Digital UK and Ofcom
Switchover Tracker Survey

Switchover Progress Report
Q4 2007

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Contents

Executive Summary

- This report summarises the results of the Digital UK/Ofcom Switchover Tracker during Q4 (October-December) 2007 and publishes first results of consumer experiences during the successful digital switchover in Whitehaven, Cumbria between October and November 2007. Switchover tracker data is used to measure the nation's progress to switchover across various key metrics such as awareness of the transition and consumer's understanding of what to do to prepare, as well as their intentions to convert and actual digital TV conversion.
- Further results included in the report this quarter are a summary of developments among people who will be entitled to additional help through the Government's Digital Switchover Help Scheme and a description of the situation in Scottish Borders – the next area of the UK due to switch over to digital in November 2007.
- In Q4 almost nine out of ten people in the UK (89%) were aware of the switchover, up 6pp from Q3 and an overall increase of 9 percentage points (pp) throughout 2007. More people than ever before (69%) understood what they needed to do to prepare for the change, up 6 percentage points. The improvement of awareness and understanding of switchover follows the most recent Digital UK communications campaign which ran from late September 2007 until the end of the year.
- Digital TV take-up results of the Digital UK/Ofcom Switchover Tracker indicated that more than four out of five homes (83%) had access to digital TV on at least the main TV set in their home.
- Personal comfort with the digital switchover process is growing among the population following the successful completion of the first UK switchover in Whitehaven in November 2007. Nationally, 86% felt comfortable with making the changes to receive a digital signal in time for switchover, an improvement of 4 percentage points from Q4 2006. In Scottish Borders more than nine out of ten (94%) feel comfortable with the transition.

Digital TV Conversion

- On 19th December 2007 Ofcom issued its Q3 2007 Communications Market Progress Report on the take-up of digital TV. At the end of September 2007 the proportion of homes with digital TV on their primary set stood at 85.1%. A further 1% of homes currently receive TV via analogue cable, bringing the overall UK multichannel audience to over 86%.
- This growth in the multichannel TV market indicates a further decrease of the analogue terrestrial main set audience by 1.1 percentage points from Q2 2007 (multichannel TV take-up increased from 85% in Q2 to 86.1% in Q3 2007). Most recent conversion results from the Q4 Digital UK/Ofcom Switchover Tracker suggested 3 percentage points growth of primary set

conversion during the last quarter of 2007 (up from 80% in Q3 to 83% in Q4) bringing the two sources for main set TV conversion closer in line.

- During 2007, the Switchover Tracker recorded increased levels of digital TV take-up on secondary set conversion mainly due to growth of the Freeview platform. Over the last year, full household conversion passed the 50% mark - with 8 percentage points growth from 45% at the end of 2006 to 53% full household conversion at the end of 2007. Regionally, both secondary set conversion and full household conversion are also growing especially in the regions set to switch first.

Switchover key metrics in 2007

- Over the year 2007 awareness of switchover among the population as a whole grew more than 9 percentage points, from eight out of ten people aware at the end of 2006 to almost nine out of ten aware at the end of 2007 (89%). Growth in awareness was recorded among all consumer groups, although groups with previously lower levels of awareness, e.g. Black and Minority Ethnic Groups (58% aware), the youngest age group 16-24 year olds (74% aware) and people living in flats (77% aware) continued to be less aware than the UK average.
- With switchover becoming reality in Copeland at the end of 2007, people are growing more comfortable with the transition from analogue to digital TV. General attitudes to switchover also improved slightly in the last quarter (from 74% to 77% in Q4) and 7 percentage points across the whole year.
- Digital TV conversion levels, which had remained stable for most of 2007, improved notably in Q4 (plus 3 percentage points from 80% to 83%).

The Digital Switchover Help Scheme

- The Digital Switchover Help Scheme has been set up by the BBC at the request of the Government to offer eligible people help to make the switch to digital television on one of their TV sets. The BBC has set up a subsidiary, DSHS Ltd, to operate the scheme. It will be rolled out in each region as switchover approaches. Every eligible person will be contacted directly at their home. The BBC has selected eaga, a leading provider of residential energy efficiency and outsourcing services as the Help Scheme service provider from the Border TV region onwards.
- From the Digital Switchover Tracker we know that principle groups eligible for the Help Scheme (those aged 75 or over, and those in receipt of certain disability benefits) report lower levels of understanding of digital switchover and low awareness that there will be assistance available for them.
- From October 2007 the Digital Switchover Tracker included a number of Help Scheme specific questions to be asked to those eligible for the Help Scheme living in the Border region. Results show that there is currently limited understanding among eligible groups of both who will be eligible for

the Scheme and what help will be offered. This limited understanding is a reflection of the fact that the details of the Scheme have yet to be communicated to eligible individuals.

Scottish Borders one year out from switchover

- At the end of 2007, less than one year out from the first switchover date in the region, Scottish Borders residents served by the Selkirk transmitter group seem well prepared for the transition to digital TV. People in the region have the highest level of switchover awareness (98%) and understanding of how to prepare (90%) in the UK. More than eight out of ten (84%) of Selkirk homes already have digital TV on at least one of their TV sets and more than half of all households (57%) are fully digital.
- In comparison to the rest of the UK and to the other early switching regions, people living in Scottish Borders have higher levels of detailed understanding; almost three quarters (72%) of the Scottish Borders population know that their region switches to digital in 2008. 43% are aware that their recorders will be affected by the switchover. This is higher than it was during the same time period in Copeland, but remains considerably lower than main switchover awareness. Finally, awareness of the ‘‘digital tick’’ logo is significantly higher in Selkirk (85% vs. 76% nationally).
- Following the successful switchover in Copeland more people in Scottish Borders feel relaxed about coping with the transition to digital TV. More than nine out of ten (94%) are either happy, OK, or not bothered by switchover. However, one in ten of those aged 55+ still feel slightly worried or threatened by the change. In 2008 Digital UK’s charity partnership will start its activity in the region. In co-operation with local charity groups, volunteers will be trained and help centres will be set up to provide residents with advice and support as the region moves closer to switchover.

Chapter 1

The Dashboards – Q4 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 Q3 2007 report shows that 85% of households have digital TV on their primary set and 86% 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

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

	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%	

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	2830	89%	76%	69%	43%	28%	76%	86%	92%	1%	15%	83%	49%	53%	66%	74%
1 - Selkirk	232	98%	85%	90%	43%	72%	81%	94%	94%	1%		84%	60%	57%	71%	80%
1 - Caldbeck	251	95%	81%	80%	55%	22%	74%	86%	94%	0%		81%	51%	52%	66%	74%
1 - Border	483	96%	83%	85%	49%	45%	77%	90%	94%	1%	8%	82%	56%	55%	68%	77%
2 - Westcountry	306	96%	82%	86%	56%	47%	78%	82%	92%	3%		82%	45%	52%	64%	73%
3 - Wales	330	92%	84%	71%	45%	49%	77%	87%	95%	0%		89%	45%	55%	67%	82%
4 - Granada	313	93%	83%	68%	48%	34%	72%	85%	93%	1%		91%	48%	59%	70%	69%
5 - West	202	93%	80%	71%	42%	29%	75%	83%	92%	1%		85%	49%	55%	68%	70%
6 - STV North	159	90%	82%	74%	49%	37%	88%	89%	87%	1%		75%	57%	50%	66%	78%
7 - STV Central	155	95%	80%	75%	53%	39%	78%	90%	92%	1%		81%	51%	52%	65%	77%
8 - Central	105	94%	76%	70%	41%	21%	72%	83%	89%	4%		82%	50%	55%	66%	65%
9 - Yorkshire	101	91%	80%	63%	35%	16%	78%	88%	98%	0%		84%	56%	53%	69%	79%
10 - Anglia	84*	95%	73%	83%	52%	21%	79%	90%	98%	0%		81%	49%	50%	66%	76%
11 - Meridian	98*	90%	65%	72%	47%	33%	81%	86%	95%	0%		89%	42%	48%	66%	73%
12 - London	405	77%	77%	60%	40%	23%	76%	85%	92%	2%	13%	81%	46%	55%	64%	74%
13 - Tyne Tees	57*	92%	82%	69%	43%	40%	64%	81%	94%	1%			47%	57%	68%	
14 - Ulster	56*	72%	40%	52%	12%	7%	88%	98%	72%	1%		64%		37%	56%	

Ulster:6 months data July to September 2007

(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	2830	89%	76%	69%	43%	28%	76%	86%	92%	1%	15%	83%	49%	53%	66%	74%
Male	1374	89%	79%	71%	51%	32%	79%	88%	92%	1%	16%	84%	52%	57%	69%	77%
Female	1456	89%	74%	66%	35%	24%	74%	84%	92%	1%	14%	82%	47%	50%	64%	71%
16-24	311	74%	81%	62%	29%	21%	83%	91%	90%	1%		86%	51%	55%	68%	82%
65-74	364	95%	70%	64%	54%	34%	70%	85%	92%	2%	9%	77%	46%	53%	64%	67%
65+	644	90%	64%	62%	49%	31%	73%	83%	90%	1%	8%	72%	42%	50%	60%	64%
ABC1	1259	93%	79%	78%	46%	30%	76%	86%	95%	1%	12%	83%	52%	53%	67%	74%
C2DE	1571	85%	74%	60%	40%	26%	76%	86%	89%	2%	18%	82%	46%	54%	65%	74%
Rural	493	93%	77%	70%	46%	29%	78%	87%	92%	3%	9%	75%	51%	51%	64%	76%
Urban	2337	89%	76%	69%	43%	28%	76%	86%	92%	1%	16%	84%	49%	54%	66%	73%
Low income	610	82%	73%	58%	42%	25%	73%	84%	90%	4%	14%	77%	41%	53%	62%	70%
BME	238	58%	69%	42%	28%	20%	76%	86%	86%	3%		75%	46%	57%	65%	79%
Non-English	170	58%	64%	36%	31%	21%	76%	82%	88%	0%		76%	46%	61%	67%	79%
Disabled	448	88%	72%	57%	45%	30%	70%	77%	89%	4%	16%	83%	44%	56%	66%	70%
Need assistance	142	87%	61%	51%	32%	24%	69%	87%	82%	3%	14%	35%	0%	0%	21%	
Hard to reach	1296	85%	74%	61%	44%	27%	74%	85%	91%	3%	13%	80%	48%	55%	66%	72%
Living alone	523	89%	72%	66%	41%	24%	78%	85%	91%	1%	18%	73%	31%	52%	59%	71%
Families w/ chidren	903	90%	78%	71%	42%	27%	75%	84%	93%	2%	6%	90%	54%	53%	70%	75%
Rent private	364	77%	81%	60%	36%	21%	80%	88%	88%	2%	10%	79%	47%	57%	67%	77%
Rent council	602	81%	75%	55%	37%	29%	69%	82%	92%	1%	16%	83%	41%	56%	65%	79%
House	2396	91%	76%	71%	43%	28%	76%	86%	93%	1%	14%	84%	49%	52%	66%	73%
Flat	424	77%	76%	58%	41%	27%	76%	87%	88%	2%	17%	77%	48%	63%	68%	81%
THS - 75+	280	83%	55%	58%	42%	26%	77%	80%	89%	1%	8%	66%	36%	46%	54%	61%
THS - DLA/AA <75	144	90%	77%	58%	47%	39%	66%	77%	95%	2%		87%	60%	62%	74%	74%

(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
Cultured Conservatives	**407**	90%	71%	71%	47%	29%	67%	79%	89%	1%	13%	75%	41%	46%	58%	63%
Out-and-About Families	**386**	87%	80%	73%	41%	33%	79%	89%	93%	2%		89%	57%	59%	72%	77%
Traditionalists	**528**	91%	74%	64%	39%	41%	68%	76%	90%	2%	11%	74%	32%	45%	54%	62%
TV-Centrics	**918**	94%	86%	77%	50%	42%	80%	91%	96%	1%		95%	56%	59%	73%	82%
Rolling Stones	**231**	86%	78%	69%	40%	34%	77%	86%	89%	1%	14%	76%	38%	49%	61%	73%
High-Tech Consumers	**360**	92%	86%	78%	51%	32%	86%	94%	96%	0%		93%	61%	62%	75%	81%

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Chapter 2

The Q4 2007 Tracker Results

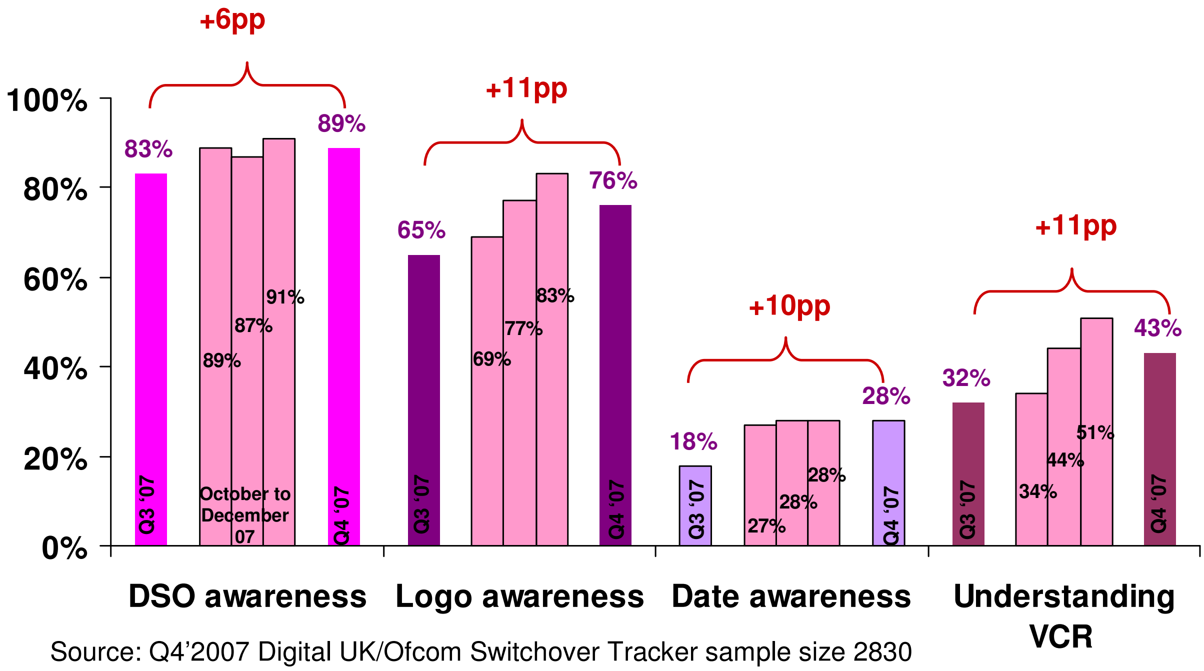
Summary

- The year 2007 shows continuous growth across all of the key switchover metrics. Throughout the year large improvements were made in building awareness and understanding of digital switchover, as well as encouraging main set conversion in previously analogue TV households. As the first region in the UK has successfully switched to digital, confidence is growing among the population and people are feeling more and more comfortable with the transition to digital TV.
- Over the year 2007 awareness of switchover among the population as a whole grew more than 9 percentage points, from eight out of ten people aware at the end of 2006 to almost nine out of ten aware at the end of 2007 (89%). Growth in awareness was recorded among all consumer groups, although groups with previously lower levels of awareness, e.g. Black and Minority Ethnic Groups (58% aware), the youngest age group 16-24 year olds (74% aware) and people living in flats (77% aware) continued to be less aware than the UK average.
- With switchover becoming reality in Copeland at the end of 2007, people are growing more comfortable with the transition from analogue to digital TV. General attitudes to switchover also improved slightly in the last quarter (from 74% to 77% in Q4) and 7 percentage points across the whole year.
- Digital TV conversion levels, which had remained stable for most of 2007, improved notably in Q4 (plus 3 percentage points from 80% to 83%).

Awareness and understanding gains following the autumn TV campaign

- The most recent communications campaign continued to drive general awareness of the change to digital, but it also helped building detailed knowledge and understanding of digital switchover. The main messages of the campaign focused on the regional rollout of switchover; understanding that video recorders will also be affected by the switchover, as well as promoting the 'digital tick' logo for guidance when buying digital TV equipment.
- At the end of the year 2007 national awareness of switchover peaked at a new high of 89% (+6pp on Q3 2007). Particularly high levels of awareness remain in the lead switchover regions Border (96%), Wales (92%), West Country (96%) and Granada (93%). Virtually everybody (98%) is aware of switchover in the next region to switch (Selkirk transmitter group in the Border TV region), which goes digital in November 2008. In Caldbeck, the second main transmitter group in Border, where switchover is not happening until Q4 2009, 95% of the population are aware of the change.

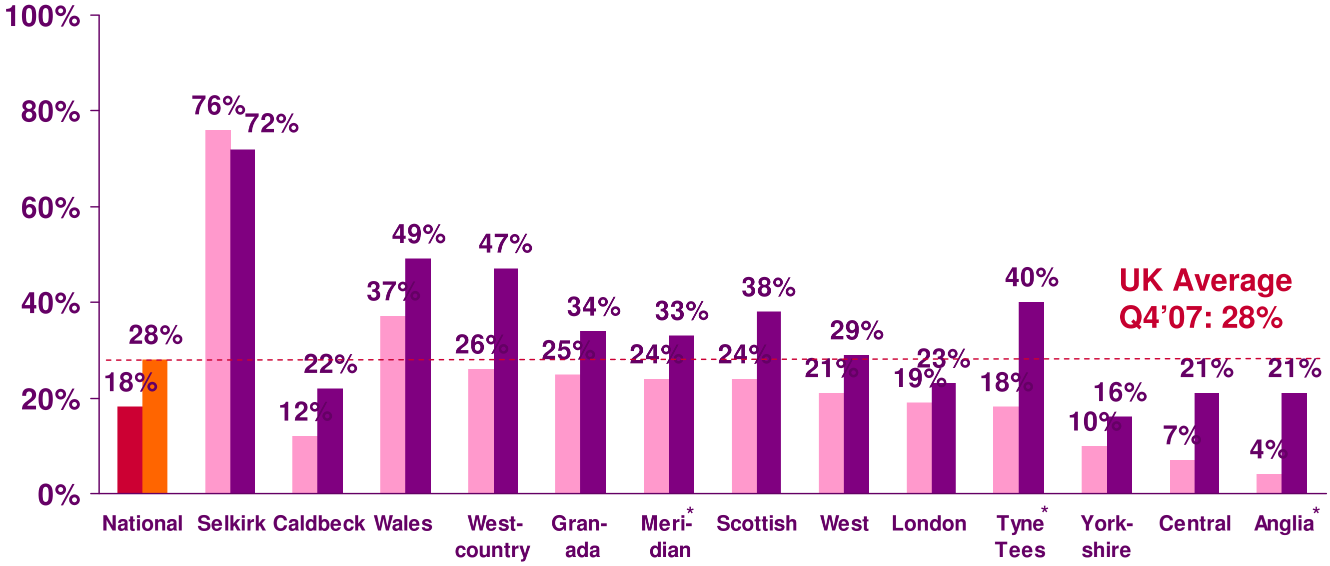
FIGURE 2.1: AWARENESS AND UNDERSTANDING GROWTH FOLLOWING THE AUTUMN 2007 CAMPAIGN



Source: Q4'2007 Digital UK/Ofcom Switchover Tracker sample size 2830

- The autumn 2007 campaign achieved significant improvement in awareness of the regional switchover dates, up from 18% nationally in Q3 2007 to 28% in Q4 2007. Date awareness is significantly higher in the early switching regions. Nearly three-quarters of the population living in the Selkirk transmitter area (72%) understand that they will switchover during 2008 and throughout Border, West Country and Wales almost half of the population know which year the transition from analogue to digital will happen (Border 45%, West Country 47% and Wales 49%).

FIGURE 2.2: REGIONAL DATE AWARENESS INCREASES THROUGHOUT Q4 2007



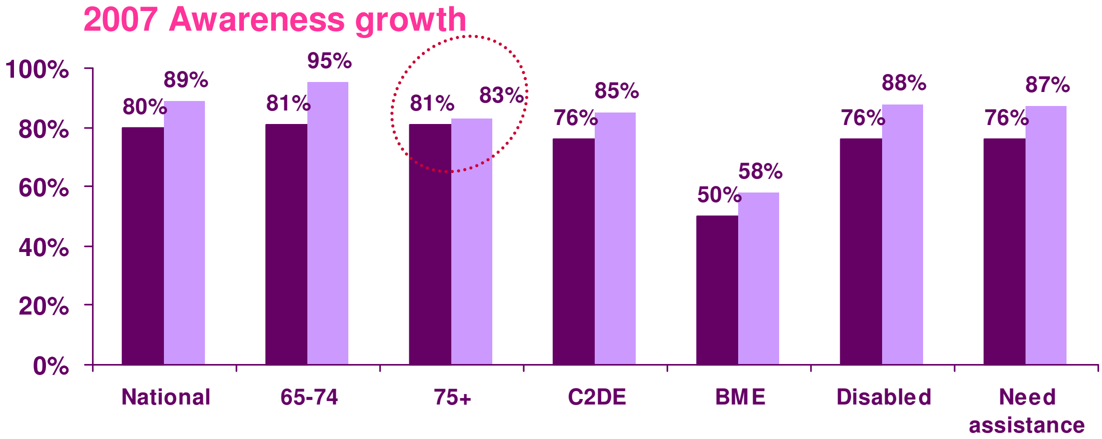
Source: Q4'2007 Digital UK/Ofcom Switchover Tracker sample size 2830, regions marked with * have low samples sizes and must be viewed as indicative only

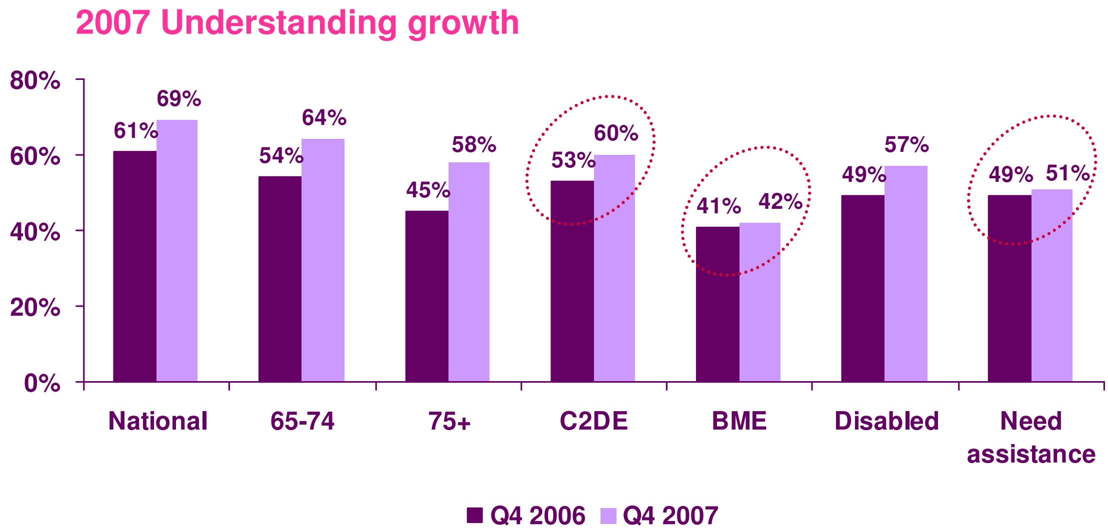
- Part of the most recent campaign was aimed at increasing understanding that analogue recorders will also be affected by switchover. Throughout the last three months of 2007 awareness of this improved from 32% in Q3 2007 to 43% in Q4 2007.

Understanding of switchover

- Understanding of what you need to do for switchover grew in line with awareness during 2007; rising 8pp throughout the year from 61% at the end of 2006 to 69% by the end of 2007.
- In Q4 2007 understanding was markedly better in Border and the West Country (both 85%+) but Wales and Granada, two of the other early switching regions, showed only average understanding (Wales 71%) or even below average understanding in Granada (68%). Digital UK recognises that now awareness is well established in each of the early switching regions understanding gaps need to be filled and switchover myths need to be dispelled. This is especially true in areas like Wales, that have high levels of digital TV conversion via digital satellite subscription.
- While gaps in awareness of switchover among different consumer groups closed in 2007, understanding gaps still remain pronounced among harder to reach parts of the population. Below average growth in understanding was recorded among lower social economic class groups C2DE (plus 7pp to 60% understanding at the end of 2007), Black and Minority Ethnic groups (plus 1pp to 42% understanding) and among those groups who say that they will need assistance to go digital (plus 2pp to 51% understanding).

FIGURE 2.3: YEAR ON YEAR AWARENESS AND UNDERSTANDING GROWTH AMONG CONSUMER GROUPS



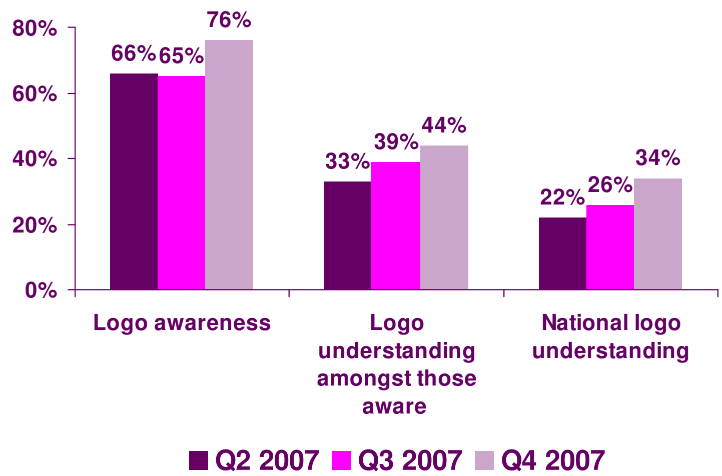


Source: Q4'2007 Digital UK/Ofcom Switchover Tracker sample size 2830

'Digital tick' logo awareness and understanding

- Another key awareness metric is recognition of the 'digital tick' logo. At the end of 2007 more than three quarters of the population (76%, up 11pp from 65% in Q3 2007) felt familiar with the logo.

FIGURE 2.4: AWARENESS AND UNDERSTANDING OF THE 'DIGITAL TICK' LOGO



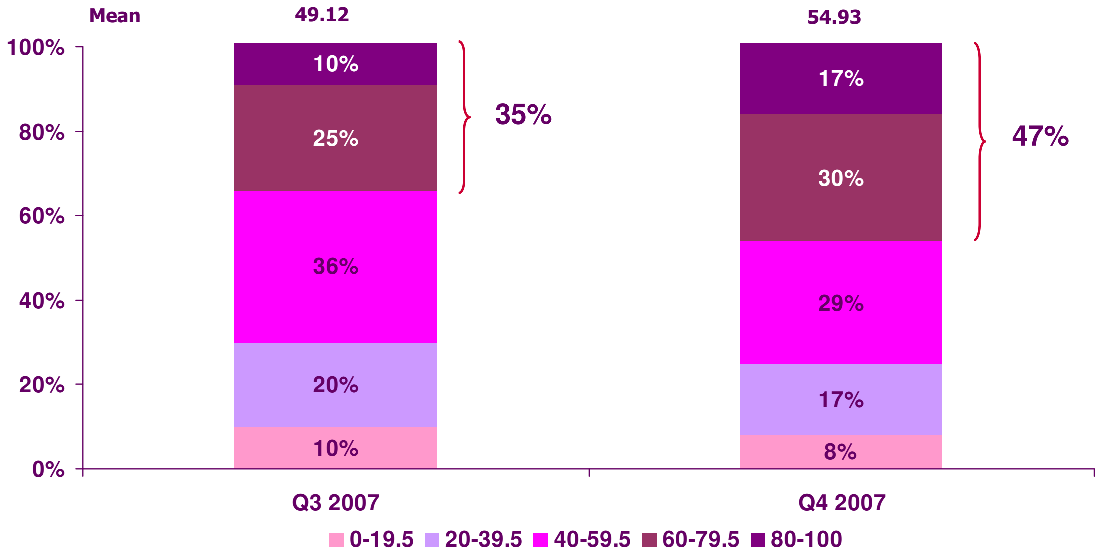
- The logo is an important element of the switchover programme and its value grows as recognition increases. With more than three-quarters of the population aware of the logo Digital UK is moving towards building people's understanding of the 'digital tick' which helps consumers purchase the right type of digital TV equipment at the point of sale. Equipment that will work through switchover carries the 'digital tick' and retailers and manufacturers throughout the UK can apply for a license to use the logo on product packaging and to receive point of sale material to distribute in individual shops.
- In Q4 2007 44% of those aware of the 'digital tick' logo understood what it means (up 5pp from Q3 2007). With 76% of the UK aware of the logo during the last quarter, this means one third (34%) of the overall population had a correct understanding of what the logo means.

The switchover understanding index

- Following the start of the switchover programme in Q4 2007 in Copeland, people now realise the complexity of switchover and that not only TV sets, but also potentially recorders and aerials will be affected by the switch. While the general understanding metric probes peoples' understanding of the switchover process, and that they have to do something in order to prepare, Digital UK is also looking to measure detailed understanding of switchover.
- The understanding index combines all relevant detailed understanding metrics from the Digital UK/Ofcom Switchover Tracker to get an individual score per respondent. The score is determined by the following metrics in the survey:

  (1) understanding of a number of options to go digital
  (2) awareness that all TV sets have to be converted to digital
  (3) knowledge of the regional switchover date
  (4) understanding that VCRs will have limited functionality after switchover
  (5) understanding of potentially having to upgrade an aerial for switchover

FIGURE 2.5: QUINTILE DISTRIBUTION OF UNDERSTANDING INDEX SCORES



Source: Q3'07 – Q 4'07 DUK/Ofcom Switchover Tracker. Sample size 2829 (Q3), 2830 (Q4)

- In Q4 2007 47% of the UK population had high levels of detailed switchover knowledge, i.e. received a score in the highest two quintiles (80 to 100 scores or 60 to 79.5 scores). In comparison to the previous quarter, this is an improvement of 12pp. Respondents aged 25 to 65 are more likely to have scores in the high levels of understanding quintiles whereas older parts of the population are over-represented in the low levels of understanding score quintile. In Q4 2007 8% of the population had very low levels of understanding, e.g. did not know more than one option to go digital, did not know their switchover date and were unaware that switchover may affect their aerial and video recorder. However among people 75 years and older this proportion increases to almost a quarter (22% in Q4 2007).
- Detailed understanding of switchover among consumers will be tracked with the understanding index from Q1 2008 going forward. Digital UK will conduct further analysis into the performance among different consumer groups on the index to gain further insight on where the knowledge gaps in the UK population lie.

Digital TV Conversion

- Most recent conversion results from the Q4 Digital UK/Ofcom Switchover Tracker suggested 3pp growth of primary set conversion during the last quarter of 2007 (up from 80% in Q3 to 83% in Q4) . This brings the Switchover Tracker results back in line with the take-up figures of the Ofcom Digital TV updates published on a quarterly basis. For Q3 2007 Ofcom reported that the proportion of homes with digital TV on their primary set stood at 85.1% at the end of September 2007. A further 1% of homes currently receiving TV via analogue cable bring the overall UK multichannel audience to over 86%.
- During 2007, the Switchover Tracker recorded increased levels of digital TV take-up on secondary set conversion mainly due to growth of the Freeview platform. Over the last year, full household conversion passed the 50% mark - with 8 percentage points growth from 45% at the end of 2006 to 53% full household conversion at the end of 2007. Regionally, both secondary set conversion and full household conversion are also growing especially in the regions set to switch first.

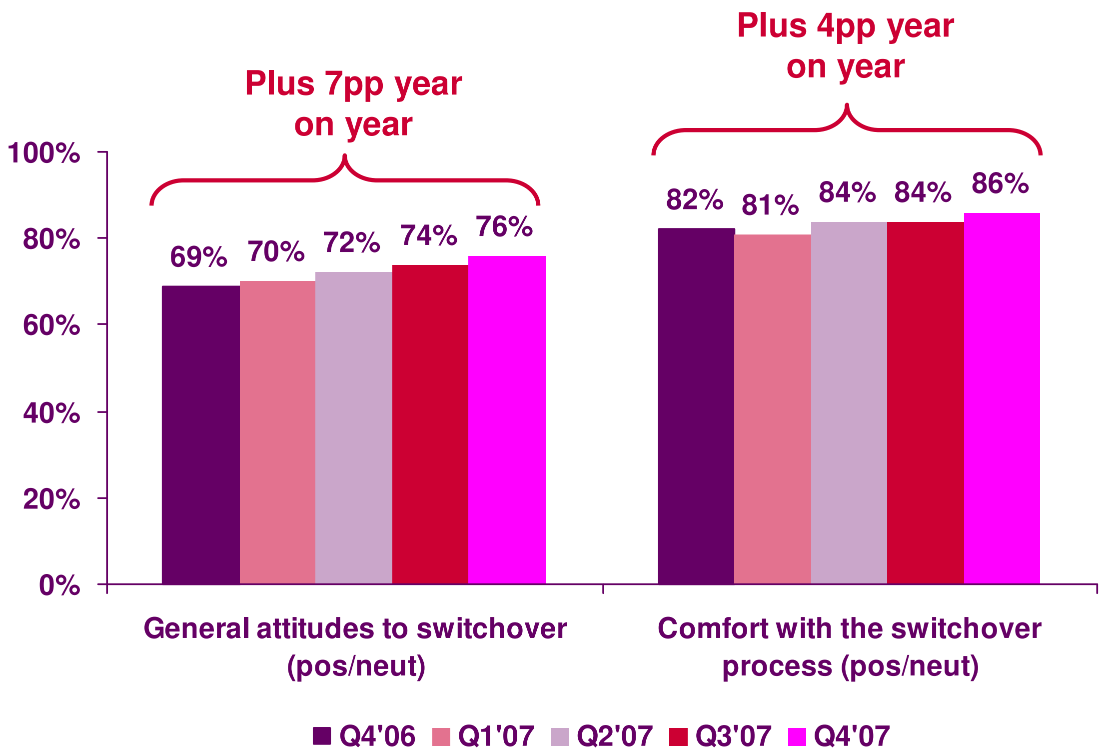
Attitudes Towards Switchover

- During 2007 attitudes towards the policy of switchover improved slowly but continuously. At the end of the year more than three-quarters of the population felt positive or neutral about switchover (believing either that it is ‘a good thing’, or that it is ‘just one of those things’ to be getting on with). In comparison to Q3 this is a marginal improvement of 2pp. Year on year the attitudes to switchover metric followed a small upward trend, improving by 7pp from 69% feeling positive or neutral in Q4 2006 to 76% in Q4 2007.
- Personal comfort with the digital switchover process is also growing following the successful completion of the first UK switchover in

Whitehaven in November 2007. Nationally, 86% felt comfortable with making the changes to receive a digital signal in time for switchover, an improvement of 4pp throughout 2007. In the Scottish Borders area, the next area to switch to digital only broadcasting, more than nine out of ten (94%) feel comfortable with the transition.

- Although more vulnerable audiences are becoming more comfortable with switchover, below average levels of personal comfort remain in those groups, e.g. only 77% of people with a disability feel confident about coping with switchover compared to 86% nationally, and the proportion feeling positive or neutral about the process of 75+year olds is 80%, 6pp lower than the national average. Comfort levels are also lower among people who speak English as a second language and among those renting from the council (both 82%).

FIGURE 2.6: 2007 IMPROVEMTNS IN ATTITUDES TOWARDS DIGITAL SWITCHOVER



Source: Q4'2006 to Q4 2007 Digital UK/Ofcom Switchover Tracker

Intentions to Convert

- In Q4 2007 yet again intentions to convert remained broadly stable. 92% said they had a definite plan to convert for switchover, and again just 1% said that they would not convert (the difference between the two groups being those who 'don't know' what they are going to do).

Chapter 3

Copeland – The first UK switchover: Consumer Experiences

Research in Copeland

Copeland was the Switchover Programme's first opportunity to assess consumers' reactions to digital switchover in a 'real world' scenario which, unlike earlier trials in Ferryside and Bolton, aimed to implement switchover as it would be rolled out across the country without over-serving householders.

Insights have been drawn from a comprehensive programme of research which included:

- The Copeland Tracker: a continuous quantitative survey operated by GfK NOP and similar to the national survey but run only in the switchover area and boosted to sample 250 homes per quarter;
- Dipstick Surveys: short, intensive quantitative surveys conducted immediately before and after each of the switchover dates to provide a status report of homes' readiness; also operated by GfK NOP;
- The Copeland Panel: a selection of 25 Copeland homes that participated in a series of 5 in-depth interviews (both face-to-face and telephone), viewer diaries and online forums to provide a qualitative view of the switchover experience; operated by QMedia;
- Retail Observers: professional Headcount agency field staff deployed to observe footfall and buying behaviour at electrical retailers in the weekends before each switchover date, and the days over switchover.

Where appropriate research insights have been supplemented by data from the call centre, Help Centres and other sources.

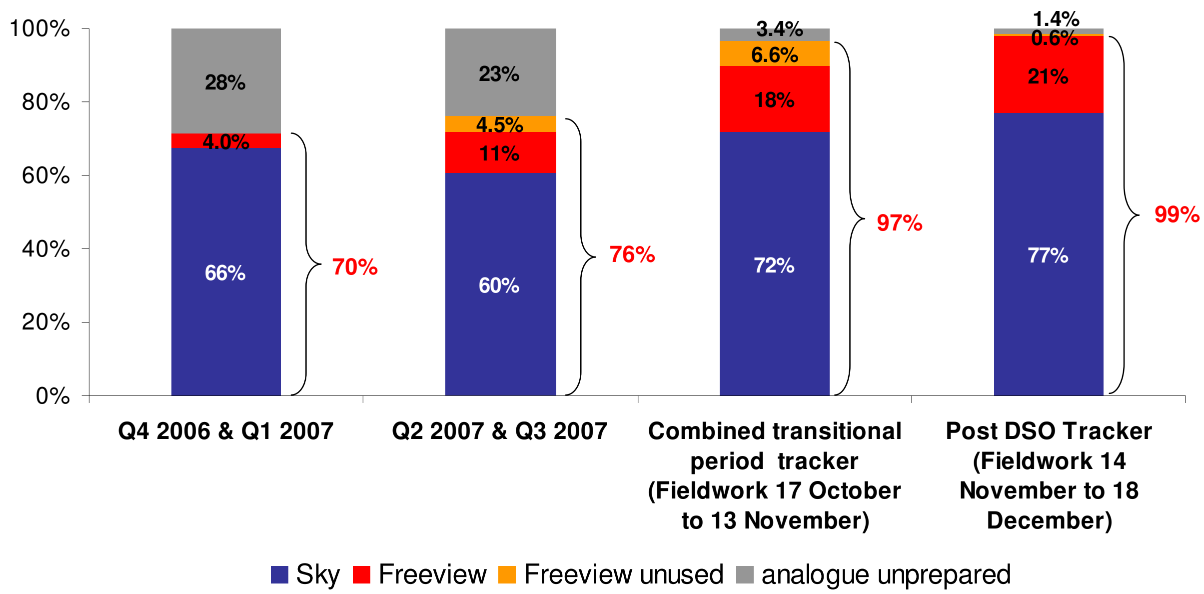
Positive reception of switchover

- Copeland residents were overwhelmingly positive about the switchover: 94% of the 189 homes interviewed after the switch felt positively or neutrally about switchover.
- Almost all – 95% – thought the digital services were better or the same as the analogue services, and the majority, 69%, said their TV signal had improved with switchover.
- 81% said they had received sufficient information on switchover, while 15% felt they had not had enough.
- Three-quarters (74%) had no concerns about switchover. The most important concerns were the cost (10%), for the elderly (5%) or not getting the full line-up of Freeview channels (5%).

Main set conversion

- Despite the lack of Freeview at the local transmitters before the switchover 70% of households had digital television either from Sky (66%) or by picking up a Freeview signal from the Caldbeck transmitter (4%).
- The majority of conversions took place at the point of switchover (shortly before the first switchover date on 17th October). Retail data suggests that sales peaked in the two weekends before the first switchover (6/7th and 13/14th October).
- A very small number of homes (3 in a sample of 189) were not converted immediately after the second switchover date on 14th November. All 3 homes planned to convert: one had a box and was waiting to install it, one was planning to convert before the end of 2007, and one intended to convert but did not know when. As far as we know no home chose not to convert after switchover.

Figure 3.1: COPELAND MAIN SET CONVERSION: SEPTEMBER 2006 TO DECEMBER 2007



Source: Q4 2006 to Q3 2007 Copeland Switchover Tracker (n=214-316), Copeland Transitional period Tracker (n=198) and Post Switchover Tracker (n=185)

Platform Choice

- Approximately 40% of analogue homes chose Sky, and 60% chose Freeview. The Sky conversions took place at or around the switchover date, despite satellite being available prior to switchover.
- Post-switchover Sky had increased its share of primary sets to 77% (+11pp) and Freeview had taken the remaining 22% of main sets.
- More homes ultimately opted for Sky than they originally indicated. In Q1 2007 only 5% of analogue homes said that they would choose Sky (70% said Freeview, and 25% did not know which platform they would choose). Sky conducted significant marketing activity in the area before the

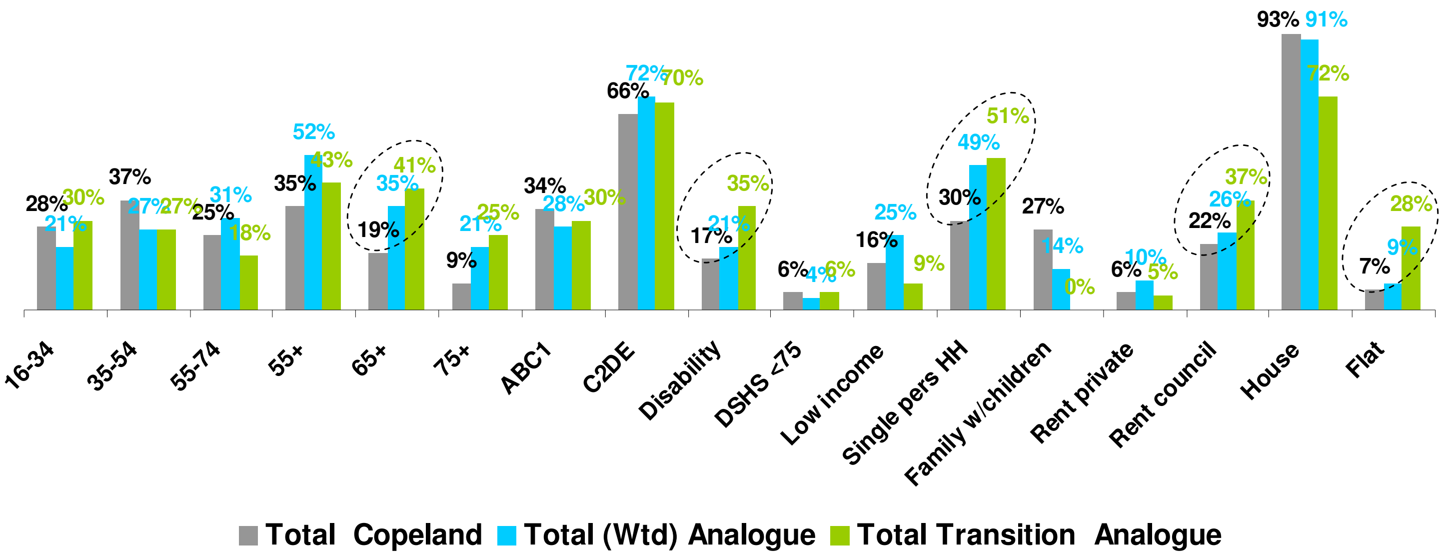
switchover, and Panel interviews indicate that some may have regarded Sky as a 'safe' option in case anything 'went wrong' with the terrestrial switchover. Only 5% of Sky conversions were via Freesat from Sky.

- Only 1% of Sky homes indicated after switchover that they are likely to replace Sky with Freeview now that it is available (84% said they were unlikely to consider changing).

Profile of Analogue Homes

- Prior to switchover (October 2006 – September 2007), the profile of analogue homes in Copeland closely matched that nationwide: older than 55 years (52%), in single person households (49%), and a member of a lower social class (72% C2DE).
- During the transition period, the profile of the diminishing pool of analogue homes changed, indicating that it was the oldest, the disabled, single person households who were most likely to be the very last to convert. Those living in flats and renting from the council were also markedly more likely to be laggards.

Figure 3.2: PROFILE OF COPELAND HOMES, AND COPELAND ANALOGUE HOMES



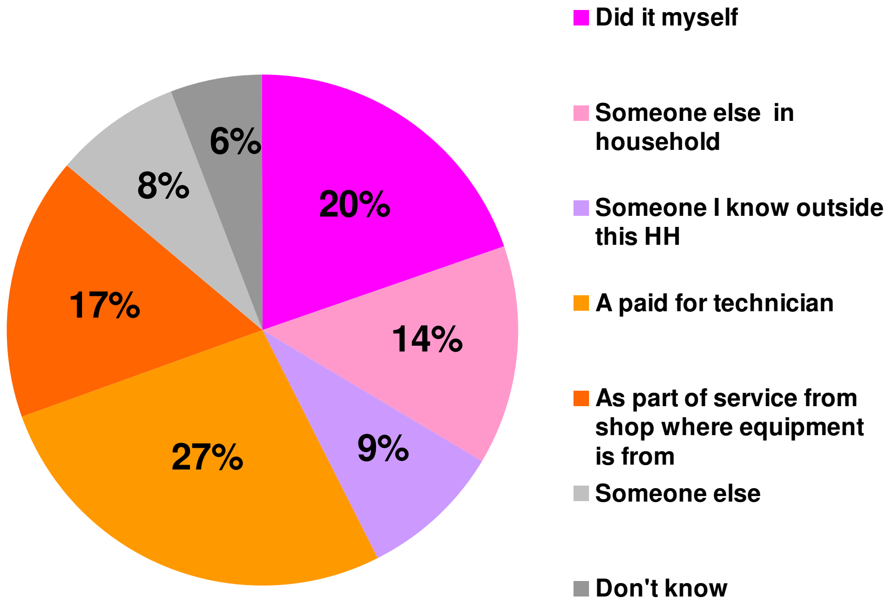
Source: Total Copeland residents Switchover Tracker from October 2006 to September 2007 (all respondents vs. all analogue main set respondents) (n=1016)
Total Copeland analogue Switchover Tracker respondents Transition period (17th of October to 14th of November 2007)

Connecting Freeview Equipment

- Very few homes bought Freeview equipment well in advance of the switch-on of the Freeview signal. 3% reported having bought Freeview equipment 3-6 months ahead of switchover (April to June). From 3 months out (July and August) this rose to 8%.

- From the end of August and the launch of the Five digital signal, Copeland residents began to connect their equipment to receive Five for the first time. In September those watching Freeview rose from 7% (likely watching the Caldbeck transmitter) to 16% of homes, with a further 4% still choosing not to hook up their Freeview box.
- An unanticipated effect of the transition period was that some who had bought Freeview equipment for 17th October still did not bother connecting it until November 14th. The Tracker suggests that a third (32%) of those who had bought Freeview equipment for their main set had not connected it in the first two weeks of the transition period. This fell to 17% in the last two weeks of the transition period.
- The majority of digital TV equipment bought for digital switchover (61%) was installed by the buyers themselves (37%) or by the person in the household who is responsible for dealing with TV equipment (24%). Among people who sought help with installing equipment, their retailer was the first point for help. In 15% of all installations a technician was paid in 5% of all installations the service was included in the offer.
- However, among those people upgrading their analogue main sets for the first time, the proportions who received help from outside of their home were significantly higher than overall. While 20% of analogue homes installed the equipment themselves and 14% had someone else in their home sort it out, the largest proportion (27%) of main sets were upgraded by a paid installer or people received installation as a free service from the place where they bought their TV equipment. This figure includes paid for Help Scheme installations as well as upgrades to the Sky platform, which by definition include an installation visit. Even among Freeview main set users 22% purchased installation of the digital box and 17% received help with the installation.

Figure 3.3: Installation of digital TV equipment among recent converters



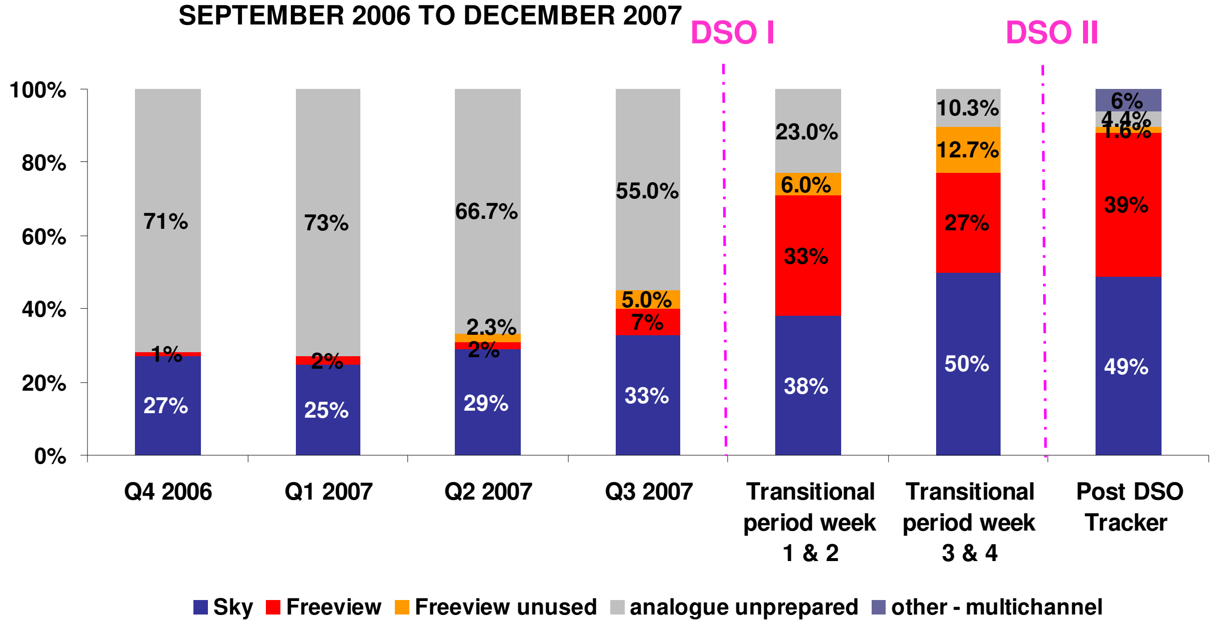
Source: Transition Period and Post Switchover Tracker combined: All respondents who converted their main set in the last year. Sample Size (n): 112

- More than nine out of ten people (92%) who installed their digital TV equipment themselves thought it was easier (45%) or as easy as expected (47%) and only 4% of them encountered more difficulties than they had expected up-front (n=69 during transition period and post DSO).

Secondary Set Conversion

- Take-up of digital TV on secondary sets in Copeland stood at 40% immediately before switchover, predominantly through Sky multiroom subscriptions in Sky homes (33%).
- These conversion levels increased rapidly during the transition period driven mainly by the Freeview platform. More than one third (roughly 33% used and 6% unused Freeview equipment) took up Freeview for their secondary sets in Copeland.
- Post-switchover digital TV conversion on additional sets in Copeland stands at more than 95%. The market share of Freeview on secondary sets in Copeland increased to 40.6% overall (39% connected kit plus 1.6% unused Freeview equipment) and take-up of Sky on subsequent sets is 49%.
- Sky therefore remains the strongest digital TV platform on secondary sets as well as primary sets in Copeland, despite nationally having lost this position to Freeview.

Figure 3.4: COPELAND SECONDARY SET CONVERSION: SEPTEMBER 2006 TO DECEMBER 2007



Source: Q4 2006 to Q3 2007 Copeland Switchover Tracker (n=214-316), Copeland Transitional period Tracker (n=198) and Post Switchover Tracker (n=185)

Timing and Pace of Conversion of Secondary Sets

- Conversion of secondary sets in Copeland to Sky multiroom was a gradual process and started earlier than the take-up of Freeview, whose market share could only grow after the DTT signal became available in the area in

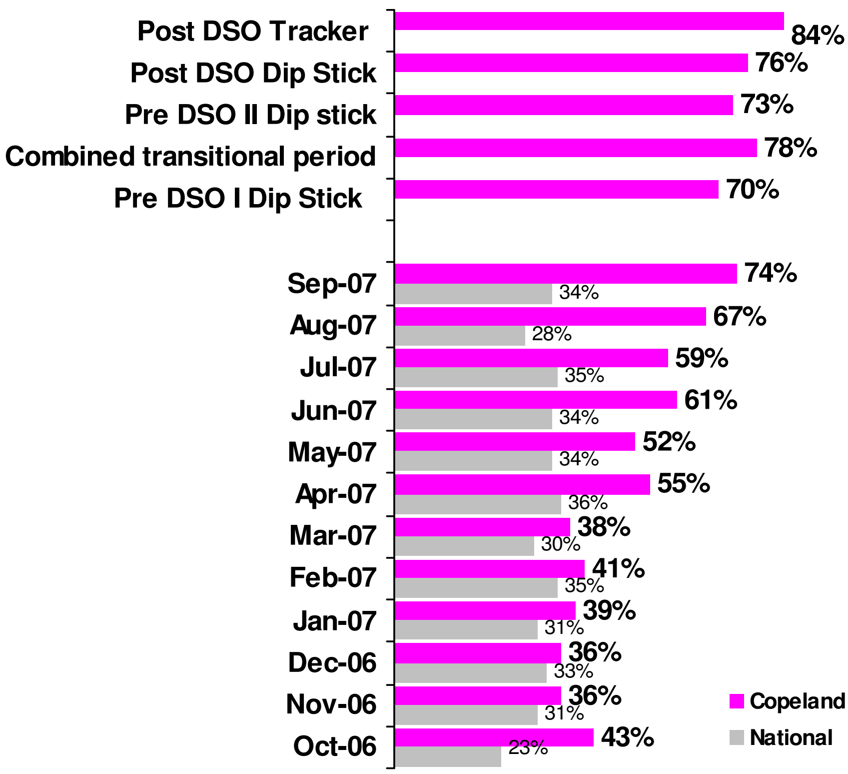
October. Up to 6 months before the switchover a quarter of secondary sets in Copeland received their signal through digital satellite. This had increased to one third of secondary sets by Q3 2007 before the first switchover date in October, and to almost half of all sets during the transition period and post switchover (43% in the transition period and 49% post switchover). Sky records an overall growth on secondary set conversion of 22pp from Q4 2006 to post DSO in Q4 2007.

- Most Freeview secondary set conversions occurred when the digital terrestrial signal first became available on 17th October. However, the transition period was used by many residents to buy further Freeview boxes for secondary sets in their homes, which were connected to remaining analogue sets throughout the 4 week grace period.
- A small number of people made preparations for their secondary sets as early as Q2 2007 onwards, when residents started to buy digital boxes which remained unconnected until the switchover.

Recording

- There was good understanding of the analogue recording issue at the point of switchover, with 84% of all homes saying they were aware of this in December.

Figure 3.5: UNDERSTANDING OF THE LOSS OF INDEPENDENT RECORDING ON ANALOGUE RECORDERS

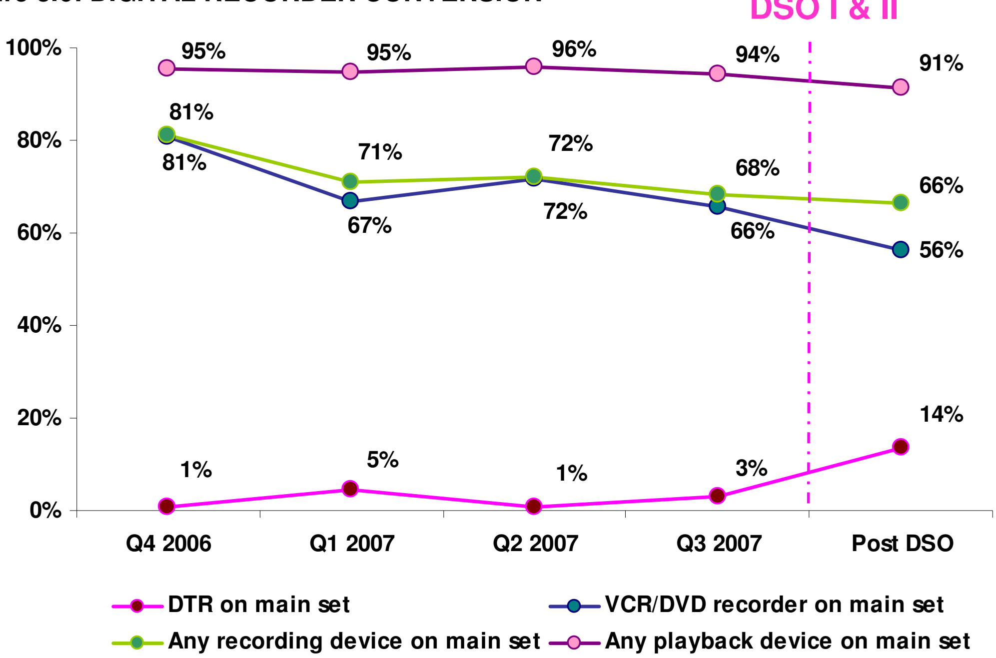


Source: Q4 2006 to Q3 2007 Copeland Switchover Tracker (n=214-316), Copeland Transitional period Tracker (n=198) and Post Switchover Tracker (n=185), Copeland dip stick surveys (n=50-100)

- Few homes seemed concerned about the loss of independent recording: only 5% had noticed the loss of independent recording functionality, despite over one-third (34%) saying that they regularly used independent recording before switchover.

- Very few homes have upgraded to a digital recorder or attempted to connect their analogue recorder to a digital box. Of the 25 Panel homes only two had bought a Freeview DTR in readiness for switchover (one family home; one couple 65+). Post switchover only 14% of homes had a digital recording facility. Overall recorder ownership (analogue or digital) declined from 81% to 66%.

Figure 3.6: DIGITAL RECORDER CONVERSION



Source: Q4 2006 to Q3 2007 Copeland Switchover Tracker (n=214-316), Copeland Transitional period Tracker (n=198) and Post Switchover Tracker (n=185)

- The majority of consumers who decided to upgrade their TV equipment with a DTR were early converters: 61% bought them more than 3 months before switchover and another third (34%) at least three months before the switch. This supports the view that the DTR purchase was an informed choice, and that the 'late rush' of purchases were straightforward digital boxes.

- Recording has clearly caused less concern than anticipated. Panel interviews suggest that this may be due to:

  1. Limited VCR recording pre-switchover. While half the Panel homes had a VCR with their main set, as well as many with secondary sets, most were used for tape playback only. None recorded to VHS on a regular basis.

  2. Changes in viewing behaviour with digital TV which reduce demand for recording. Panel homes reported not wanting to record as often, because (a) the channel choice in digital reduced to need to 'stockpile'

tapes to watch, and (b) the ability to 'catch-up' on the digital channels meant that they did not need to record the earlier transmissions on the main channels:

"I don't get my husband to record it [Coronation Street] any more because I can always catch it later on ITV2" [Panel home, Dec 2007]

3. Recording a secondary / later concern (initial focus was on converting the television). Most homes had not been concerned to set-up their recorders at the point of switchover, but several commented they may attempt this at a later date:

   "I've not hooked up the recorder, but I'll probably want to do that for Christmas telly" [Panel home, Dec 2007]

   As such, some homes may only encounter recording issues a month or more after switchover.

- As a result, many homes were observed to either be planning to upgrade to a digital recorder later and perhaps moving the existing box onto an unconverted second set (often suggesting they would buy a recorder as a Christmas or birthday present); or to be waiting to see if they would miss the recording functionality before deciding how to proceed.
- In the Post Switchover Tracker only 12% had plans to upgrade the analogue recorder on their main set, while 59% said they would leave it and live with the reduced functionality. Unsurprisingly, there was even less intention to do anything with recorders attached to second sets, where only 7% had plans to upgrade.

Use and Viewing of Digital Television

Installing and Using Digital Television

- Many found digital TV cheaper and more straightforward to set-up and use than they anticipated: 81% of Tracker respondents said that had no problems installing their digital television equipment, and 50% found it easier than they expected (only 7% said it was more difficult).
- Problems with using the new TV services and the new equipment were overcome in the first few weeks after people first started using them. During the Transition period 14% of Whitehaven residents found the new equipment more difficult to use, but post DSO this proportion had decreased to 7% overall. The top usability issue was using the increased number of remote controls.
- A quarter of the population in Copeland found the digital TV services easier to use, which might also be down to some respondents choosing to upgrade to Sky which is known as having very easy to use equipment with intuitive navigation. Getting used to new TV equipment was harder for older people in Copeland, even after the transition period ended still more than one in ten of all 65+ year olds found it harder to use the new equipment compared to 7% overall.

Enjoyment of Digital Television

- There was an almost universally positive reaction to digital services: nearly everyone – 95% said that they found the digital services better or the same as their old analogue service.
- Panel homes noted that they particularly appreciated the EPG, programme synopsis, and interactive features – and that they were pleasantly surprised by the benefits these functions brought.
- Most (71%) had tried using the digital text services, although there were mixed views, with 34% saying they were easier than analogue text but 25% saying they were harder to use; and 44% saying they were better, while 22% thought they were worse. 70% of those complaining about digital text thought it was slower than the analogue service.

Viewing Behaviour

- We observed some notable changes in viewing behaviour at switchover, including exploration of the new channels and increased viewing in some homes.
- All Panel homes that converted for the first time at switchover had explored the new digital channels, and two-thirds (67%) of Tracker homes had looked through the new channels.
- Two-thirds of Tracker respondents said that they liked the new channels, (32% did not have a view).
- Qualitative evidence suggests that the overall volume of viewing increased in newly-digital homes, and 12% of Tracker respondents getting digital for the first time said that they were watching more television than before (80% said the same, 7% said less).
- The Panel suggests this ‘new viewing’ is taking place at a number of different times of the day:
  - Early mornings: having the TV on as background when getting ready for the day (for example, the music programming on E4; digital BBC Radio 1)
  - Daytime: those at home during the day, particularly older people, leaving the television on to watch BBC News 24
  - Afternoons: children watching CBBC when returning home from school
  - Late night: watching Five films late at night in bed
- In some instances live TV viewing has replaced VHS or DVD viewing (as above, one Panel home now watches the soaps later on ITV2 rather than needing to record them from ITV1).
- Panel homes tended to explore the channels they knew of first; predominantly Five and E4. From there they then began to explore other channels.
- Exploratory behaviour is assisted by the EPG and programme synopsis functions, which as discussed above, have been highly valued by previously analogue homes.

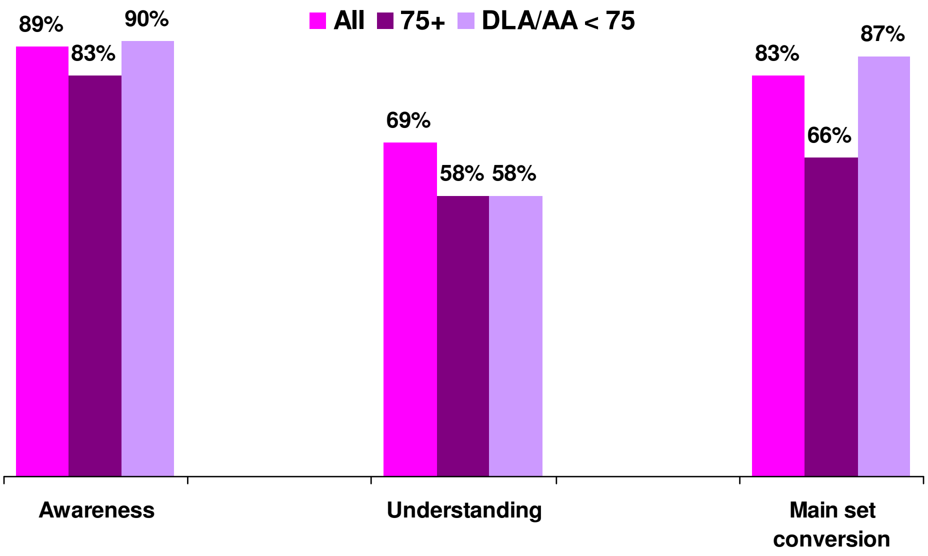
Chapter 4

The Digital Switchover Help Scheme

- The Digital Switchover Help Scheme has been set up by the BBC at the request of the Government to offer eligible people help to make the switch to digital television on one of their TV sets. The BBC has set up a subsidiary, DSHS Ltd, to operate the scheme.
- People are eligible for the Help Scheme if they are aged 75 years or more, or if they are registered blind or partially sighted. Also eligible are people who get (or could get) attendance or constant attendance allowance (AA), mobility supplement, or disability living allowance (DLA).
- It is estimated that about 7 million people in the UK will be eligible for the scheme through the switchover period.
- The scheme will be rolled out in each region as switchover approaches. In each ITV region eligibility opens eight months before the first transmitter switches, and ends a month after the last transmitter switch. Every eligible person will be contacted directly at their home.
- Those who apply receive a choice of equipment, installation, help with using the equipment, a new aerial (if needed) and after care.
- Equipment provided by the Help Scheme such as set-top boxes meets higher usability requirements: easy set up/use, access to audio description, functional remote control design, easier rescanning.
- Most people will contribute £40 to the cost of the scheme. For those eligible people who are receiving income support, the Help Scheme is provided free.
- To date the Help Scheme has helped more than 2,800 Copeland residents switch over to digital. Capita was the service provider for that one-off project.
- Eaga, a leading provider of residential energy efficiency and outsourcing services, has been selected by the BBC as the Help Scheme service provider to deliver the help available under the scheme from the Border TV region onwards.
- From the Digital Switchover Tracker we know that those 75 and over report slightly lower levels of awareness of digital switchover than the UK population overall (83% in Q4 2007 versus 89% nationally), and even less in understanding (58% versus 69% nationally) overall. They also have far lower levels of conversion, with just 66% owning a digital main set in Q4 2007, 17pp below the national average.
- The under 75s in receipt of DLA or AA have awareness in line with the national average at 90%, but much lower levels of understanding, 11pp below the national average at 58%. However, they are more likely already to have a digital main set, with 87% digital TV take-up among this group in

Q4 2007, 4pp higher than the national average. This group is also more likely to live in households that are already fully converted (62%, compared to the national average of 53%).

Figure 4.1: Switchover awareness and understanding amongst eligible groups

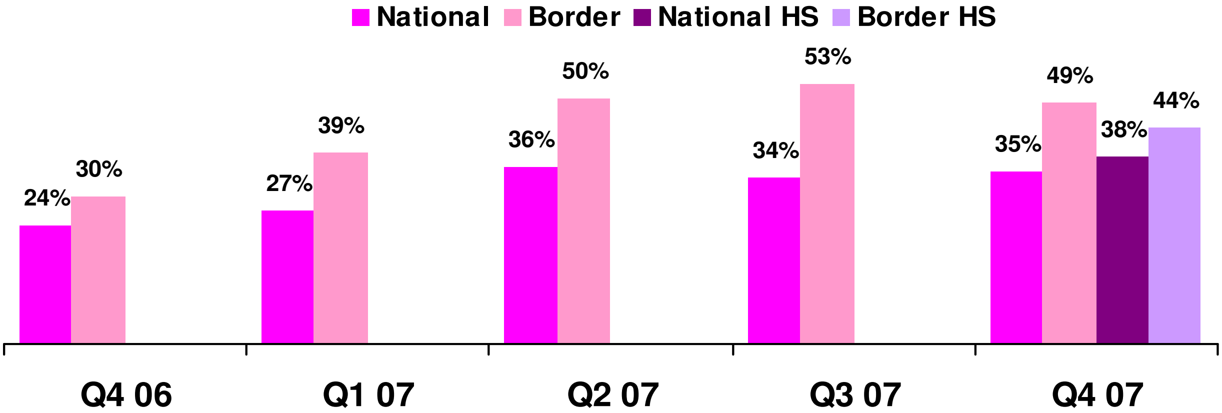


Source: Q4'2007 Digital UK/Ofcom Switchover Tracker sample size 2830

National awareness of the Help Scheme

- In Q4 2007 roughly a third (35%) of the UK population knew that there will be government assistance for certain groups to help them prepare for digital switchover. This rose to almost half (49%) in Border, or 44% among eligible respondents. Border awareness of the scheme peaked in Q3 2007, probably influenced by coverage of the Copeland switchover. With switchover in Border still being some months away, communication of the Scheme has yet to start; information provided so far being references to the Help Scheme in Digital UK's general mailings.

Figure 4.2: National and regional awareness of the Digital Switchover Help Scheme

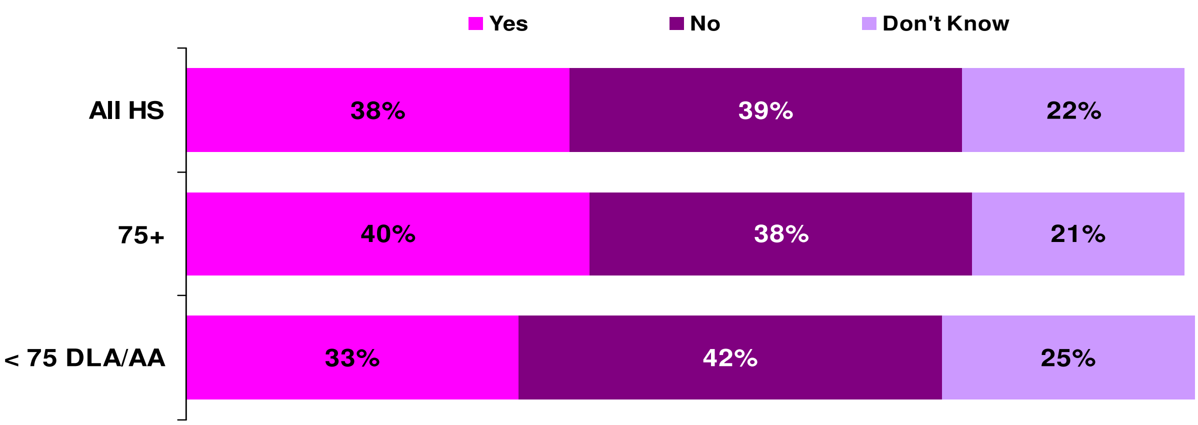


Source: Q4 2006 to Q4 2007 Digital UK/Ofcom Switchover Tracker. Q4 2007 sample size 2830, Border 483, Help Scheme national 424

Border Help Scheme Boost

- From October 2007 the Digital UK/Ofcom Tracker included a number of Help Scheme specific questions to be asked to those eligible for the Help Scheme living in the Border region. In the course of Q4 2007 we interviewed 208 Help Scheme eligible respondents in Border: 146 were aged 75 and over, and 98 were in receipt of DLA or AA (60 of whom were under the age of 75).
- The first quarter's results show that there is currently limited understanding among eligible groups of both who will be eligible for the Scheme and what help will be offered. This limited understanding is merely a reflection of the fact that the details of the Scheme have yet to be communicated to eligible individuals. When asked directly whether they thought they are eligible for the Help Scheme just 38% of those eligible in Border answered yes, a further 22% responded don't know and 39% believe they are not eligible for help. Awareness of eligibility was lowest among those under 75 and in receipt of DLA or AA; 42% of this group don't believe they are eligible for help.

Figure 4.3: Understanding of eligibility among Digital Switchover Help Scheme groups

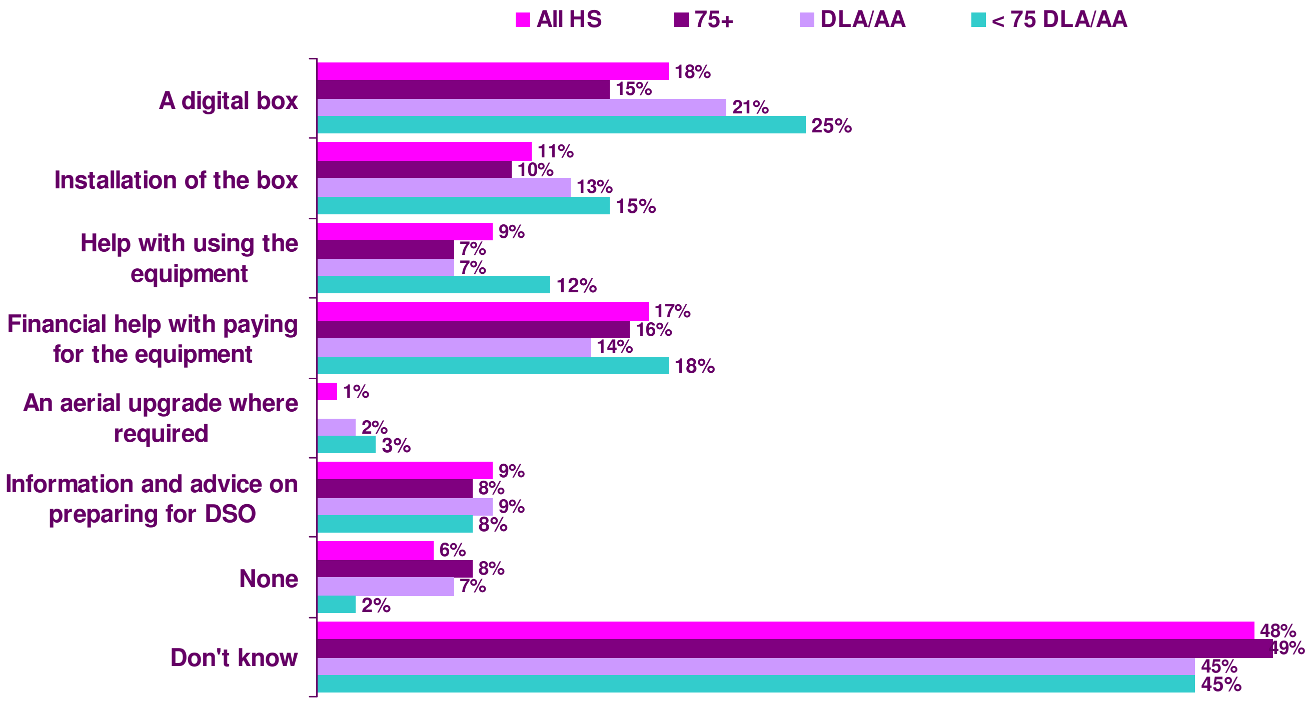


Source: Border Help Scheme Boosts sample size 208 *Please note base sizes for sub groups are small: 75+ (146), DLA/AA (98*), >75 DLA/AA (60*)

- Two thirds (64%) believe that the elderly are eligible for the Scheme. Only a third (32%) of those who think the elderly are eligible set the benchmark for eligibility at the correct age of 75 years of age or over; the 75 and over group were most likely to get this right. Similarly when respondents were asked if people with disabilities are eligible for help under the Scheme, persons under 75s in receipt of DLA or AA recorded the highest awareness. Almost a third of all eligible respondents (30%) also think that people on a low income or benefits are eligible for help, but just 7% think blind or partially sighted people are eligible.
- We asked respondents what kind of assistance they think will be provided. While almost half (48%) responded *don't know* to this question, 18% mentioned a digital box, 17% financial help with paying for equipment and 11% installation of the box. Only 1% mentioned a possible aerial upgrade

and less than 10% expect the service to offer help with using the equipment and information and advice.

Figure 4.4: Understanding of the Digital Switchover Help Scheme Service



Source: Border Help Scheme Boosts n=208
Please note base sizes for sub groups are extremely small: 75+ (146), DLA/AA (98), >75 DLA/AA (60*)

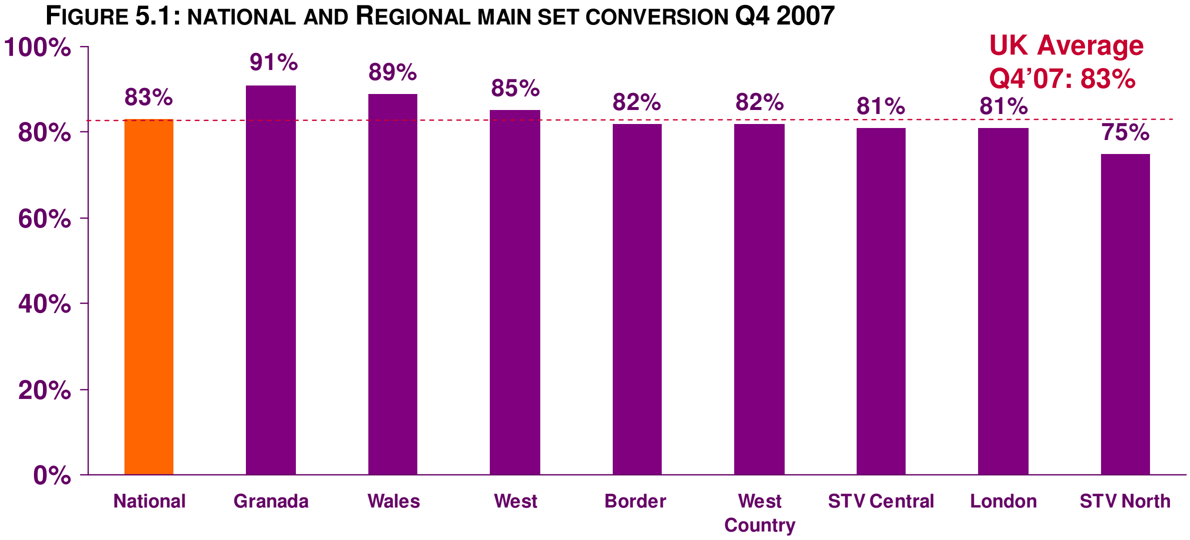
- Almost half (49%) of eligible respondents in Border don't know how much people will be expected to pay for the Help Scheme service. 37% believe it will be free, and the majority of those suggesting a possible price estimated (correctly) at around the £40 mark. The under 75s in receipt of DLA or AA were the most likely to think that the service will be free. There is currently little expectation regarding timings of the Scheme, when it will be communicated, and help available.
- Bearing in mind the limited understanding of the Scheme that was apparent among eligible groups in Border, it is interesting to see that at this point, prior to detailed communications and with switchover still almost a year away, a brief explanation of the Scheme had little effect on how likely people thought they would be to take-up the Help Scheme. 46% said they are very or quite likely to take-up the Scheme before an explanation, and 47% afterwards. Among those saying they are unlikely to take-up help from the Scheme, the most common reason was that they are already converted to digital, and believe they are ready for digital switchover.
- There were a significant number of Don't Know responses to the Help Scheme specific questions. This is explained in part by the characteristics of these types of respondent. It is also indicative of a general low awareness, understanding, and uncertainty of the Help Scheme.

Chapter 5

IN FOCUS: The analogue only audience

- The most recent levels of digital TV take-up suggest that currently around 15% of the UK population only have access to analogue TV in their home. Ofcom's take-up figures for Q3 2007 state that 85.1% of homes have digital TV on at least one set and Q4 2007 conversion levels from the Digital UK/Ofcom Tracker record digital conversion at 83% of UK homes.
- Despite varying regional DTT coverage throughout the UK there are relatively small differences in digital TV take-up region by region. During 2007 the Switchover Tracker recorded proportionately higher levels of take-up in areas that have patchier digital terrestrial coverage, suggesting that increasingly people living in marginal coverage areas are converting to digital although they do not always receive the highest quality of service from their transmitter.
- Regionally digital TV penetration is highest in areas that traditionally record high levels of take-up such as Wales (89%), where adoption of satellite services has been above average for many years. Other factors that influence digital TV take-up in the regions are proximity of the region to their switchover date and to some extent regional DTT coverage. This means early switching urban areas with high DTT coverage levels like Granada (91%) and West (85%) record above average digital TV conversion and areas like Border (82%) and West Country (82%) with more limited coverage have conversion levels slightly below the national average. Late switching regions like London have below average levels of take-up (81%) despite a DTT signal being available to almost all homes in London.

FIGURE 5.1: NATIONAL AND REGIONAL MAIN SET CONVERSION Q4 2007



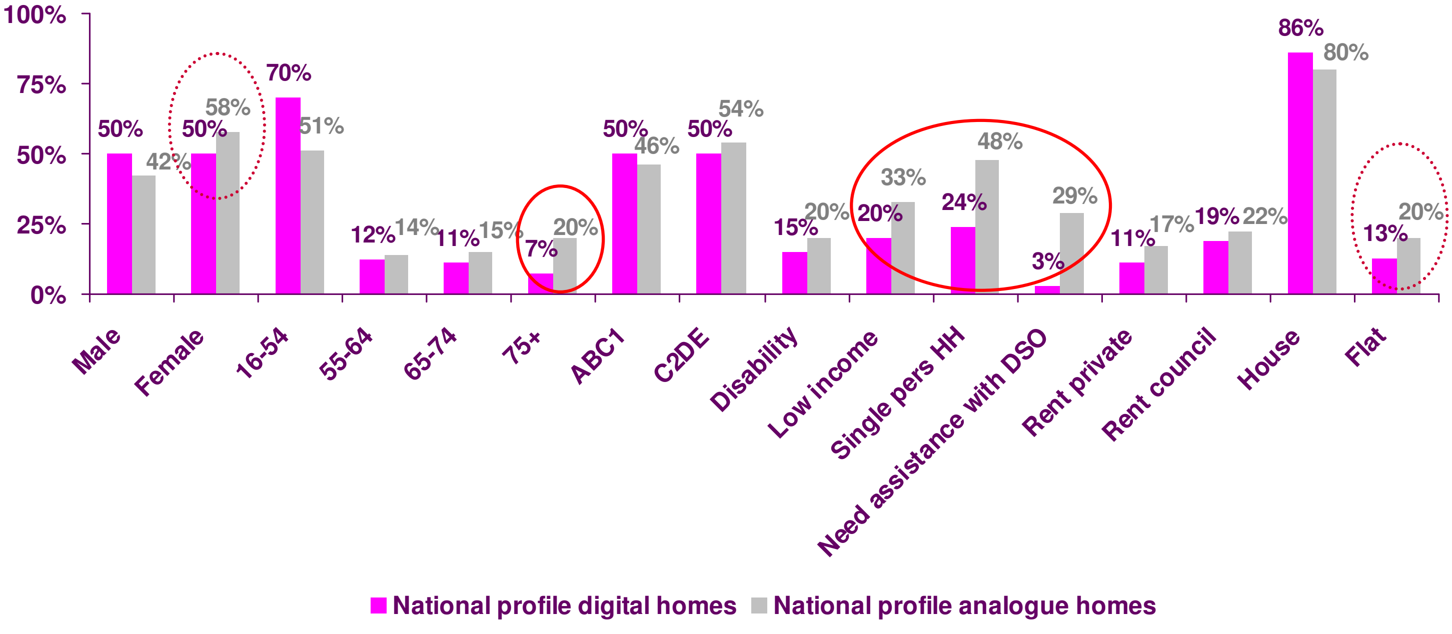
Source: Q4'2007 Digital UK/Ofcom Switchover Tracker sample size 2830, regions marked with * have low samples sizes and must be viewed as indicative only

- Following this analysis, analogue households are more likely to be in late switching areas or in areas where they cannot receive a digital signal before switchover happens if they have decided that they do not want to go digital via satellite, e.g. because of cost reasons.

Demographic profile of the analogue audience

- The social demographic profile of analogue homes is very different from the UK population as a whole and analogue viewers are more likely to need assistance with the transition to digital.
- The majority of analogue respondents are female (58% analogue vs. 50% digital homes) and they are more likely to be older, particularly at the highest end of the age spectrum, e.g. 75+ (20% of the analogue households vs. 7% in digital homes). This also makes large parts of the remaining analogue population in the UK eligible for the Digital Switchover Help Scheme.
- Despite general differences in age, gender and social class, the living circumstances of the analogue and the digital audience also vary greatly. Analogue viewers have lower levels of income, mainly due to the fact that a large proportion of them are pensioners. More importantly the proportion of analogue viewers living on their own is significantly larger than among the digital audience (48% of analogue homes vs. 25% of digital ones).
- Almost a third of analogue homes (29%) think that they will need help with the switchover process while only 3% of already digital homes feel this way. This suggests that the experience of having gone digital for at least one set in the home helps people to build confidence that they can do it again when it comes to switchover.

FIGURE 5.2: SOCIAL DEMOGRAPHIC PROFILE OF ANALOGUE HOMES



Source: Digital UK/Ofcom Switchover Tracker Q1'07 to Q4'07 12 months rolling data

- Another key difference is the importance of TV in analogue homes. Almost half of analogue respondents (42%) are light TV watchers vs. just over a quarter (27%) of the already digital respondents. However, still more than one in ten (14%) analogue viewers watch more than 5 hours per day and would therefore be considered heavy TV viewers.
- The fact that analogue viewers watch less TV impacts on their awareness and understanding of switchover as they are less likely to have seen the Digital UK advertising in the past (46% saw advertising among analogue homes vs 56% in digital ones). As the regions move closer to switchover Digital UK therefore needs to use alternative ways, such as direct mail campaigns, to reach analogues homes in time for switchover.

Chapter 6

IN FOCUS: The Selkirk Transmitter group serving Scottish Borders

Selkirk summary

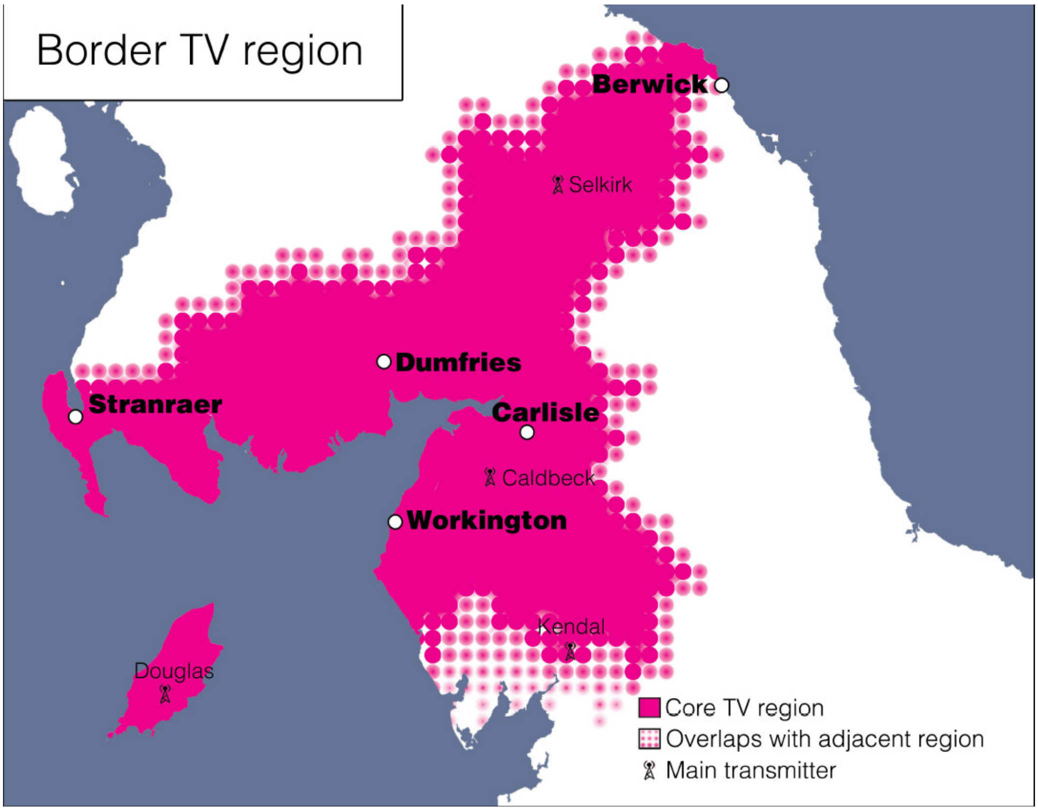
- At the end of 2007, less than one year out from the first switchover date in the region, residents of the Selkirk transmitter area seem well prepared for the transition to digital TV. People in the area have the highest level of switchover awareness (98%) and understanding how to prepare (90%) in the UK. More than eight out of ten (84%) of Selkirk homes already use digital TV on at least one of their TV sets and more than half of households (57%) are fully digital.
- In comparison to the rest of the UK and to the other early switching regions, people living in Scottish Borders have higher levels of detailed understanding; almost three quarters (72%) of the Scottish Borders population know that their area switches to digital in 2008. Some (43%) are aware that their recorders will be affected by the switchover. This is higher than it was during the same time period in Copeland, but it is considerably lower than main switchover awareness in Selkirk. Finally, awareness of the 'digital tick' logo is significantly higher in Selkirk (85% vs. 76% nationally).
- Following the successful switchover in Copeland more people in Scottish Borders feel relaxed about coping with the transition to digital TV. More than nine out of ten (94%) are either happy, OK or not bothered by switchover. However, 1 in 10 of those aged 55+ still feel slightly worried or threatened by the change. In 2008 Digital UK's charity partnership will start its activity in the region. In co-operation with local charity groups, volunteers will be trained and help centres will be set up to provide residents with advice and support as the region moves closer to switchover.

The Scottish Borders served by the Selkirk Transmitter

- The Border TV region consists of 2 main transmitter groups: The Caldbeck transmitter area switching in Q2 2009 and the Selkirk transmitter area switching to digital only broadcasting between 6th and 20th of November 2008. After the successful switchover of the Copeland area during the last quarter[1] the Selkirk transmitter serving the Scottish Borders area is next to switch in the UK switchover rollout plan.

[1] please see chapter 3 for more details about the switchover consumer experiences in Copeland

FIGURE 6.1: BORDER TV REGION MAP: SELKIRK AND CALBECK MAIN TRANSMITTER GROUPS

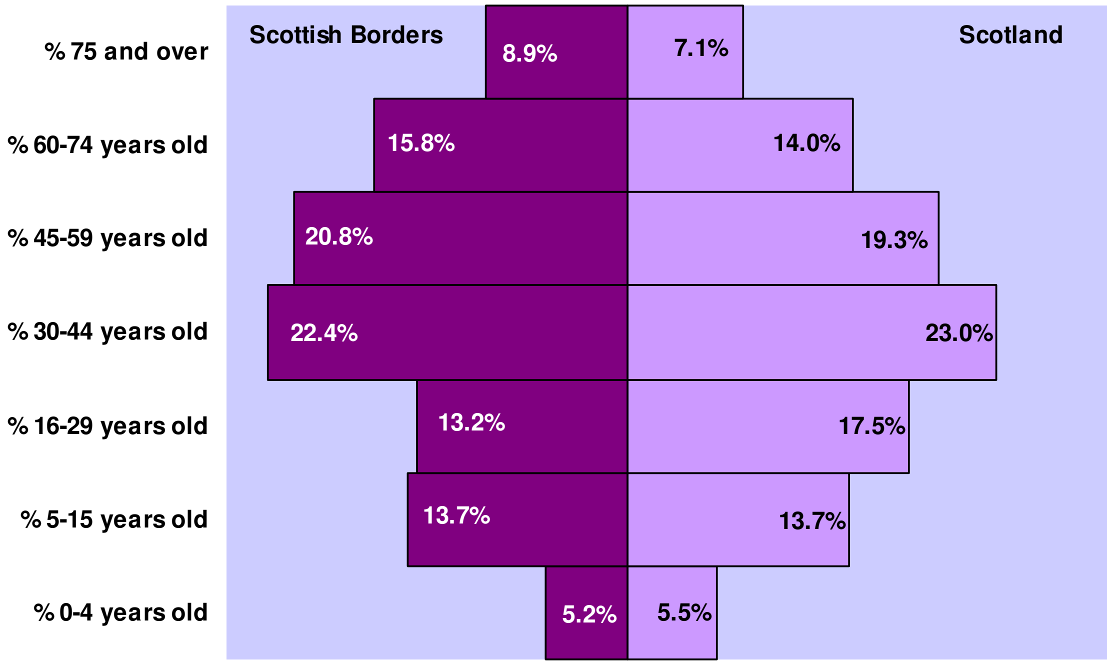


- The Scottish Borders area sits within south-east Scotland, overlapping into a small part of England around Berwick-upon-Tweed. Geographically the region is hilly, with the River Tweed flowing west to east through the region. It is very sparsely populated and therefore many residents may have to overcome larger than average distances to purchase digital TV equipment in preparation for switchover. Key towns in the area include Hawick, Peebles, Galashiels, Kelso, Jedburgh and Melrose.
- The Selkirk transmitter group serves approximately 50,000 households and the main transmitter is located just outside the town of Selkirk. It has 11 dependent relay transmitters. They are Peebles, Innerleighten, Lauder, Stow, Galashiels, Clovenfords, Jedburgh, Hawick, Bonchester Bridge, Yetholm and Eyemouth.
- Currently only the Selkirk main transmitter broadcasts a low power digital terrestrial signal. For everybody currently receiving their TV signal from one of the relay transmitters the digital terrestrial signal will only become available at point of switchover in November 2008.

Demographic profile of the Scottish Borders region

- 107,000 people live in the Scottish Borders region. Scottish census data suggests that people living in Scottish Borders are slightly older than the rest of the Scottish population. On average Scottish Borders has around 2% more older people in all age brackets from 45 years upwards (1.8% more 75+ year olds and 60 to 74 year olds and 1.5% more 45 to 59 year olds than Scotland as a whole).

FIGURE 6.2: SCOTTISH BORDERS AGE PROFILE



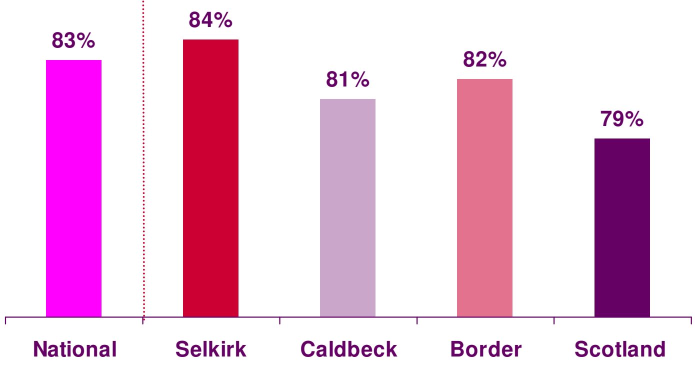
Source: Scottish 2001 Census data

- While the gender balance is similar to Scotland as a whole, Scottish Borders residents are less likely to have a disability or long term limiting illness. The proportion who say they are suffering from a disability in Scotland stands at 20.3% but among Scottish Borders residents this proportion drops to only 17.4%.
- The vast majority (98.7%) of the Scottish Borders population live in resident households, mostly houses and some blocks of flats or converted houses. However, 1.3% (around 1,382 people) live in one of the estimated 111 communal residential establishments. The majority of these establishments are care homes as 56% of those living in communal establishments are 75+ and 17% have a long term limiting illness.

Digital TV take-up

- When comparing levels of ownership of digital TV, penetration figures are slightly higher in Selkirk (84%) when compared to the UK national average of 83% and significantly higher than the Scotland average which stands at 79%. With currently more than half of Selkirk homes receiving digital TV via satellite (51%) and only one third of homes watching Freeview on their main set, this level of pre-switchover take-up is very encouraging.

FIGURE 6.3: DIGITAL TV CONVERSION IN SELKIRK AND THE BORDER TV REGION



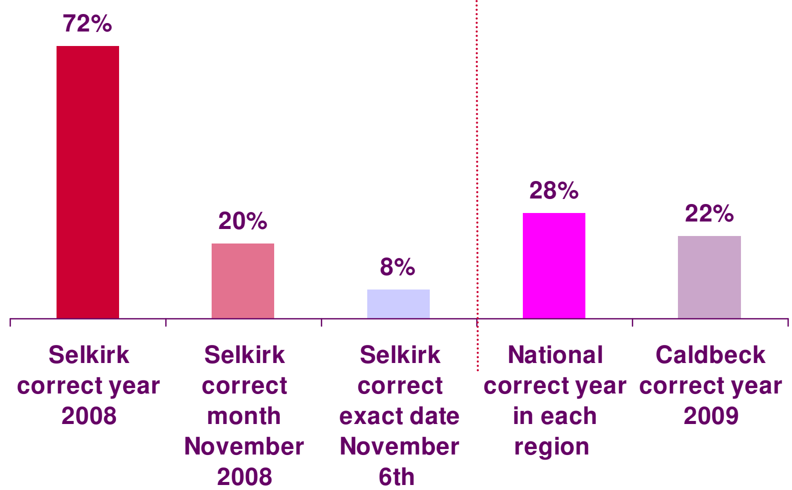
Source: Q4'2007 Digital UK/Ofcom Switchover Tracker sample size 2830 nationally Selkirk 232, Border 483

Awareness and Understanding of digital switchover

- At the end of 2007 virtually everybody (98%) living in the area served by the Selkirk transmitter group was aware that switchover is happening. This shows that one year out from switchover in the region, residents are in a very similar situation to those in Copeland, after the switchover date was announced to them in March 2007, seven months out from the first Copeland switchover date at the time.
- Respondents who were aware of the term 'digital TV switchover' were further asked what it meant to them in order to gauge their level of understanding of how to prepare for digital switchover. Selkirk currently has a markedly higher level of understanding of what to do to prepare than the UK as a whole with nine out of ten people (90%) in Selkirk vs. 69% nationally knowing that they will have to convert their TVs to receive a television signal after switchover happens. Digital UK is encouraged by the fact that as the next region to switch Scottish Borders has the highest level of understanding of what to do in the UK and also that almost 50% of the Scottish Borders residents recall unprompted that they have to upgrade all of their TVs to digital in order to use them after the switch, although this falls to 1 in 3 among those aged 55+.
- Almost three quarters (72%) of the Scottish Borders population are clear that the switchover will happen this year. During this most recent quarter the Digital UK Switchover Tracker also started probing people's more detailed understanding of the switchover date. At the end of 2007 20% of the Scottish Borders population are aware that switchover is happening in November 2008 and less than one in ten (8%) know the first switchover date 6th of November 2008.
- On 30th October 2007 Digital UK announced that the Selkirk switchover would start on 6th of November 2008. On that date the BBC Two analogue signal will be switched off and replaced with a digital service. Scottish Borders residents will go through a 2 week transition period before the

remaining analogue channels (BBC One, ITV1, Channel 4 and Five) will be switched off on the 20th of November.

FIGURE 6.4: KNOWLEDGE OF THE CORRECT SWITCHOVER DATE IN SELKIRK TRANSMITTER AREA

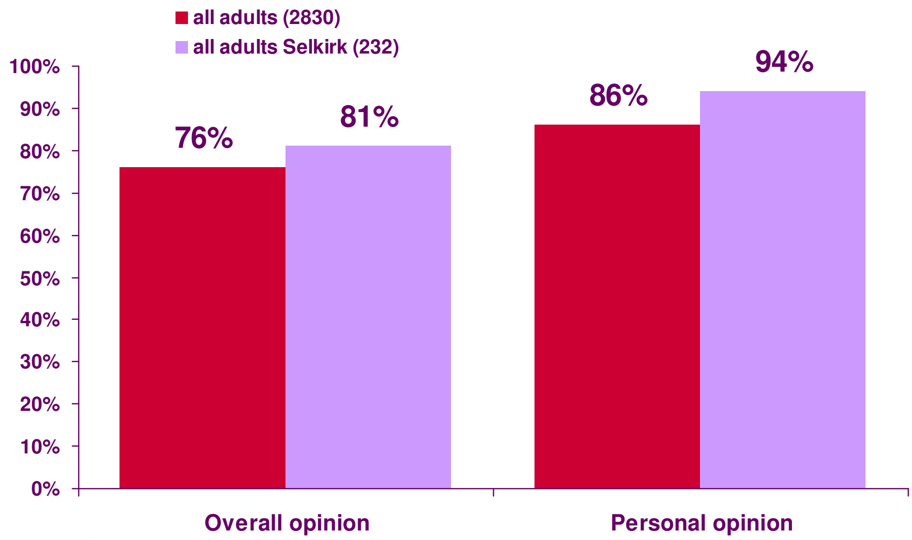


Source: Q4'2007 Digital UK/Ofcom Switchover Tracker Selkirk sample 232 national 2830

Attitudes towards digital switchover

- To gauge their overall opinion, respondents were asked about their attitudes towards switchover and about their personal comfort with the process.
- Following the successful switchover in Copeland more people in Scottish Borders feel comfortable with coping with the transition to digital TV. More than nine out of ten (94%) are either happy, OK or not bothered by switchover. However, one in ten of those aged 55+ still feel slightly worried or threatened by the change. In 2008 Digital UK's charity partnership will start its activity in the region. In co-operation with local charity groups, volunteers will be trained and help centres will be set up to provide residents with advice and support as the region moves closer to switchover.
- At the end of 2007 adults in the Selkirk area felt generally more positive about the switchover process and policy with more than eight out of ten (81%) feeling positive about switchover in general compared to the national average of 76%.

FIGURE 6.5: ATTITUDES TOWARDS DIGITAL SWITCHOVER IN THE SCOTTISH BORDERS AREA



Scottish Borders Retail Infrastructure

- There are 20 electrical retail outlets in Scottish Borders and the immediate area[2], of which 15 are logo licensed. Note, however, that the independent stores are generally small, with some selling just 1 or 2 pieces of TV equipment. There are no well established independents similar to Brooks' in Copeland, and many residents will shop outside the area (in Edinburgh, Newcastle).

Retailer	Location	Logo Licence?
1. Multiples [3]		
Comet	Galashiels	Yes
Currys	Galashiels Berwick-Upon-Tweed	Yes
2. Unassisted Stores [5]		
Argos	Galashiels Berwick-Upon-Tweed	Yes
Tesco	Galashiels	Yes
Woolworths	Hawick	
Co-Op	Berwick-Upon-Tweed	Yes
3. Independents – Logo Licensed [7]		
Border Video and TV Services	Galashiels Tweedbank Hawick	Yes
James Stewart & Son	Kelso Melrose	Yes
Tweed Televisions Ltd	Berwick-Upon-Tweed[3]	Yes
Vision 2020 Ltd	Melrose	Yes
4. Independents – Unlicensed [5]		
Budget TV Centre	Earlston	No
G&N Electronics	Selkirk	No
Hislops [to check]	Selkirk	No
Radio & Gramophone	Jedburgh	No
Peebles TV Services	Peebles	No

** Not within transmission area but in close proximity*

Retail Readiness

- The Winter 2007 mystery shopping exercise surveyed many of the stores in the Scottish Borders area. The results suggest a mixed picture for retail readiness in the area.

[2] List excludes numerous stores in adjacent areas e.g, Edinburgh and Newcastle
[3] Technically outside transmission area but relevant in terms of proximity of retail outlets

- The Licensed Independents serving the Selkirk area demonstrated a thorough and sound knowledge of switchover and related issues. All brought up switchover in discussions around digital TV, explaining what it would mean to the consumer and drawing attention to issues such as recording and aerials.
- The Licensed Independents were all able to give the correct year for Selkirk, and most the correct month and even date for DSO. Many demonstrated extensive knowledge of local reception and coverage, extending to current and future service availability.
- Assessors also felt that all of these stores asked suitable and sufficient questions to assess needs – which contributed to overall satisfaction with the visits and the impression that all questions were answered and relevant areas discussed.
- Information given out by unassisted stores in the Scottish Borders area was patchier and store staff struggled with the basic information about digital switchover and could not offer the mystery shopper a switchover leaflet to take away.

Digital UK activity

- In Q4 2007 all households in the Scottish Borders region received a Digital UK leaflet about switchover, highlighting that the countdown to digital television for the area had begun and pointing residents to the first switchover date on 6th of November 2008.

FIGURE 6.6: SCOTTISH BORDERS 1 YEAR PRE-SWITCHOVER LEAFLET

- Digital UK's Regional Manager for the Border TV region John Askew, who successfully led the Copeland switchover in October and November 2007, is organising meetings with the Scottish Borders Digital Switchover Stakeholder Group for early 2008. Similar to the set-up of the group in Copeland, this will include members of the local council as well as representatives from local charity groups.

- During Q4 2007 the regional Digital UK team visited every listed retailer in Scottish Borders and Dumfries and Galloway. For 2008 the team are planning to hold regular "Business Breakfast Briefings" for retailers and aerial installers to provide them with information about switchover. The first meeting took place on Wednesday 9th January in the Scottish Borders region.
- The regional team is also arranging to hold digital drop-in sessions in Galashiels, Hawick, Jedburgh, Peebles, Berwick, Duns, Kelso, Eyemouth and Coldstream every six weeks in 2008. The first of these sessions was held in January 2008. They will be hosted in local community centres and staged with the assistance of the local Community Education service.
- In 2008 Digital UK's charity partnership will start its activity in the region. In co-operation with local charity groups, volunteers will be trained and Help Centers will be set up to provide residents with advice and support as the region moves closer to switchover.

APPENDIX ONE: About the Switchover Tracker

- On 3rd April 2006 Ofcom and Digital UK launched a continuous tracking study, the 'Switchover Tracker', to monitor the UK's conversion to digital television for switchover. More than 6,400 households were surveyed face-to-face during 2006 and around 10,000 households were surveyed during 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 7.1 – THE SIX MEASURES ON THE OFCOM & DIGITAL UK SWITCHOVER TRACKER

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

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

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

The Dashboards

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

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

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

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

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

[4] Note that Ulster, as the smallest region in population terms (other than Border, which is being heavily boosted), does not currently collect enough surveys each quarter to report on a quarterly basis. Data for Ulster will be provided every six months, and the region, like all others, will be boosted three years out from switchover.

Figure 7.2 – Explanation of the 'Key Metrics' shown on the Tracker Dashboards

1a – Unprompted Awareness of switchover

Question:

"Have you heard of digital TV switchover?"

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

Responding: Yes

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

Questions:

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

"What do you think will happen at switchover?"

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

Responding: Need to get digital TV 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: <u>Some or all</u> of TVs have already been or will be adapted/upgraded
4b Responding: <u>None</u> of my TVs will be adapted/upgraded

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 <u>main TV set</u>
5b Responding as above for all <u>non-primary TV sets</u>
5c/5d Responding as above for <u>all TV sets</u> in household

BASE SIZE	-1- Awareness		-2- Understanding			-3- Pos/neut attitude		-4- Intentions to convert			-5- Conversion				-6-
	-a- 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 Q4 2007 focused on regional and national communications run by Digital UK, testing awareness and attitudes towards these. The Q1 2008 module will test awareness and usage of analogue and digital text services, and explore attitudes towards the loss of analogue text services 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 Q4 2007 the Tracker interviewed 2830 households:
- 955 in October
- 940 in November; and
- 935 in December.

During Q4 2007, an additional 208 respondents in Border identified as eligible for the Digital Switchover Help scheme (the over 75s and those on Disability Living Allowance, Attendance Allowance, or the registered blind or partially sighted) were interviewed about the Help Scheme.

The total tracker sample for the second year (Q2 2007 to Q1 2008) will be approximately 11,000 interviews.

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 will achieve c.300 interviews per quarter, or 1,200 interviews each over the course of the year. From Q3 2007 onwards, Border, the first region to switch was boosted on its individual main transmitter regions, Caldbeck and Selkirk. Over one quarter around 450 interviews will be achieved throughout Border – 1,800 over the course of the year.

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

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

Consumer Group Sample Sizes

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

Sampling Method

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

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

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

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

Post-survey weighting

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

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

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

APPENDIX TWO: Glossary of Terms

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