

Digital UK and Ofcom
Switchover Tracker Survey

Switchover Progress Report
Q3 2008

digitaluk

Ofcom
OFFICE OF COMMUNICATIONS

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Executive Summary

- This report summarises the results of the Digital UK & Ofcom Switchover Tracker during Q3 (July - September) 2008. Switchover Tracker data is used to measure national and regional progress to switchover across various key metrics, such as awareness and understanding of the change among consumers, as well as actual take-up of digital TV.
- Included within this report are updates on national and regional key metrics and a summary of the readiness of consumers who are eligible for the Switchover Help Scheme. A regional In-Focus chapter reviews switchover readiness in Wales.
- In November 2008 the switchover programme began with switchover in Scottish Borders. Switchover Tracker monitoring will stop in regions where switchover is complete and so from next quarter 'national' metrics will be available for conversion figures only*. Results will continue to be published, but regular readers of this report should note that the format and frequency of the Progress Reports will change with greater emphasis on the progress of the remaining regions.

Digital TV Conversion

- Ofcom issued its Q2 2008 Communications Market Digital Progress Report on the take-up of digital TV on 3 October 2008. It states that 88% of homes had multichannel TV as of June 2008. This includes a very small proportion of homes (estimated 0.1%) that receive TV via analogue cable (who will not be affected by the digital switchover). Ofcom's Q3 report is due to be published in December 2008.
- Q2 2008 results represented a 0.8 percentage point growth in multichannel TV quarter-on-quarter. Fewer main TV sets are now being converted each quarter, but digital TV take-up on secondary TV sets continues to grow consistently and stood at 55% at the end of quarter two.
- At the end of Q3 2008 the Switchover Tracker showed digital TV take-up at 87% (up 4 percentage points), in line with Ofcom's Q2 2008 estimate. Also in line with Ofcom's findings, the Switchover Tracker showed more than half of secondary TV sets converted to digital (56%). UK-wide more than seven out of ten (72%) of all TV sets have been converted to digital, up two percentage points since Q2 2008.
- Over the last quarter main TV set conversion grew in the early switchover regions: Border (84%, up 2pp), West Country (87%, up 5pp) and Wales (90%). One month before switchover in the Scottish Borders 90% of homes in the region had converted their main TV set to digital. This is despite the fact that, prior to switchover and the extension of Freeview coverage on 6 November 2008, only half of local residents could receive a digital TV signal through their aerial.

**Any region that has switched will be assumed to have converted all TVs used to watch broadcast television to digital.*

Q3 2008 switchover key metrics

- During the third quarter of 2008 (July – September) national awareness and understanding metrics remained relatively unchanged, while key metrics continued to grow in regions closest to switchover. At the end of September 2008 national switchover awareness stood at 88% and understanding of how to prepare for the change held stable to the previous quarter at 68%. Switchover awareness in early switching regions, Border, Wales and West Country is on average 10 percentage points higher than the national result (98% vs.88% nationally).
- People's detailed understanding of switchover grows as regions get closer to switchover. The Detailed Understanding Index combines various individual indicators of understanding of switchover; in Q3 2008 almost half of the population in the UK scored 60 points or above on the Detailed Understanding Index.
- Trend analysis of key metrics in the regions shows that a reasonably consistent pattern of growth, linked with Digital UK's activity, is developing in each region.

The Switchover Help Scheme

- The Switchover Help Scheme offers eligible people equipment to convert one TV, installation and a demonstration of how it works, as well as someone to call while they are getting used to it. People are eligible if they are aged 75 years or more, have lived in a care home for six months 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.
- While awareness of digital switchover among eligible groups is in line with the average for all UK adults, those aged 75 and over and those under 75 and on disability benefits show far lower levels of understanding of what they need to do to continue watching television after switchover. In Q3 2008 those 75+ were 14 percentage points behind the all adult understanding average and those under 75 in receipt of eligible disability benefits 19 percentage points behind.
- Among those aged 75 and over there is a similar gap when it comes to main TV set conversion. In the third quarter of 2008 only 73% of 75+ households had a digital main TV set (14pp behind the all adult national average). In comparison, those under 75 in receipt of disability benefits were as likely as all adults to have converted their main TV set.
- In Q3 2008 national awareness of the Switchover Help Scheme stood at 32% among all adults and 31% among those eligible for help, but both were boosted in the final month of the quarter by a national TV advertising campaign.
- At the end of quarter three the Help Scheme had offered help to eligible people in Scottish Borders, Cumbria and south west Scotland. Awareness raising activity begins in each region seven months before switchover starts. West Country A (the area served by the Beacon Hill and Stockland Hill transmitter groups, due to switch between April and May 2009) was the only other region where this activity had commenced in Q3 2008.

In Focus: Switchover preparations in the Wales TV region

- Switchover in Wales starts on 12 August 2009 with stage one switchover of the Kilvey Hill transmitter group serving the Swansea area, making Wales the third TV region to start switchover. All key switchover metrics are tracking above national averages.
- Reflecting their early switchover date the population in Wales have almost universal awareness of digital switchover (97% vs. 88% UK-wide) and more than seven out of 10 (72%) understand what they have to do to prepare for the change, four percentage points above the national average (68%).
- Take-up of digital TV is historically high in Wales with the majority of digital TV viewers using satellite services on their main TV set (50% vs. 35% UK-wide). In the two years since Tracker monitoring started just over 10% of homes in Wales have converted their main TV set to digital. Despite only nine months remaining until the start of switchover in the region, conversion of secondary TV sets is the same as the national average (56%).

Chapter 1

The Dashboards – Q3 2008

Quarterly results are presented on dashboards of progress:

(1) The Dashboard: by Regions and Project

Key metrics for each switchover region, for projects (sub-regions) in each region and for the UK as a whole.

(2) The Dashboard: by Consumer Groups

Key metrics provided for a range of demographic and consumer groups.

(3) The Dashboard: by Switchover Segment

Key metrics for Digital UK’s switchover consumer segments (see the Q2 2006 Switchover Progress Report for further details)

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

How to read the dashboards

FIGURE 1.1 – NAVIGATING THE TRACKER DASHBOARDS

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

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

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

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

	BASE SIZE	-1- Awareness			-2- Understanding				-3- Pos/neutral attitude		-4- Intentions to convert		-5- Conversion			-6- Satisfact'n with digital TV	
		a- Switchover	b- Logo	c- Help Scheme	a- What to do for DSO	b- Update VCRs	c- Switchover year	d- Detailed understand 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/household conversion		d- Total TV sets onrt
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%	85%
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%	40%	57%	68%	
14 - Ulster	56*	76%	46%	14%	52%	11%	13%	13%	94%	100%					61%		

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- Satisfact'n with digital TV
		-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	
NATIONAL	3556	88%	80%	32%	68%	42%	30%	48%	79%	89%	94%	1%	87%	56%	61%	72%	76%
1 - Border	484	99%	88%	58%	83%	60%	70%	79%	80%	92%	97%	1%	84%	57%	57%	70%	66%
1a - Selkirk	160	100%	94%	70%	87%	62%	95%	94%	89%	98%	98%	1%	90%	62%	66%	76%	49%
1b - Caldbeck	324	98%	85%	52%	81%	59%	57%	71%	75%	88%	96%	1%	81%	55%	53%	67%	76%
2 - West Country	429	98%	87%	43%	88%	54%	74%	79%	81%	85%	97%	1%	87%	58%	64%	73%	78%
2a - West Country A	222	98%	87%	43%	88%	54%	74%	78%	78%	91%	98%	0%	86%	51%	62%	70%	81%
2b - West Country B	207	98%	87%	43%	87%	53%	74%	80%	84%	78%	96%	1%	87%	65%	65%	76%	75%
3 - Wales	514	97%	84%	33%	72%	45%	41%	57%	78%	87%	94%	1%	90%	56%	60%	72%	77%
3a - West Wales	209	96%	83%	28%	79%	41%	47%	59%	78%	88%	96%	0%	92%	59%	60%	74%	73%
3b - North Wales	172	97%	87%	37%	62%	48%	43%	61%	79%	87%	89%	3%	89%	58%	61%	73%	79%
3d - South Wales and Blaenplwyf	133	98%	83%	36%	73%	48%	27%	47%	78%	83%	97%	0%	89%	48%	58%	69%	82%
4 - Granada	310	92%	86%	39%	73%	53%	43%	62%	77%	91%	94%	2%	89%	61%	62%	74%	72%
5 - West	306	95%	86%	44%	77%	50%	38%	58%	80%	91%	94%	3%	87%	59%	63%	73%	77%
6 - STV North	322	94%	81%	30%	65%	38%	44%	50%	77%	86%	94%	1%	85%	58%	58%	71%	69%
7 - STV Central	307	92%	86%	38%	75%	53%	43%	54%	82%	93%	98%	0%	92%	71%	71%	82%	77%
8 - Central	104	85%	82%	37%	65%	42%	19%	42%	77%	84%	93%	1%	80%	45%	53%	65%	77%
9 - Yorkshire	104	91%	80%	24%	68%	47%	10%	39%	57%	74%	94%	1%	93%	58%	62%	75%	61%
10 - Anglia	80*	94%	67%	31%	85%	49%	34%	52%	94%	97%	94%	0%	89%	51%	53%	71%	85%
11 - Meridian	98*	94%	83%	27%	63%	51%	30%	59%	75%	91%	95%	1%	84%	56%	62%	70%	74%
12 - London	420	76%	75%	27%	59%	29%	21%	34%	85%	92%	91%	2%	84%	53%	61%	70%	77%
13 - Tyne Tees	55*	90%	84%	39%	58%	30%	27%	36%	94%	95%	97%	0%	97%	55%	67%	76%	88%
14 - Ulster	23**																

(2) The Dashboard: by Consumer Groups

	BASE SIZE	-1- Awareness			-2- Understanding				-3- Pos/neut attitude		-4- Intentions to convert		-5- Conversion				-6- Satisfact'n with digital TV
		-a- Switchover	-b- Logo	-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	
NATIONAL	3556	88%	80%	32%	68%	42%	30%	48%	79%	89%	94%	1%	87%	56%	61%	72%	76%
Analogue	388	80%	64%	28%	52%	34%	26%	36%	71%	73%	74%	6%	-	13%	0%	4%	
Digital	2936	90%	82%	32%	71%	44%	31%	51%	80%	92%	97%	0%	100%	59%	70%	80%	76%
Male	1746	88%	82%	34%	70%	49%	27%	52%	82%	91%	94%	2%	88%	56%	62%	73%	78%
Female	1810	87%	78%	31%	66%	36%	31%	43%	76%	87%	94%	1%	86%	55%	59%	71%	74%
16-24	398	70%	83%	24%	54%	35%	23%	38%	86%	93%	86%	2%	88%	59%	64%	73%	86%
65-74	440	93%	70%	34%	65%	51%	33%	50%	73%	83%	92%	2%	74%	36%	47%	58%	72%
ABC1	1596	91%	80%	38%	72%	45%	30%	51%	84%	92%	96%	1%	89%	57%	63%	73%	80%
C2DE	1960	84%	80%	27%	63%	40%	29%	44%	75%	87%	92%	2%	85%	54%	58%	71%	72%
Rural	537	96%	81%	40%	71%	52%	39%	56%	86%	92%	94%	0%	84%	59%	59%	72%	78%
Urban	2915	87%	80%	31%	67%	42%	29%	47%	79%	89%	94%	1%	88%	55%	61%	72%	76%
Low income	758	86%	77%	25%	63%	34%	27%	39%	72%	82%	93%	1%	81%	44%	60%	66%	68%
BAME	299	57%	64%	25%	34%	23%	10%	20%	79%	86%	87%	3%	84%	57%	71%	75%	70%
Non-English	250	48%	59%	21%	25%	18%	8%	13%	77%	84%	83%	5%	79%	34%	64%	65%	69%
Disabled	603	91%	75%	29%	58%	43%	29%	41%	66%	79%	93%	0%	85%	50%	58%	69%	65%
Need assistance	168	91%	54%	24%	62%	21%	30%	25%	77%	77%	73%	4%	35%	4%	1%	23%	58%
Hard to reach	1602	83%	76%	31%	59%	39%	27%	42%	76%	87%	92%	2%	84%	51%	62%	70%	72%
Living alone	741	92%	74%	34%	63%	39%	29%	40%	71%	83%	91%	1%	76%	40%	59%	65%	77%
Families w/ children	1098	90%	85%	30%	69%	40%	28%	47%	79%	91%	97%	1%	94%	58%	59%	74%	72%
Rent private	457	76%	76%	29%	59%	32%	19%	34%	76%	88%	88%	3%	82%	50%	66%	71%	75%
Rent council	732	87%	82%	25%	63%	40%	26%	41%	75%	87%	94%	1%	84%	51%	61%	70%	67%
House	2940	88%	80%	33%	69%	45%	30%	51%	80%	89%	94%	1%	89%	56%	60%	72%	76%
Flat	594	83%	78%	30%	60%	32%	26%	33%	77%	90%	91%	2%	79%	51%	64%	70%	77%
SHS - 75+	364	89%	57%	34%	54%	38%	24%	35%	75%	80%	93%	1%	73%	40%	55%	61%	74%
SHS - DLA/AA <75	176	90%	82%	22%	49%	46%	25%	38%	67%	75%	91%	0%	86%	47%	51%	66%	62%

(3) The Dashboard: by Switchover Segment

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

	BASE SIZE	-1- Awareness			-2- Understanding				-3- Pos/neut attitude		-4- Intentions to convert		-5- Conversion				-6- Satisfact'n with digital TV
		-a- Switchover	-b- Logo	-c- Help Scheme	-a- What to do for DSO	-b- Update VCRs	-c- Switchover year	-d- Detailed understand index	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold conversion	-d- Total TV sets convrt	
NATIONAL	3556	93%	83%	38%	73%	47%	44%	58%	80%	89%	95%	1%	89%	60%	61%	73%	75%
Cultured Conservatives	479	93%	70%	37%	72%	43%	39%	53%	77%	87%	92%	2%	76%	50%	49%	63%	58%
Out-and-About Families	487	90%	88%	37%	77%	43%	45%	61%	78%	91%	97%	1%	92%	64%	65%	76%	72%
Traditionalists	659	92%	77%	32%	61%	44%	44%	51%	70%	77%	91%	1%	78%	43%	48%	61%	68%
TV-Centrics	1154	95%	88%	39%	76%	51%	47%	61%	84%	92%	96%	1%	97%	66%	66%	79%	80%
Rolling Stones	330	88%	86%	39%	74%	42%	44%	58%	81%	89%	93%	4%	82%	63%	70%	75%	78%
High-Tech Consumers	447	93%	89%	42%	81%	55%	44%	67%	88%	98%	97%	0%	97%	64%	69%	79%	86%

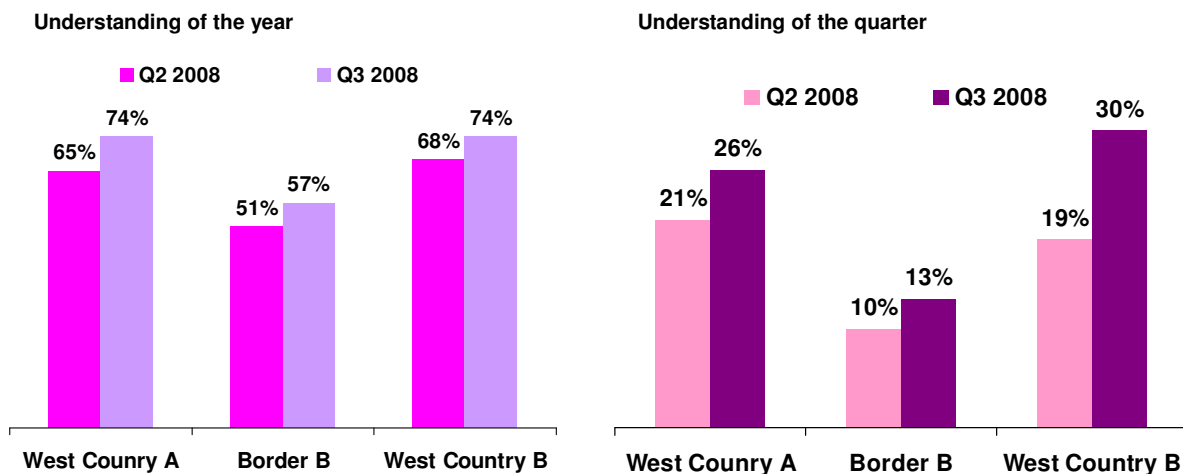
Chapter 2

The Q3 2008 Switchover Tracker Results

Key metrics

- During the third quarter of 2008 (July – September) national awareness and understanding metrics remained relatively unchanged, while key metrics continued to grow in regions closest to switchover. At the end of September 2008 national switchover awareness stood at 88% and understanding of how to prepare for the change held stable to the previous quarter at 68%. Switchover awareness in early switching regions, Border, Wales and West Country is on average 10 percentage points higher than the national result (98% vs.88% nationally).
- A series of switchover date announcements in West Country and Wales over the summer led to uplifts in detailed date awareness in these regions. Almost three-quarters of the West Country population (74%) know that they switch during 2009, while 41% in Wales know that they are either switching in 2009 or 2010.
- A quarter (26%) of people living in West Country A (the Beacon Hill and Stockland Hill transmitter groups, switching in April and May 2009) are aware that they will switch between April and June next year (up 5pp from Q2 2008). In West Country B (the Caradon Hill, Redruth and Huntshaw Cross transmitter groups, switching in July and August 2009) three in 10 (30%) adults know that they switch between July and September 2009 (up 11pp from Q2 2008).
- Date awareness has also increased in the final part of the Border region to switch. More than half (57%) of the population living in the area served by the Caldbeck and Douglas transmitter groups (switching in June and July 2009) were aware that they are switching to digital in 2009. One in 10 (13%) had more detailed understanding of the timings of switchover (up 3pp from Q2 2008).

FIGURE 2.1: GROWTH IN DETAILED DATE AWARENESS IN EARLY SWITCHOVER PROJECT REGIONS

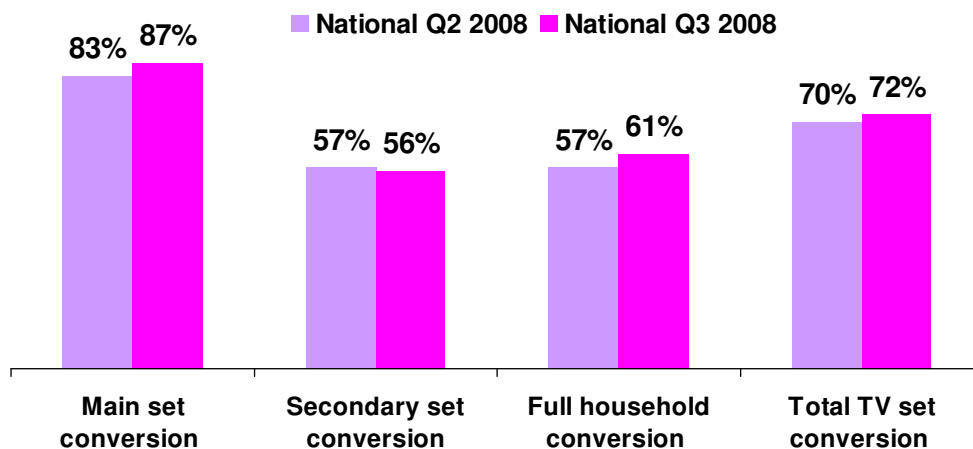


Source: Digital UK & Ofcom Switchover Tracker
 Sample size: Regional sample sizes over 150 respondents per quarter

Digital TV conversion

- At the end of Q3 2008 the Switchover Tracker showed digital TV take-up at 87% (up 4pp from Q2 2008). This is in line with Ofcom's Q2 2008 estimate which reported 88% of UK homes with access to digital TV. Secondary TV sets are increasingly being converted to digital. The Q3 08 Switchover Tracker showed more than six out of 10 (61%) UK homes with all TV sets converted to digital. Throughout the UK more than seven out of 10 (72%) TV sets have been converted to digital, up two percentage points on the previous quarter.

FIGURE 2.2: DIGITAL TV CONVERSION QUARTER ON QUARTER



Source: Digital UK & Ofcom Switchover Tracker
 Sample size: National Q2 (3444) Q3 (3556)

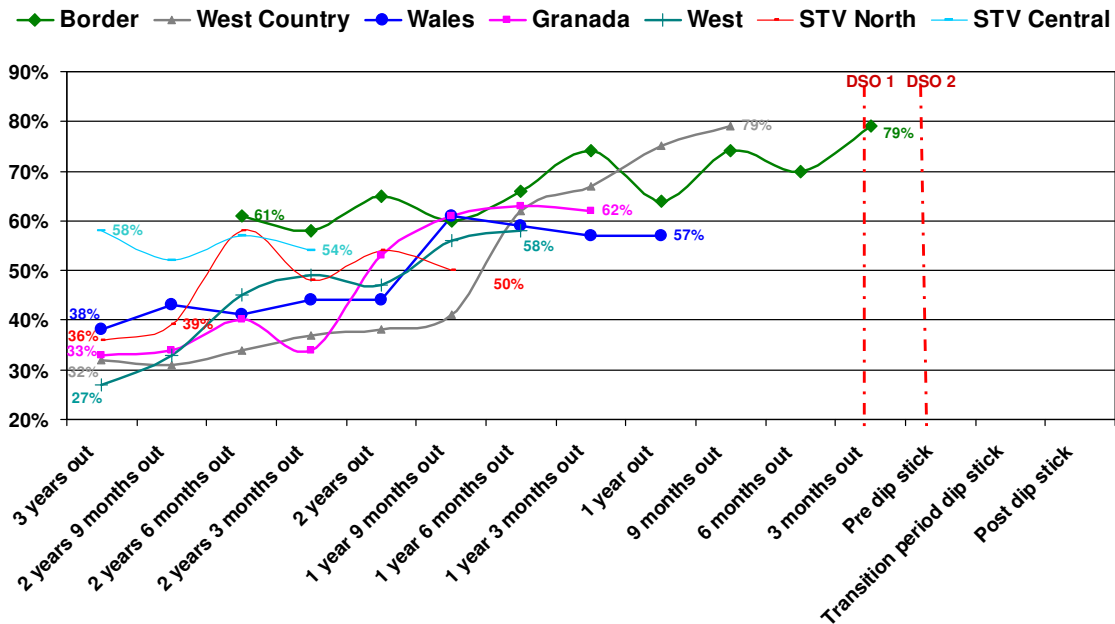
- Encouragingly, digital TV take-up continues to grow in regions closer to switchover, even in areas where coverage of the digital terrestrial signal is patchy and will only improve at switchover. Main TV set conversion in the Border TV region grew by two percentage points to 84% (90% in the Scottish Borders, 81% in Border B). Conversion in West Country was up by five percentage points to 87% (86% West Country A and 87% West Country B) and more than nine out of 10 homes in Wales (90%) had converted their main TV set to digital.

Regional progress in detailed understanding

- Detailed understanding of the impacts of switchover grows as regions get closer to switchover. The Detailed Understanding Index combines various individual indicators of understanding of switchover; in Q3 2008 almost half of the population in the UK scored 60 points or above on the Detailed Understanding Index. Key metrics that feed into the understanding index are:
 - Correct understanding of the year of switchover: 30% nationally
 - Understanding of two options to go digital: 30% nationally
 - Knowledge that recorders will be affected by switchover: 20%
 - Understanding that all TV sets will need upgrading to digital: 10%
 - Knowledge that aerials might need upgrading for switchover: 10%

- Trend analysis shows improving levels of regional detailed understanding as Digital UK rolls out the switchover information campaign to successive regions. Over the last year scores have improved on average by more than 10 percentage points. Detailed understanding grew 15 percentage points in Border (64% in Q4 2007 to 79% in Q3 2008), 17 percentage points in West Country (62% to 79%) and nine percentage points in Granada (53% to 62%).

FIGURE 2.3: REGIONAL GROWTH IN DETAILED UNDERSTANDING



Source: Digital UK & Ofcom Switchover Tracker
 Sample size: regional over 200 per region and quarter

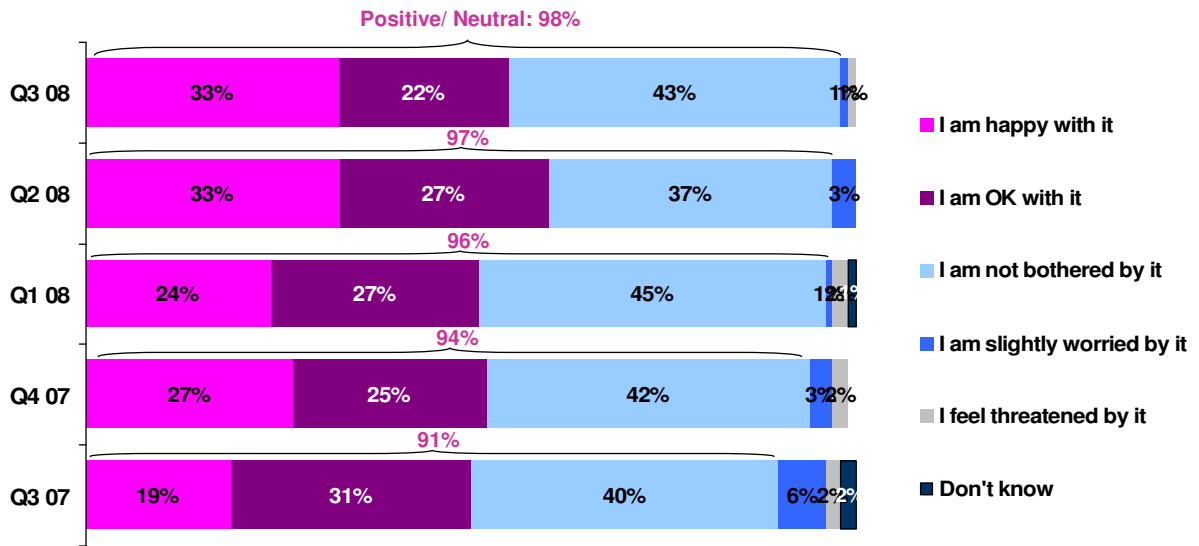
- At switchover project level, which combines transmitter groupings that are adjacent and switch in consecutive months, the improvements in detailed understanding are even more pronounced. More than nine in 10 people (94%) in the Scottish Borders (served by the Selkirk transmitter group, which switched in November 2008) scored 60 points or above on the Detailed Understanding Index (3 months before switchover). More than seven in 10 (71%) adults across the rest of the Border region (Border B served by the Caldbeck and Douglas transmitter groups, switching in June and July 2009) also have this level of understanding.

Scottish Borders one month before switchover

- At the end of quarter three, just over one month before the start of switchover in the Scottish Borders, the region was well prepared. More than nine out of 10 homes had already converted at least one TV set to digital. This is despite the fact that, prior to the start of switchover and the extension of Freeview coverage on 6 November 2008, only around half of local residents could receive a digital TV signal through their aerial.

- More than eight out of 10 adults in the Scottish Borders knew that switchover was due to take place in November this year (81%) and more than one-third of the population knew the exact date switchover started.
- The detailed impacts of switchover were well understood; 96% knew that every TV set needs to be converted to continue receiving a TV signal after switchover and 62% understood that analogue recorders will have limited functionality after the change (only able to playback tapes/DVDs and record the channel being watched).
- Positive and neutral attitudes towards switchover have increased steadily over the last year. Shortly before switchover almost nine in 10 (89%) Scottish Borders residents felt either positive or neutral about the change, an improvement of eight percentage points on Q3 2007. Levels of personal comfort with switchover were even more positive with 98% feeling either happy or not bothered about it, compared to just over 94% feeling this way a year ago.

FIGURE 2.4: SCOTTISH BORDERS GROWTH IN POSITIVE AND NEUTRAL ATTITUDES TOWARDS SWITCHOVER



Source: Digital UK & Ofcom Switchover Tracker
 Sample size: regional over 150 respondents per region and quarter

- Tracker monitoring stopped in the Scottish Borders at the end of September. Short readiness surveys were conducted on the weekend before stage one of switchover on 6 November, and again before stage two of switchover on 20 November. A third follow-up survey was held two weeks after switchover. The results if these surveys will be reported as part of the Scottish Borders review process.

Chapter 3

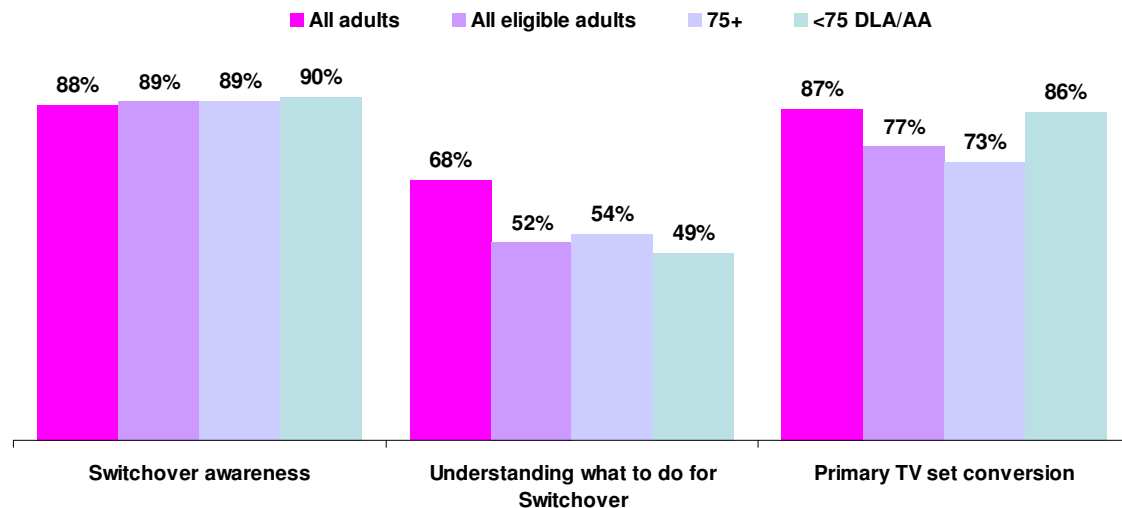
The Switchover Help Scheme

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

Key switchover metrics among Switchover Help Scheme eligible adults

- While awareness of digital switchover among eligible groups is in line with the average for all UK adults, those aged 75 and over and those under 75 and on disability benefits show far lower levels of understanding of what they need to do to continue watching television after switchover. In Q3 2008 those 75+ were 14 percentage points behind the all adult understanding average and those under 75 in receipt of eligible disability benefits 19 percentage points behind.
- Among those aged 75 and over there is a similar gap when it comes to main TV set conversion. In the third quarter of 2008 only 73% of 75+ households had a digital main TV set (14pp behind the all adult national average). In comparison, those under 75 in receipt of disability benefits were as likely as all adults to have a converted their main TV set.

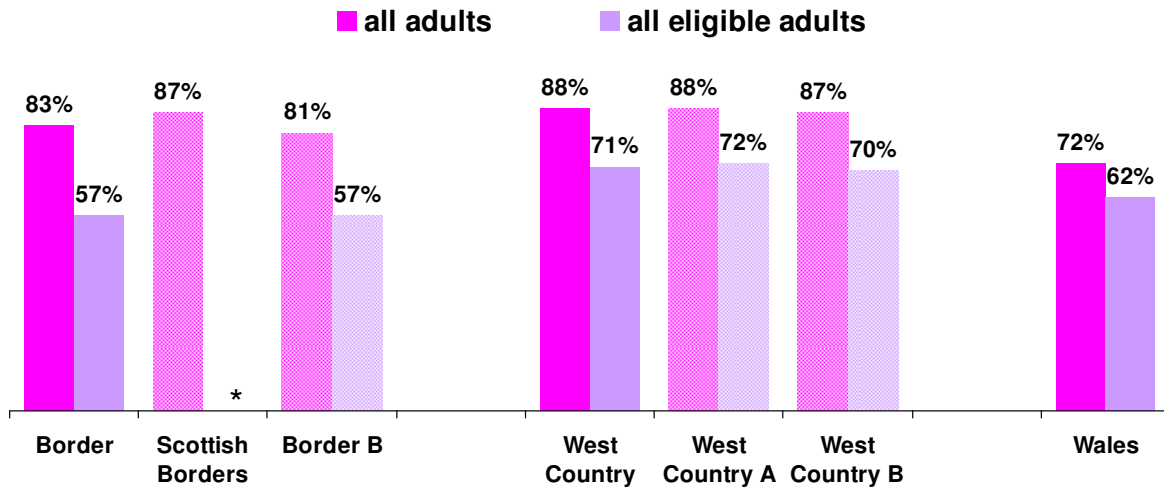
FIGURE 3.1: Q3 2008 KEY METRICS AMONG THOSE ELIGIBLE FOR THE SWITCHOVER HELP SCHEME



Source: Digital UK & Ofcom Switchover Tracker
 Sample size: all adults (3556), 75+ (364), <75 DLA/AA (176)

- The gap in understanding between all adults and those eligible for assistance from the Help Scheme can be seen throughout the switchover regions and remains consistent as switchover draws closer in a region. For example in Border, where switchover started 6 November 2008 (in the Scottish Borders), all adult understanding of what to do was 83% compared to just 57% among all eligible adults in the region, a difference of 26 percentage points.

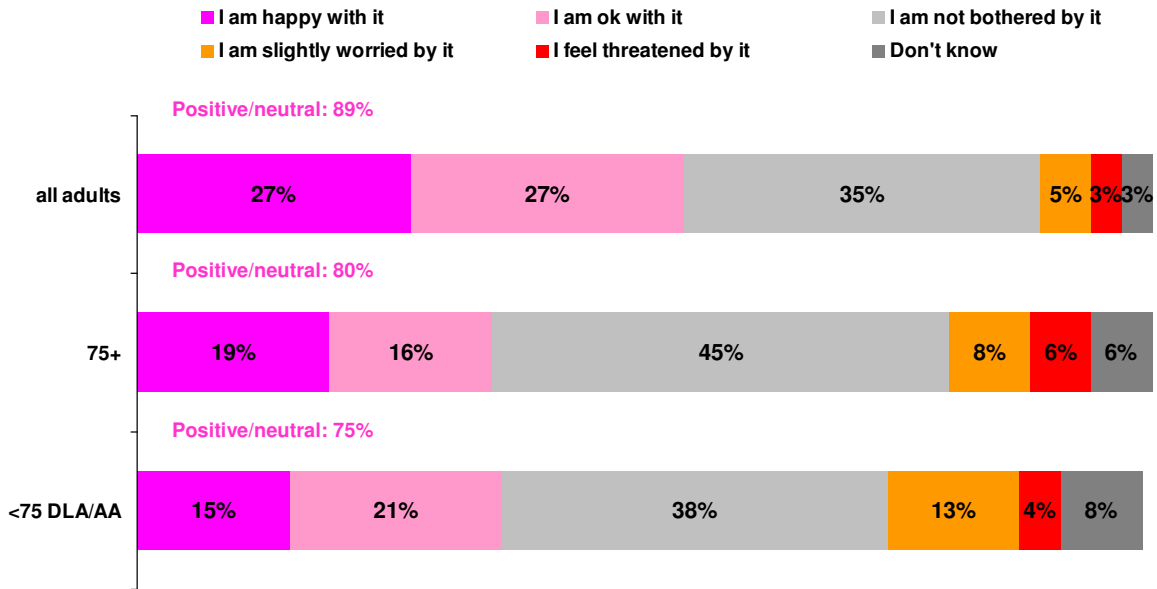
FIGURE 3.2: Q3 2008 UNDERSTANDING OF WHAT TO DO FOR SWITCHOVER AMONG HELP SCHEME ELIGIBLE RESPONDENTS IN THE EARLY REGIONS



Source: Digital UK & Ofcom Switchover Tracker
 Sample size all adults: Border (484), West Country (429), Wales (514),
 All eligible adults: Border (244), West Country (238), Wales (211)
 * data omitted due to small sample sizes

- The proportion of all adults who are comfortable with switchover has remained stable since the start of the year at 89%. In Q3 2008 those aged 75 and over reported lower levels of comfort with switchover (80% positive or neutral) and those under 75 and on disability benefits lower levels still (75% positive or neutral).
- In Q3 2008 those aged 75 and over were the most likely to feel neutral towards switchover and the least likely to be happy or ok with it (they were also more likely to have said that they felt threatened by switchover). The difference in attitudes among those under 75 on disability benefits compared to all adults was most pronounced when it came to the proportion who said they were slightly worried about switchover. The Help Scheme has been designed with these less confident consumers in mind.

FIGURE 3.3: Q3 2008 COMFORT WITH SWITCHOVER AMONG HELP SCHEME ELIGIBLE GROUPS

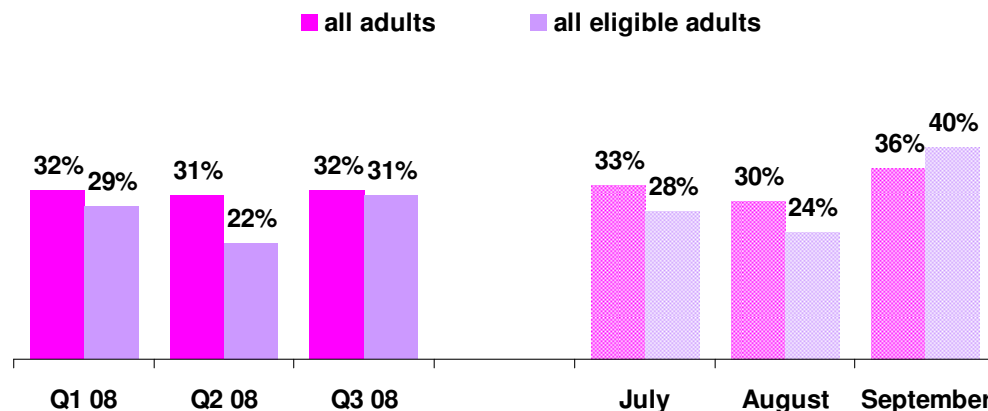


Source: Digital UK & Ofcom Switchover Tracker
 Sample size: all adults (3556), 75+ (364), <75 DLA/AA (176)

Awareness of the Switchover Help Scheme

- Among all adults awareness of the Help Scheme has been stable at either 31% or 32% since the beginning of 2008. Among those eligible the proportion aware of the Help Scheme has fluctuated between approximately one in five and one in three.
- A national TV campaign was launched at the end of September 2008 in order to boost awareness of the Help Scheme. Between July and September awareness of the Help Scheme increased three percentage points (to 36%) among all adults and 12 percentage points (to 40%) among those eligible for the Help Scheme.

FIGURE 3.4: NATIONAL AWARENESS OF THE SWITCHOVER HELP SCHEME OVER TIME AMONG ALL ADULTS AND THOSE ELIGIBLE FOR HELP



Source: Digital UK & Ofcom Switchover Tracker
 Sample size: all adults quarterly, 2819, 3444, 3556, monthly, 1181, 1183, 1192
 All eligible adults quarterly, 385, 489, 540, monthly, 158, 188, 194

- September was the first month this year where UK-wide awareness of the Help Scheme was higher among eligible adults than all adults, a reflection of the impact that the national TV campaign had among those it targeted. Recall of the TV ad was higher among those eligible for the Help Scheme than all adults (these groups generally report lower levels of recall for TV advertising).

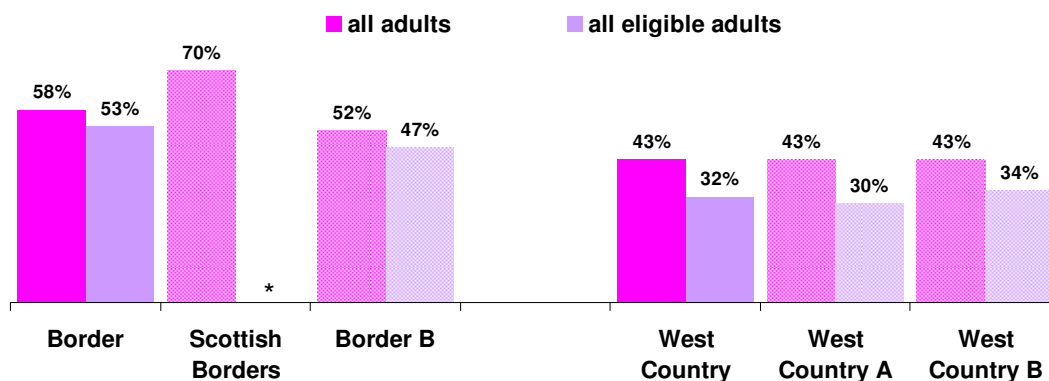
FIGURE 3.5: IMAGES FROM THE SWITCHOVER HELP SCHEME NATIONAL TV ADVERT



Switchover Help Scheme in the next regions to switch

- Switchover Help Scheme communications are timed to coincide with regional availability of the help. They launched in the Scottish Borders in April 2008, approximately six months prior to switchover in the region. Starting at the end of June the Help Scheme mailed all of those eligible for help further information in the form of an 'options pack', the first of three mailings for non-respondents. By the end of September eight in 10 (79%) eligible adults and seven in 10 (70%) adults in the Scottish Borders were aware of the Help Scheme.
- At the end of quarter three, West Country A (the area served by the Beacon Hill and Stockland Hill transmitter groups, due to switch between April and May 2009) was the only other region where targeted awareness raising Help Scheme activity had commenced (in September).
- Q3 2008 all adult awareness of the Help Scheme in West Country A was 43% among all adults and 30% among those eligible for help. Just under one third (31%) of eligible adults in West Country A were able to name the two main eligibility criteria of the Help Scheme (older people and people with disabilities). We would expect a positive shift in these metrics following further communication of the Help Scheme in the West Country A region.

FIGURE 3.6: Q3 2008 AWARENESS OF THE SWITCHOVER HELP SCHEME IN BORDER AND WEST COUNTRY



Source: Digital UK & Ofcom Switchover Tracker

Sample size: All adult regional figures 150+, all eligible adult regional figures 100+

*data omitted due to small sample sizes

Chapter 4

IN FOCUS: Wales and its switchover projects

Wales summary

- Switchover in Wales starts on 12 August 2009 with stage one switchover of the Kilvey Hill transmitter group serving the Swansea area, making Wales the third TV region to start switchover. All key switchover metrics are tracking above national averages.
- Reflecting their early switchover date the population in Wales have almost universal awareness of digital switchover (97% vs. 88% UK-wide) and more than seven out of 10 (72%) understand what they have to do to prepare for the change, four percentage points above the national average (68%).
- Take-up of digital TV is historically high in Wales with the majority of digital TV viewers using satellite services on their main TV set (50% vs. 35% UK-wide). In the two years since Tracker monitoring started just over 10% of homes in Wales have converted their main TV set to digital. Despite only nine months remaining until the start of switchover in the region, conversion of secondary TV sets is the same as the national average (56%).

Background to Wales and its transmitter groups

- Wales is located on a peninsula in central-west Great Britain. The nation is bordered by England to the east and by sea in the other three directions. More than three million people and 1.3 million households are served by one of the Welsh transmitter groups. The region is divided into three switchover projects: West Wales, North Wales and South Wales. Please see table and map below detailing transmitter groupings and dates.
- The main population and industrial areas are located in South Wales, which consists of the cities of Cardiff, Swansea and Newport. Two-thirds of the Welsh population live in South Wales, with a further concentration in Wrexham, eastern North Wales. The nation's capital Cardiff is Wales' largest city with a population of 317,500.
- Much of Wales' diverse landscape is mountainous, particularly in the north and central regions. In many cases these areas act as natural boundaries for terrestrial TV services between the transmitter groups.
- Parts of Wales have been heavily industrialised since the 18th century. From the early 1970s, the Welsh economy faced massive restructuring with large numbers of jobs in traditional heavy industry disappearing, being replaced eventually by those in light industry and services. In more rural areas tourism plays a vital role in the economy.

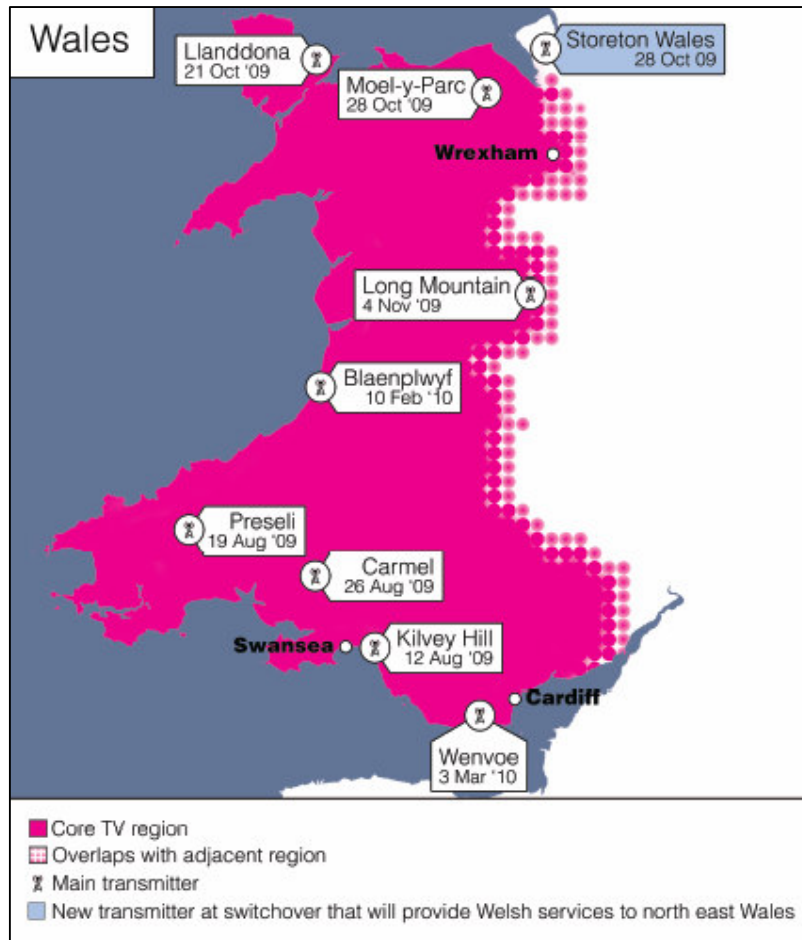
- Wales is one of the UK's devolved authorities, which means that although most of the executive powers are exercised by the Parliament of the United Kingdom at Westminster, increasing powers are devolved to the National Assembly for Wales in Cardiff. The National Assembly was first established in 1998 under the Government of Wales Act. There are 60 members of the Assembly, known as Assembly Members (AMs).

FIGURE 4.1: SWITCHOVER PROJECTS AND SWITCHOVER DATES FOR WALES

TV region	Transmitter Group	Area served	DSO 1	DSO 2
West Wales	Kilvey Hill	the Swansea area	12-Aug-09	9 Sep 09
	Preseli	south-west Wales	19-Aug-09	16-Sep-09
	Carmel	parts of south and central Wales	26-Aug-09	23-Sep-09
North Wales	Llanddona	north-west Wales	21-Oct-09	18-Nov-09
	Moel-y-Parc	north-east Wales	28-Oct-09	25-Nov-09
	Long Mountain	parts of east and central Wales	4 -Nov-09	3-Dec -09
South Wales and Blaenplwyf	Blaenplwyf	parts of west and central Wales	10-Feb-10	10-Mar-10
	Wenvoe	Cardiff, Newport and south-east Wales	03-Mar-10	31-Mar-10

- The largest parts of Wales (over 600,000 homes) are served by the Wenvoe transmitter group, the last transmitter group to switch in the region (in March 2010). The remaining main transmitter groups also serve a sizable number of homes. The first to switch is Kilvey Hill, serving the Swansea area and more than 130 thousand homes. Almost 200 relay transmitters are fed from one of the eight main Welsh transmitters.
- Pre-switchover digital terrestrial (DTT) coverage in Wales is some of the lowest in the UK; 63% of homes in Wales can currently receive a digital terrestrial TV signal, significantly lower than the national average of 73%. The DTT signal will extend to virtually all homes at switchover (98%) and 73% of Welsh households will be able to receive more than 40 Freeview channels after all broadcasting has migrated to digital (source: Ofcom Digital Switchover Factsheet, August 2008).

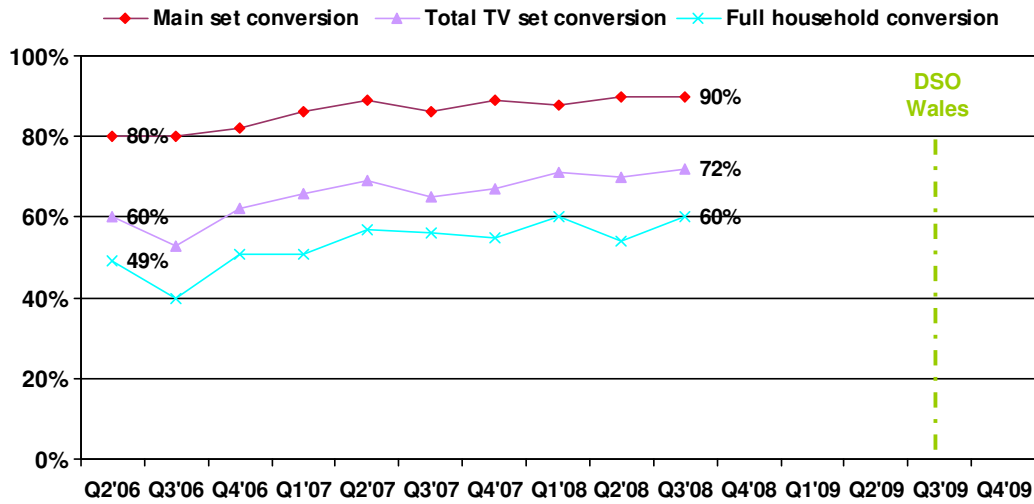
FIGURE 4.2: MAP OF WALES WITH ITS TRANSMITTER GROUPS



Digital TV take-up

- More than 10% of Welsh homes have converted their main TV set to digital since monitoring started in Q2 2006. By Q3 2008 more than nine out of 10 homes in Wales (90%) were using digital TV on their main TV set, compared to 87% UK-wide. Conversion levels are slightly higher in the early switching sub-regions; 92% conversion in West Wales and 89% in North Wales.
- Conversion levels for secondary TV sets and full household conversion are in line with UK-wide levels, but slightly lower than the levels in the other early switching regions. At the end of Q3 2008 56% of secondary TV sets in Wales had been converted to digital (the same as the national figure). Similarly 60% of homes had all of their TV sets converted to digital in Wales (vs. 61% nationally).

FIGURE 4.3: DIGITAL TV CONVERSION TRENDS IN WALES

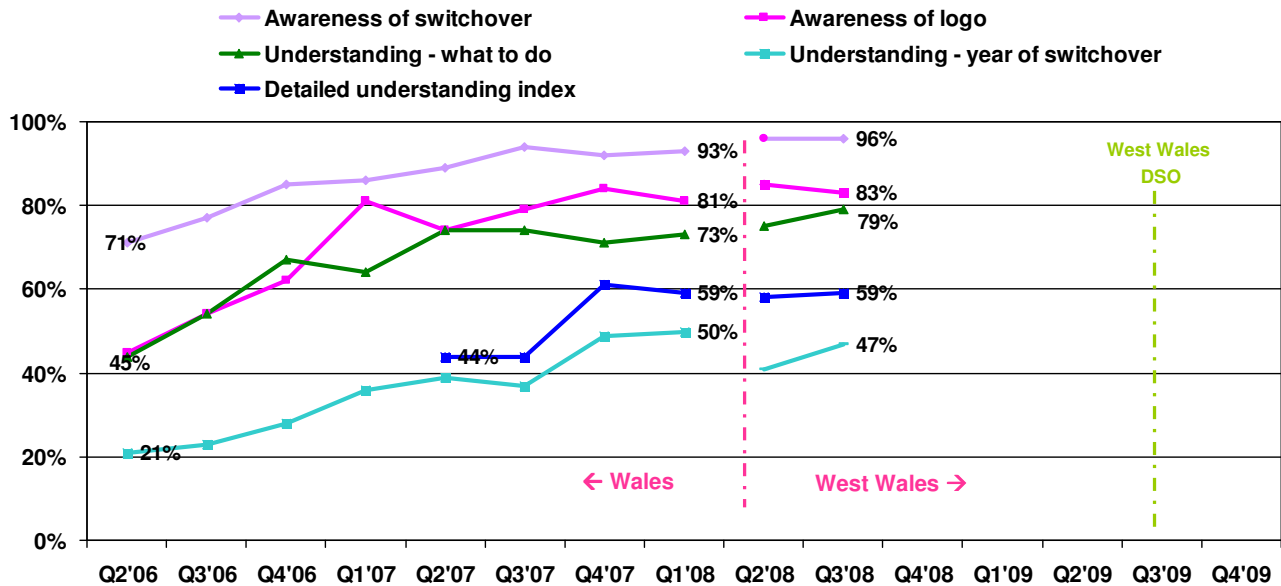


Source: Q3 2008 Digital UK & Ofcom Switchover Tracker
 Sample size: National (3556), Wales (514)

Awareness and Understanding of digital switchover

- There has been a steady increase in switchover awareness in Wales since monitoring started in Q2 2006. At the end of Q2 2008 almost everybody in the region was aware of the change.

FIGURE 4.4: AWARENESS AND UNDERSTANDING GROWTH IN WALES AND WEST WALES OVER TIME



Source: Q2 2006 to Q3 2008 Digital UK & Ofcom Switchover Tracker
 Sample size: National (3556), Wales (514), West Wales (209)

- A series of understanding questions on the Tracker probe respondents' highest level of understanding: what they have to do to prepare for switchover. In Q3 2008 almost three-quarters of the population (72%) in Wales knew what they had to do to continue watching television after switchover. This proportion is four percentage points above the UK wide average, but compared to other early switching regions, understanding of what to do is comparably low.

Digital UK activity

- The exact switchover dates have been announced for all Welsh transmitter groups. Digital UK's national manager for Wales, Gwenllïan Carr, has engaged with local and national Welsh media to inform the public of the switchover timetable for West Wales (the Kilvey Hill, Preseli and Carmel transmitter groups). The national team frequently updates local stakeholders, such as local authorities and community leaders as well as MPs and Welsh Assembly Members, on the progress of switchover preparations in Wales.
- During the summer the Digital UK roadshow travelled throughout Wales visiting over 50 locations and gave more than 14,500 local residents advice about how to prepare for the digital TV switchover.

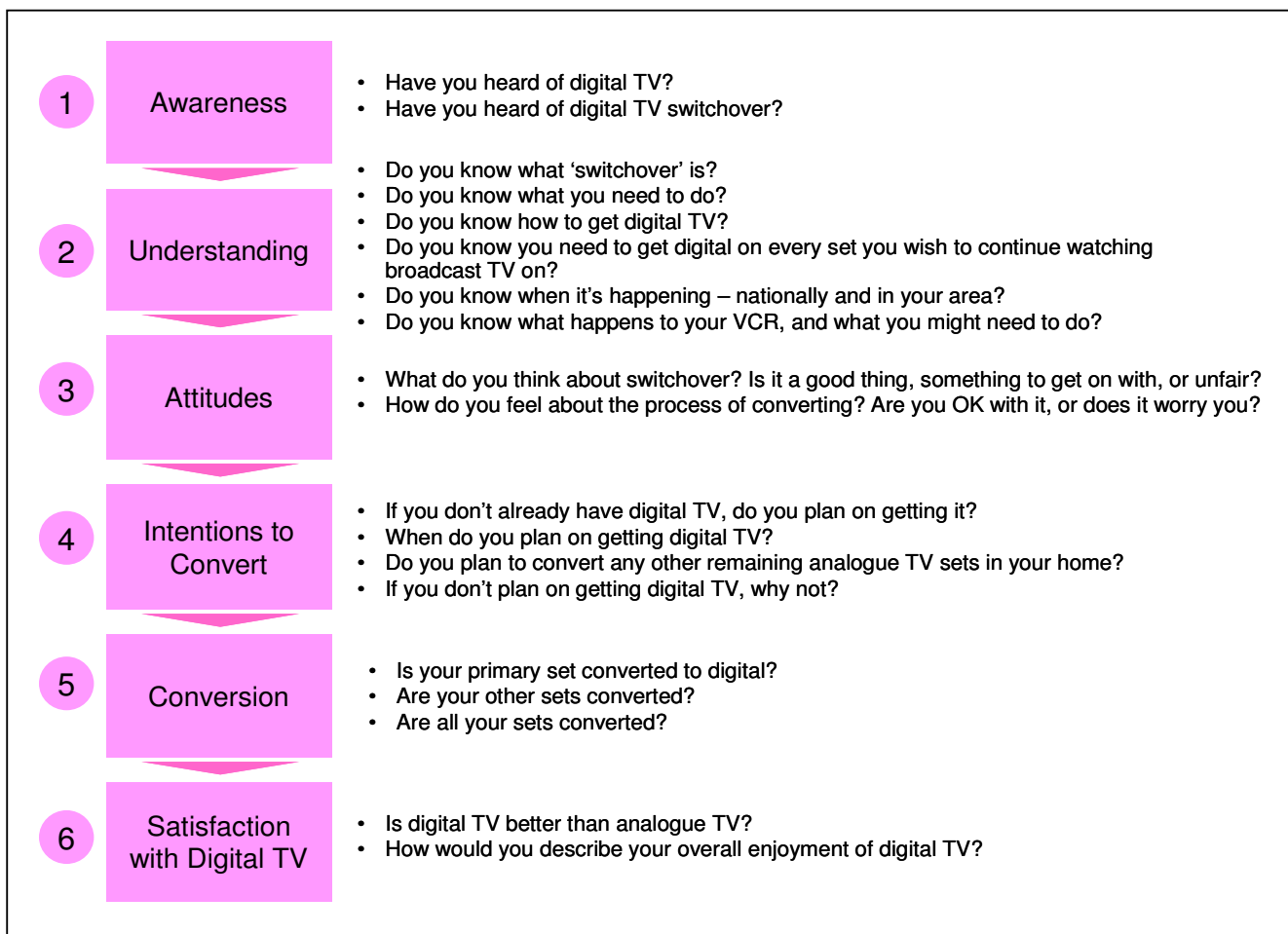
FIGURE 4.5: THE DIGITAL UK ROADSHOW IN WALES



APPENDIX ONE: About the Switchover Tracker

- On 3 April 2006 Ofcom and Digital UK launched a continuous tracking study, the 'Switchover Tracker', to monitor the UK's conversion to digital television for switchover. More than 6,400 households were surveyed face-to-face during 2006, around 10,000 households were surveyed during 2007, and 13,000 households will be surveyed during 2008. The quarterly results are used as the key tool by which progress towards switchover is assessed.
- The questionnaire is designed to track the following six dimensions:

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



- 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 population¹.

- The sample includes the full range of consumer groups, including those who may have some difficulty with switchover, including: older people, people with disabilities, those in rural areas, black and minority ethnic groups, people living on their own and those living in different types of property e.g. rented accommodation (private or social housing), and in multiple-dwelling units. See the Glossary at Appendix Two for a full explanation of these terms.
- The sample also includes those who will, at switchover, be eligible for the Digital Switchover Help Scheme: the over 75s and the severely disabled (those on Disability Living Allowance, Attendance Allowance, or those registered blind or partially sighted). From October 2007 onwards all respondents in Border identified as eligible for the Digital Switchover Help Scheme were asked to answer an additional section of questions relating to the scheme. Additional interviews were carried out among the over 75s and severely disabled respondents in Border, to boost the sample size.

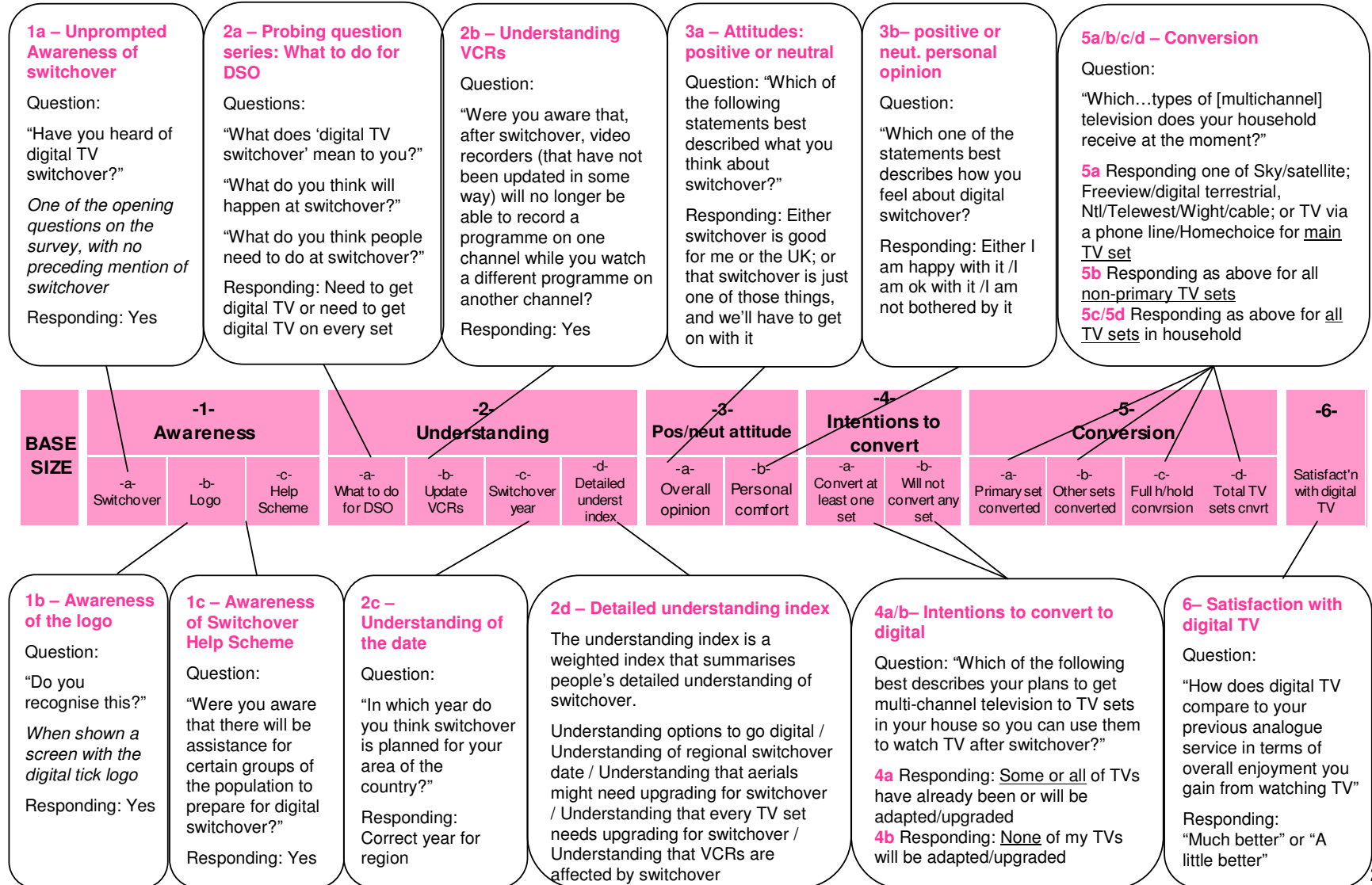
The Dashboards

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

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

¹ 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



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 Q3 2008 module tested communications questions. These considered the effectiveness of the adverts '3 Ways to Switch,' 'Pete,' and 'Doris' by investigating whether they improve understanding of what the public and help scheme eligible groups need to do at switchover.

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 Q3 2008 the Tracker interviewed 3556 households:

- 1181 in July
- 1183 in August; and
- 1192 in September.

During Q3 2008, an additional 229 respondents in Border, 224 respondents in West Country and 153 in Wales were identified as eligible for the Digital Switchover Help scheme (the over 75s and those on Disability Living Allowance, Attendance Allowance, or registered blind or partially sighted) and interviewed about the Help Scheme.

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

Regional Sample Sizes

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

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

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

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

Consumer Group Sample Sizes

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

Sampling Method

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

The sample of 16+ adults is divided with quotas on age, gender and working status, to reflect the demographic profile of each ITV region. In Q3 2007, a quota on flats was included in order to further ensure the representative nature of each sample point.

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

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

Post-survey weighting

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

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

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

APPENDIX TWO: Glossary of Terms

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