

Digital UK Switchover Tracker Survey

Switchover Progress Report
to end of Q4 2008

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digitaluk

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Executive Summary

- This report summarises the results of the Digital UK & Ofcom Switchover Tracker until the end of the year 2008. Switchover Tracker data is used to measure regional readiness for switchover among consumers across various key metrics such as awareness and understanding of switchover, as well as actual take-up of digital TV.
- The Switchover Tracker reporting has been changed to reflect the start of the switchover programme in November 2008 and how regions are now moving through the process.
- Regional results will now be reported based on their proximity to switchover. This allows comparison of regional readiness at key stages of the switchover information campaign, e.g. 9 months out, 6 months out, and 3 months out. Please find a detailed summary of the changes to the reporting format in Appendix 1 (page 20 onwards).

National digital TV Conversion

- Regional digital TV take-up figures from the Switchover Tracker Survey compliment the national take-up figures published in Ofcom's 'Communication Market Digital Progress' reports.
- On 2 April 2009 Ofcom issued its Q4 2008 'Communications Market Digital Progress Report', stating that 88.9% of homes in the UK had multichannel TV at the end of the year 2008. This represented a 0.7 percentage point growth in multichannel TV on main sets over the fourth quarter. As seen in previous reports fewer main sets are now being converted each quarter, but digital TV take-up on secondary sets continues to grow, and stood at 60% at the end of 2008.
- The Switchover Tracker showed flat main TV set conversion from quarter 3 to quarter 4 2008. Eighty seven per cent of UK homes had their main TV set converted to digital and take-up figures for secondary TV sets matched the Ofcom figures with 60% of subsequent televisions receiving a digital signal. Nearly two thirds (63%) of homes were fully converted.
- During the whole year 2008, 4% of main television sets and 10% of secondary TV sets were converted to digital with most of the main sets converted during the early half of the year. Digital TV take-up is higher across those regions switching in 2009 (90% in Q4 2008) than in later switching regions (87% in Q4 2008).
- Secondary TV set conversion in those regions switching in 2009 continued to grow. During 2008, 16% of secondary TV sets were converted throughout Border, West Country Wales and Granada, compared to 9% in regions due to switch between 2010 and 2012.

Switchover awareness and understanding growth during 2008

- Awareness and understanding of switchover improved across the remaining switchover regions in the course of 2008. With more than nine out of ten people already aware of switchover, bigger improvements were recorded during 2008 around understanding how to convert than awareness growth. During the year switchover awareness improved slightly to 90% across the remaining switchover regions (up 2 percentage points from the end of quarter 3 2008). More than seven out of ten respondents (72%) understood the need to convert their remaining analogue sets to get ready (up 4 percentage points from September).
- Following the date announcements in the early switching regions, and the start of the programme with the Scottish Borders switchover in November 2008, there is improving awareness of regional switchover start dates. By the end of 2008, 35% of people knew the year when switchover starts in their region (up 5pp from September 2008). Understanding of when switchover happens at each transmitter group tends to only improve in the last few months before switchover, as the sense of imminence grows and communications intensifies.
- Almost nine out of ten people feel comfortable getting ready for the change (89%, up 3 percentage points year on year from the end of 2007). This suggests that the positive experience of switchovers to date (e.g. in Scottish Borders) provides reassurance to consumers elsewhere in the country awaiting their switchovers.

Regional progress

- The Scottish Borders region successfully switched in November 2008:
 - The residents of the 52,000 homes in the Scottish Borders region felt “well prepared” for the digital switchover¹. Awareness of the change remained high throughout the process and understanding of how to get ready peaked on the weekend before the first switchover date.
 - Monitoring showed consistent growth on main set conversion. Ninety-seven per cent of households in the Scottish Borders were ready before the first switchover date on 6 November, and over 99% were ready for the second switchover date on 20 November. All homes interviewed two weeks after switchover had converted at least one set to digital.
 - While switchover was a straightforward process for most people in the area, research showed that some people were not aware of the need to re-tune their Freeview equipment on the two switchover days. Tracker results highlighted far lower awareness of the need to re-tune in Scottish Borders than in Copeland (44% vs. 82% Dipstick Survey results immediately before switchover), despite a similar prominence in

¹ Pre switchover focus groups in Scottish Borders in early November 2008.

communications². Digital UK has reviewed consumer and trade communications to make the re-tuning message more prominent in the future.

- Regions preparing for switchover in 2009 showed good progress during 2008 across all key metrics:
 - Main set conversion in Border, West Country, Wales and Granada combined increased during 2008, up 1 percentage point from 89% in Q4 2007 to 90% by Q4 2008.
 - Switchover date announcements have unsurprisingly driven understanding of the regional switchover timings. Following the date announcements in Border B at the beginning of October 2008, correct understanding of the year improved 24 percentage points from 58% to 82%. Similar uplifts in correct date awareness were recorded in West Country and Wales earlier in the year.

² Note that the Copeland area had no Freeview coverage until switchover and higher levels of re-tune awareness can be explained through new users understanding the need to tune better than people who have not changed their TV set up for a long time.

Chapter 1

Switchover Tracker Dashboards

Changes to the Switchover Tracker reporting format

The Switchover Tracker reporting has been changed to reflect the start of the switchover programme in November 2008 and how regions are now moving through the process.

Going forwards regional progress will be monitored by comparing the key metrics at three monthly stages in the consumer information campaign. The results for each region are based on two-month rolling data for the relevant review point, for example: November and December 2008 Tracker data is used to describe the Border B region, switching in June and July 2009, at its 6 months out review point.

As regions go through switchover, Digital UK's monitoring methodology changes from continuous surveying on the Switchover Tracker, to intense bursts of interviewing immediately before and after the event (known as 'Dipstick Surveys').

After a region is switched it ceases to be represented on the Switchover Tracker. Therefore:

- In November 2008 Scottish Borders served by the Selkirk transmitter group switched to digital TV and it is no longer included in the Switchover Tracker sample.
- During 2009, West Country, the rest of the Border TV region, and parts of Wales and the Granada TV regions will switch and consequently drop off the Switchover Tracker.

The new reporting format therefore shows progress across all **remaining switchover regions** rather than national averages as before. The last data point for digital TV take-up (taken from the post switchover dipstick survey) will be recorded as the switchover end point for that region, and will be used to calculate **national conversion metrics**.³

The Switchover Tracker Dashboards

Results are presented on the following dashboards of progress:

(1) The Dashboard: Most recent data by switchover project
Key metrics for each switchover project and topline averages for all remaining switchover regions.

(2) The Dashboard: by Consumer Groups
Key metrics provided for a range of demographic and consumer groups on three-month rolling data.

³ Please refer to appendix one for a detailed summary of Switchover Tracker reporting changes.

(1) The Dashboard: Most recent data by switchover project

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

** Extremely small base size – data omitted

	Month until DSO 1 (first)	Data period used	Sample size	Awareness		Understanding						Attitudes		Conversion data						
				Switchover awareness	Help Scheme awareness	DSO 1 date - year	DSO 1 date - month	Need to convert to digital TV	Detailed understand index*	VCR impact	2-stage process	Retuning (all with analogue or freeview sets)	Opinion (positive/neutral)	Personal comfort (positive/neutral)	Conversion primary set	Conversion full household	Conversion other sets	Conversion Total TV sets		
National (conversion data only)		Oct-Dec 2008	3857												87%	63%	60%	74%		
remaining switchover regions		Oct-Dec 2008	3857	90%	38%	35%	n/a	72%	50%	43%	n/a	n/a	82%	89%	87%	63%	60%	74%		
complete																				
	Copeland	20/11/07		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
	Scottish Borders	04/12/08	dip stick data	156	99%	75%	n/a	n/a	87%	n/a	79%	n/a	n/a	86%	97%	100%	87%	86%	92%	
switchover within the year	West Country A	-6 Months	Sep/Oct 2008	147	97%	53%	65%	n/a	85%	70%	57%	n/a	n/a	87%	92%	85%	63%	58%	72%	
	Border B	-6 Months	Nov/Dec 2008	211	99%	66%	82%	32%	88%	84%	67%	28%	n/a	76%	94%	79%	56%	54%	66%	
	West Country B	-9 Months	Sep/Oct 2008	139	97%	53%	73%	n/a	88%	78%	60%	n/a	n/a	89%	85%	90%	65%	64%	77%	
	West Wales	-9 Months	Oct/Nov 2008	137	92%	28%	50%	9%	78%	52%	29%	16%	n/a	74%	83%	90%	59%	53%	71%	
	North Wales	-12 Months	Sep/Oct 2008	127	96%	44%	50%	n/a	60%	66%	51%	n/a	n/a	80%	87%	92%	75%	72%	82%	
	Granada	-12 Months	Oct/Nov 2008	313	97%	43%	67%	20%	73%	72%	46%	14%	n/a	74%	88%	90%	64%	66%	78%	
switchover within 2 years	Blaenplwyf	-15 Months	Oct/Nov 2008	416	93%	37%	46%	n/a	72%	56%	38%	n/a	n/a	78%	84%	91%	66%	60%	76%	
	South Wales	-15 Months	Oct-Dec 2008	126	92%	35%	27%	6%	65%	47%	39%	17%	n/a	75%	86%	89%	68%	65%	77%	
	West	-15 Months	Nov/Dec 2008	207	97%	45%	48%	n/a	82%	65%	50%	20%	n/a	83%	88%	90%	67%	54%	75%	
	STV North A	-18 Months	Oct/Nov 2008	217	92%	30%	47%	n/a	62%	51%	36%	17%	n/a	82%	88%	83%	57%	51%	68%	
	STV North B	-21 Months	Oct/Nov 2008	217	92%	30%	47%	n/a	62%	51%	36%	17%	n/a	82%	88%	83%	57%	51%	68%	
	STV Central Torosay	-24 Months	n/a	n/a	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker	No Tracker
	Channel Islands	-24 Months	n/a	n/a	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted	Not yet boosted
2 years or more to DSO	Anglia A	-2 years and 3 months	Aug-Nov 2008	102	90%	43%	27%	n/a	67%	52%	52%	28%	n/a	88%	94%	90%	62%	55%	74%	
	Central A	-2 years and 6 months	Sep/Oct 2008	138	94%	45%	23%	n/a	78%	42%	42%	9%	n/a	83%	90%	88%	60%	58%	73%	
	STV Central B	-2 years and 6 months	Oct/Nov 2008	207	94%	37%	45%	n/a	72%	58%	48%	20%	n/a	85%	93%	94%	72%	69%	81%	
	Yorkshire	-2 years and 9 months	Sep-Nov 2008	106	90%	34%	19%	n/a	68%	35%	41%	n/a	n/a	79%	84%	87%	55%	56%	71%	
	Anglia B	-3 years	Aug-Nov 2008	102	90%	43%	27%	n/a	67%	52%	52%	28%	n/a	88%	94%	90%	62%	55%	74%	
	Central B	-2 years and 9 months	Oct/Nov 2008	203	91%	40%	17%	n/a	69%	38%	38%	11%	n/a	80%	89%	86%	57%	58%	71%	
	Meridian	-3 years and 3 months	Aug-Nov 2008	134	94%	39%	27%	n/a	69%	50%	48%	n/a	n/a	76%	95%	89%	71%	67%	80%	
	London	-3 years and 6 months	Sep/Oct 2008	278	82%	26%	19%	n/a	66%	34%	32%	19%	n/a	87%	91%	84%	67%	60%	74%	
	Tyne Tees	-3 years and 9 months	Jul-Dec 2008	114	92%	41%	29%	n/a	64%	42%	37%	n/a	n/a	86%	89%	87%	57%	57%	71%	
	Ulster	-3 years and 9 months	Jan-Dec 2008	109	76%	15%	24%	n/a	54%	27%	23%	n/a	n/a	93%	99%	76%	55%	47%	66%	

* The Detailed Understanding Index is a weighted index gauging people's understanding of 5 factors: (i) options for going digital, (ii) date, (iii) aerials, (iv) that every TV set needs upgrading, (v) recorders

(2) The Dashboard: by Consumer Groups

	Data period used	Sample size	Awareness		Understanding						Attitudes		Conversion data				
			Switchover awareness	Help Scheme awareness	DSO 1 date - year	DSO 1 date - month	Need to convert to Digital TV	Detailed understand index*	VCR impact	2-stage process	Retuning (all with analogue or freeview sets)	Opinion (positive/neutral)	Personal comfort (positive/neutral)	Conversion - primary set	Conversion - full household	Conversion - other sets	Conversion - Total TV sets
National (conversion data only)	Oct-Dec 2008	3875												87%	63%	60%	74%
Remaining switchover regions	Oct-Dec 2008	3857	90%	38%	35%	n/a	72%	50%	43%	n/a	n/a	82%	89%	87%	63%	60%	74%
Analogue	Oct-Dec 2008	404	81%	27%	33%	n/a	52%	36%	24%	n/a	n/a	72%	73%	0%	0%	17%	5%
Digital	Oct-Dec 2008	3226	92%	40%	36%	n/a	75%	53%	46%	n/a	n/a	83%	92%	100%	72%	63%	82%
Male	Oct-Dec 2008	1868	91%	44%	37%	n/a	75%	58%	52%	n/a	n/a	85%	92%	90%	68%	66%	78%
Female	Oct-Dec 2008	1989	90%	33%	33%	n/a	69%	43%	35%	n/a	n/a	80%	87%	85%	58%	55%	71%
16-24	Oct-Dec 2008	385	79%	32%	24%	n/a	68%	36%	29%	n/a	n/a	85%	93%	90%	65%	64%	77%
65-74	Oct-Dec 2008	497	93%	41%	38%	n/a	66%	51%	50%	n/a	n/a	76%	85%	86%	53%	42%	65%
ABC1	Oct-Dec 2008	1820	92%	43%	35%	n/a	78%	53%	46%	n/a	n/a	84%	91%	91%	65%	61%	76%
C2DE	Oct-Dec 2008	2037	88%	34%	35%	n/a	66%	48%	40%	n/a	n/a	81%	88%	84%	61%	59%	73%
Rural	Oct-Dec 2008	605	94%	44%	28%	n/a	71%	48%	46%	n/a	n/a	83%	90%	87%	56%	55%	71%
Urban	Oct-Dec 2008	3076	90%	37%	35%	n/a	72%	50%	42%	n/a	n/a	82%	89%	87%	64%	61%	75%
Low income	Oct-Dec 2008	739	88%	33%	35%	n/a	62%	45%	39%	n/a	n/a	78%	87%	79%	60%	51%	68%
BAME	Oct-Dec 2008	297	60%	27%	16%	n/a	47%	26%	24%	n/a	n/a	78%	82%	82%	69%	52%	73%
Non-English	Oct-Dec 2008	245	50%	24%	15%	n/a	38%	22%	24%	n/a	n/a	79%	79%	75%	65%	51%	69%
Disabled	Oct-Dec 2008	702	92%	34%	38%	n/a	66%	50%	42%	n/a	n/a	73%	84%	79%	55%	55%	68%
Need assistance	Oct-Dec 2008	170	83%	30%	35%	n/a	49%	36%	30%	n/a	n/a	69%	68%	29%	0%	10%	22%
Hard to reach	Oct-Dec 2008	1709	86%	36%	32%	n/a	65%	46%	42%	n/a	n/a	79%	86%	85%	60%	54%	71%
Living alone	Oct-Dec 2008	764	87%	37%	38%	n/a	65%	47%	41%	n/a	n/a	76%	83%	77%	60%	44%	66%
Families with children	Oct-Dec 2008	1230	91%	36%	37%	n/a	75%	52%	41%	n/a	n/a	84%	91%	93%	65%	66%	78%
Rent private	Oct-Dec 2008	436	82%	32%	21%	n/a	65%	33%	33%	n/a	n/a	82%	88%	81%	62%	47%	69%
Rent council	Oct-Dec 2008	868	85%	34%	34%	n/a	64%	46%	39%	n/a	n/a	79%	89%	81%	61%	58%	71%
House	Oct-Dec 2008	3218	92%	40%	36%	n/a	73%	51%	44%	n/a	n/a	83%	90%	90%	63%	62%	76%
Flat	Oct-Dec 2008	630	84%	31%	30%	n/a	64%	43%	39%	n/a	n/a	78%	86%	78%	61%	44%	67%
Help Scheme: 75+	Oct-Dec 2008	396	86%	37%	34%	n/a	53%	38%	40%	n/a	n/a	78%	87%	71%	56%	37%	60%
Help Scheme: DLA/AA < 75	Oct-Dec 2008	186	94%	38%	36%	n/a	71%	53%	42%	n/a	n/a	81%	85%	90%	68%	57%	74%

* The Detailed Understanding Index is a weighted index gauging people's understanding of 5 factors: (i) options for going digital, (ii) date, (iii) aerials, (iv) that every TV set needs upgrading, (v) recorders

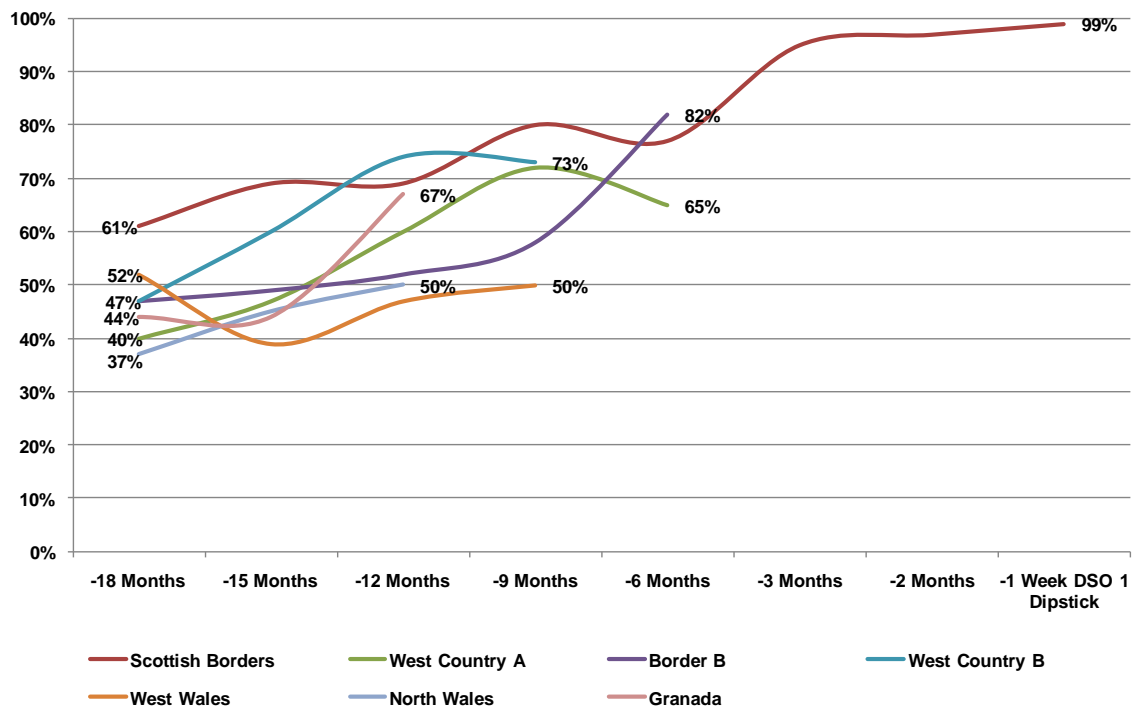
Chapter 2

Regional Progress

Awareness and understanding trends at key switchover stages

- By the end of 2008 more than nine out of ten people in each of the 2009 switching regions were aware of switchover, with the highest levels of awareness in those regions switching in the first half of 2009 (West Country A 97%, Border B 99% and West Country B 99%).
- The announcement of the exact switchover dates between 12 and 8 month in advance drives regional date awareness. Following the date announcements in Border B in October 2008, correct understanding of the year improved by 24 percentage points from 58% to 82%. Similar improvements were achieved in both West Country and the first switchover project in Wales (47% to 60% in West Country A, 60% to 74% in West Country B, and 39% to 47% in West Wales just before the 12 months out mark).

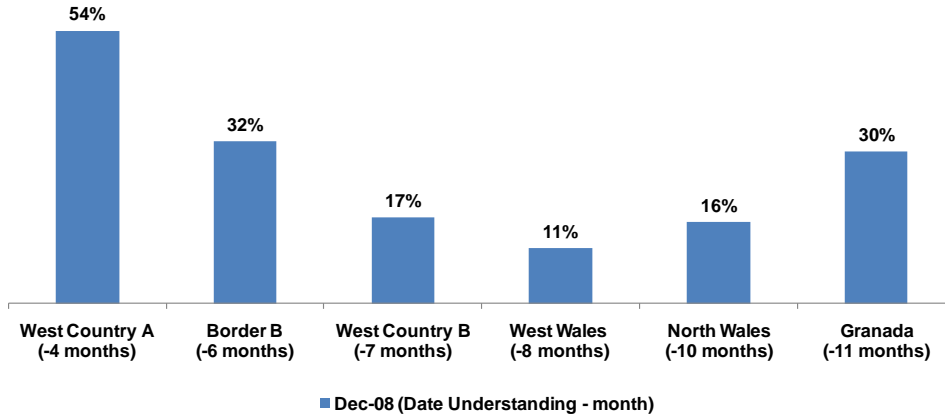
FIGURE 2.1: UNDERSTANDING YEAR OF SWITCHOVER



Source: Digital UK Switchover Tracker

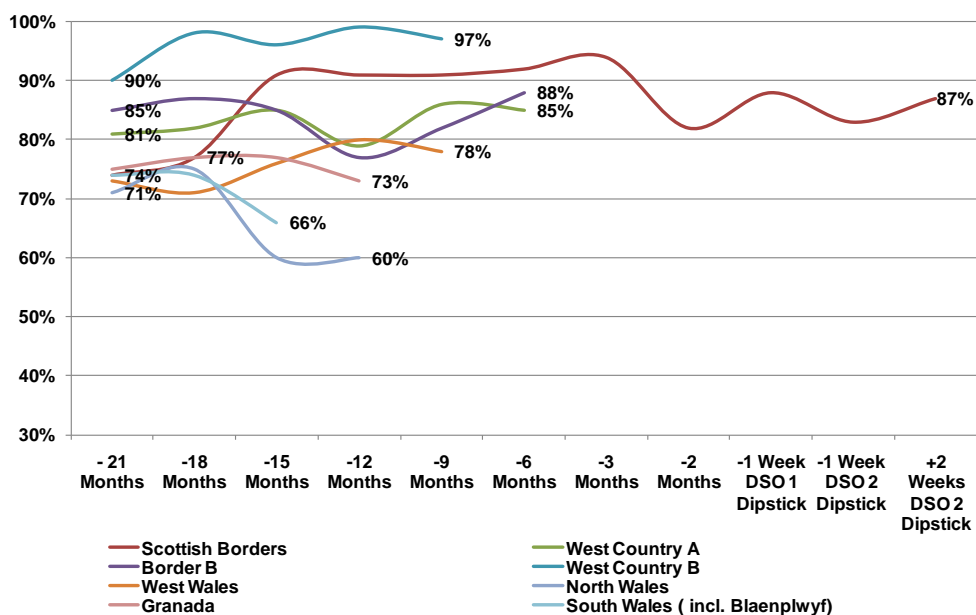
- Date awareness increases substantially closer to the switchover start date. At the end of the year (December 2008) more than half of West Country A residents knew that switchover started in April/May 2009.

FIGURE 2.2: UNDERSTANDING MONTH OF SWITCHOVER DECEMBER 2008 DATA



- Long term understanding trends indicate that roughly three quarters of the population understand what to do to prepare for digital switchover at the one and a half years out mark (-18 months).
- Understanding levels are tracking at lower levels in Wales where take-up of satellite services is higher. As communication intensifies in the months leading up to switchover in 2009 the understanding metrics are expected to improve, e.g. after the distribution of the switchover information leaflet during January 2009.

FIGURE 2.3: UNDERSTANDING NEED TO CONVERT TO DIGITAL TV

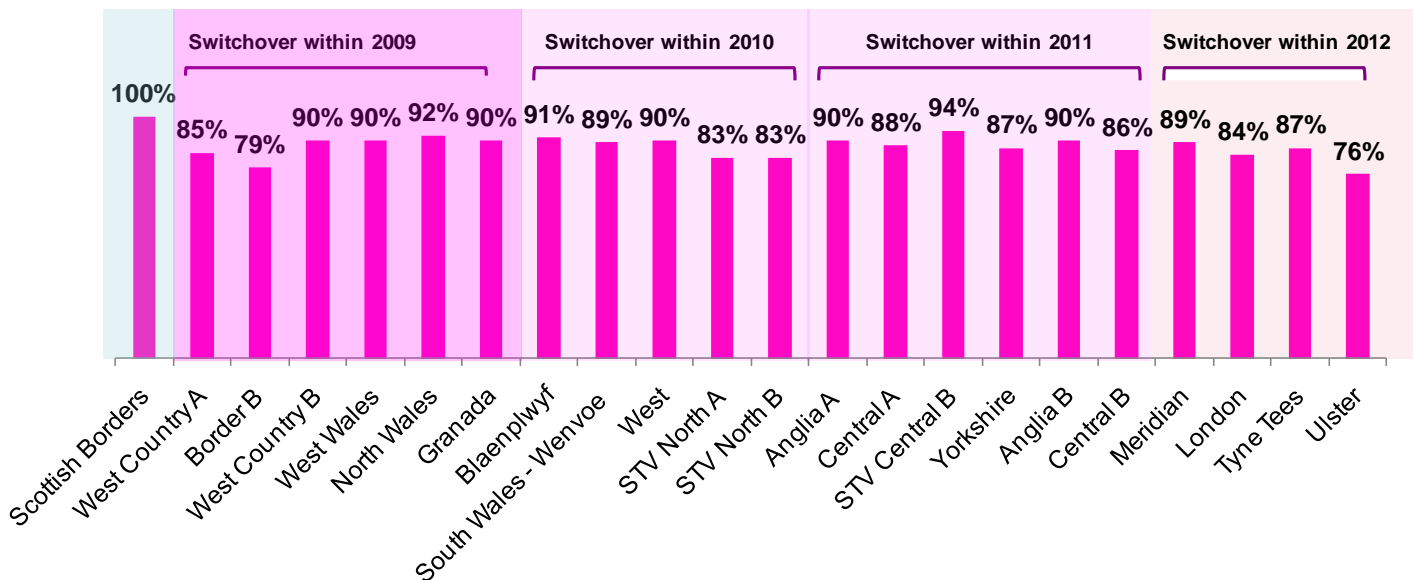


Source: Digital UK & Ofcom Switchover Tracker

Regional Digital TV take-up

- Take-up in some of the earlier switching regions with more limited Freeview coverage (like Border B and West Country A) remained lower than the national average at the end of 2008. However at least ninety per cent of homes in West Country B, West Wales, North Wales and Granada have converted their main set to digital TV.
- Levels of take-up for regions switching in 2009 are in line or above those recorded for Scottish Borders at a similar stage (85% at 6 months out).
- From October 2008 the switchover tracker started monitoring the proportion of households that have bought digital TV equipment in preparation for switchover but have not yet installed it. Across both regions switching in 2009 and those switching later in the programme, 2% of homes own equipment in preparation for switchover.

FIGURE 2.4: MAIN TV SET CONVERSION ACROSS THE UK



Source: Digital UK & Ofcom Switchover Tracker to December 2008

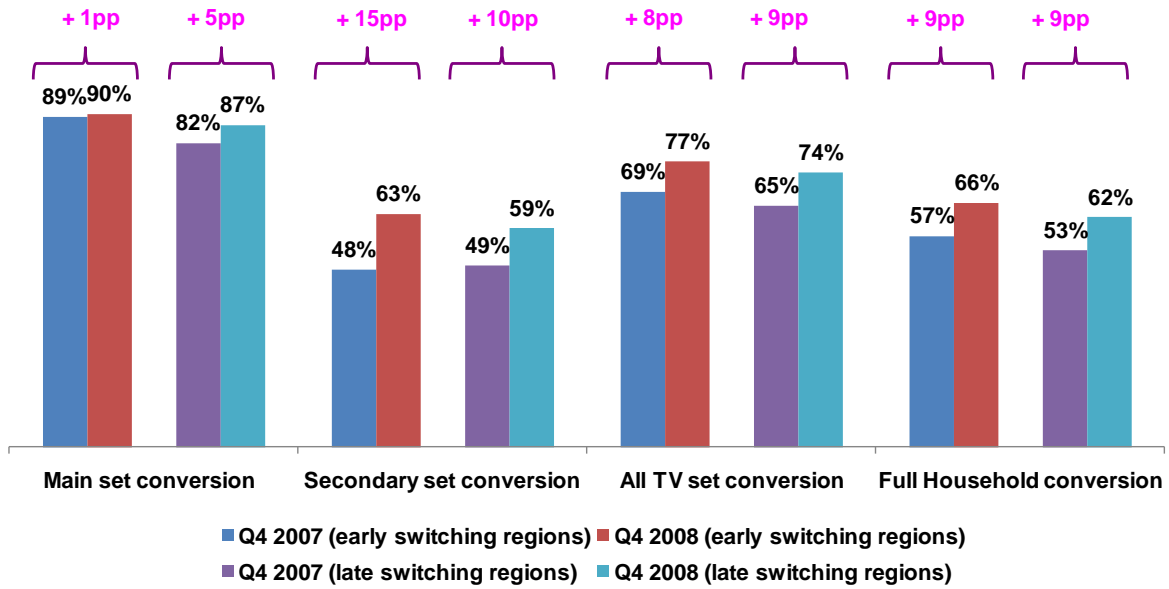
Regional conversion developments in 2008

- During 2008 4% of main television sets and 10% of secondary TV sets were converted to digital. Average digital TV take-up is higher across the regions switching in 2009 (90% in Q4 2008) than in the later switching ones (87% in Q4 2008).
- However, main set conversion has slowed in early switching regions as the market is more saturated particularly in regions with lower pre-switchover DTT coverage. During 2008 proportionately more main sets were converted in later switching regions (5%) than in regions close to switchover (2%).
- Secondary TV set conversion in those regions switching in 2009 continued to grow. During 2008 16% of secondary TV sets were converted

throughout Border, West Country Wales and Granada, compared to 9% in regions due to switch between 2010 and 2012.

FIGURE 2.5: 2008 CONVERSION PATTERNS 2009 SWITCHOVER REGIONS* VERSUS REGIONS SWITCHING (2010-2012)

Note: 2009 switchover regions include Border, West Country, parts of Wales and Granada

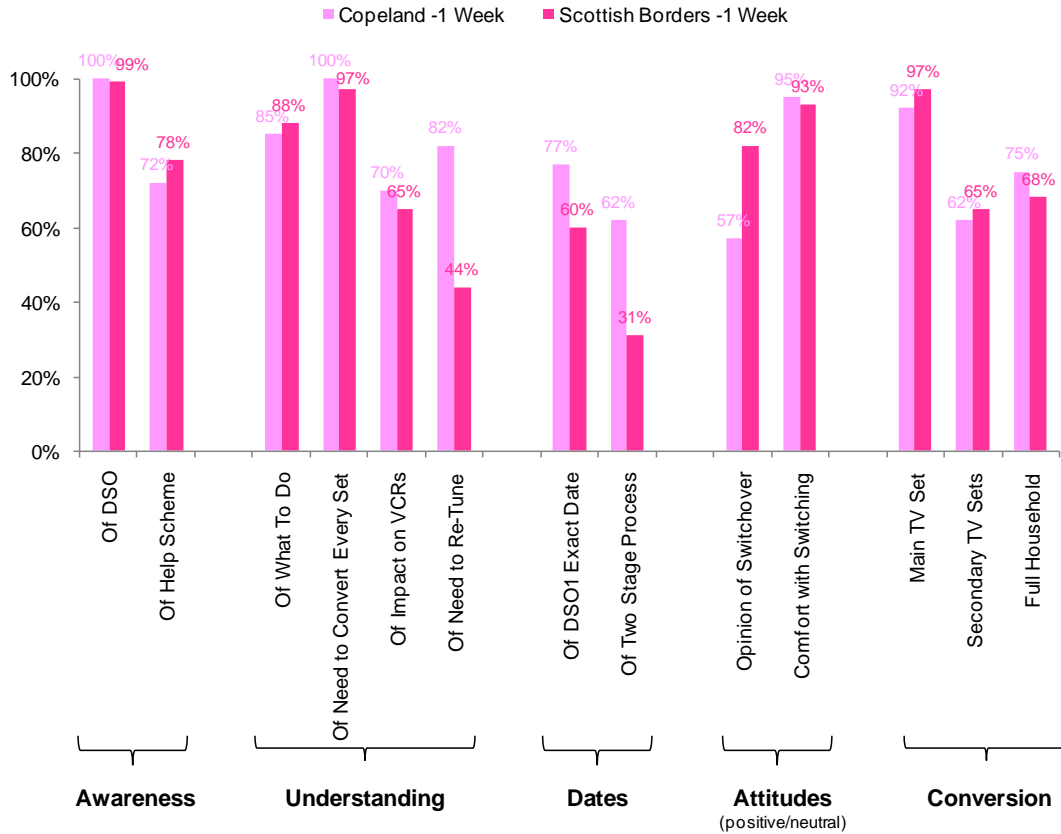


Source: Digital UK & Ofcom Switchover Tracker

Regional Update: Switchover in Scottish Borders

Transmitter Group	Area served	Homes ('000)	DSO 1	DSO 2
Selkirk	Scottish Borders	52	6 Nov 2008	20 Nov 2008

FIGURE 2.6: COMPARISON OF KEY SWITCHOVER METRICS IN SCOTTISH BORDERS AND COPELAND AT 1 WEEK OUT



Source: Digital UK Dipstick Surveys, Copeland n=56; Scottish Borders n=164

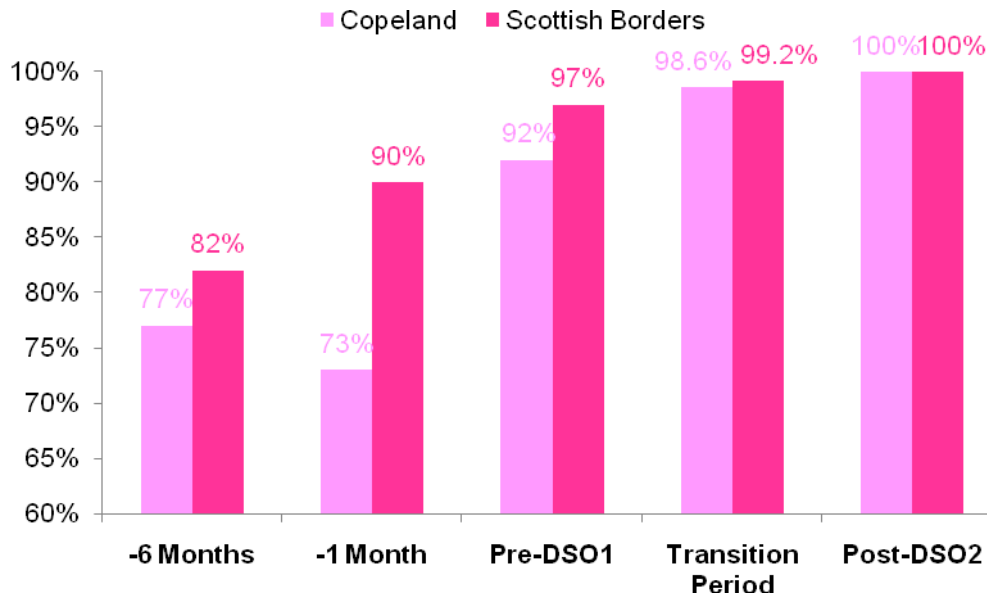
- In November 2008 the Selkirk transmitter and its 11 relays, serving 52,000 homes in the Scottish Borders, successfully switched to digital TV. Scottish Borders was the second UK switchover following the Copeland pilot in 2007.
- The residents of the 52,000 homes in the Scottish Borders region felt “well prepared” for the digital switchover⁴. Awareness of the change remained high throughout the process and understanding of how to get ready peaked on the weekend before the first switchover date.
- Monitoring showed consistent growth on main set conversion. Ninety-seven per cent of households in the Scottish Borders were ready before the first switchover date on 6 November, and over 99% were ready for the second switchover date on 20 November. All homes interviewed two weeks after switchover had converted at least one set to digital.

⁴ Pre switchover focus groups in Scottish Borders in early November 2009.

- Of those homes which were analogue immediately before the switchover, 30% chose to convert their main set with Sky and 50% chose Freeview. The remainder did not specify their platform. Half of those who converted for switchover chose to replace their TV set rather than convert their existing set with a digital box.

FIGURE 2.7: SCOTTISH BORDERS DIGITAL TV CONVERSION

Note: Includes homes that had bought equipment but not installed it



Source: Digital UK Dipstick Surveys, Scottish Borders: pre-DSO1 n=164; pre-DSO2 n=161; post-DSO2 n=156

- Up to one month before switchover only 62% of second sets in the region had been converted to digital TV and 38% were analogue. After switchover 92% of second sets had been converted, and only 8% of second sets remained unconverted. After switchover 87% of homes reported having converted every TV set in their home. This conversion pattern mirrors take-up on secondary sets in Copeland where as many as 96% of second sets had been converted two weeks after the switchover.
- Whilst the Scottish Borders switchover proved a straightforward transition for most residents, the consumer research and the Digital UK contact centre response highlighted that a few people had experienced difficulty with re-tuning existing DTT equipment. Survey results suggest that awareness of the need to re-tune was far lower in Scottish Borders than in Copeland (44% vs. 82% immediately before DSO1), despite a similar prominence in communications. Digital UK has reviewed consumer and trade communications to make the re-tuning message more prominent in the future.

Regional Update: West Country A – 6 months from switchover

Transmitter Group	Area served	Homes ('000)	DSO 1	DSO 2
Beacon Hill	Torbay and south Devon	132	8 April 2009	22 April 2009
Stockland Hill	Exeter, parts of Devon, Somerset and Dorset	206	6 May 2009	20 May 2009

FIGURE 2.8: COMPARISON OF KEY SWITCHOVER METRICS IN WEST COUNTRY A AT 6 MONTHS OUT

regions at -6 months	West Country A	West Country A	Scottish Borders	Border B
	-9 Months	-6 Months	-6 Months	-6 Months
Data period used	Jun/Jul 2008	Sep/Oct 2008	Apr/May 2008	Nov/Dec 2008
Sample size	146	147	102	211
Switchover awareness	97%	97%	99%	99%
Help Scheme awareness	41%	53%	56%	66%
know DSO 1 date - year	72%	65%	77%	82%
know DSO 1 date - month	n/a	n/a	56%	32%
know DSO 1 date - day	n/a	n/a	14%	n/a
Understanding of need to convert	86%	85%	92%	88%
Detailed understanding index	81%	70%	81%	84%
Understand VCR impact	55%	57%	36%	67%
Opinion (positive/neutral)	75%	87%	86%	76%
Personal comfort (positive/neutral)	90%	92%	95%	94%
Conversion - primary set	78%	85%	85%	79%
Conversion - full household	52%	63%	50%	56%
Conversion - other sets	45%	58%	57%	54%
Conversion - Total TV sets	63%	72%	66%	66%

- At 6 months out from the start of switchover in April 2009 West Country A seemed well prepared. Awareness is almost universal at 97% and 85% of homes have converted their main TV set to digital TV (up 7pp from July 2008, 9 months out from switchover).
- By October 2008 85% of homes in West Country A had access to digital TV; approximately the same conversion level as observed in Scottish Borders at 6 months before switchover. Full household conversion is higher in West Country A than it was in Scottish Borders. Almost two thirds (63% of homes) have converted all of their TV sets in West Country A, versus 50% in Scottish Borders at 6 months out.
- Following the first national advertising campaign during August and September 2008, awareness of the Switchover Help Scheme improved significantly in West Country A. In October 2008 more than half of all residents in the area (53%) were aware that there would be assistance with switchover.

Regional Update: Border B – 6 months from switchover

Transmitter Group	Area served	Homes ('000)	DSO 1	DSO 2
Douglas	the Isle of Man	38	18 June 2009	16 July 2009
Caldbeck	Cumbria, south west Scotland and the south Lakes	308	24 June 2009	22 July 2009

FIGURE 2.9: COMPARISON OF KEY SWITCHOVER METRICS IN BORDER B AT 6 MONTHS OUT

regions at -6 months	Border B	Border B	Scottish Borders	West Country A
	-9 Months	-6 Months	-6 Months	-6 Months
Data period used	Aug/Sep 2008	Nov/Dec 2008	Apr/May 2008	Sep/Oct 2008
Sample size	218	211	102	147
Switchover awareness	98%	99%	99%	97%
Help Scheme awareness	50%	66%	56%	53%
know DSO 1 date - year	58%	82%	77%	65%
know DSO 1 date - month	n/a	32%	56%	n/a
know DSO 1 date - day	n/a	n/a	14%	n/a
Understanding of need to convert	82%	88%	92%	85%
Detailed understanding index	69%	84%	81%	70%
Understand VCR impact	61%	67%	36%	57%
Opinion (positive/neutral)	78%	76%	86%	87%
Personal comfort (positive/neutral)	88%	94%	95%	92%
Conversion - primary set	78%	79%	85%	85%
Conversion - full household	53%	56%	50%	63%
Conversion - other sets	54%	54%	57%	58%
Conversion - Total TV sets	65%	66%	66%	72%

- At 6 months out from switchover, key metrics were improving in the Border B switchover region. Virtually everybody in the region was aware of switchover (99%) while main set conversion was lower in the region (79%) than in similar regions at the same point (85% of homes were converted at 6 months out in both Scottish Borders and West Country A). Low levels of take-up will have been partly due to lower levels of pre-switchover DTT coverage in this area.
- Despite lower conversion levels Border B residents seemed well informed and prepared. From September to December 2008 awareness and understanding metrics had improved significantly, driven mainly by the announcement of the local switchover dates in the media on 1 October 2008 and supporting local advertising. At 6 months out from the first switchover in the region, awareness that switchover was happening in 2009 had improved by 24pp (from 58% August/September to 82% November/December 2008) and one third of the population (32%) knew that their region was switching to digital in June 2009.
- Following the national Help Scheme advertising campaign during August and September, awareness of the Switchover Help Scheme also improved significantly (up 16pp from 50% to 66%).
- Other understanding metrics for Border B were also showing new all time highs compared to other regions at the same stage. Sixty-seven per cent of residents were aware of the impact of switchover on recording devices, following advertising in September and October 2008 (36% in Scottish Borders and 57% in West Country A).

Regional Update: West Country B – 9 months from switchover

Transmitter Group	Area served	Homes ('000)	DSO 1	DSO 2
Huntshaw Cross	north Devon	66	1 July 2009	29 July 2009
Redruth	west Cornwall and the Isles of Scilly	122	8 July 2009	5 Aug 2009
Caradon Hill	Plymouth, parts of Devon and east Cornwall	255	12 Aug 2009	9 Sept 2009

FIGURE 2.10: COMPARISON OF KEY SWITCHOVER METRICS IN WEST COUNTRY B AT 9 MONTHS OUT

regions at -9 months	West Country B -12 Months	West Country B -9 Months	West Country A -9 Months	Scottish Borders -9 Months
Data period used	Jun/Jul 2008	Sep/Oct 2008	Jun/Jul 2008	Jan/Feb 2008
Sample size	132	139	146	143
Switchover awareness	99%	97%	97%	99%
Help Scheme awareness	34%	53%	41%	62%
know DSO 1 date - year	74%	73%	72%	80%
know DSO 1 date - month	n/a	n/a	n/a	35%
know DSO 1 date - day	n/a	n/a	n/a	9%
Understanding of need to convert	86%	88%	86%	91%
Detailed understanding index	80%	78%	81%	84%
Understand VCR impact	52%	60%	55%	50%
Opinion (positive/neutral)	79%	89%	75%	78%
Personal comfort (positive/neutral)	77%	85%	90%	97%
Conversion - primary set	83%	90%	78%	82%
Conversion - full household	59%	65%	52%	55%
Conversion - other sets	64%	64%	45%	55%
Conversion - Total TV sets	73%	77%	63%	67%

- At 9 months out from the first switchover in West Country B the region was well prepared. Most key metrics were ahead or in line with West Country A at 9 months out.
- From July to October 2008 take-up of digital TV increased on both main and subsequent sets in the region, bringing take-up to nine out of ten homes with access to digital TV (90%, up 7pp from July 2008). Close to two thirds of homes in the region (65%) have now converted all of their sets to digital (up 6pp from July 2008).
- Following the Autumn Help Scheme TV campaign awareness of assistance increased significantly in the region (up 19pp), and more than half of all residents were aware of the Help Scheme.

Regional Update: West Wales – 9 months from switchover

Transmitter Group	Area served	Homes ('000)	DSO 1	DSO 2
Kilvey Hill	the Swansea area	132	12 Aug 2009	9 Sept 2009
Preseli	south-west Wales	83	19 Aug 2009	16 Sept 2009
Carmel	parts of south and central Wales	110	26 Aug 2009	23 Sept 2009

FIGURE 2.11: COMPARISON OF KEY SWITCHOVER METRICS IN WEST WALES AT 9 MONTHS OUT

regions at -9 months	West Wales	West Wales	Scottish Borders	West Country A
	-12 Months	-9 Months	-9 Months	-9 Months
Data period used	Jul/Aug 2008	Oct/Nov 2008	Jan/Feb 2008	Jun/Jul 2008
Sample size	136	137	143	146
Switchover awareness	97%	92%	99%	97%
Help Scheme awareness	31%	28%	62%	41%
know DSO 1 date - year	47%	50%	80%	72%
know DSO 1 date - month	n/a	9%	35%	n/a
know DSO 1 date - day	n/a	n/a	9%	n/a
Understanding of need to convert	80%	78%	91%	86%
Detailed understanding index	63%	52%	84%	81%
Understand VCR impact	41%	29%	50%	55%
2-stage process	n/a	16%	n/a	n/a
Opinion (positive/neutral)	78%	74%	78%	75%
Personal comfort (positive/neutral)	90%	83%	97%	90%
Conversion - primary set	92%	90%	82%	78%
Conversion - full household	59%	59%	55%	52%
Conversion - other sets	59%	53%	55%	45%
Conversion - Total TV sets	73%	71%	67%	63%

- With 9 months to go until the first switchover in Wales, West Wales recorded high levels of take-up of digital TV, but awareness and understanding of switchover were somewhat lower than those recorded in other areas at the same point out.
- More than nine out of ten homes in the region had access to digital TV, with high take-up of satellite services from Sky. Secondary set conversion in the region is in line with other regions.
- Ninety-two per cent of the population were aware of the change (7pp lower than awareness in Scottish Borders at 9 months out).
- At this early stage West Wales residents also had lower levels of date awareness with only half of all residents aware that they are switching during 2009 and less than one in ten (9%) aware that they are switching in August 2009.

Regional Update: North Wales – 12 months from switchover

Transmitter Group	Area served	Homes ('000)	DSO 1	DSO 2
Llanddona	north-west Wales	95	21 Oct 2009	18 Nov 2009
Moel y Parc	north-east Wales	179	28 Oct 2009	25 Nov 2009
Long Mountain	parts of east and central Wales	24	4 Nov 2009	3 Dec 2009

FIGURE 2.12: COMPARISON OF KEY SWITCHOVER METRICS IN NORTH WALES AT 12 MONTHS OUT

regions at -1 year	North Wales	North Wales	West Wales	Scottish Borders
	-15 Months	-12 Months	-12 Months	-12 Months
Data period used	May-July 2008	Sept/Oct 2008	Jul/Aug 2008	Oct/Nov 2007
Sample size	111	127	136	152
Switchover awareness	94%	96%	97%	98%
Help Scheme awareness	39%	44%	31%	46%
know DSO 1 date - year	45%	50%	47%	69%
know DSO 1 date - month	n/a	n/a	n/a	15%
know DSO 1 date - day	n/a	n/a	n/a	8%
Understanding of need to convert	60%	60%	80%	91%
Detailed understanding index	64%	66%	63%	74%
Understand VCR impact	54%	51%	41%	39%
Opinion (positive/neutral)	81%	80%	78%	78%
Personal comfort (positive/neutral)	91%	87%	90%	93%
Conversion - primary set	91%	92%	92%	90%
Conversion - full household	56%	75%	59%	66%
Conversion - other sets	49%	72%	59%	69%
Conversion - Total TV sets	70%	82%	73%	76%

- With 1 year to go until switchover starts in North Wales in October 2009, the region appeared to be in good shape. North Wales had high conversion levels (92% of main sets had access to digital TV) and awareness and understanding metrics were in line with expectations.
- At the end of October 96% of residents in North Wales were aware of the switchover and Help Scheme awareness increased to 44% (up 5pp from July 2008) following the national Help Scheme awareness campaign in Autumn 2008.
- Half of all residents (50%) knew that North Wales is switching in 2009; this is slightly higher than date awareness in West Wales at that point (47%) but remains lower than understanding of the year in some other regions switching this year, e.g. Granada (67%) or in West Country B (74%) at the one year out mark.
- Progress on secondary set conversion is above that in other regions: three quarters of households (75%) had already converted all of their TV sets to digital by October 2008, which is significantly higher than was recorded in Scottish Borders at that point.

Regional Update: Granada – 12 months from switchover

Transmitter Group	Area served	Homes ('000)	DSO 1	DSO 2
Winter Hill	Liverpool, Manchester, Lancashire, Cheshire and north Staffordshire	3,041	4 Nov 2009	2 Dec 2009

FIGURE 2.13: COMPARISON OF KEY SWITCHOVER METRICS IN GRANADA AT 12 MONTHS OUT

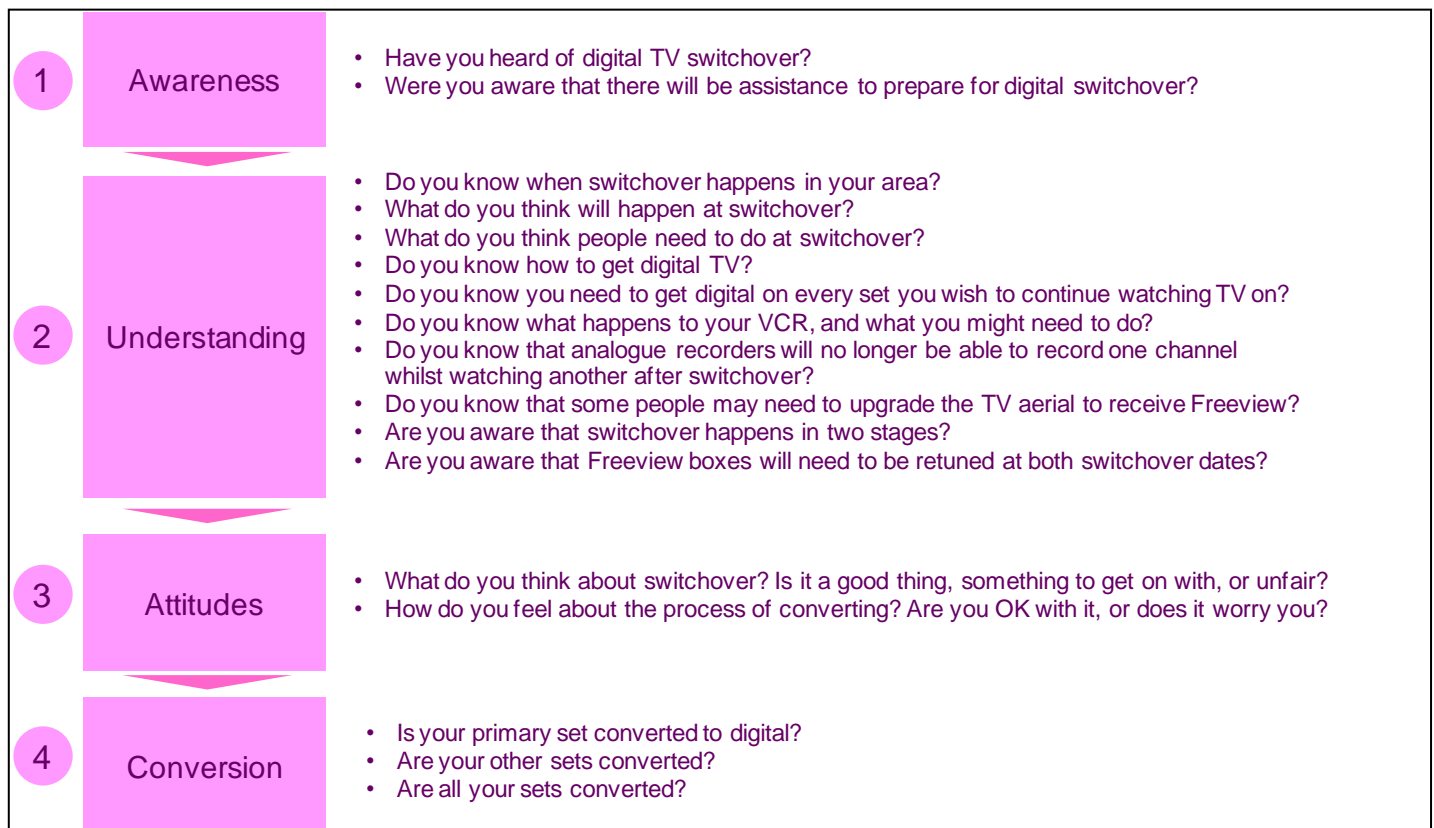
regions at -1 year	Granada -15 Months	Granada -12 Months	Scottish Borders -12 Months	Border B -12 Months
Data period used	Jul/Aug 2008	Oct/Nov 2008	Oct/Nov 2007	May/Jun 2008
Sample size	206	313	152	223
Switchover awareness	94%	97%	98%	96%
Help Scheme awareness	39%	43%	46%	54%
know DSO 1 date - year	44%	67%	69%	52%
know DSO 1 date - month	n/a	20%	15%	n/a
know DSO 1 date - day	n/a	n/a	8%	n/a
Understanding of need to convert	77%	73%	91%	77%
Detailed understanding index	63%	72%	74%	68%
Understand VCR impact	56%	46%	39%	55%
2-stage process	n/a	14%	n/a	n/a
Opinion (positive/neutral)	76%	74%	78%	76%
Personal comfort (positive/neutral)	91%	88%	93%	92%
Conversion - primary set	88%	90%	90%	75%
Conversion - full household	58%	64%	66%	56%
Conversion - other sets	57%	66%	69%	55%
Conversion - Total TV sets	70%	78%	76%	65%

- Over recent months conversion levels to digital TV improved significantly in the Granada TV region and by the end of the year 9 out of 10 homes had at least one digital TV set in their home (up 2pp from August 2008). Secondary set conversion was in line with expectations in this region with high levels of pre-switchover DTT coverage. Prior to switchover 94% of the Granada population can receive Freeview. This will increase to 99% after switchover. By the end of November 64% of homes in the region had fully converted all their sets in their home and almost 8 out of 10 TVs (78%) in the area were converted to digital.
- The regional switchover date for the Granada TV region was announced on 21 October 2008. Regional press activity and supporting advertising activity managed to drive correct understanding of the switchover year up 23pp from 44% in August to 67% in November. However, only 2 in 10 residents in the region could correctly name November as the month when switchover happens in Granada.
- The remaining awareness and understanding metrics were broadly in line with other regions at one year out. Seventy-three per cent of residents knew how to prepare for the change and 43% of residents were aware of the Switchover Help Scheme. Most awareness and understanding metrics improved following the distribution of the 8 months out switchover leaflet in November 2008.

APPENDIX ONE: About the Switchover Tracker

- The Switchover Tracker Survey started in April 2006. It is a continuous tracking survey designed to monitor the UK's conversion to digital television and consumer readiness as the nation switches to digital between 2008 and 2012. Sample sizes over recent years are as follows:
 - 2006: 6,400 respondents
 - 2007: 10,000 respondents
 - 2008: 13,600 respondents
 - 2009: 16,500 respondents (planned)
- Switchover Tracker respondents complete a 20 minute face-to-face interview. Fieldwork is carried out by GfK NOP. Interviewers speak to a representative sample of the population including more vulnerable parts of the population who are less likely to have converted their TV sets to digital already.
- The questionnaire is designed to track the following four dimensions of readiness:

FIGURE 3.1 – 4 DIMENSIONS OF READINESS ON THE DIGITAL UK SWITCHOVER TRACKER



- The Tracker is conducted across all switchover regions until a project is fully switched. Sample sizes per region are boosted as a region gets closer to the start of switchover:
 - 300 respondents per quarter in regions where switchover starts within the next 2.5 years.
 - 200 responders per quarter and switchover project from 15 months out in regions that have a drawn out switchover timetable and have to be split into more than one project.
 - The remaining regions are sampled in line with their proportion of the national population.
 - Tracker monitoring stops after a project is fully switched.
- Immediately before switchover starts monitoring changes from continuous surveying on the Switchover Tracker to small intense bursts of interviewing before and after the event. These so called 'dipstick surveys' include the same key metrics but also gather additional information, on people's experiences with switching over, re-tuning equipment as well as a general review of the programme and the communications campaign.
- Regional readiness is monitored by comparing the key metrics at 3 monthly stages as regions approach switchover. The Switchover Tracker dashboards show the most up to date results for each project based on their individual regional timings, counting down to the first switchover in each region.
- The results for each region show two-month rolling data for the relevant data point in that region. For example November and December 2008 Tracker data describe the Border B region at its 6 months out review point.
- The Switchover Tracker sample includes the full range of consumer groups, including those who may have some difficulty with switchover. This includes: older people, people with disabilities, those living in rural areas, minority ethnic groups (BAME), 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.

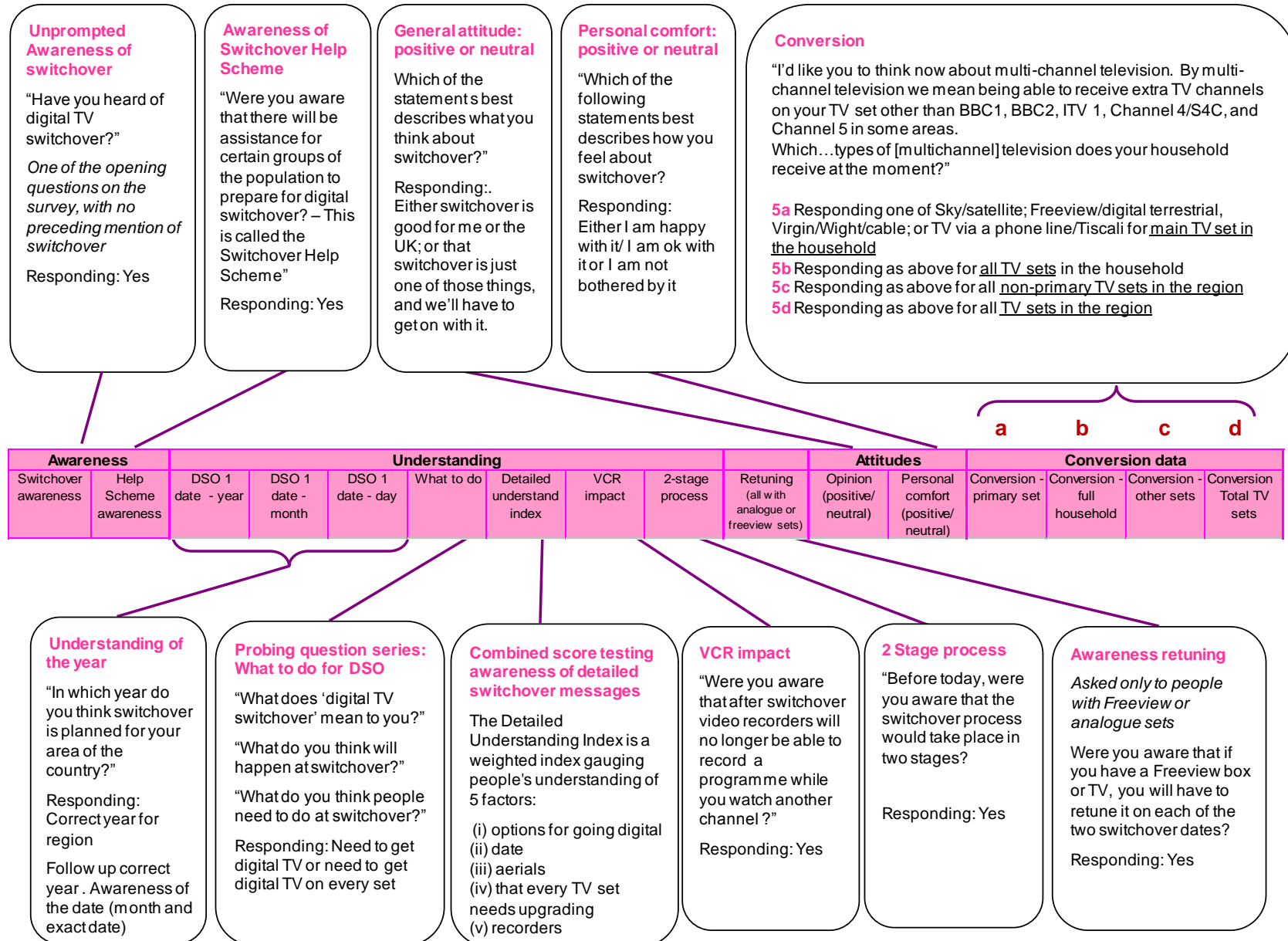
The Switchover Tracker Help Scheme Boost

- At one year out from the start of switchover in a region sample sizes of those parts of the population who are eligible for the Switchover Help Scheme get boosted by 100 to 150. These include people 75 years or older and people with certain disabilities (those on Disability Living Allowance, Attendance Allowance, those registered blind or partially sighted or people living in care homes).
- Respondents eligible for the Switchover Help Scheme are invited to answer an additional section of questions (5 minutes) relating to the scheme for a £5 incentive.

The Dashboards

- Summary Tracker results are provided in the 'dashboards' of progress towards switchover:
 - (1) The regional dashboard: Most recent data by switchover project
Key metrics for each switchover project and topline averages for all remaining switchover regions.
 - (2) The dashboard: by Consumer Groups
Key metrics provided for a range of demographic and consumer groups – see appendix two for further detail.
- 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.

FIGURE 3.2 – EXPLANATION OF THE ‘KEY METRICS’ SHOWN ON THE TRACKER DASHBOARDS



The Tracker Module

In addition to the standard question set as described above, the survey has a flexible sub-set of questions which are used to collect research data on a current topic. Since Q2 2006 the following topics have been researched through the Switchover Tracker Module:

- **Q2 2006:** Switchover Segmentation, selection of attitudinal statements resulting in 6 different consumer segments with different motivations to convert to digital TV.
- **Q3 2006:** Equipment usability, and an exploration of people's perceptions of their digital TV equipment and their confidence in using it.
- **Q4 2006:** Effectiveness of the autumn 2006 consumer communications campaign and awareness and understanding of the Digital Tick Logo Scheme.
- **Q1 2007:** Analogue and digital recording devices, gauging the conversion challenge for analogue recorders in the UK. Tested the use of analogue and digital recording devices and explored the potential for the digital recorders market.
- **Q2 2007:** Energy efficiency and electronic waste e.g. through disposal of old TV sets and recording devices after switchover as well as the 3 and 6 Mux coverage issue of Freeview post switchover.
- **Q3 2007:** Aerials and the registered digital installer scheme. It also tests awareness that the digital terrestrial signal will extend at switchover
- **Q4 2007:** Effectiveness and consumer response to the autumn 2007 consumer communications campaign.
- **Q1 2008:** Awareness and usage of analogue and digital text services, and attitudes towards the loss of analogue text services at switchover. In March 2008 the module also tested awareness of Digital UK's Skip television advertising campaign.
- **Q2 2008:** Tested whether respondents needed help or expected to need help with choosing, installing and learning to use Digital TV services. This was to inform an extra segmentation project, carried out in order to segment Help scheme respondents.
- **Q3 2008:** Digital UK and Switchover Help Scheme communications campaign effectiveness to gauge whether the campaign improves understanding of what the public and help scheme eligible groups need to do at switchover.
- **Q4 2008:** Motivated Helpers Module to quantify the number of people with a propensity to help others through switchover and to test messages that might motivate different types of helpers to provide this help.

Sampling methodology

The Tracker currently uses standard demographic quotas to achieve a sample that is representative of the UK as a whole. As switchover projects start dropping off the Switchover Tracker after a region is fully switched (after Q4

2008), the Tracker results remain representative of all remaining switchover regions.

The selection of interview point 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

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.

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

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

The individual weighting profile is used for all flexible campaign driven measures like awareness of switchover or the Switchover Help Scheme and understanding the need to convert or all detailed campaign messages like understanding of the year, month or exact date when digital switchover starts in each region.

The household weighting profile is used for all TV ownership metrics, e.g. levels of digital TV conversion of the first to the fifth TV set in the home.

APPENDIX TWO: Glossary of Terms

ABC1	Higher socioeconomic groups [higher (A) intermediate (B) or junior (C1) managerial, professional or administrative occupations or students]
C2DE	Lower socioeconomic groups [skilled (C2) and semi or unskilled manual workers (D), pensioners, the retired and casual workers (E)]
Rural	Those living in areas with population density of less than 3 people per hectare
Urban	Those living in areas with population density of more than 3 people per hectare
Low Income	Those on less than 60% of national median income; less than £13,500 p.a.
BAME	Black and minority ethnic groups
Non-English	Those whose first language is not English
Disabled	Those citing health problems or disabilities that mean they have difficulties with everyday tasks
Need assistance	Those living alone with analogue on any TV set in their home who would not feel competent to install Freeview equipment themselves and are likely to require help from someone outside of their home
Hard to reach	Those under the age of 75 in the following groups: 65-74, Low income, BAME, Non-English, Disabled (but not receiving DLA/AA), those living in rural areas, and those with terrestrial on any TV set who are not sure who they would ask for help with installing Freeview
Living on Own	Those living in single person households
Disabled DLA/AA	Disabled people receiving Disability Living Allowance or Attendance Allowances (and therefore eligible for the Switchover Help Scheme)