Ofcom and Digital UK
Switchover Tracker Survey

Switchover Progress Report
Q2 2007

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Contents

Executive Summary

- This report summarises Q2 2007 results of the Ofcom & Digital UK Switchover Tracker through the analysis of digital switchover consumer metrics as the UK moves closer to switchover.
- In Q2 2007 key switchover metrics improved across the board, reaching the highest level of switchover awareness so far - 87% nationally. People's understanding of what they need to do for digital switchover grew by 2 percentage points (pp) to 66% in Q2 and has grown by 25pp year on year.
- For the first time half of all homes (50%) said that they had converted all their TVs to digital. As Digital UK launched in September 2005 GfK reported that only c.18% of homes were fully converted. In the past 2 years a further one third (32%) of UK homes have prepared themselves for switchover.

Digital TV Conversion

- On 20th of June 2007 Ofcom issued its Q1 2007 Digital Television Progress Report on take-up of digital TV. At March 2007 more than 4 out of 5 homes had digital television. Multichannel conversion was 81.7% and digital TV penetration, excluding those households who subscribe to analogue cable services, stood at 80.5%. For the first time Ofcom reported that more than half of all TV sets in the UK (51%) had been converted to digital.
- The Ofcom & Digital UK Switchover tracker figures suggested 2pp additional growth of primary set conversion during the second quarter of this year (up from 78% in Q1 to 80% in Q2) – broadly in line with the Ofcom take-up results. Encouragingly Border and Granada now show take-up figures exceeding their Q2 targets (Border 83% take-up to its 76% target and Granada 88% conversion to its 81% target).
- Tracker data also suggests that digital TV is increasingly becoming the most common way of watching TV on any set, as secondary TV set conversion in UK homes increases to 45% (up 4pp from Q1 2007).
- For the first time half of all homes (50%) surveyed during the quarter had converted all their TV sets that they use for TV watching (up to 5 sets per home) to digital, with full household conversion highest in Wales (57%), London (57%), Granada (52%) and Border (51%). Overall 63% of all TV sets used for television watching surveyed during Q2 are currently able to receive a digital signal.

Q2 Switchover Tracker Key Metrics

- Awareness of switchover is almost universal in the early switchover regions with levels of switchover awareness around 90% or more in Border (97%), Westcountry (94%), Wales (89%) and Granada (93%). With the exception of the two STV regions (78%) and Ulster (72%) (Q1 and Q2 combined, and indicative only) all regions have awareness levels greater than 80%.
- General attitudes to switchover improved slightly in this quarter. However, overall almost 2 out of 5 (39%) think that they will ask somebody for help after they found out what they have to do in order to convert their televisions to digital. Those who are most likely to need help with the conversion process are women (56%) older people (63% of all 65+), disabled people (63%) and those living on their own (61%). Over 4 out of 5 who will ask for help with installing digital television equipment will turn to a friend or family member to help them with the installation process.
- Awareness of the digital logo has been growing steadily quarter on quarter during the last year and reached 66% in Q2, meaning that now two thirds of the population recognise the digital tick logo. Year on year growth in awareness of the digital tick logo was 21pp, exactly in line with the year on year growth of switchover awareness. With a target of 63% the performance of the logo also exceeded expectations for this quarter.

Electronic Waste and Energy Efficiency

- Although almost every television set can be converted to digital, some may take the opportunity of switchover to replace old TV equipment with new flat screens and digital recorders. 35% of homes with an analogue television indicated that they would get rid of an analogue TV around switchover, and 27% of those with an analogue recorder stated that they may get rid of it at switchover.
- When prompted to consider the importance of energy efficiency when buying digital TV equipment, 79% said it was important to understand what the energy consumption of a product is from labelling, and 67% said the energy efficiency of the equipment would be a factor in their purchasing decision.

Switchover in Copeland

- The first switchover date is now approaching for residents of Copeland, Cumbria. June 9th marked the start of the 100 days countdown to the first analogue channel being switched off in the area on October 17th 2007. We are encouraged that during this last quarter the general and more detailed understanding metrics have improved whilst general switchover awareness has held stable at 96%.
- General levels of understanding improved by 5pp and by the end of June 4 out of 5 residents (80%) in the area understood what they have to do to prepare for digital switchover. After the announcement of the switchover

date on March 15th this year understanding of the fact that switchover will happen at the end of this year (in Q4) has almost doubled (39% before to 75% after). Almost all of those people are also able to say that switchover is happening in October (73% of the total population). More than half of the population in Copeland (56% vs. 39% in Q4 2006 and Q1 2007) now understand that recording devices will have reduced functionality after switchover.

- 76% of main sets in Copeland have been converted to digital, up 6pp from Q1, whilst secondary set conversion (31%) still remains 14pp below the national level. Indicative numbers suggest that a further 13% of people with analogue main sets have purchased a Freeview box for their main set to prepare for digital switchover.

- People are still unsure about when they will convert their remaining analogue sets. Whist the majority intend to convert their sets before or at switchover, an increasing number of people intend to wait until switchover has happened (7% of people will wait until Q1 or Q2 2008) or are waiting for the Digital Switchover Help Scheme to become available (9% of people).

- Despite growing levels of awareness of the Digital Switchover Help Scheme (33% in Q4 2006 to 60% in Q2 2007), the understanding of what type of help is going to be provided in the package and whether people have to pay for the service is unclear to some. People are still most likely (33%) to think that financial support will be offered.

- For the third quarter in a row levels of concern about digital switchover have been decreasing in the Copeland area. In Q2 over two thirds (71%) of the population had no concerns about switching to digital (compared to 66% in Q1 2007 and 50% in Q4 2006). For those who have concerns, the cost of switchover is the most common worry (9%).
- In Copeland captions about digital switchover started appearing on analogue TV sets from May 2007 onwards and 58% of all respondents with any analogue set in the area say they have seen the captions. More than 9 out of 10 regarded the captions as useful or necessary.

Switchover for Black and Minority Ethnic (BME) Groups

- Having previously observed low levels of switchover awareness amongst Black and Minority Ethnic (BME) groups on the Tracker (62% in Q2 2007, 25pp below the national average), Digital UK commissioned an ethnic omnibus survey (Ethnibus) in June 2007 to investigate in more detail current levels of awareness, understanding and attitudes towards digital switchover amongst BME groups. Headline findings, from the comparison of the June switchover tracker results with the ethnibus results, have been included in this Switchover Progress Report.
- Despite low levels of switchover awareness, take-up of digital television services in BME households are in line with the nation as a whole, 83%

had a digital main set in June. Take-up of subscription based digital television services like satellite and cable is much higher in BME homes whilst take-up of free to view platforms remains much lower than amongst white parts of the population in the UK.

- Perhaps because of the low take-up of Freeview on main television sets, secondary TV set conversion take-up remains much lower amongst BME groups than for the nation as a whole.
- Levels of understanding remain at fairly low levels amongst BME groups, although there is a very strong feeling amongst the groups that they have already done everything necessary for switchover by upgrading all of their TV sets to digital (27%).
- These findings suggest the need for targeted switchover communications to BME groups, which Digital UK is planning for later this year. Although the majority of BME groups prefer to receive public information through mainstream advertising channels (52%) other non-traditional media channels (e.g. community outlets and ethnic television and press) can reach many older BME consumers as well as BME groups with higher proportions of non-English speakers, including the Pakistani or Bangladeshi communities.

Switchover in the North West TV region

- This Report includes an 'In Focus' chapter examining switchover in the North West (Granada TV region). The North West has almost universal DTT coverage, and exhibits high level of digital TV penetration when compared to the rest of the UK (88% compared to 80%). It also shows higher levels of awareness of switchover (93% versus 87%), although is not yet on a par with Border (97%) or Westcountry (94%), which like the North West will switch in 2009. Adults in the North West also show lower levels of understanding (72%) than other lead regions, although this figure is above the national average of 66%.

- Despite relatively high awareness of switchover, few in the region know when it is happening. Only a quarter (26%) are able to correctly state the 2009 date of digital switchover in the region.

Chapter 1

The Dashboards – Q2 2007

Quarterly results are presented on dashboards of progress:

(1) The Dashboard: By Regions
Key metrics for each switchover region, and the UK as a whole

(2) The Dashboard: By Consumer Groups
Key metrics provided for a range of demographic and consumer groups (see Appendix Two for a full Glossary of consumer group terms)

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

Note that conversion figures on the dashboard are based on tracker data, and are therefore indicative only. The figures provided in Ofcom's Quarterly Digital TV Progress Reports remain the authoritative guide to digital TV take-up. The Q1 2007 report shows that 80.5% of households have digital TV and 81.7% have multi-channel TV (including analogue cable).

How to read the dashboards

FIGURE 1 – NAVIGATING THE TRACKER DASHBOARDS

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

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

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

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

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

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	-a- What to do for DSO	-b- Update VCRs	-c- Regional date	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-c- Analogue h/holds to cnvrt 12m	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
NATIONAL	2448	87%	66%	66%	35%	16%	72%	84%	91%	2%	13%	80%	45%	50%	63%	74%
1 - Border	322	97%	86%	79%	47%	63%	79%	87%	97%	0%		83%	42%	51%	62%	81%
2 - Westcountry	314	94%	71%	84%	37%	22%	73%	81%	96%	1%	12%	77%	49%	46%	63%	79%
3 - Wales	310	89%	74%	74%	38%	39%	71%	80%	95%	1%		89%	51%	57%	69%	78%
4 - Granada	299	93%	70%	72%	36%	26%	75%	86%	92%	1%		88%	50%	52%	67%	64%
5 - West	303	89%	70%	70%	35%	18%	73%	84%	92%	2%		81%	47%	49%	64%	74%
6 - STV/Gramp	318	78%	70%	57%	34%	19%	69%	84%	89%	1%	20%	80%	39%	46%	59%	77%
7 - Central	108	87%	60%	62%	36%	5%	62%	84%	89%	1%		64%	30%	42%	48%	72%
8 - Yorkshire	98*	90%	74%	61%	36%	10%	68%	86%	88%	2%		82%	37%	44%	60%	66%
9 - Anglia	88*	83%	66%	65%	39%	10%	74%	89%	91%	4%		80%	46%	55%	64%	70%
10 - Meridian	87*	85%	63%	66%	34%	24%	75%	81%	93%	3%		74%	51%	44%	62%	69%
11 - London	112	85%	64%	67%	28%	14%	76%	82%	93%	4%		86%	53%	57%	69%	82%
12 - Tyne Tees	58*	83%	79%	58%		17%	73%	82%	90%	9%		90%	61%	62%	76%	76%
13 - Ulster	56*	72%	28%	56%		8%	77%	97%	67%	4%		63%		46%	54%	

(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	-a- What to do for DSO	-b- Update VCRs	-c- Regional date	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-c- Analogue h/holds to cnvrt 12m	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
NATIONAL	**2448**	87%	66%	66%	35%	16%	72%	84%	91%	2%	13%	80%	45%	50%	63%	74%
Male	**1169**	87%	70%	72%	44%	19%	76%	88%	92%	2%	13%	82%	53%	56%	67%	77%
Female	**1279**	86%	63%	60%	27%	14%	69%	80%	90%	3%	13%	78%	39%	45%	58%	72%
16-24	**250**	66%	67%	49%	21%	12%	79%	91%	84%	4%		76%	50%	50%	63%	91%
65-74	**329**	91%	62%	69%	45%	22%	61%	80%	88%	5%	12%	74%	39%	44%	59%	69%
65+	**597**	86%	58%	61%	41%	20%	63%	78%	84%	5%	8%	68%	33%	41%	53%	67%
ABC1	**1074**	88%	65%	71%	38%	16%	76%	86%	92%	2%	8%	80%	47%	52%	64%	74%
C2DE	**1374**	85%	68%	61%	31%	17%	69%	83%	90%	2%	18%	80%	43%	49%	62%	74%
Rural	**412**	88%	66%	70%	39%	14%	81%	92%	92%	3%	18%	83%	47%	49%	65%	80%
Urban	**2036**	86%	66%	65%	34%	17%	71%	83%	91%	2%	12%	80%	45%	50%	62%	73%
Low income	**509**	83%	62%	56%	35%	14%	67%	80%	88%	3%	9%	72%	36%	48%	57%	71%
BME	**87***	62%	63%	34%	11%	3%	75%	82%	92%	5%		83%		67%	76%	83%
Non-English	**107**	55%	50%	33%	15%	5%	67%	79%	83%	1%		68%	33%	59%	57%	75%
Disabled	**437**	90%	60%	64%	39%	15%	60%	75%	87%	4%	18%	76%	46%	50%	63%	71%
Need assistance	**146**	81%	45%	45%	29%	11%	62%	74%	69%	7%	9%	39%	2%	0%	22%	86%
Hard to reach	**1099**	84%	65%	61%	37%	15%	70%	83%	91%	3%	12%	79%	44%	52%	63%	74%
Living alone	**480**	88%	56%	59%	37%	14%	67%	78%	85%	4%	11%	68%	33%	49%	55%	75%
Families w/ chidren	**725**	90%	74%	67%	29%	14%	70%	83%	94%	1%	8%	86%	44%	47%	62%	72%
Rent private	**237**	76%	72%	62%	27%	9%	72%	86%	86%	3%	10%	71%	26%	41%	53%	73%
Rent council	**485**	84%	68%	53%	31%	13%	71%	83%	89%	4%	19%	79%	41%	49%	61%	77%
House	**2177**	88%	66%	68%	35%	17%	73%	85%	91%	2%	12%	80%	45%	50%	62%	74%
Flat	**253**	72%	73%	45%	34%	12%	65%	78%	92%	3%	20%	74%	42%	54%	65%	77%
THS - 75+	**268**	81%	52%	49%	34%	17%	65%	75%	80%	6%	4%	60%	27%	36%	46%	65%
THS - DLA/AA <75	**121**	89%	69%	62%	47%	12%	60%	73%	95%	0%		86%	57%	60%	72%	72%

(3) The Dashboard: By Switchover Segment

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

** Extremely small base size – data omitted

	BASE SIZE	-1- Awareness		-2- Understanding			-3- Pos/neut attitude		-4- Intentions to convert			-5- Conversion				-6-
		-a- Switchover	-b- Logo	-a- What to do for DSO	-b- Update VCRs	-c- Regional Date	-a- Overall opinion	-b- Personal comfort	-a- Convert at least one set	-b- Will not convert any set	-c- Analogue h/holds to cnvrt 12m	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total TV sets cnvrt	Satisfact'n with digital TV
NATIONAL*	2448	87%	66%	66%	35%	16%	72%	84%	91%	2%	13%	80%	45%	50%	63%	74%
Cultured Conservatives	362	89%	61%	71%	38%	25%	69%	77%	90%	2%	9%	74%	40%	42%	57%	60%
Out-and-About Families	347	89%	73%	74%	30%	23%	76%	88%	94%	1%		87%	49%	51%	65%	72%
Traditionalists	501	86%	64%	57%	33%	23%	59%	71%	88%	2%	14%	72%	32%	39%	53%	63%
TV-Centrics	776	91%	79%	74%	39%	30%	77%	88%	95%	1%		94%	53%	54%	70%	82%
Rolling Stones	188	84%	75%	72%	46%	32%	79%	90%	98%	1%		74%	36%	52%	59%	83%
High-Tech Consumers	274	88%	76%	76%	43%	28%	83%	91%	97%	0%		95%	61%	58%	75%	82%

*The Ofcom/DUK tracker segmentation uses a separate weighting profile to compare different types of consumers and their attitudes towards digital switchover. For reasons of consistency in the report the overall national figures remain the same as on the previous dashboards.

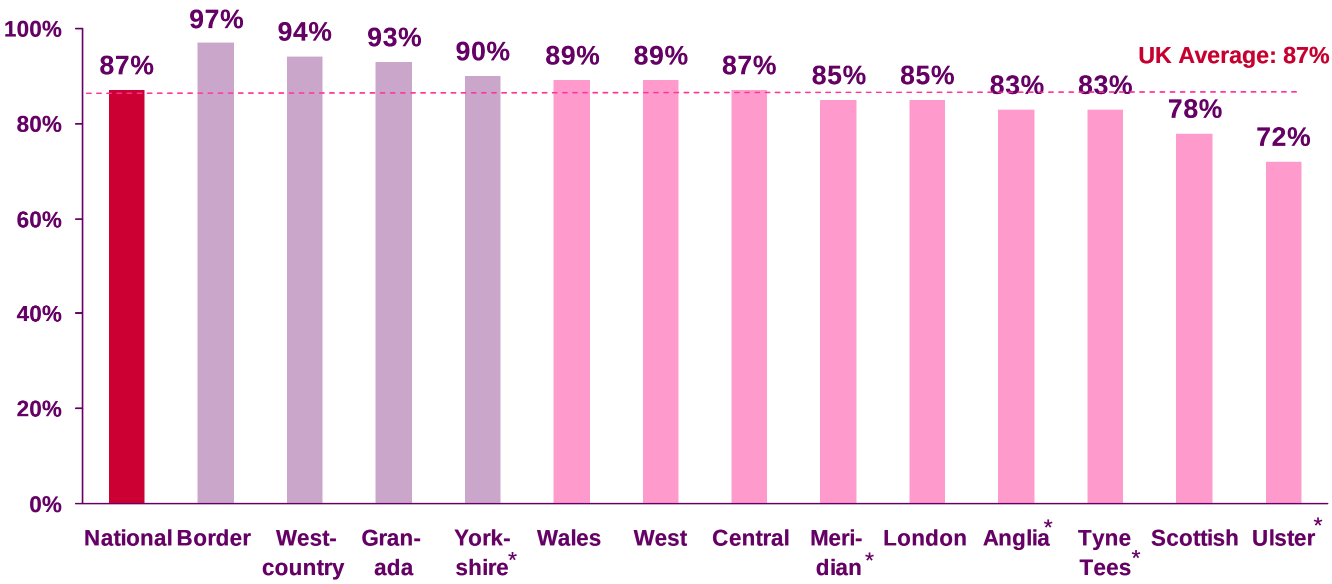
Chapter 2

The Q2 2007 Tracker Results

Switchover Awareness

- In Q2 2007 key switchover metrics improved across the board, and awareness of switchover rose to its highest level yet: 87% nationally. Year on year switchover awareness grew by 21pp, from 66% awareness in Q2 2006. With this rise in awareness nationally and regionally Digital UK exceeded its own awareness target of 80% for this quarter by 7pp.
- Awareness of switchover is almost universal in the early switchover regions with levels of switchover awareness around 90% or more in Border (97%), Westcountry (94%), Wales (89%) and Granada (93%). With the exception of the two STV regions (78%) and Ulster (72%) (Q1 and Q2 combined) all regions have awareness levels greater than 80%.

Figure 2.1: Digital Switchover awareness by TV region



* view as indicative only as regional sample size smaller than 100, Ulster Q1/Q2 2007 combined

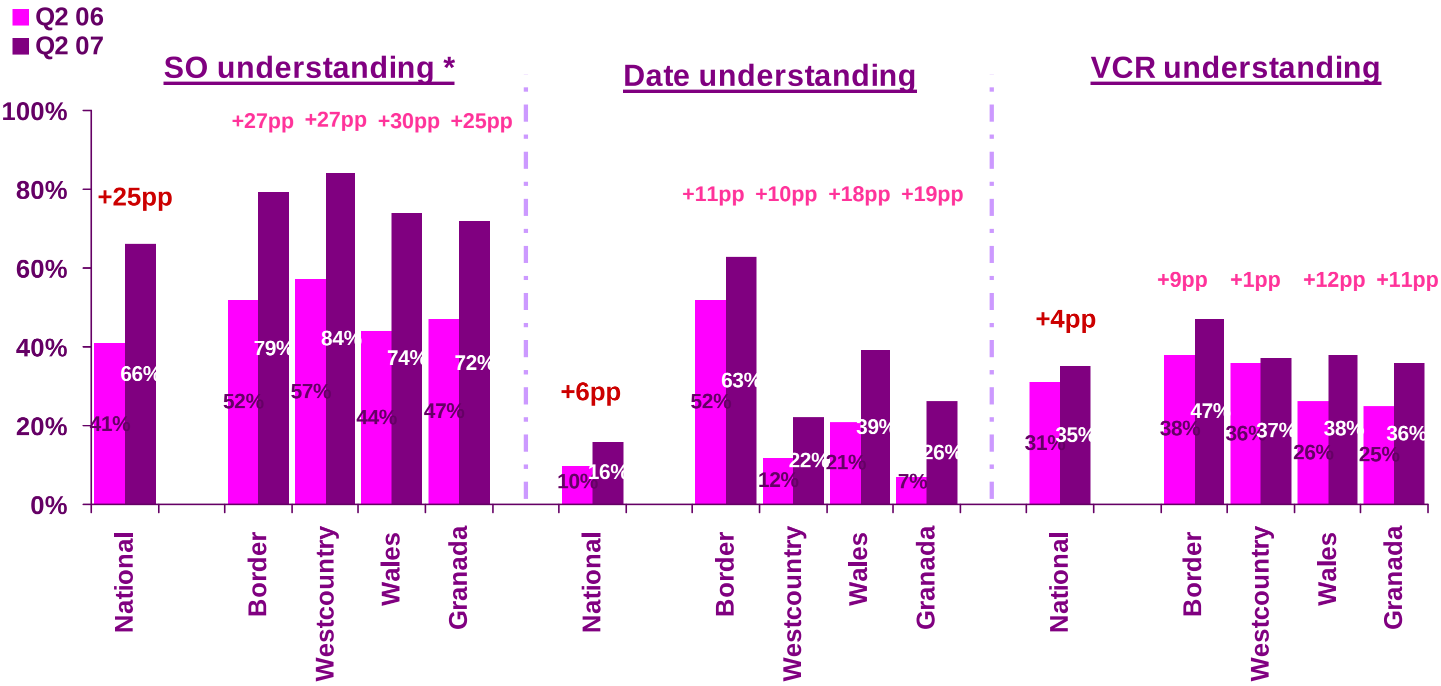
Source: Q2 Ofcom & Digital UK Switchover tracker, 2448 respondents

- Awareness levels remain lower amongst the youngest age group at 66% (16-24 year olds), but amongst all other age groups more than 4 out of 5 know that the change to digital television is happening.

Understanding of Switchover

- Understanding also improved nationally and in all lead regions. General understanding of what to do for digital switchover grew by 2pp to 66% and the last year saw a growth of 25pp. In the lead regions around three quarters of the population know that they have to take action by getting digital TV for switchover. However, in Q2 levels of understanding did not improve amongst all consumer groups, and less than half of respondents living in flats (45%), those over 75 (49%), and those who say they need assistance with the switch to digital (45%) understand what they have to do for digital switchover.

Figure 2.2: Year on year growth in switchover understanding nationally and regionally



Please note: Figures for Q2 06 understanding what to do are based on June results only
June base sizes: National 646, Border 116, Westcountry 105, Wales 104, Granada 98

Source: Q2'06 and Q2'07 Ofcom & Digital UK Switchover tracker, n= Q2'06: 2522; Q2'07: 2448

- Understanding that VCRs need to be upgraded (in order to continue watching one channel while you record another) and understanding of the regional switchover date remain relatively low nationally and in the lead regions, although awareness of the VCR issue is significantly higher in Border 47% vs. 35% nationally. Over the last year awareness of the impact of digital switchover on VCRs has grown on average 10pp in Border, Wales and Granada compared to 4pp growth UK wide.
- Understanding of the switchover date continues to improve very slowly from 15% in Q1 2007 to 16% in Q2 2007. As with most of the key switchover metrics, the early switchover regions are performing better on most awareness and understanding measures and equally more people in Border, Wales, Westcountry and Granada are aware of their regional date. In Border almost two thirds (63%) of the population understand that switchover is happening in 2008 or 2009. However, looking at the responses by the relevant transmitter region, most Border residents

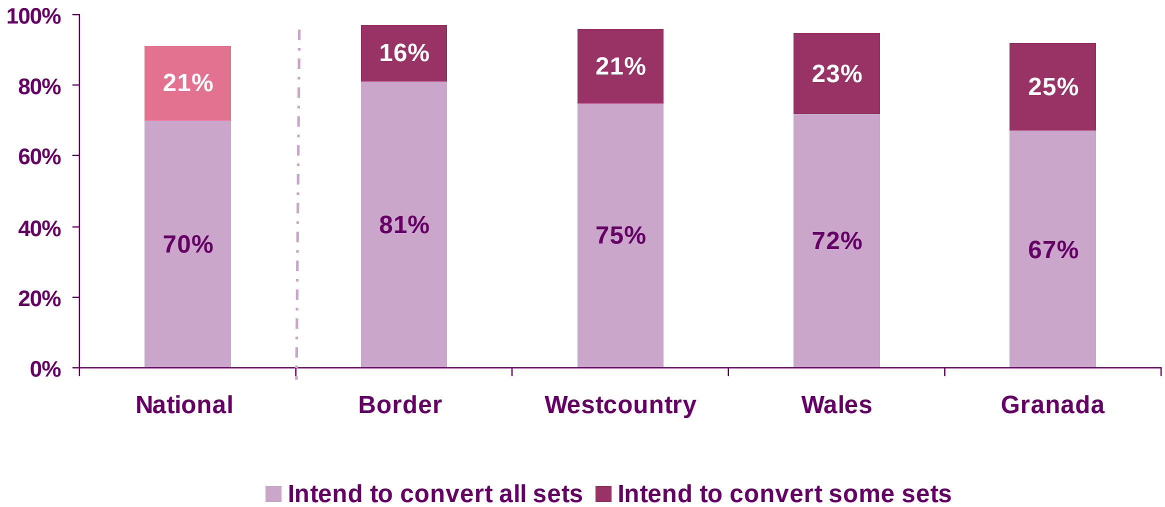
believe that the switch to digital is happening in 2008 even if they are living in the Caldbeck transmitter area which is switching to digital in 2009.

- During this last quarter more than half of the population who intend to convert existing analogue TV sets to Freeview (55%) were aware that they might have to upgrade their aerial in order to receive a TV signal after digital switchover compared to 48% awareness of this issue in the previous quarter.
- Unprompted understanding of the need to upgrade every TV set in the household remained static during Q2 (21%). However, when asked directly 77% of the population said they understood that they had to upgrade all their sets that they want to keep for watching television, a significant increase on 71% awareness in the previous quarter. Awareness of having to upgrade all TV sets is highest in Border 86% and in Westcountry 85%, whilst Wales (a TV region with fairly low secondary TV set conversion and high levels of satellite take-up on main sets) still shows awareness at the same level as the nation as a whole.

Intentions to convert to digital

- Nationwide more people are making decisions on what to do with their television sets at switchover. In Q2 more than 9 out of 10 (91%) wanted to convert at least one of their existing television sets to digital (up 3pp), while the proportion of those who say they will not convert any of their sets remains unchanged at 2%.
- With growing intentions to convert at least some of their TV sets, the proportion of those saying they will update or have already updated all of their sets is equally increasing. In Q2 70% of the population were planning to convert all of their sets or had updated them already with similar proportions in the lead switchover regions (Border – 81%; Westcountry – 75%; Wales – 72%; Granada – 67%).

Figure 2.3: Q2 Intentions to convert all/some TV sets to digital



Source: Q2 Ofcom & Digital UK Switchover tracker, n=2448 national (n=322-299 regional)

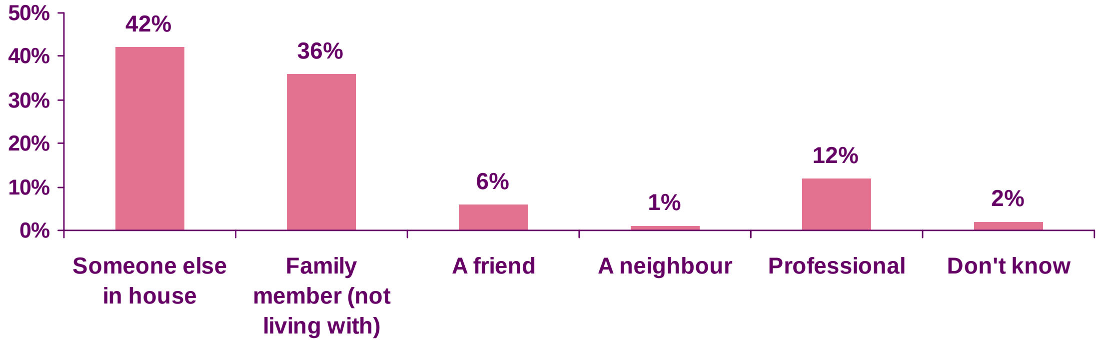
Digital TV take-up figures

- The Ofcom & Digital UK Switchover tracker figures suggested 2pp additional growth of primary set conversion during the second quarter of this year (up from 78% in Q1 to 80% in Q2). These take-up figures are broadly in line with Ofcom's recently published Q1 2007 conversion data reporting multichannel conversion at 81.7% of UK homes. Encouragingly Border and Granada now show take-up figures exceeding their targets (Border 83% take-up to its 76% target and Granada 88% conversion to its 81% target).
- Switchover tracker data also suggests that digital TV becomes more common throughout the home as secondary TV set conversion increases to 45% (up 4pp from Q1 2007). For the first time half of all homes (50%) surveyed during the quarter had converted all their TV sets that they use for TV watching (up to 5 sets per home) to digital, with full household conversion highest in Wales 57%, London 57%, Granada 52% and Border 51%. Overall 63% of the TV universe surveyed during Q2 is currently able to receive a digital signal.

Attitudes to digital switchover

- General attitudes to switchover improved slightly in this quarter. More that 7 out of 10 in the UK feel positive or neutral about digital switchover in general and 84% of the population feel positive or neutral about coping with the process. General attitudes held broadly stable amongst all consumer groups and personal comfort to cope with the switchover process improved across the different demographic groups.
- A significant proportion of the population anticipates needing help with converting their television and recording equipment to digital as they get closer to switchover. Although generally the majority of the population claim to set up electrical equipment in their home themselves (51%), overall almost 2 out of 5 (39%) think that they will ask somebody for help after they found out what they have to do in order to convert their televisions to digital. Those who are most likely to need help with the conversion process are women (56%) older people (e.g. 63% of all 65+), disabled people (63%) and those living on their own (61%).
- Almost two thirds of the respondents who are 65 or older (63%) think that they will need some help with the switchover process. This figure increases to 70% amongst the 75+ group who are entitled to the Digital Switchover Help Scheme.
- Almost 4 out of 5 of those who will ask for help with installing digital television equipment will turn to a family member to help them with the installation process. During Q2 42% of those respondents were planning to ask a family member living with them for help and 36% were planning to ask a family member outside of their home. 12% of those who need help prefer to ask for professional help e.g. somebody from a local electrical retailer or an official qualified installer. Further options are friends of the respondent (6%) or neighbours (1%). Only 2% of those who say that they will need help with the process do not know who they would contact.

Figure 2.4: Who would you ask for help with switchover?



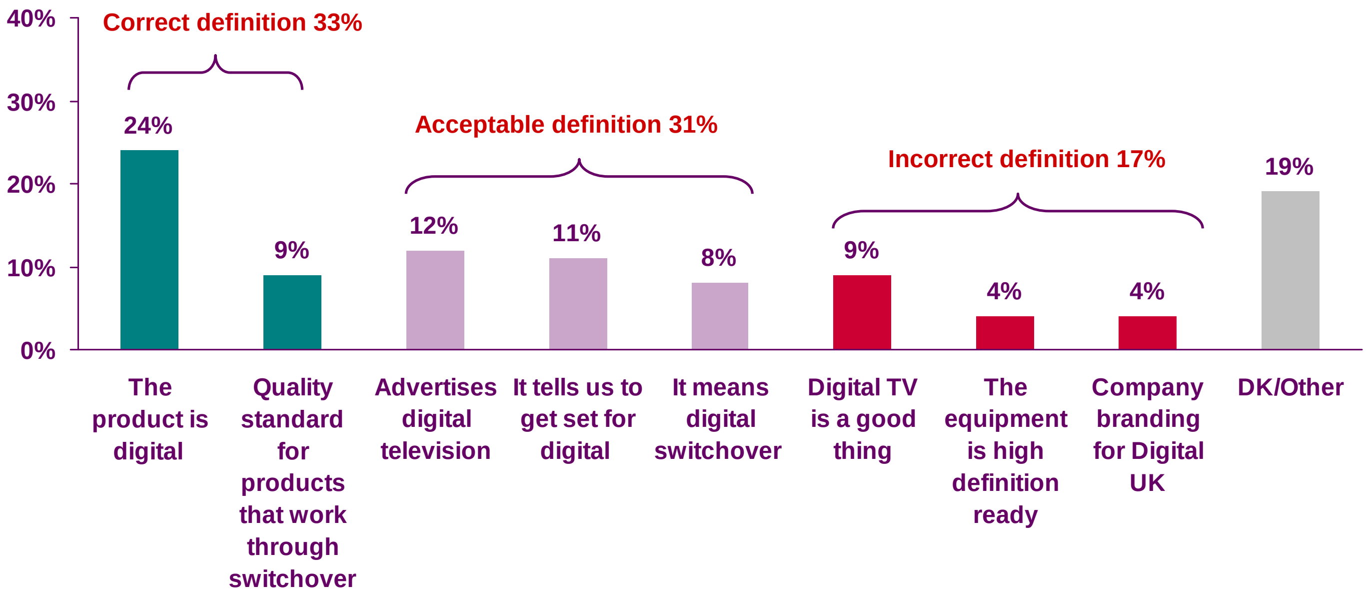
Source: Q2 Ofcom & Digital UK Switchover tracker, sample size: 491

- These findings are very much in line with a recently published qualitative research of “Digital Television Switchover and Disabled, Older, Isolated and Low Income Consumers” which Digital UK jointly commissioned with the Ofcom Advisory Committee for Older and Disabled People. That study found that low confidence with technology coincided with most of the other characteristics of participants like old age, disability (at all levels of severity) rural and social isolation. However, nearly all participants had a variety of informal and formal supporters to assist them with digital television switchover.

Digital tick logo

- Awareness of the digital tick logo has been growing steadily quarter on quarter during the last year and reached 66% in Q2, meaning that two thirds of the population now recognise the digital tick logo. Year on year growth in awareness of the digital tick logo was 21pp, exactly in line with the year on year growth of switchover awareness. With a target of 63% the performance of the logo also exceeded expectations from this quarter.

Figure 2.5: Understanding of the digital tick logo



Source: Q2 Ofcom & Digital UK Switchover tracker, sample size: 1739

- One third of those aware of the logo (33%) have a correct understanding of what it means as a trade mark for digital television equipment. A further third of them give an acceptable explanation of the logo pointing people towards digital television or switchover in general whilst 17% of those aware have the wrong understanding of what the digital tick logo means.

Chapter 3

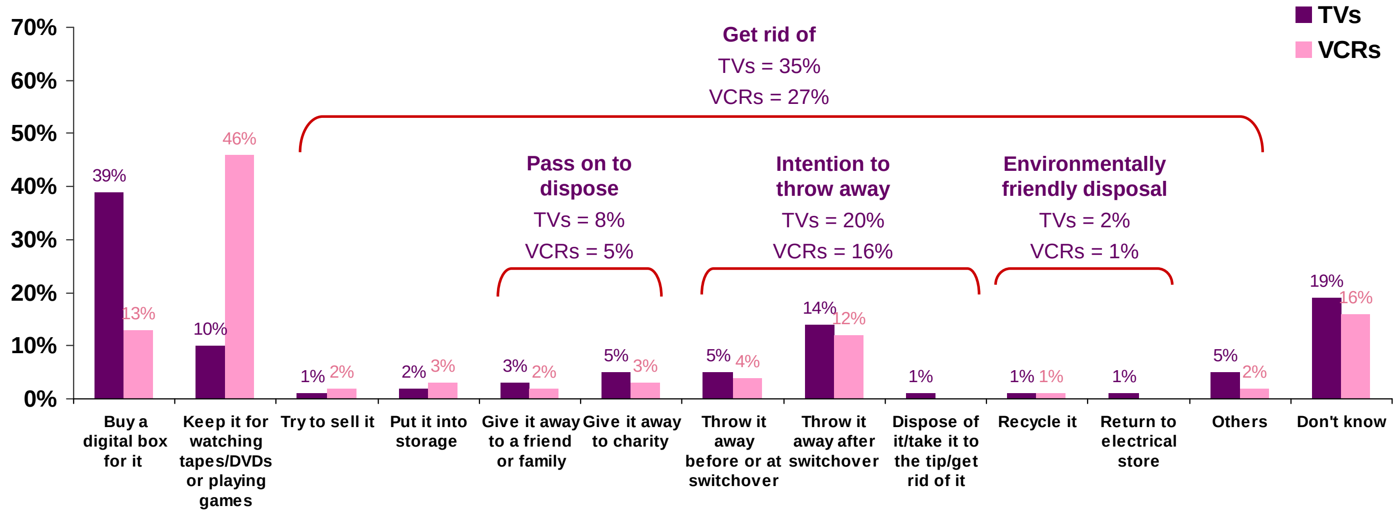
Waste and Energy Efficiency of Digital Television Equipment

- In Q2 2007 the Switchover tracker included a series of questions to (1) assess the likelihood that homes will throw television equipment away at switchover, and (2) gauge the importance of energy efficiency to consumers buying new digital television equipment.

Waste disposal

- Although almost every television set can be converted to digital, some may take the opportunity of switchover to replace old TV equipment with new flat screens and digital recorders.
- The tracker research shows that some householders may choose to throw away their old analogue TVs and recorders at switchover. 35% of homes with an analogue television indicated that they would get rid of an analogue TV around switchover. 50% of all homes still have an analogue television, suggesting that perhaps 4.5 million UK homes in total are considering disposing of analogue TVs at switchover.
- Similarly, 27% of homes with an analogue recorder stated that they may get rid of it at switchover. 66% of homes have an analogue recorder, indicating that 3.8 million homes are considering disposing of an analogue recorder.

Figure 3.1: Intentions to keep or dispose of analogue TVs and recorders at switchover



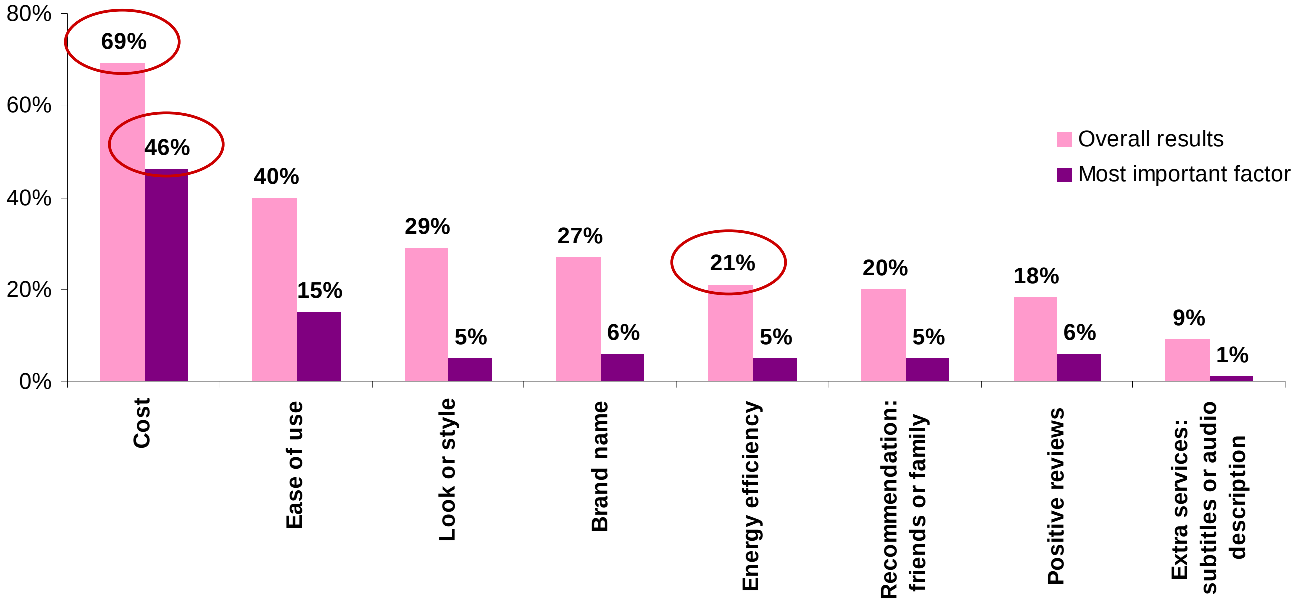
Source: Q2 Ofcom & Digital UK Switchover tracker
Sample: Analogue TV households = 1176, analogue recorder households = 1667

- The results also indicate that few are aware that electrical waste can be safely disposed of at retailers or Designated Collection Facilities, which are now required under the WEEE (Waste Electrical and Electronic Equipment) Directive to take receipt of old consumer electronics. Only 6% of those planning to get rid of an analogue television, and 4% of those planning to dispose of an analogue recorder, would recycle it or return it to a retailer. The majority of TVs (57%) and recorders (59%) would be thrown away.

Energy efficiency of digital television equipment

- There is growing awareness of the energy consumption of household electricals. The tracker asked individuals what the most important considerations were when buying new TV equipment. 2 in 10 people (21%) said that energy efficiency is one of the things they think about. The most important factor, of course, is price, followed by ease of use.

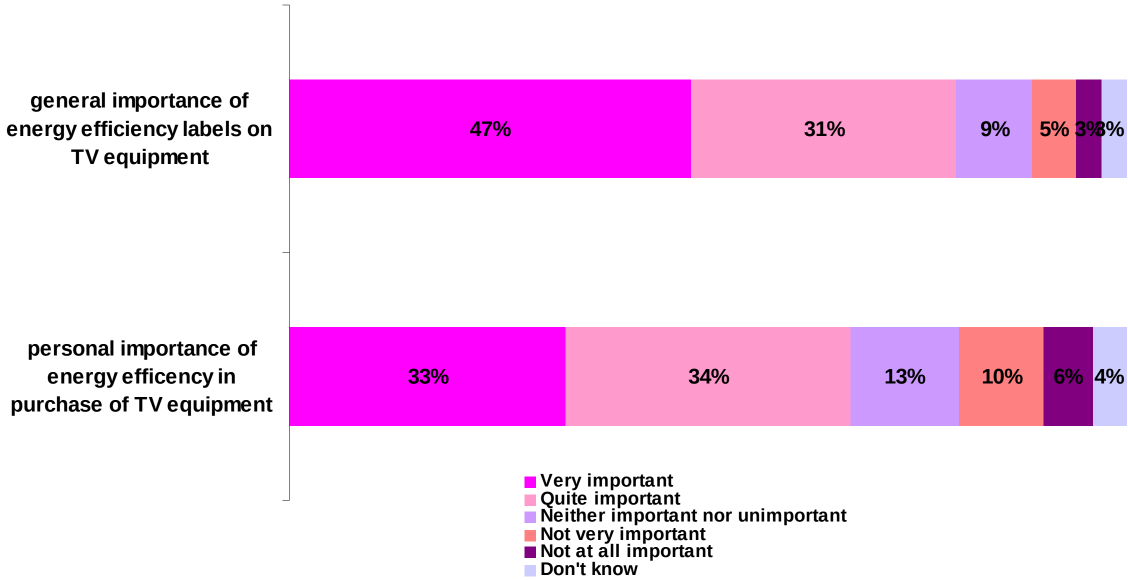
Figure 3.2: Factors when purchasing new digital TV equipment (unprompted)



Source: Q2 Ofcom & Digital UK Switchover tracker, Sample = 2448

- When prompted to consider the importance of energy efficiency, 79% said it was important to understand what the energy consumption of a product is from labelling, and 67% said the energy efficiency of the equipment would be a factor in their purchasing decision.

Figure 3.3: Importance of energy efficiency when purchasing new digital TV equipment



Source: Q2 Ofcom & Digital UK Switchover tracker, Sample = 2448

Chapter 4

Update Q2 2007: Copeland tracker results

Summary

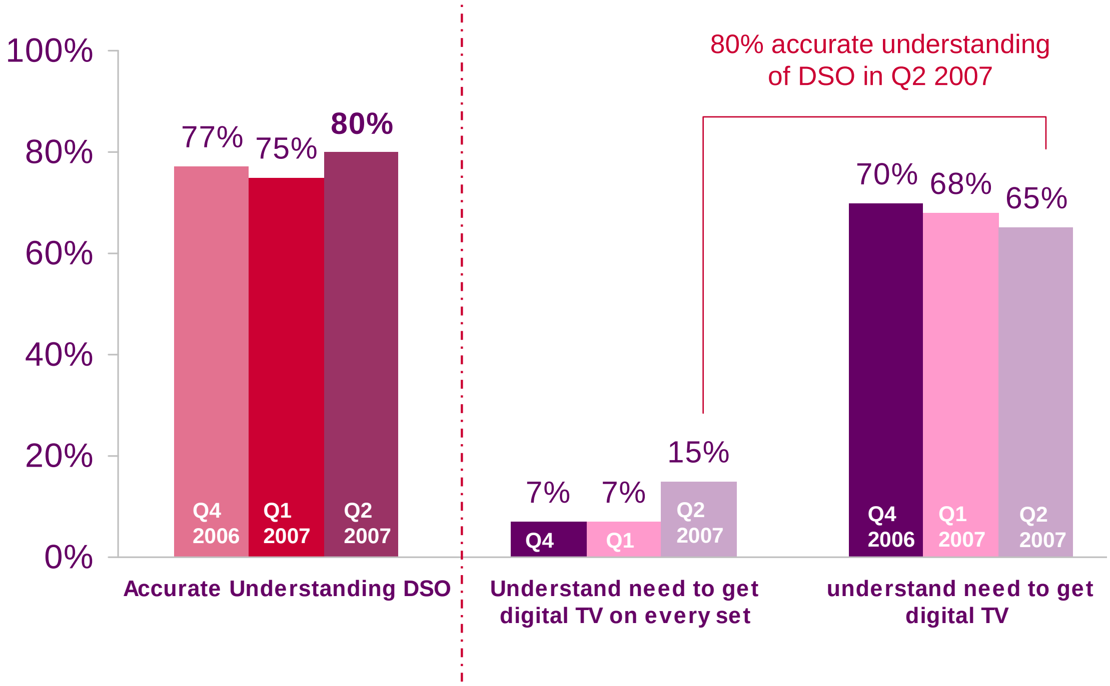
- The first switchover date is now approaching for residents of Copeland, Cumbria. June 9th marked the start of the 100 days countdown to the first analogue channel being switched off in the area on the October 17th 2007. We are encouraged that during this last quarter the general and more detailed understanding metrics have improved whilst general switchover awareness has held stable at 96%.
- General levels of understanding improved by 5pp and by the end of June 4 out of 5 residents (80%) in the area understood what they have to do to prepare for digital switchover. After the announcement of the switchover date on the 15th of March this year understanding of the date has almost doubled, and three quarters of the population in Whitehaven and the surrounding area (73%) know that digital switchover is happening in October of this year. More than half of the population in Copeland (56% vs. 39% in Q4 2006 and Q1 2007) now understand that recording devices will have reduced functionality after switchover.
- 76% of main sets in Copeland have been converted to digital, up 6pp on Q1, whilst secondary set conversion (31%) still remains 14pp below the national level. Indicative numbers suggest that a further 13% of people with analogue main sets have purchased a Freeview box for their main set to prepare for digital switchover.
- People are still unsure about when they will convert their remaining analogue sets. Whist the majority intend to convert their sets before or at switchover, an increasing number of people will wait until switchover has happened (7% of people will wait until Q1 or Q2 2008) or are waiting for the Digital Switchover Help Scheme to become available (9% of people).
- Despite growing levels of awareness (33% in Q4 2006 to 60% in Q2 2007) of the Digital Switchover Help Scheme, the understanding of what type of help is going to be provided in the package and whether people have to pay for the service is unclear to some people in Whitehaven. People are still most likely (33%) to think that financial support will be offered.
- For the third quarter in a row levels of concern about digital switchover have been decreasing in the Copeland area. In Q2 over two thirds (71%) of the population had no concerns about switching to digital (compared to 66% in Q1 2007 and 50% in Q4 2006).
- In Copeland captions about digital switchover started appearing on analogue TV sets from May 2007 onwards and 58% of all respondents

with any analogue set in the area have seen the captions after they started running. More than 9 out of 10 (92%) of respondents saw them as useful or necessary.

Stable awareness and improving levels of detailed understanding

- During Q2 2007 digital switchover awareness remains at almost universal levels and stood at 96% at the end of Q2 2007. Indicative figures suggest that lower levels of awareness persist amongst the youngest (16-24 year olds) and the oldest (65+) demographics, although even amongst those age groups more than 90% were aware of switchover.
- With only a few months until BBC2 is switched off, the general level of understanding has increased 5pp and the more detailed understanding metrics have improved considerably. In Q2 2007 4 out of 5 Copeland residents (80%) understood that they have to take action and get a digital TV receiver in order to watch television after switchover. Amongst the people with correct understanding of what digital switchover means the figure for people who spontaneously reflect that they have to get all of their televisions ready for switchover has doubled over the last quarter (Q1 2007 7% to 15% in Q2 2007). When asked directly 91% of the population in Copeland say they know that they have to upgrade all their sets in Q2, an 8pp increase of understanding compared to the previous quarter (83%).

Figure 4.1: Growth of switchover understanding in Copeland

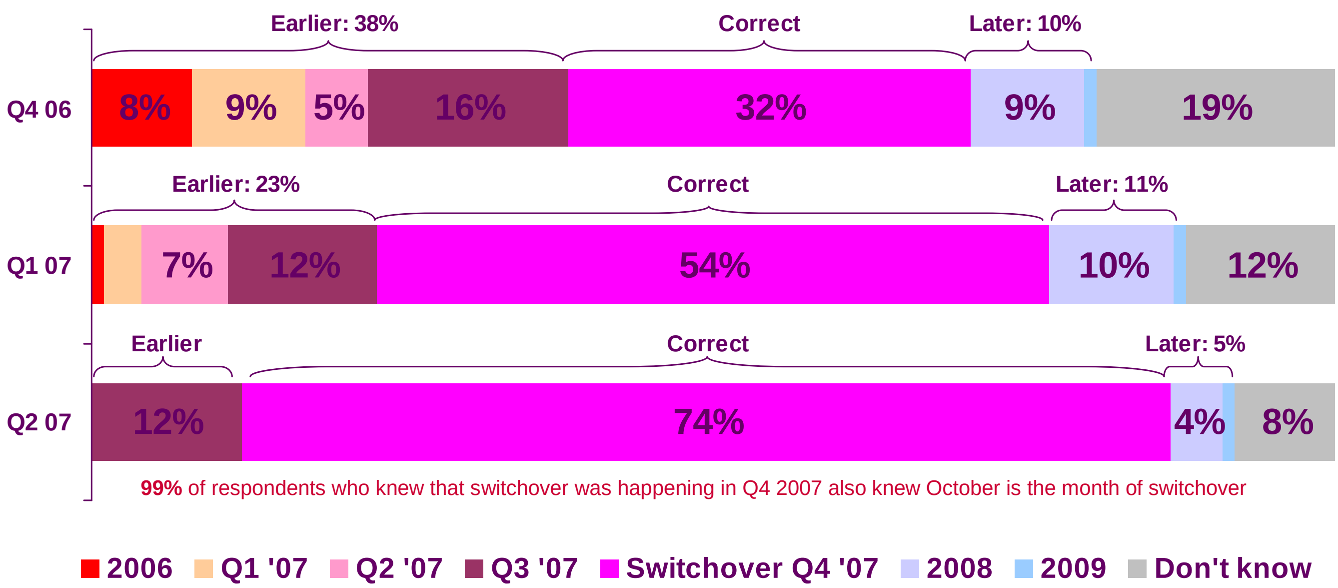


Source: Q2 Ofcom & Digital UK Copeland tracker
Sample: Copeland (Q4-218, Q1-214, Q2-268)

- After the announcement of the switchover date on the 15th of March this year understanding of the date has almost doubled. 39% understood that switchover would happen at the end of the year (Q4) in October 2006, rising to 75% at the end of June 2007. Almost all of these people (73% of the total population) also knew that digital switchover is happening in October, with indicative figures suggesting that women (75%) and older parts of the population (65+, 83%) are the most aware of the local switchover month.

- Residents are now picking up more information on the exact date of switchover. In Q2 one quarter of the population understood that switchover was happening on 17th of October. During previous quarters Whitehaven residents still showed higher levels of confusion, with many thinking that switchover is happening earlier than October and more not knowing the timelines for switchover at all.
- Over the next months the Copeland tracker will start to monitor the levels of understanding that digital switchover is happening in two stages, e.g. that the first channel (BBC2) is being switched off on 17th of October and all the other channels will get switched off on November 14th.

Figure 4.2: Growth of switchover date awareness in Copeland



Source: Q2 Ofcom& Digital UK Copeland tracker
Sample: Copeland (Q4-218, Q1-214, Q2-268)

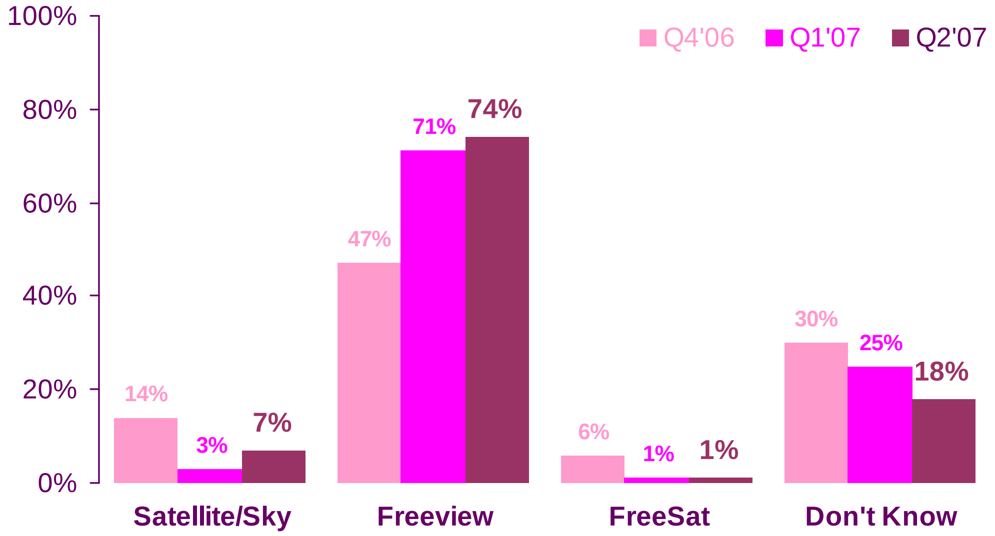
- During this most recent quarter we have also seen a significant rise in awareness that digital switchover impacts on the functionality of recording devices. More than half of the population in Copeland (56% vs. 39% in Q4 2006 and Q1 2007) now understand that recording devices will have reduced functionality after switchover meaning that users will not be able to record one programme whilst watching another. All the basic recording and playback functions of analogue recorders will continue to work as before. Awareness of the VCR issues is slightly higher amongst respondents who own an analogue recording device (58%) and awareness amongst this group has increased along the same lines as amongst the Copeland population overall (42% awareness in Q1 2007 to 58% awareness in Q2 2007).

- Awareness of the different options to go digital is high amongst Copeland respondents and over recent quarters unprompted awareness of the subscription free ways of receiving digital television (Freeview via a set top box, 65% in Q2 and Freeview via an integrated digital television, 16% in Q2 vs 11% in Q1 2007) has substantially increased. However, awareness of digital satellite and Sky services are still the most frequently given response, unprompted (83% in Q2 2007) as well as prompted (98% in Q2 2007).

Intentions to convert and actual digital TV take-up in Copeland

- 76% of main sets in Copeland have been converted to digital, up 6pp to Q1. Indicative numbers suggest that a further 13% of people with analogue main sets have purchased a Freeview box for their main set to prepare for digital switchover, which is currently not in use until the DTT signal becomes available in the area in October. Levels of secondary set conversion remain at 31%, 14pp below the national level of secondary set conversion. This might be expected given that Freeview is not yet generally available in the area. The increase in conversion throughout this last quarter is mainly due to a higher proportion of the population claiming to watch digital television via an integrated digital television (idTV).
- With only a few months to go until switchover happens almost everybody in the Copeland area has decided what to do with their TV sets and 96% of the population now know that they are going to upgrade at least one of their televisions sets to digital (up 3pp from Q1). More than three quarters of the population claim that they have adapted or will adapt all of their TV sets in their home (79%) whilst only the minority of 17% will leave some of their additional sets unconverted after digital switchover. Encouragingly no one in the Whitehaven area plans to go without television after digital switchover.
- As plans to upgrade existing television sets are developing amongst Whitehaven residents the timescales of when people will be adapting them with additional equipment are also becoming clearer to the population in Copeland. Whilst most people will try to convert their analogue sets before or at switchover an increasing number of people intend to wait until switchover has happened (7% of people will wait until Q1 or Q2 2008) or are waiting for the Digital Switchover Help Scheme to become available (9% of people).
- Indicative figures suggest that currently 24% intend to convert their analogue main set before switchover, 33% at or after switchover, 17% when the council or government does it for them (80% of which are individuals eligible for the Help Scheme). A further 26% don't know when they will convert their main set and are likely to leave it to the last minute.

Figure 4.3: Quarter on quarter intentions to convert to which platform in Copeland



Source: Q2 Ofcom/Digital UK Copeland tracker
All results are based on a small sample and must be viewed as indicative only:
Sample size: Q4: 60, Q1:56, Q2: 55 analogue main sets

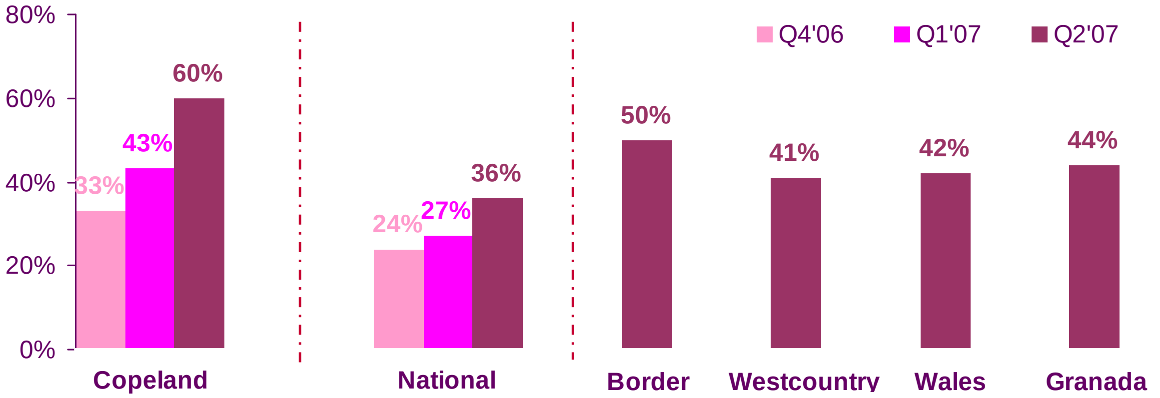
- The most recent research results suggest that the growing majority of Copeland residents intend to convert the remaining analogue television sets in their home to the digital terrestrial platform (Freeview). Up until switchover the only digital television platform generally available in the area has been digital satellite (Sky) which has dominated digital take-up figures in Copeland.

Help Scheme awareness and communications

- As in all parts of the country additional support will be offered to more vulnerable people to help them with the switch to digital television. The eligibility criteria to qualify for the Digital Switchover Help Scheme are being 75+ years old or being severely disabled (receiving Disability Living Allowance or Attendance Allowance, or being registered blind or partially sighted).
- Over the most recent months we have seen growing awareness of the Help Scheme amongst Whitehaven residents (33% in Q4 2006 to 60% in Q2 2007). National awareness of the Help Scheme is currently 36% with higher levels of awareness in all of the early switchover regions. Indicative results for Copeland suggest that Help Scheme awareness is even higher amongst the groups that are entitled to it with 73% awareness amongst people 75+ or with a severe disability. Generally awareness is higher in the disabled groups than amongst older recipients of the Help Scheme. Newspaper coverage, leaflets and conversations with friends and family have contributed the growing awareness of the Help Scheme.
- Despite this, some people appear to be unclear on what type of help is going to be provided under the Help Scheme and whether people have to pay for the service. 29% of those aware of the scheme claim they don't know what support will be part of the scheme. Most people still think that

financial assistance is going to be provided (33%), although this figure has slightly dropped compared to the last quarter (38% in Q1 to 33% in Q2 2007). Equally the proportion of people assuming that the help will be free is increasing steadily (up 7pp to 41% in Q2 2007). One quarter of those aware of the Help Scheme correctly assume that a digital box will be provided to each recipient and a minority of people assume that an installation service and/or aftercare service will be part of the package.

Figure 4.4: Growth of Help Scheme awareness in Copeland vs. Nationally



Source: Q2 Ofcom & Digital UK Copeland tracker and national tracker
Sample: Copeland (Q4-218, Q1-214, Q2-268)
Q2 National tracker: 2448, regional sample sizes: 299- 322

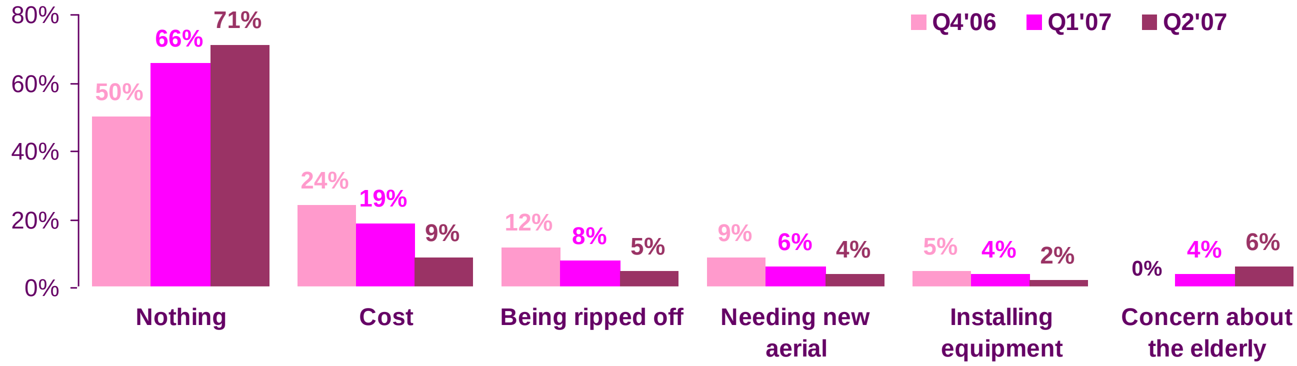
- Alongside growing levels of awareness of the Help Scheme, understanding of the eligibility criteria for the scheme is equally increasing, with less people than in previous quarters wrongly assuming that people on low incomes would be eligible for the help. The majority of residents expect older people (78%) and disabled people (20%) to be entitled to help.
- At the end of March this year all Copeland households received a letter outlining the Digital Switchover Help Scheme and almost half of the population recalls receiving this information (49%), although only a minority responded to the letter that was sent to them, by calling a freephone number (5%) or by returning the attached form (11%). A further 8% who recall receiving the letter during Q2 still intended to respond.
- Over the coming weeks the contractor will assess whether those who responded to the letter are indeed eligible for the scheme and then these households will receive an options pack outlining the different ways to go digital with the Help Scheme to each household.

Fewer cost concerns and growing switchover enthusiasm

- For the third quarter in a row levels of concern about digital switchover have been decreasing in the Copeland area. In Q2 over two thirds (70%) of the population had no concerns about switching to digital (compared to 66% in Q1 2007 and 50% in Q4 2006). Compared to previous quarters almost all issues of concern related to digital switchover have reduced.

Although cost still tops the list of things people are worried about, concerns about the cost of digital switchover in general or specifically about getting ripped off when purchasing new digital television equipment have more than halved since Q4 2006.

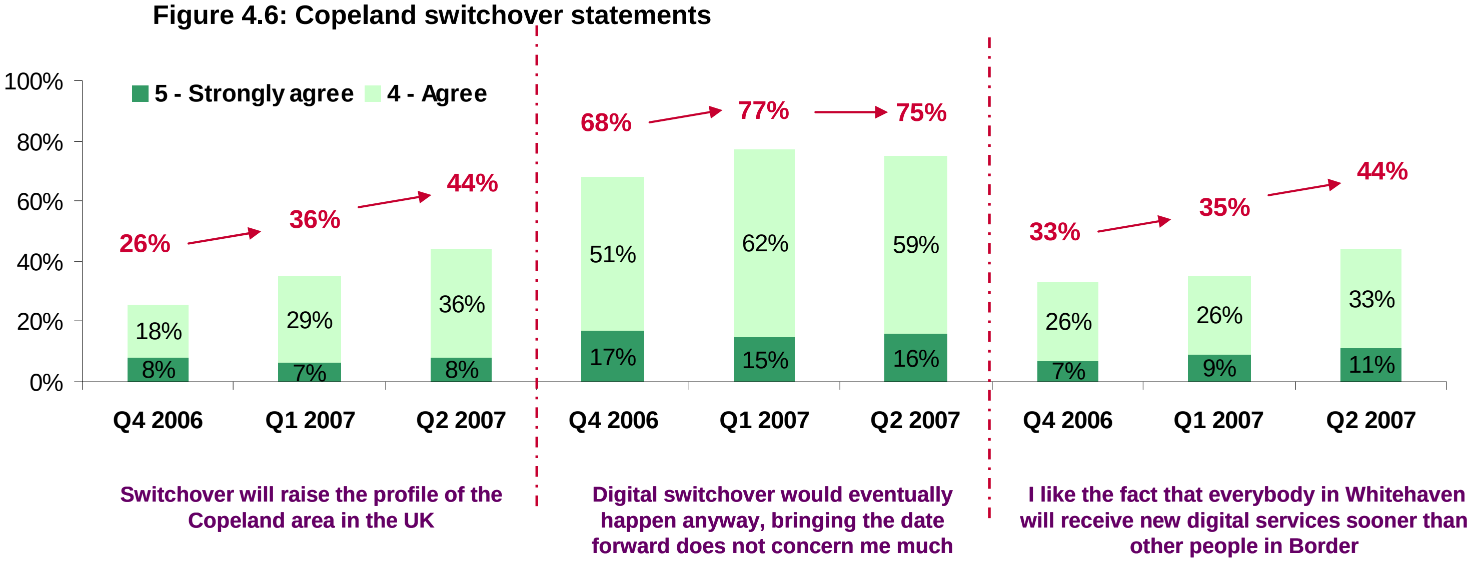
Figure 4.5: Decrease of switchover concerns amongst Copeland residents



Source: Q2 Ofcom/Digital UK Copeland tracker, Sample: Copeland (Q4-218, Q1-214, Q2-268)

- Attitudes to digital switchover remain broadly unchanged. 73% feel positive or neutral about switchover and levels of personal comfort have risen to 89% of the Copeland population feeling comfortable or neutral about the switchover process.
- As Copeland residents grow more familiar with the topic of switchover they appear more positive about the effect that the change to digital television has on their town and for them as viewers. 44% of Whitehaven residents now agree that switchover will raise the profile of the area in the UK, up 9pp from 35% in Q1 2007 to 44% in Q2 2007. They also increasingly agree that they personally benefit from receiving the new services before anybody else in the area, up 9 pp from 35% in Q1 2007 to 44% in Q2 2007. Copeland residents feel strongest that switchover would eventually happen anyway and in Q2 2007 three quarters of the population (75%) were not concerned about bringing the date forward.

Figure 4.6: Copeland switchover statements



Source: Q2 Ofcom/Digital UK Copeland tracker, Sample: Copeland (Q4-218, Q1-214, Q2-268)

Digital UK information campaign: Captions and the Digital Tick Logo

- Switchover experience in other European countries has shown that captions appearing on their screens have helped people identify whether their TV sets are actually affected by switchover. In Copeland captions about digital switchover started appearing on analogue TV sets from May 2007 onwards and 58% of all respondents with any analogue set in the area have seen the captions after they started running.

Figure 4.7: Example of on-screen captions running in Copeland

- Indicative results suggest that more than 9 out of 10 respondents (92%) who have seen the captions accept them as useful necessary and almost half of them (45%) also correctly associate Digital UK with being responsible for the messages on screen. However, nearly 4 in 5 people (78%) still do not feel any urgency to upgrade their sets, with these people answering that they will do nothing for now.
- At the end of July the whole Copeland area will receive a 20 page reference guide providing each household with all the detailed knowledge about the switchover to digital. The information included in the leaflet will be on switchover happening in two stages, raising awareness to convert analogue recording devices and channel five going live to test digital television equipment during August.
- In co-operation with the Copeland council Digital UK is informing Copeland residents of the first switchover date with a large bulletin board and a countdown clock at the Whitehaven harbour.

Figure 4.8: Digital UK communications 3 month leaflet and Whitehaven Harbour Clock

- Over time the digital tick logo has become a well recognised trademark for Copeland residents and now more than 4 out of 5 people in the area will recognise it (86% Q2 2007 vs. 75% in Q1 2007 and 66% national awareness in Q2 2007). As residents start buying new digital television equipment in preparation for digital switchover the digital tick will become a helpful guide for choosing products that will work through switchover. However, the developments also show that not everybody who is able to recognise the logo also correctly understands what it means.

Chapter 5

IN FOCUS: Black and Minority Ethnic Groups
Results of the June Ethnibus survey

- In June 2007 Digital UK commissioned a piece of research with the independent specialist research agency Ethnic Focus, to conduct an ethnic omnibus (Ethnibus) to investigate the current levels of awareness, understanding and attitudes towards digital switchover. 800 face to face interviews were carried out with respondents from black and minority ethnic (BME) groups throughout England during the month.
- This chapter compares results of the ethnibus survey with switchover tracker results from white parts of the population surveyed for the tracker. All results were collected during the same time period (June 2007) and with the same survey methodology. However, conclusions from the comparison of different data sources might be limited as different sampling techniques and other methodological differences may not make the results directly comparable.
- In addition to the Ethnibus data the Ofcom & Digital UK switchover tracker collects data on BME groups and corresponding awareness and understanding of switchover on a continuous basis. Data used in this chapter was aggregated from April 2006 to May 2007 to gain a robust base for analysis of BME groups. Further results referenced in this chapter were taken out of the Ofcom Communications Market report on Ethnic Minority Groups and Communications Services which was on published 21st June 2007.

Demographic profile of minority ethnic groups in the UK

- According to the last Office for National Statistics (ONS) Census in 2001, the majority of the UK population were white (92.1%) and 7.9% belonged to a BME group. This equated to around 4.5 million BME people in the UK at that time. More recent population estimates have shown that the BME population has since increased by 1.3 percentage points, representing 9.2% of the UK population in 2006.
- People in the UK from BME backgrounds are more likely to live in England than in any other UK nation. According to the 2001 Census, 96.2% of all people from BME groups in the UK lived in England; only 3.8% lived in Wales, Scotland or Northern Ireland. The BME population of the UK is concentrated in large urban centres. Nearly half (45%) live in the London region, where they comprise 28.8% of all residents.
- Census data also suggests that there are demographic differences between BME communities and the white British population in the UK.

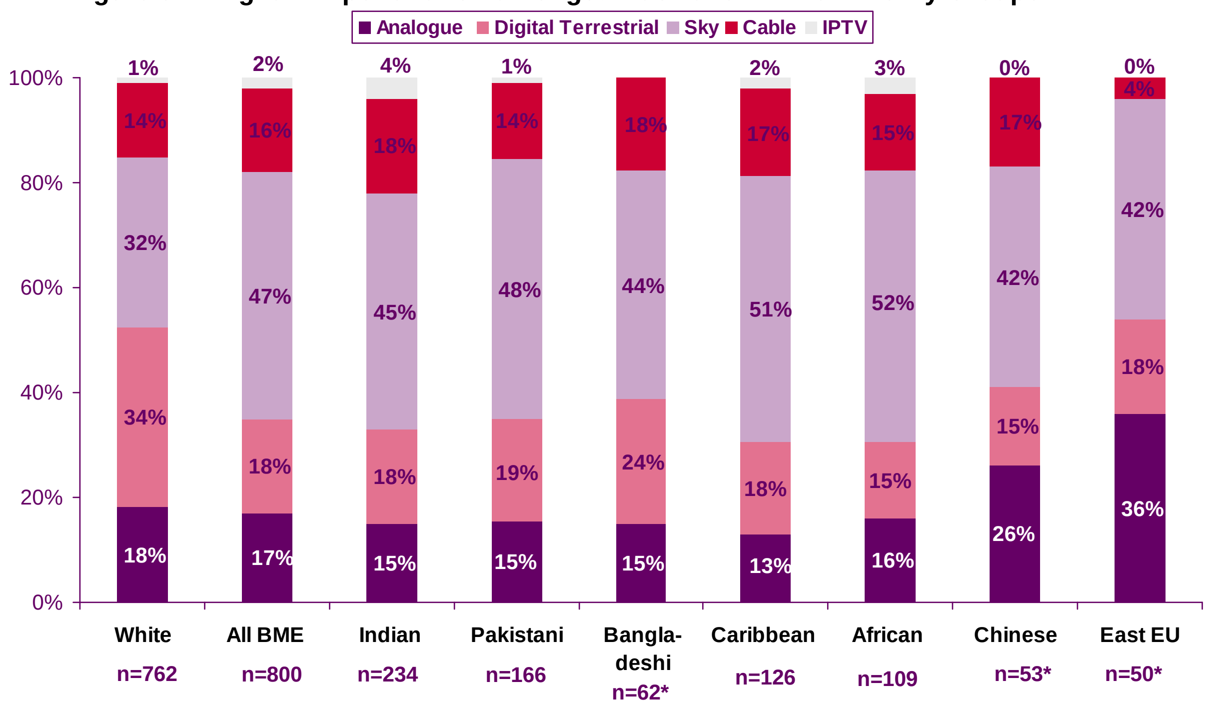
BME communities have a younger age profile, larger household size, are more likely to have dependent children in the house and are also more likely to be unemployed and on lower incomes than the white British population.

Digital TV status

Main set conversion

- Results from the Ofcom & Digital UK tracker show that penetration of digital television services in BME households is in line with the nation as a whole, but take-up of subscription based digital television services like satellite and cable is much higher amongst the BME community than amongst the nation as a whole.
- The more recent results of the June Ethnibus indicate that take-up of digital television has increased during the last year although the general picture remains unchanged and take-up of free to view digital television platforms is significantly lower amongst BME groups than amongst the white population in the UK.

Figure 5.1: Digital TV penetration amongst Black and Ethnic Minority Groups



Source: Black and Ethnic Minority Groups: June Ethnibus survey results
White parts of the UK population: June Digital UK & Ofcom Switchover tracker results

**results are based on a sample lower than 100 respondents and should be treated as indicative only.*

- Take-up amongst the biggest BME communities, especially Asian, African and Caribbean groups is higher than the average of the white British population. Indicative results for some BME groups also suggest that digital TV take-up is lower in the Chinese and Eastern European community than for Asian, African and Caribbean households. This firstly suggests that adoption of digital television is not a priority for people who recently arrived in the UK, e.g. the Polish community, which has seen substantial growth over the last few years. Another reason for lower levels of digital TV penetration could be the lack of specialised targeted programming for smaller ethnic audiences like the Chinese community in the UK.

- Qualitative research by Ofcom in 2004 found that the core reason for adopting multichannel television amongst people from BME groups was to increase their choice of programmes and channels, to access specialist channels/programmes including those targeted at BME groups and to benefit from time-shifted viewing using Digital Television Recorders. For most of the Asian groups in the UK this specialised programming is accessible on the Sky platform explaining the high levels of take-up for these groups. Although other satellite platforms are accessible in the UK, 95% of Ethnibus respondents said that they were subscribing to Sky services for their first and second sets.
- Amongst all BME groups Freeview take-up remains low and possibly overall digital TV take-up could be boosted by building awareness of digital terrestrial as a digital TV platform which also has a limited amount of specialised programming available (e.g. radio channels like BBC Asian network).

Conversion of additional TV sets in the home

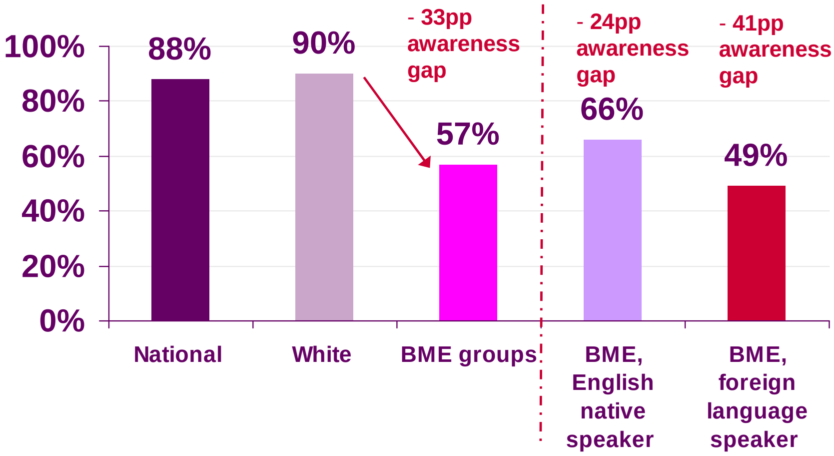
- Slower take-up of free-to-view digital television services amongst BME audiences also impacts on the levels of multichannel conversion on secondary TV sets in BME households. Only 34% of second sets in BME households have been converted to digital compared to 46% amongst white respondents. Less than one in ten second sets in BME homes has been converted to Freeview (9%) and satellite remains the strongest digital TV provider with twice as many subscribers (18%). Although other satellite providers are accessible in the UK with content specific to minority communities, Sky remains the most popular satellite provider.
- On the other hand the digital switchover conversion challenge for BME homes may be eased by the fact that tracker data suggests that the average number of TV sets in BME households is lower than amongst the population as a whole (1.79 average number of set in BME homes vs. 2.1 average number of TV sets in UK homes).

Digital television Switchover awareness and understanding

- Awareness of the change to digital television is significantly lower amongst BME groups compared to the population as a whole. Overall, fewer than 3 out of 5 (57%) had heard about switchover (June 2007) compared to 90% awareness amongst white parts of the population and 88% overall awareness of switchover on the Ofcom & Digital UK switchover tracker in the same month.

- Switchover awareness is lowest amongst the Eastern European community (44%) and the Pakistani community (46%). The groups with the highest levels of switchover awareness are the Bangladeshi (67%) and Indian (62%) communities. Despite showing lower levels of conversion, awareness of digital switchover is relatively high amongst the Chinese community (63%).

Figure 5.2: June switchover awareness



Source: Black and Ethnic Minority Groups: June Ethnibus survey results
White parts of the UK population: June Digital UK & Ofcom Switchover tracker results

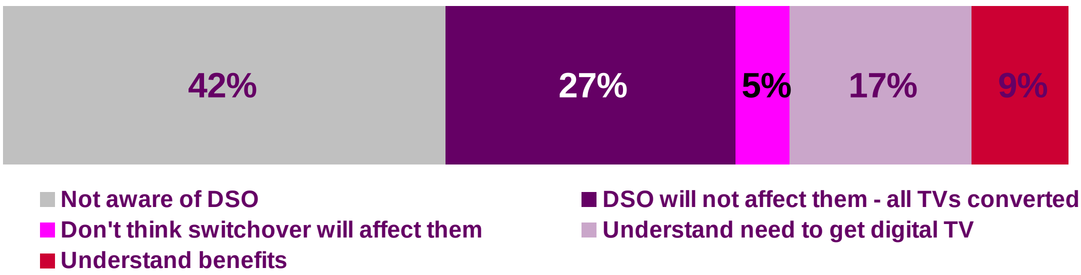
- Awareness of digital switchover among BME groups is lower than the national average even amongst respondents who consider English to be their first language. At 66% awareness they are 24pp less aware of switchover than those who identify themselves as white British. However, language problems may present a further barrier as fewer than half of BME respondents who do not speak English as their native language (49%) are aware of the change to digital television. This suggests that reaching BME audiences with information about switchover is not only difficult when communicating in foreign languages but it emphasises the difficulty reaching BME audiences in general through public information campaigns.
- These results are consistent with our monitoring of switchover awareness amongst BME groups on the Ofcom & Digital UK Switchover tracker, which showed an awareness gap between white and BME groups of 26pp over the whole year (77% switchover awareness for the nation as a whole and 51% for BME respondents).
- Similar to the pattern we have seen with the population as a whole, levels of switchover awareness are lower amongst the youngest and the older age groups in the BME community. Awareness is also lower amongst the BME population on low incomes. Fewer than half of BME respondents on low incomes have heard about the digital television switchover.

Understanding of digital television

- Levels of understanding of what to do for switchover remain at fairly low levels amongst BME groups, although there is a very strong feeling amongst them that they have already done everything necessary for switchover by upgrading all of their TV sets to digital (27%).

- Overall, almost one third of BME groups believe that they will not be affected by switchover (32%), most of them because they say that they have upgraded all of their TV sets to digital (27%) whilst 5% have the misconception that they will not have to do anything in general. Only 17% of the BME population currently realises that they will have to get digital TV in order to get ready for digital switchover.

Figure 5.3: Understanding of digital switchover



Source: June Ethnibus Research (sample 800)

Digital Switchover information campaign

- The current levels of switchover awareness and understanding amongst BME groups highlight the problem of reaching BME audiences through the current Digital UK campaign and the traditional media channels used for advertising the change.
- In June 2007 51% of the BME population claim that they have not seen or heard any advertising about digital switchover and even 18% of those aware of digital switchover do not recall having seen any advertising. This stresses the importance of other sources of information for these audiences such as reading editorial content or learning about switchover through word of mouth, e.g. through somebody within their community or their family.
- Although mainstream media channels are well accepted ways to communicate messages such as digital switchover to the BME community, other non-traditional media channels (e.g. community outlets and BME media) can reach many older consumers as well as non-English speaking BME groups and members of traditionally more closed communities.
- Overall 52% of BME groups state that they usually find out about public information campaigns through mainstream TV and press advertising,

though the patterns for the preferred media outlets vary greatly for different BME groups:

- More than 3 out of 5 Caribbean (67%), African (64%) and Chinese (66%) respondents mention mainstream TV and press advertising as their first choice for receiving information about digital switchover.
- The vast majority of Eastern European respondents (56%) prefer to receive this information from someone in their community.
- Word of mouth communication is appreciated most amongst groups where language barriers are very strong, e.g. amongst Pakistani, Bangladeshi and Eastern European communities and ethnic media channels will reach established and organised community circles like Indian, Pakistani and Bangladeshi groups.

- Encouragingly the doordrop campaign in the North West of England region seems to have been received by at least some of the BME groups as more people in the North West than elsewhere recall receiving switchover information through their letterbox (12% in North West vs. 9% across the UK).

Chapter 6

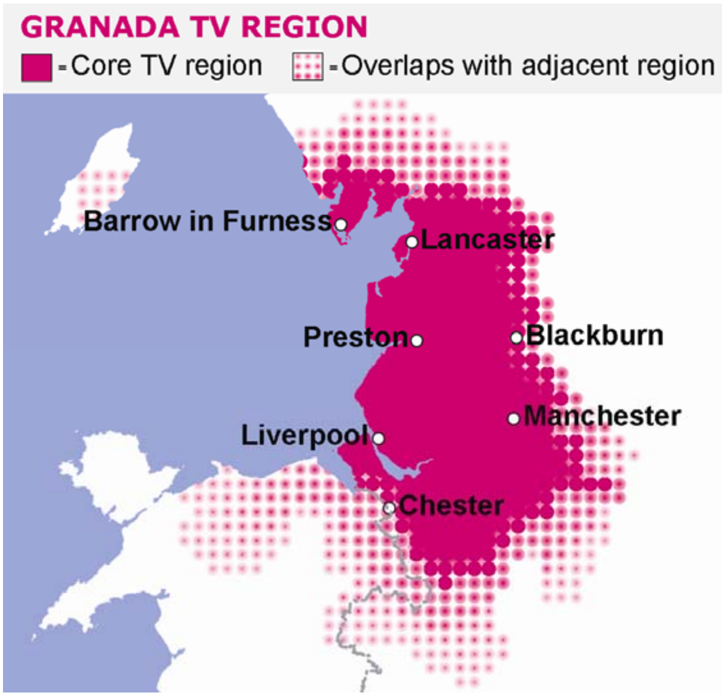
IN FOCUS:
North West (Granada) TV Region

- This section looks specifically at switchover issues among consumers living in the North West (Granada) TV region.

Introduction to the North West TV region

- With over 6 million people from all backgrounds and 39 local authorities, the North West is the fourth region on the digital switchover rollout plan. It is served by a single main transmitter group (Winter Hill) which includes 69 relay stations spread all over the region. The whole region will be switched over at once during the last quarter of 2009.
- The Granada transmission region includes some of the biggest urban areas of the UK including Manchester, Liverpool and Preston, and stretches from the Lake District to Telford, Shropshire, and from Colwyn Bay on the North Wales Coast as far as the Pennines. Granada broadcasts to 11.5% of UK homes - over 2.8 million households.
- The region has currently the highest level of existing DTT coverage in the UK with more than 9 out of 10 households in the region able to receive a Freeview signal even before switchover has happened.

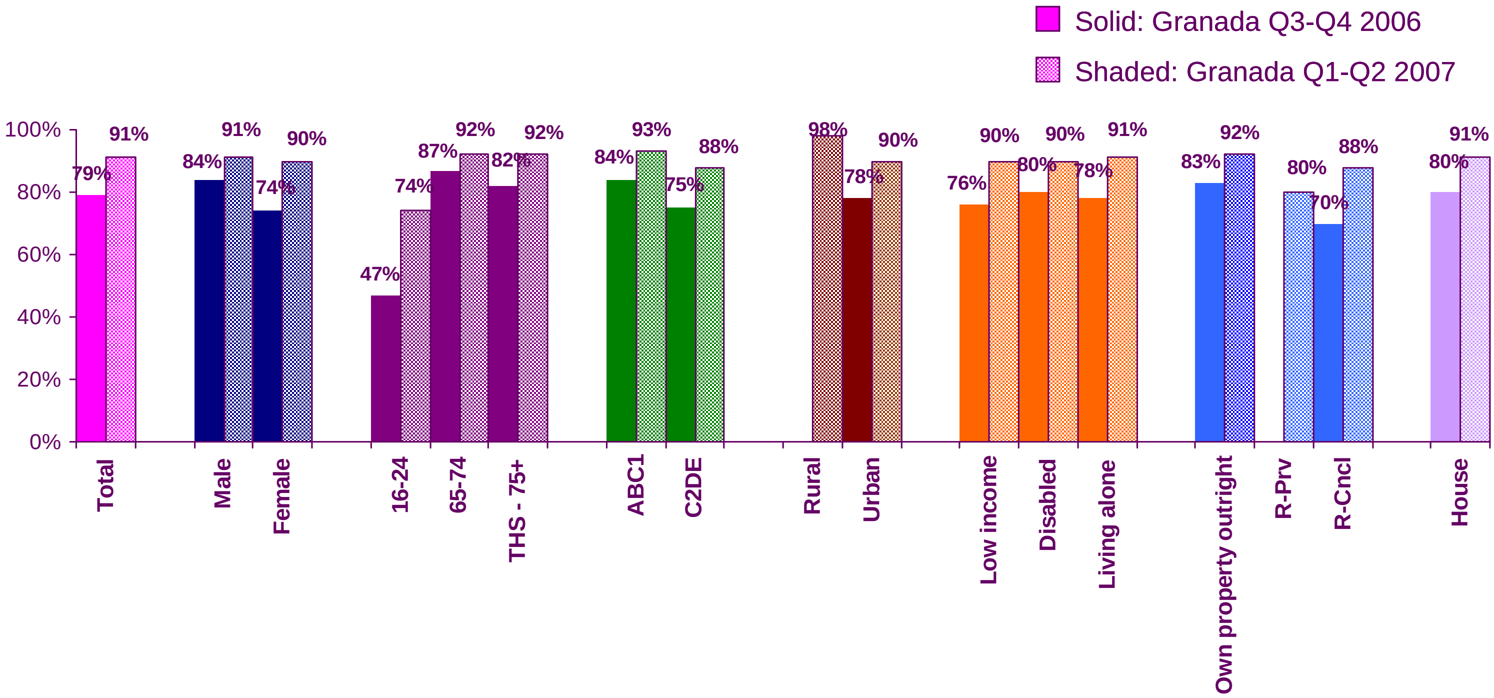
FIGURE 30: NORTH WEST (GRANADA) TV REGIONS MAP



Ownership of digital TV, awareness of switchover

- The North West has a higher level of digital TV penetration when compared to the rest of the UK (88% main set conversion compared to 80% nationally in Q2 2007). Tracker figures also suggest that digital TV take up is increasing more rapidly, with main set conversion up 8pp from Q1.
- As we have seen for all of the other early switchover regions, the North West also has higher levels of awareness of the term 'digital switchover' compared to the national average. Current switchover awareness is at 93% versus 87% nationally, just behind Border at 97% (switching in late 2008 and early 2009) and Westcountry at 94% (switching in mid-2009).
- Year on year there has been impressive growth of switchover awareness in the North West, up from 64% in Q2 2006 to 93% in the most recent quarter. Rolling together several quarters worth of data (Q3-Q4 2006 and Q1-Q2 2007) allows for further analysis into the growth of switchover awareness amongst different consumer groups. Awareness has increased especially amongst the youngest demographic and social renters in the region.

FIGURE X: SWITCHOVER AWARENESS IN GRANADA BY CONSUMER GROUP
Note: R-Prv = Rent privately; R-Cncl = Rent from council

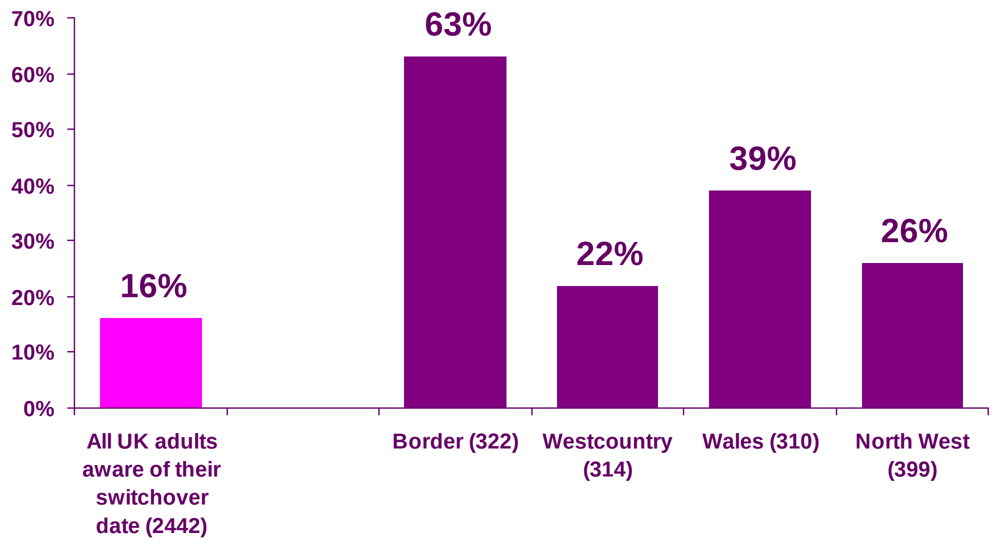


Understanding of digital switchover

- Despite high levels of switchover awareness, there appears to be less clarity amongst adults in the North West of what to do for digital switchover: the 72% who display general understanding is lower than in the other lead regions, although this figure is still higher than the national average of 66% in Q2.
- Nevertheless it should be pointed out that from Q3 2007 to Q1 2007 understanding of digital switchover has grown by 23pp in the region.

- The North West region is due to switch over in 2009, but it appears from the Tracker data that the region currently has the second largest knowledge gap of the correct switchover date amongst all the earlier switching regions.

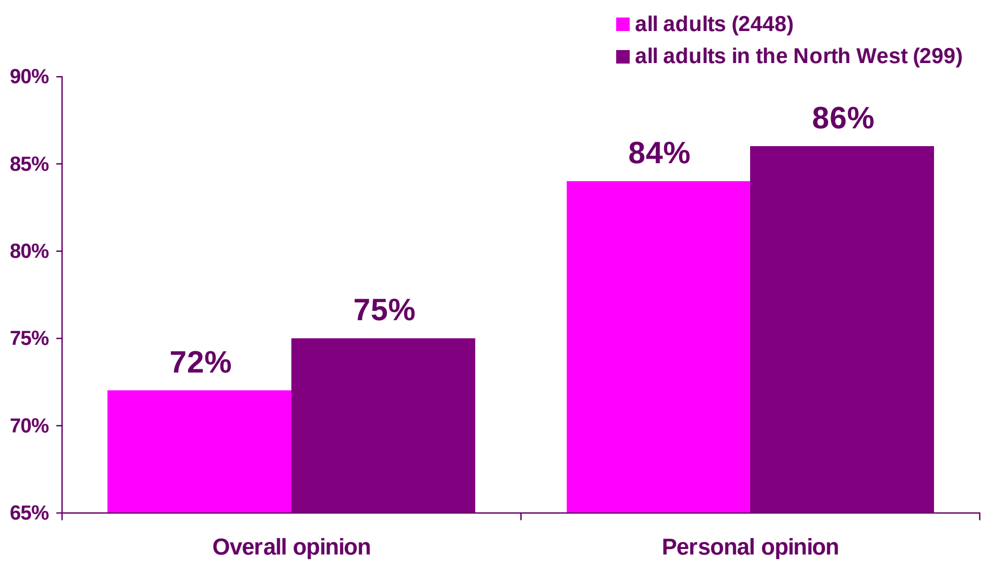
FIGURE 31: CORRECT SWITCHOVER DATE KNOWN



Attitudes towards digital switchover

- Adults in the North West have a higher positive/neutral attitude towards digital switchover overall when compared to the national average (75% compared to 72%).

FIGURE 32: ATTITUDES TOWARDS DIGITAL SWITCHOVER IN GRANADA



- To gauge their overall opinion, respondents were asked the following question*:*
  'Q Which of the following statements best describes what you think about switchover'
    - *Switchover is good for the UK*
    - *Switchover is just one of those things, and we'll have to get on with it*
    - *Switchover is unfair; we shouldn't be forced to convert to digital*

- Adults in the North West had a higher net positive or neutral response (75%) on this question than the total UK population (72%) – and the North West figure was up by 5 percentage points from Q1 07.

- When asked about their personal opinion or comfort with the switchover process, adults in the North West also scored a slightly higher net positive or neutral response (86%) compared to the total UK population (84%).

Digital UK activity in the North West (Granada) TV region.

- In February of this year Digital UK appointed Jo Waters as the Regional Manager for the Granada TV region. During recent months she has started to build relationships with local stakeholders especially meeting with local authorities, business groups and the community sector.
- She estimates that some of the biggest challenges in the region will be reaching people living in social isolation especially in the most urban areas, as well as overcoming language or cultural barriers to communicate switchover to the large pockets of minority ethnic groups living in the region. These include, but are not limited to, Asian community groups in Manchester, Preston and the Lancashire towns of Burnley, Rochdale, Blackburn and Oldham; the Chinese community (prevalent in both Manchester and Liverpool) and the region's growing Polish community.
- Most recently she has had to address problems concerning mis-selling of aerial installation services in her region and issues concerning how the region's burgeoning tourist industry educates its members about preparing for switchover, specifically hoteliers, proprietors of guest houses, B&B's and public houses and owners of camping and caravanning sites.

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 8,300 households were surveyed, face-to-face during 2006 and more than 9,000 households will be surveyed in 2007. 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 33 – THE SIX MEASURES ON THE OFCOM & DIGITAL UK SWITCHOVER TRACKER

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

- The tracker is conducted in all switchover regions, and samples are boosted in each region three years out from switchover. In 2006 Border, Westcountry, 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. The remaining regions are sampled in line with their proportion of the national population[1].

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

The Dashboards

- Summary Tracker results are provided in the 'dashboards' of progress towards switchover:

  (1) The Dashboard: By Regions – which summarises results of each of the key metrics for each of the switchover regions, and at a national level

  (2) The Dashboard: By Consumer Groups – which provides key metrics for different consumer groups including standard demographic breakdowns but also with a focus on hard to reach groups (see Appendix Two for a Glossary explaining the consumer group terms)

  (3) The Dashboard: By Segment - showing tracking metrics for the six switchover segments (see Q3 Switchover Progress Report for detailed description of these segments)

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

[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 34 – 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 and need to get digital TV on every set

2b – Understanding to update VCRs

Question:

"Were you aware that, after switchover, video recorders will no longer be able to record a programme while you watch a different programme on another channel

Asked following several questions on switchover, and an explanation of what switchover is

Responding: Yes

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

5a/b/c – 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- Unpromptd	-b- Logo	-a- What to do for DSO	-b- Update VCR	-c- Date	-a- Overall opinion	-b- Personal opinion	-a- Convert at least one set	-b- Will not convert any set	-c- Analogue h/holds to cnvrt 12m	-a- Primary set converted	-b- Other sets converted	-c- Full h/hold convrsion	-d- Total converted	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

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

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

4c– Analogue households to convert in 12 months

Question:

"When do you plan to update this TV set so that you can use it after switchover?"

Responding: In the next 3 months or next 3 months to a year

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 topic for Q2 2007 focused on a mixed collection of issues, including energy efficiency, awareness of the 3 and 6 Mux coverage issue and disposal of TV sets and recording devices after switchover. The upcoming Q3 module has a focus on aerials and the registered digital installer scheme. It tests awareness that the digital terrestrial signal will extend at switchover and looks at comparing the Digit Al campaign to other campaigns using cartoon characters.

Tracker Methodology

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

Sample Sizes

During Q2 2007 the Tracker interviewed 2448 households:

- 812 in April
- 817 in May; and
- 891 in June.

The total tracker sample for the second year (Q2 2007 to Q1 2008) will be approximately 10,000 interviews.

Regional Sample Sizes

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

During the second year this means that Border, Westcountry, Wales, Granada, West and STV North/Central will achieve c.300 interviews per quarter, or 1,200 interviews each over the course of the year. From Q3 2007, the sample for the Border region will be further boosted by additional interviews in the Selkirk area.

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

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

Consumer Group Sample Sizes

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

Sampling Method

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

The sample of 16+ adults is divided with quotas on age, gender and working status, to reflect the demographic profile of each ITV region. From Q3 2007, a quota on flats will be 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)