or on benefits will be eligible, down from 30% in the previous quarter.

- Among those who think the elderly will be eligible only a third (32%) correctly suggest the starting age for eligibility will be 75; most think that people will be eligible at a younger age (58% gave an age under 75). A greater proportion of those who think that people with disabilities will be eligible can name the specific disability benefits that will determine eligibility (66% naming Disability Living Allowance and 32% Attendance Allowance).

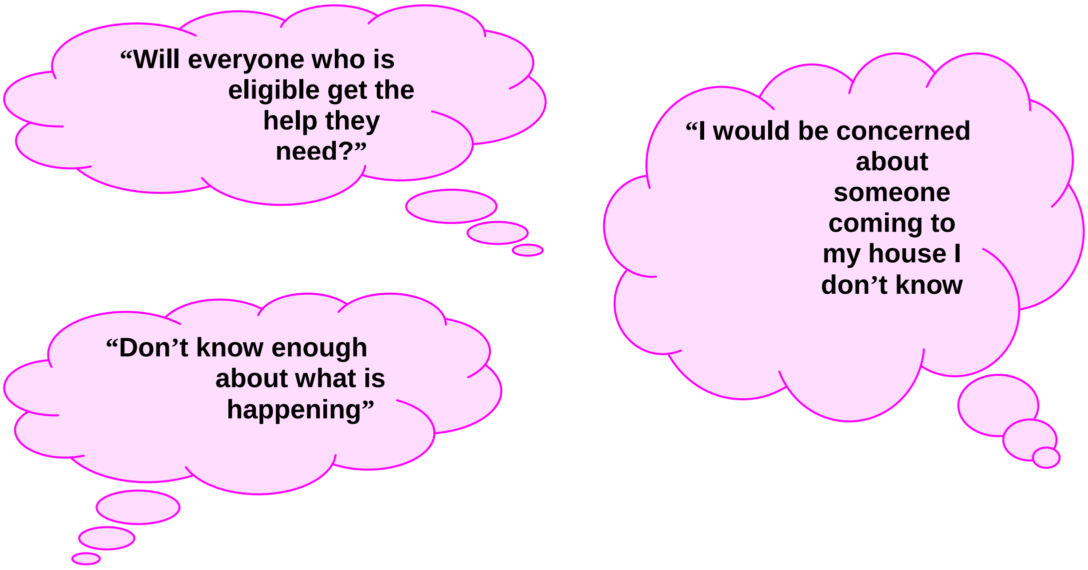
Figure 4.5: Understanding of the eligibility criteria for the Help Scheme



Source: DUK/Ofcom Switchover tracker - Border Help Scheme Boost
Base: All eligible respondents. Q4 2007 (208); Q1 2008 (206)

- When asked if they have any comments about the Help Scheme at this point eligible respondents cited various things, including understandable concerns with having people visiting their home and the desire for more information. These are being considered by the Help Scheme in the development of the Border plan.

Figure 4.6: Comments on the Help Scheme from Border respondents



Source: DUK/Ofcom Switchover tracker - Border Help Scheme Boost
Base: All eligible respondents. Q1 2008 (206)

- Before communications begin there has been little shift in understanding and attitudes among those eligible for the Help Scheme in Border between Q4 2007 and Q1 2008. For some (those in the area of Scottish Borders served by the Selkirk transmitter group who are due to switch in November 2008) switchover is drawing closer and targeted communications for the Help Scheme will start in June.

Chapter 5

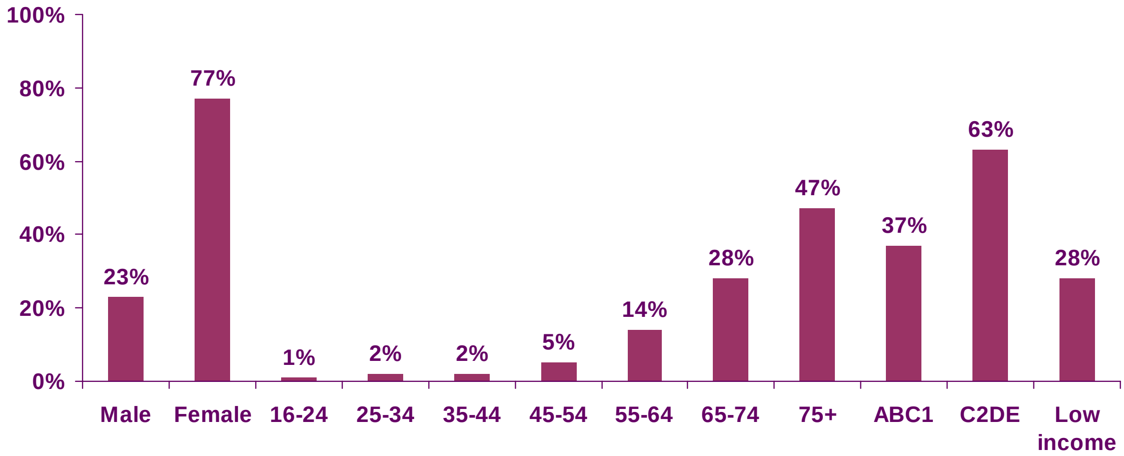
IN FOCUS: People needing assistance with switchover

- The Digital UK/Ofcom Switchover Tracker monitors key switchover metrics among various consumer groups and helps to identify audiences that will find digital switchover more difficult and might require additional assistance. While many parts of the population find the transition from analogue to digital easy and have already made the switch if they can, some key audiences encounter additional barriers to go digital or simply find some of the barriers more difficult to overcome.
- One of the groups monitored closely by the Digital UK/Ofcom Tracker are people who live on their own and who feel that they would have to turn to somebody outside of their home for help when it comes to switching their equipment to digital. This group appears on the Switchover Consumer Groups Dashboard labelled as those who "need assistance" with switchover.

Demographic profile of those who need assistance with switchover

- The group of people who feel they need help with switchover makes up 5% of the population. They are more likely to be female (77% women vs. 23% men), older (47% are 75+), disabled (47%) and on lower incomes (28%).

FIGURE 5.1: SOCIAL DEMOGRAPHIC PROFILE OF THE GROUP WHO NEED HELP WITH SWITCHOVER



Source: Q4 2006 to Q1 2008 Digital UK/Ofcom Switchover tracker
Sample: Respondents needing help 812

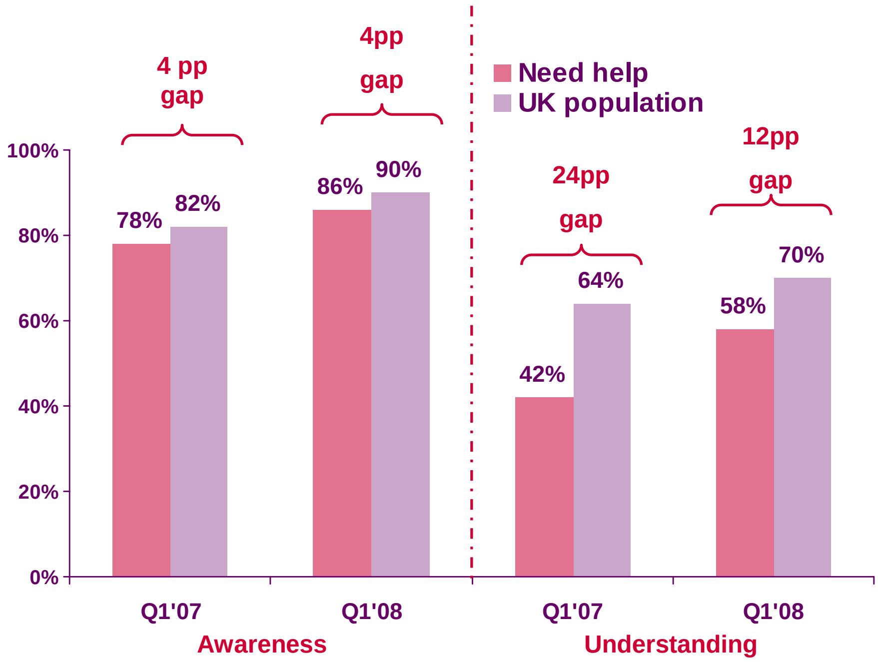
- Because of their age profile and their high propensity to have some form of disability, a significant proportion of this group will qualify for additional help through the Switchover Help Scheme.

- TV is very important for this audience, 1 in 3 (30%) of this group watch more than 5 hours of television per day and would therefore be considered heavy TV viewers. This is almost double the UK average of heavy TV viewers.

Awareness and understanding among those who need assistance

- There has been a steady increase in switchover awareness since Q4 2006 both among the general population, up 10 percentage points from 80% to 90% UK wide and among those who expect to need assistance with switchover, from 76% to 86%. However, as awareness has increased there still remains a 4 percentage points awareness gap between this group and the nation as a whole in Q1 2008.
- Seven out of ten of those who expect to need assistance with the switch recognise the digital tick logo, compared to 83% logo awareness nationally. Awareness of the Switchover Help Scheme is also lower than the national average with just over one quarter of the group (26%) aware of the Scheme compared to 32% nationally.
- A larger gap exists in understanding of how to prepare for switchover among those who feel they need help with the switchover process (58% vs. 70% nationally in Q1 2008). However, compared with results from a year ago the understanding gap for this group to the nation as a whole has halved over time.

FIGURE 5.2: AWARENESS AND UNDERSTANDING GROWTH OVER TIME



Source: Digital UK/Ofcom Switchover Tracker Q1 2007 and Q1 2008
Sample size: Respondents needing help 122 (Q1 2007) and 117 (Q1 2008)

- As we might expect attitudes to digital switchover are more negative among this group, and they are also less comfortable with switching over. In Q1 2008 seven out of ten of those who expect to need assistance with switchover, said that they are happy/OK or not bothered about it (compared to 88% of the UK population). However, on the whole personal comfort with switchover improving over time – albeit slowly. Over the last year personal comfort with switchover in this group has increased by 9percentage points, from 61% in Q1 2007 to 70% in Q1 2008.

Digital TV take up

- Everybody in this group has analogue TV, either on a main or a secondary set in their home. At present only 2 in 5 (38%) have converted their main TV set and just over 12% have converted their other sets to digital. Among those who have already converted to digital, Freeview is the predominant platform.
- Digital UK is working closely with the Switchover Help Scheme and the Digital UK charity partnership Digital Outreach Ltd. to provide advice and practical support at the point of switchover to those who might need it. They are working through existing community networks and local charities to distribute information about switchover to those who might find the process more challenging.

Chapter 6

IN FOCUS: The West Country and its transmitter groups

West Country summary

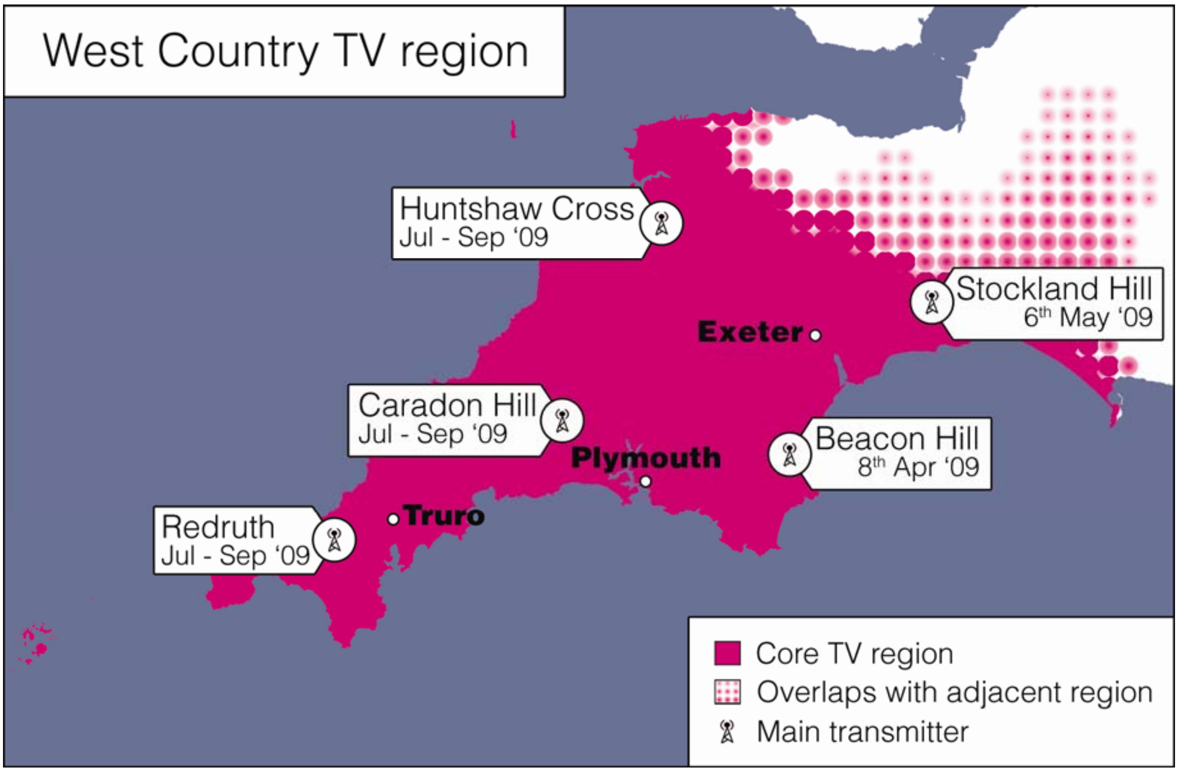
- At the end of Q1 2008 with little more than one year to go until switchover starts in the West Country the preparations are going well. People in the area have higher levels of switchover awareness (95%) and understanding (79%) than Copeland residents had at that point in time. More than eight out of ten (84%) of West Country homes already use digital TV on at least one of their TV sets and more than half of households (55%) are fully digital.
- In comparison to the rest of the UK people living in The West Country have higher levels of detailed understanding of switchover. More than two thirds of the West Country population (66%) score 60 points or above on the Detailed Switchover Understanding Index.
- However, with around four out of ten people in the West Country aware that their region is switching to digital in 2009, more will be done to raise date awareness in the transmitter group areas of the TV region. Currently only 5% of the people living in West Country A (Beacon Hill and Stockland Hill main transmitter groups) understand that their area of the country is switching to digital in Q2 2009 while one in ten people (11%) living in West Country B (Huntshaw Cross, Redruth and Caradon Hill main transmitter groups) know that their switchover date is in Q3 2009. We expect to see these numbers rise following the 8th April date announcement for Beacon Hill and Stockland Hill.
- In Q1 2008 61% of people in the West Country were aware that their recorders will be affected by the switchover. This proportion is considerably higher than it was one year out from switchover in Copeland (39% in Q4 2006).

Background West Country and its transmitter groups

- With around 843,500 households and 1,646,000 adults living in the West Country, it is one of the more sparsely populated TV regions in the UK.
- The West Country TV region is located in the South West of the UK. Its transmitters cover the area of Devon, Cornwall, the Isles of Scilly and parts of Somerset and Dorset. The area is mostly rural, with only a few notable cities, such as Exeter and Plymouth.
- With its pretty towns and beaches tourism and agriculture, especially dairy farming, play a significant role in the economy of the West Country. The landscape is principally granite moorland in the west, and chalk and

limestone downland and clay vales in the east. Historically, tin mining and fishery were sources of income and employment, but less so today. The region is most famous for its production of cider, clotted cream and pasties.

FIGURE 6.1: WEST COUNTRY TV REGION MAP WITH ITS TRANSMITTER GROUPS



- The West Country is served by five main transmitter groups which are all switching to digital during quarter 2 and quarter 3 of 2009. An additional 105 relay transmitters are fed by the 5 main West Country main transmitters. These will also be upgraded to digital only broadcasting at the time of switchover.

FIGURE 6.2: SWITCHOVER DATES FOR WEST COUNTRY MAIN TRANSMITTER GROUPS

	Main transmitter group	Switchover date(s)	
(1)	Beacon Hill	8 April 2009	22 April 2009
(2)	Stockland Hill	6 May 2009	20 May 2009
(3)	Huntshaw Cross	Q3 2009	
(4)	Redruth	Q3 2009	
(5)	Caradon Hill	Q3 2009	

- The switchover dates for the first transmitter groups in the West Country were announced on the 8th April 2008, one year out from the start of switchover of the Beacon Hill transmitter group serving Torbay and South Devon. The area will switch to digital broadcasting between the 8th and 22nd April 2009. Between the 6th and 20th May 2009 the second West Country main transmitter group Stockland Hill serving Exeter, parts of

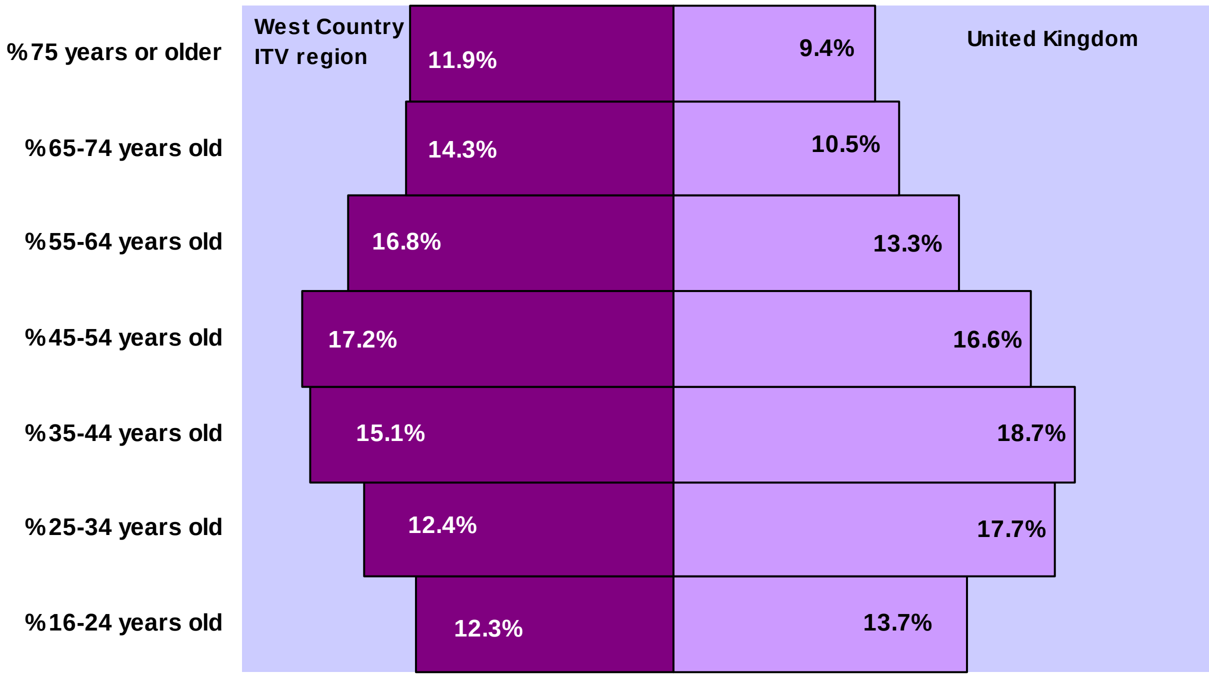
Devon, Somerset and Dorset will follow. Switchover of the other three main transmitter groups is scheduled for July to September 2009.

- Currently the West Country region has one of the lowest levels of current digital terrestrial TV coverage of any UK TV region. 42% of homes are in coverage of one of the West Country main transmitters and can already receive a digital terrestrial signal and 58% receive their signal from one of the relay transmitters. For them a digital terrestrial signal will only become available at point of switchover in 2009.
- From Q2 2008 onwards Digital UK/Ofcom Switchover Tracker results will report on a subregional level with boosted samples. The West Country TV region will be split into 2 subregions West Country A and West Country B. West Country A comprises the Beacon Hill and Stockland Hill transmitter groups which are adjacent and switch in consecutive months. West Country B is formed of the Huntshaw Cross, Redruth and Caradon Hill transmitter groups.

Demographic profile of the West Country region

- The age profile of the West Country population is slightly older than the national average and older age groups like 55-64 year olds and 65-74 year olds are overrepresented. Despite the older age average of the West Country population, the proportion of state pensioners or widows in the area is lower than the national average.

FIGURE 6.3: WEST COUNTRY AGE PROFILE



Source: 2001 ONS Census data

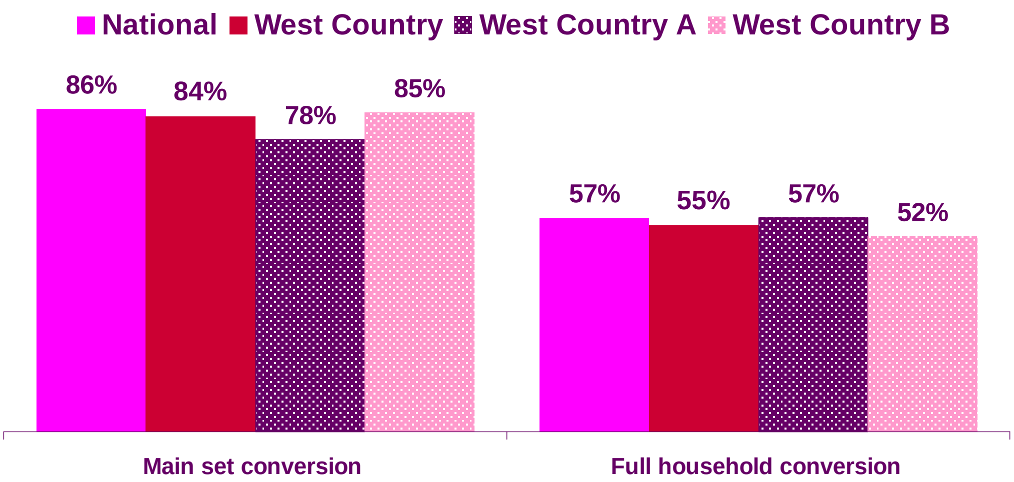
- The gender balance in the West Country matches that of the UK closely (47.7% male vs. 52.3% female). While lower middle class (C1) and skilled working class (C2) groups are overrepresented in the West Country, fewer upper middle class (A) and middle class (B) people live in the area than in the UK overall.

- Household incomes are slightly lower in the West Country than in the rest of the UK. Nationally 34% of households earn less than 60% of the national median income. In the West Country this proportion increases to 39%. However, lower incomes in the area are mostly due to the local industries and types of occupation that the West Country population has, with fishing, agriculture and tourism as key industries in the area.

Digital TV take-up

- When comparing levels of ownership of digital TV, penetration figures are slightly lower in West Country (84%) when compared to the UK national average of 86%. However, there are some considerable differences in digital TV take up between the subregions West Country A and West Country B. Lower take up of digital TV in West Country A can probably be explained through digital terrestrial coverage issues in the area. Currently almost half of homes in the West Country receive digital TV through their aerial (49%), a minority of households subscribe to cable services (6%) and only 29% of homes watch satellite TV on their main set.

FIGURE 6.4: DIGITAL TV CONVERSION IN WEST COUNTRY AND ITS SUBREGIONS



Source: Q1 2008 Digital UK/Ofcom Switchover Tracker
Sample size: 2819 nationally, West Country 314

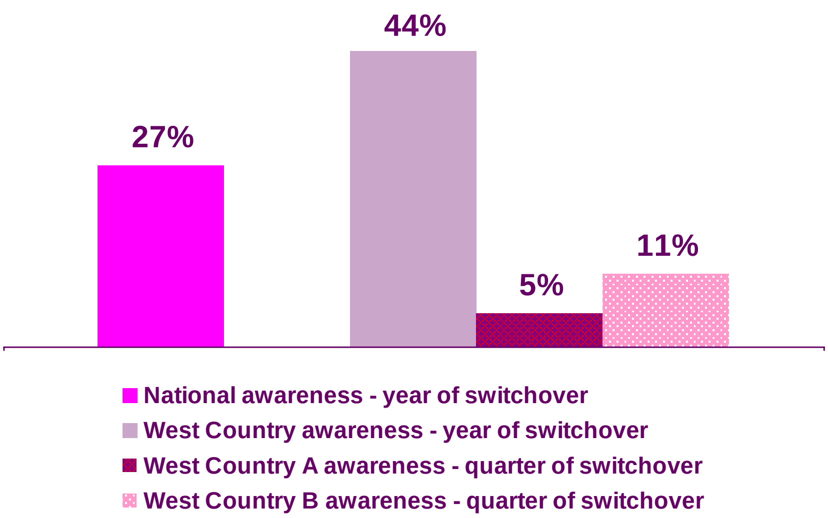
Awareness and Understanding of digital switchover

- During Q1 2008 more than nine out of ten (95%) living in the area served by West Country transmitter groups were aware that switchover is happening. This proportion is at the same level as awareness in Copeland when monitoring started one year out from the change.
- Respondents who were aware of the term 'digital TV switchover' were further asked what it meant to them in order to gauge their level of understanding of how to prepare for digital switchover. Both West Country A and B currently have a markedly higher level of understanding than the UK as a whole with more than three quarters of the population knowing that they will have to convert their TVs to receive a television signal after

switchover happens. This proportion is higher in West Country A (81%) than in West County B (75%).

- However, with around four out of ten people in the West Country aware that their region is switching to digital in 2009, will be done to raise date awareness in the transmitter group areas of the TV region. Currently only 41% of the people living in West Country A understand that their area of the country is switching to digital in 2009 while almost half of the people living in West Country B are aware of that (49%). Understanding of the exact quarter of switchover is even lower in each of the two regions with 5% of West Country A residents and 11% of the West Country B population knowing their respective switchover quarters.
- The switchover dates for the first transmitter groups in the West Country were announced on the 8th April 2008. Beacon Hill will switch to digital between the 8th and 22nd April 2009 and Stockland Hill will follow between the 6th and 20th May 2009. On the first date the BBC Two analogue signal will be switched off and replaced with a digital service. West Country A residents will have a 2 week transition period before the remaining analogue channels (BBC One, ITV1, Channel 4 and Five) are switched off on the second date.

FIGURE 6.5: UNDERSTANDING OF THE CORRECT SWITCHOVER DATE IN WEST COUNTRY TRANSMITTER AREA



Source: Q1 2008 Digital UK/Ofcom Switchover Tracker
Sample size 2,819 nationally, West Country 314

Attitudes towards digital switchover

- To gauge their overall opinion, respondents were asked about their attitudes towards switchover and about their comfort with the process.
- Most people in the West Country Borders feel positive about the transition to digital TV. More than three quarters of the population (76%) have a neutral opinion about the policy or think it is good for them or the UK. When asked how they personally feel about coping with the change almost nine out of ten (88%) feel comfortable with the change, in line with the national average at 88%.

Digital UK activity

- Coinciding with the announcement of the switchover dates for West Country A in April 2008 all households in the region were sent a Digital UK leaflet including general switchover information, options to go digital and highlighting that the countdown to digital switchover had begun. Press advertising in local newspapers across the region emphasised the switchover dates.

FIGURE 6.6: WEST COUNTRY 1 YEAR PRE-SWITCHOVER LEAFLET AND WEST COUNTRY DATE AWARENESS PRESS AD

- Digital UK's regional team based in the West Country is working with local authorities, charities, housing associations, parish councils and local and national politicians to ensure that isolated and vulnerable people know what to do for switchover. Together with its charity partnership Digital Outreach Ltd Digital UK will engage local charities in the area to spread the digital message to hard to reach people who do not qualify for the Switchover Help Scheme and who require support for switchover.
- Building awareness and understanding of the Switchover Help Scheme is also one of the key objectives for Digital UK's road show that will move through the West Country during June, July and September of this year.
- Given the importance of tourism to the regional economy, a major campaign is under way to help owners of hotels, B&Bs, holiday cottages and caravan parks.

APPENDIX ONE: About the Switchover Tracker

- On 3rd 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

	Measure	Questions
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[3].

- 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 – 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 TV platform – which shows key metrics for different groups according to the type of television service received on the Main TV set in the household

  (4) 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.

[3] 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 main TV set
5b Responding as above for all non-primary TV sets
5c/5d Responding as above for all TV sets 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: Some or all of TVs have already been or will be adapted/upgraded
4b Responding: None 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 Q1 2008 module tested awareness and usage of analogue and digital text services, and explore attitudes towards the loss of analogue text services at switchover. In March 2008 the module also tested awareness of Digital UK's *Skip* television advertising campaign.

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 Q1 2008 the Tracker interviewed 2819 households:

- 934 in January
- 946 in February; and
- 939 in March.

During Q1 2007, an additional 206 respondents in Border 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) were 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 and ITV region.

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.
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)