Ofcom and Digital UK
Switchover Tracker Survey

Switchover Progress Report
Q2 2006

Publication Date: 26 July 2006

Contents

Executive Summary

Background

- In June 2006 Ofcom reported that 72.5% of UK households had adopted digital TV, and 74.6% had some form of multi-channel television[1]. However, it was also estimated that only 40% of television sets were digital, since most households have more than one TV and in the majority only the main set has been converted[2].
- Digital TV switchover, the UK's conversion to digital television between 2008 and 2012, will require all households to get digital television on any TV set they wish to continue using to watch broadcast television.
- To monitor progress towards switchover Ofcom and Digital UK have launched a new continuous consumer tracking study, the 'Ofcom & Digital UK Switchover Tracker', to measure consumers' awareness, understanding and feelings about switchover, as well as levels of conversions on all sets and satisfaction with digital TV.
- Ofcom and Digital UK will issue a quarterly report on the survey's results that complements Ofcom's Digital Progress reports. This document is the first report from that survey and details key findings (see Appendix One for further detail on the tracker methodology).

Awareness & Understanding of Switchover

- Quarter 2 data (April to June 2006) shows that two thirds (66%) of the UK population have heard of digital TV switchover.
- Contrary to common expectations, older people aged 65-74 are actually more aware of switchover:
  - 78% of people aged 65-74 had heard of switchover; more than the national average (66%)
  - Awareness is marginally lower than usual amongst those over 75 (63%)
  - However, the lowest levels of awareness are amongst the youngest age groups with less than half of 16-24s (47%) having heard of switchover, possibly because many already have digital TV, and because this age group is generally more comfortable with digital technologies.

[1] 74.6% includes 530,554 analogue cable subscribers; most of which are expected to be transitioned to digital by Ntl / Telewest prior to switchover.
[2] Source: Ofcom: 'The Communications Market: Digital Progress Report, Digital TV Q1 2006'

- Men and those in higher socioeconomic groups are also more likely to have heard of switchover:
    - 72% of men have heard of switchover, compared to 61% of women
    - Awareness amongst ABC1s is 74%, compared to 59% for C2DEs.
- Around half the UK population understands that switchover will happen within a timeframe between 2008 and 2012. Knowledge of the local switchover date in individuals own region is limited (15% or less) in all but the Border region, where regional communications launched in December 2005 and almost half of people (49%) now know that switchover will happen there in 2008.
- Satisfaction with digital TV is consistently high across all those who already have it. Almost 8 in 10 (77%) say that it is better than analogue TV.

Intentions to Convert

- Almost 9 in 10 (88%) say they have or will have at least one set converted for switchover. A minority (9%) don't yet know whether they will or not, but might be expected to eventually switch.
- 3% say that they won't convert for switchover; a lower figure than has been seen in previous research[3]. When asked why they won't convert, most of this group say it is because TV is not important enough to them. A minority cite cost as a barrier, or have a principled objection to switchover.

Impact of the May Switchover Campaign

- Digital UK launched its first nationwide campaign of communications and assistance in May 2006. Awareness subsequently increased at a nationwide level from 60% in April to 73% during May and June, a 13 percentage point increase.
- Awareness levels grew more substantially in the first three switchover regions (Border, Westcountry and Wales) where regional campaigns were conducted:
    - In Border awareness rose by 11 points from 77% to 88%
    - In Westcountry awareness also rose by 11 points, from 71% to 82%
    - In Wales awareness started from a lower base in April at 59% and the rise was more marked, growing 24 points to 83%[4]

[3] Research commissioned by the DTI and conducted by The Generics Group in November and December 2003 ('The impact of digital switchover on consumer adoption of digital television', published March 2004) showed that 5% of households claimed they would not convert for switchover.

[4] Note that these figures are a comparison of April data (pre-campaign) against May/June combined data (post-campaign). The full quarter figures (April, May and June) quoted elsewhere in the report are aggregated figures from all three months. E.g. Awareness in Border in April was 77%, which grew to 88% in May and June, but awareness for the whole quarter (April, May and June combined) is 82%.

The Digital Switchover Logo

- The Tracker also follows awareness and understanding of the digital tick logo, used on products and services that are 'switchover-ready'.
- The report shows that 45% of people recognise the logo, and 62% of these are then able to accurately describe what it means.
- Logo awareness grew substantially over the course of the May campaign from 35% in April to 56% in May.
- Increased usage of the logo by Digital UK and all switchover stakeholders (including manufacturers, retailers, platform operators and broadcasters) continues to contribute positively to logo recognition.

A Look at the Border Region

- The Border region, the first to switchover, leads the UK on all the awareness and understanding measures:
  - 82% of those in Border have heard of switchover (national = 66%)
  - 76% understand the need to convert every TV (national = 64%)
  - 49% know the 2008 switchover date (other regions all 15% or less)
  - 54% recognise the logo (national = 45%).

Going Forward

- It is clear that penetration of digital television is making good progress with 72.5% of UK households having already converted.
- However, most households have more than one TV and estimates indicate that only 40% of all TV sets are converted.
- We therefore recognise that there is more to do to raise awareness amongst the remaining third of the population who have not yet heard of switchover, and to develop understanding of switchover and how to go digital.
- Digital UK's Autumn campaign is designed to sustain the positive momentum created during the May campaign and build understanding, whilst continuing to reassure consumers about the switchover.
- The next quarterly report will be published in October 2006. It will look at equipment usability and consumers' confidence in dealing with equipment issues, and will also focus on conversion of second sets and recorders.

Chapter 1

Introduction

- Ofcom and Digital UK have set up a new tracking study, the 'Switchover Tracker', to monitor the UK's conversion to digital television for switchover. More than 8,300 households will be surveyed, face-to-face, over the course of the coming year, and the quarterly results will be the key tool by which progress towards switchover is assessed[5]. See Appendix One for further detail of the Tracker methodology.

About the Tracker Survey

- The Tracker was launched on April 3 2006, and will run throughout the switchover programme.
- The questionnaire is designed to track the following six dimensions:

FIGURE 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?

[5] The Department of Trade and Industry made a one-off contribution to the tracker to boost the April survey.

- The Tracker is conducted in all switchover regions, and samples are boosted in each region three years out from switchover. For the current year, therefore, Border, Westcountry, Wales and Granada are all boosted to each achieve at least 300 respondents per quarter. The remaining regions are sampled in line with their proportion of the national population[6].
- 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, the socially isolated and those living on their own, those living in 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 Targeted Help Scheme of assistance for the most vulnerable: the over 75s and the severely disabled (those on Disability Living Allowance, Attendance Allowance, or the registered blind or partially sighted).

The Dashboards

- Tracker results will be reported each quarter in this report, and the summary provided in two 'dashboards' of progress towards switchover:

  (1) The Dashboard: By Regions

  (2) The Dashboard: By Consumer Groups (see Appendix Two for a Glossary explaining the consumer group terms)

  The regional dashboard summarises data on each of the key metrics described in figure 1 for each of the switchover regions, and at a national level.

  The consumer groups' dashboard summarises results again for each of the key metrics, but this time split by different consumer groups, including standard demographic breakdowns but also with a particular focus on potentially vulnerable groups.

  Both dashboards for Q2 2006 are provided in Chapter 2, with further discussion of the results in Chapter 3.

'In-Focus' Chapters

- Each quarterly report will include two chapters which focus in on a particular region, consumer group or topic. This report includes one chapter on older people, which looks at older people's television consumption, their awareness and understanding of switchover, and an

[6] 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.

assessment of their needs at switchover (see Chapter 6), and one chapter on the Border region, the first region to switch (see Chapter 7).

The Tracker Module: Investigating a new switchover topic each quarter

- In addition to the standard question set described above, each quarter the Tracker will have a sub-set of questions on a current topic. During this first quarter, Q2 2006, these have been questions testing awareness and comprehension of the May campaign of communications and assistance run by Digital UK. Results are provided in Chapter 4. In the coming quarter, Q3 2006, the module is focused on equipment usability, and results will be discussed in the next quarterly report.

Tracking the Digital Switchover Logo

- These quarterly reports will also update on the digital switchover logo used on products and services to identify them as being switchover-ready:

Chapter 5 shows how the efforts of Digital UK, manufacturers, retailers, the digital TV platforms and broadcasters have driven a significant growth in awareness of the logo, and a reasonable understanding of what it means.

Re-Contact Surveys

- Finally, all respondents are asked if they mind being re-contacted, should there be any further questions. Around two thirds are currently agreeing to this, and Ofcom and Digital UK are building up a ‘pool’ of individuals who can be re-contacted on specific topics.
- When the survey has run for one year, individuals who said they would get digital TV within the coming year will be re-contacted to follow up on whether they did; and why they did or did not eventually get digital TV.
- Re-contact surveys are also planned with sub-groups of consumers who may face particular challenges switching over. This may include potentially vulnerable consumers (to further explore their concerns and needs), and those living in multiple-dwelling units who rely on a landlord to convert their reception systems.

Monitoring Progress: The Market Planning Model

- Key metrics from the Tracker (including awareness of switchover, understanding, intentions to convert and conversion) will in future be monitored against quarterly targets, to ensure that the Switchover Programme is on track to deliver switchover in each region.

- The Q2 results contained within this report form the input for a 'Market Planning Model' that projects the required growth in each of these metrics until the point of switchover.
- The model sets separate targets for each region (in recognition of their different starting points, their different switchover dates, and their different local characteristics).
- Results can therefore begin to be compared to the quarterly targets from Q3 2006 onwards.

Ofcom and Digital UK believe that this comprehensive rolling programme of research into switchover is a unique resource that will act as the key tool for monitoring the UK's switch to digital TV; and hope that the results published in these quarterly reports will provide a valuable resource to all stakeholders with an interest in switchover.

Chapter 2

The Dashboards – Q2 2006

Quarterly results are presented on two 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)

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 are based on actual platform data, and therefore remain the authoritative guide to digital TV take-up. The Q1 2006 report shows that 72.5% of households have digital TV, and 74.6% have multi-channel TV (including analogue cable).

How to read the dashboards

FIGURE 2 – 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 below 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- Attitudes	-4- Intentions to convert			-5- Conversion			-6- Satisfaction
		-a- Switchover	-b- Logo	-a- Concept	-b- Date	Positive/ Neutral	-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	With digital TV
NATIONAL	**2522**	**66%**	**45%**	**64%**	**N/A**	**67%**	**88%**	**3%**	**10%**	**74%**	**34%**	**37%**	**77%**
1 - Border	427	82%	54%	76%	49%	72%	91%	3%	5%	69%	40%	39%	79%
2 - Westcountry	300	77%	44%	75%	12%	67%	88%	2%	12%	71%	30%	32%	80%
3 - Wales	325	71%	45%	66%	12%	66%	90%	2%	4%	83%	44%	49%	83%
4 - Granada	314	64%	42%	57%	7%	68%	87%	5%	12%	79%	40%	41%	83%
5 - West	80*	75%	40%	62%	18%	61%	79%	2%		63%	36%	32%	
6 - STV/Gramp	137	62%	42%	64%	12%	72%	89%	3%		76%	47%	47%	84%
7 - Central	179	66%	45%	66%	2%	65%	91%	1%		76%	33%	39%	72%
8 - Yorkshire	172	67%	41%	63%	4%	59%	92%	4%		77%	29%	28%	74%
9 - Anglia	145	68%	39%	53%	3%	60%	88%	3%		68%	29%	27%	79%
10 - Meridian	152	79%	45%	73%	15%	65%	83%	8%		68%	34%	42%	71%
11 - London	174	59%	54%	66%	14%	77%	88%	1%		71%	27%	34%	77%
12 - Tyne Tees	76*	68%	48%	62%	16%	68%	95%	0%		89%	37%	39%	86%
13 - Ulster	41**												

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

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

FIGURE 3 – EXPLANATION OF THE 'KEY METRICS' SHOWN ON THE TRACKER DASHBOARDS

1a – 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 – Understanding of the concept of switchover

Question:

"Before today, were you aware that every individual TV set in the household…that you want to keep watching ordinary TV on after switchover will need to be adapted or upgraded?"

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

Responding: Yes

4a/b– Intentions to convert to digital

Question:

"Which of the following best describes your plans to get multi-channel television to TV sets in your house so you can use them to watch TV after switchover?"

4a Responding: Some or all of TVs have already been or will be adapted/upgraded
4b Responding: None of my TVs will be adapted/upgraded

5a/b/c – Conversion

Question:

"Which…types of [multichannel] television does your household receive at the moment?"

5a Responding one of Sky/satellite; Freeview/digital terrestrial, Ntl/Telewest/Wight/cable; or TV via a phone line/Homechoice for main TV set
5b Responding as above for all non-primary TV sets
5c Responding as above for all TV sets in household

-1- Awareness		-2- Understanding		-3- Attitudes	-4- Intentions to convert			-5- Conversion			-6- Satisfaction
-a- Switchover	-b- Logo	-a- Concept	-b- Date	Positive/ Neutral	-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	With digital TV

1b – Awareness of the logo

Question:

"Do you recognise this?

When shown a screen with the digital tick logo

Responding: Yes

2b – 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

3 – 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

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"

(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- Attitudes	-4- Intentions to convert			-5- Conversion			-6- Satisfaction
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3 - Wales	325	71%	45%	66%	12%	66%	90%	2%	4%	83%	44%	49%	83%
4 - Granada	314	64%	42%	57%	7%	68%	87%	5%	12%	79%	40%	41%	83%
5 - West	80*	75%	40%	62%	18%	61%	79%	2%		63%	36%	32%	
6 - STV/Gramp	137	62%	42%	64%	12%	72%	89%	3%		76%	47%	47%	84%
7 - Central	179	66%	45%	66%	2%	65%	91%	1%		76%	33%	39%	72%
8 - Yorkshire	172	67%	41%	63%	4%	59%	92%	4%		77%	29%	28%	74%
9 - Anglia	145	68%	39%	53%	3%	60%	88%	3%		68%	29%	27%	79%
10 - Meridian	152	79%	45%	73%	15%	65%	83%	8%		68%	34%	42%	71%
11 - London	174	59%	54%	66%	14%	77%	88%	1%		71%	27%	34%	77%
12 - Tyne Tees	76*	68%	48%	62%	16%	68%	95%	0%		89%	37%	39%	86%
13 - Ulster	41**	*Ulster sample sizes currently too small to report on a quarterly basis; data to provided 6 monthly with first report in Q3 2006*											

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(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- Attitudes	-4- Intentions to convert			-5- Conversion			-6- Satisfaction
		-a- Switchover	-c- Logo	Concept	Positive/ Neutral	-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	With digital TV
NATIONAL	**2522**	**66%**	**45%**	**64%**	**67%**	**88%**	**3%**	**10%**	**74%**	**34%**	**37%**	**77%**
Male	1194	72%	49%	72%	73%	90%	3%	10%	74%	35%	39%	80%
Female	1328	61%	41%	56%	63%	87%	3%	11%	73%	33%	35%	75%
16-24	279	47%	45%	49%	73%	88%	4%		82%	34%	37%	80%
65-74	326	78%	48%	77%	67%	87%	4%	6%	67%	23%	30%	73%
ABC1	1150	74%	44%	71%	70%	90%	2%	9%	74%	33%	35%	76%
C2DE	1372	59%	45%	57%	65%	87%	3%	11%	73%	36%	39%	78%
Rural	469	76%	42%	70%	61%	89%	1%	6%	70%	37%	38%	83%
Urban	2053	65%	45%	63%	68%	88%	3%	11%	74%	34%	37%	77%
Low income	581	59%	46%	59%	63%	84%	4%	10%	68%	26%	40%	82%
BME	102	42%	56%	41%	71%	87%	2%		75%	19%	44%	74%
Non-English	101	35%	56%	33%	75%	74%	2%		69%	37%	54%	75%
Disabled	456	68%	47%	64%	55%	83%	6%	3%	71%	32%	36%	77%
Socially isolated	29**											
Living alone	479	69%	37%	66%	62%	82%	6%	8%	53%	21%	31%	79%
Rent private	276	57%	47%	58%	69%	82%	5%	9%	60%	27%	38%	84%
Rent council	469	57%	49%	53%	63%	88%	4%	6%	73%	43%	42%	81%
House	2219	68%	44%	65%	68%	89%	3%	7%	76%	34%	36%	78%
Flat	269	55%	50%	56%	67%	84%	4%	7%	60%	33%	42%	76%
THS - 75+	232	63%	39%	59%	55%	76%	8%	1%	45%	25%	33%	81%
THS - DLA/AA <75	134	66%	47%	61%	59%	84%	5%		71%	39%	39%	85%

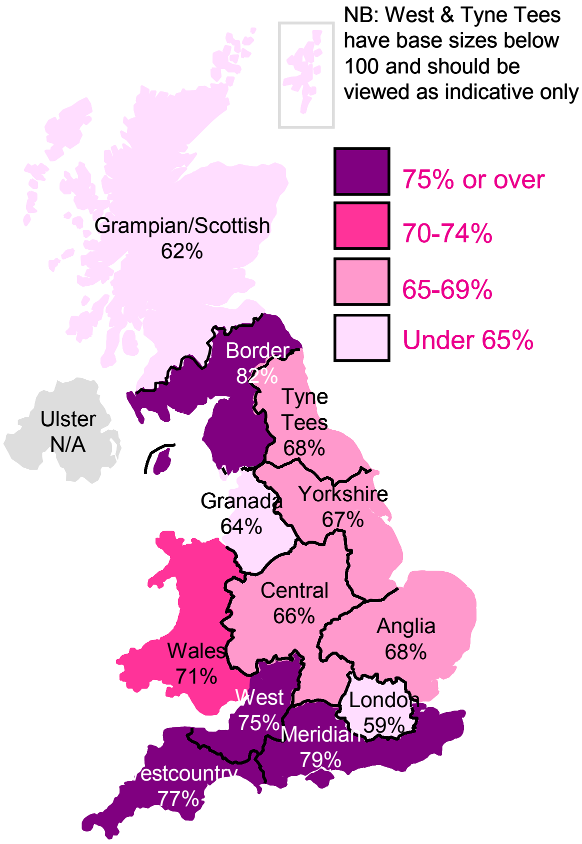
Chapter 3

The Q2 2006 Tracker Results

Awareness

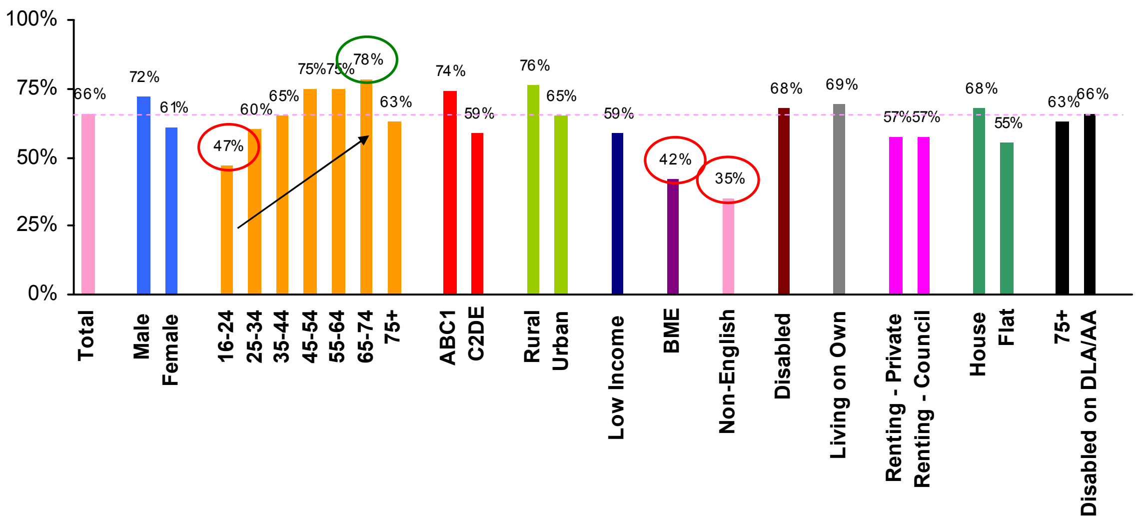
- Two thirds (66%) of the UK population have heard of digital TV switchover.
- Awareness is highest in the first region to switch, Border, at 82%. Other early regions, including Westcountry and Wales, show above average awareness at 77% and 71% respectively.
- The more urban regions, including Scottish (Edinburgh and Glasgow), Granada (Manchester and Liverpool) and London have lower levels of awareness. This is perhaps due to the younger demographic profiles of those regions, and the fact that younger age groups appear less likely to have heard of switchover (see below).

FIGURE 4 – AWARENESS OF SWITCHOVER BY SWITCHOVER REGION



- Awareness also varies quite considerably by the consumer groups that we track against.

FIGURE 5 – AWARENESS OF SWITCHOVER BY CONSUMER GROUP



- Contrary to common expectations, people aged 65-74 are actually more aware of switchover. 78% of 65-74 year olds are aware of switchover; significantly more than the 66% national average, although awareness is marginally lower than usual amongst those over 75 (63%). We regard this as encouraging, since take-up of digital TV is lower in these age groups, and because older people represent one group who may have difficulties with switchover (see Chapter 6 for further analysis of older people and switchover).

- The lowest levels of awareness are amongst the youngest age groups and black and minority ethnic (BME) groups and those who don't speak English as a first language. Less than half (47%) of 16-24s have heard of switchover; 42% of BME groups and 35% of Non-English speakers have heard of switchover. This is perhaps surprising given that younger people and BME groups are more likely to have digital TV: 82% of 16-24s have digital TV and 75% of those in BME groups, against the national figure of 74%.

- It may be that their familiarity with digital television, and, in the case of younger people, their use of a wide range of digital media means that they feel they are already 'converted' and do not pay attention to switchover, or feel it is not relevant to them. Low awareness may alternatively indicate a more serious problem in accessing these groups. Much switchover coverage has been in press and broadcast news, which may not reach younger age groups or minority groups who do not read or watch mainstream news. Digital UK is developing a community and minority ethnic communications strategy for the launch of regional communications in Granada, the most ethnically diverse of the first four switchover regions.

- Men and those in higher socioeconomic groups are also more likely to have heard of switchover. Awareness amongst men is 72%, compared to

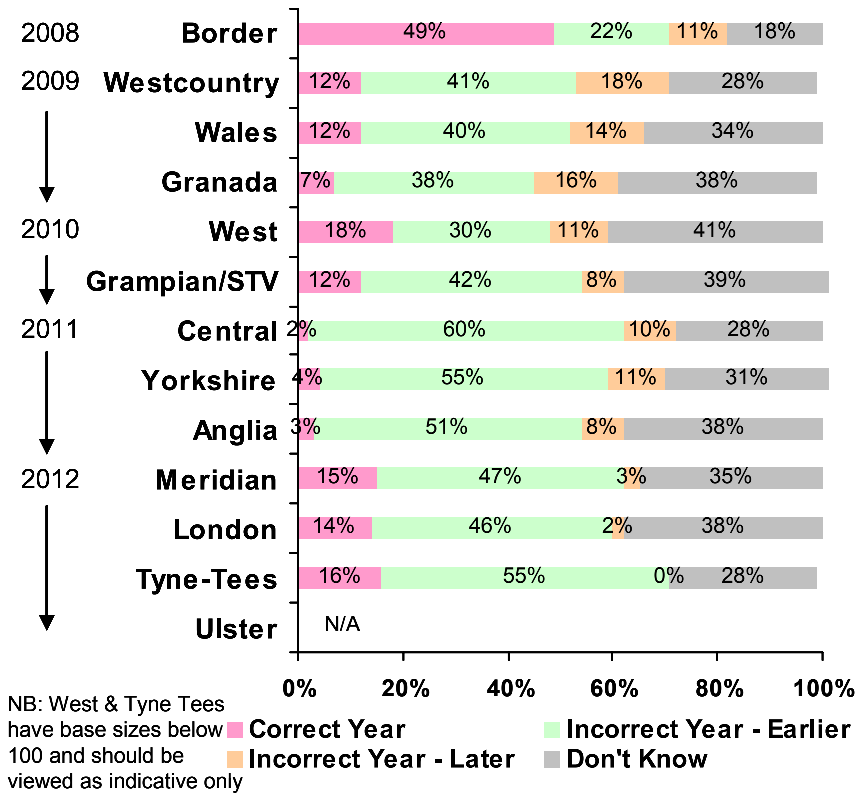
61% for women; and awareness amongst ABC1s is 74%, versus 59% for C2DEs.

- The disparity in awareness between men and women may be a reflection of men's greater confidence with digital technology, but it is a significant difference and one that we will continue to monitor.

Understanding

- Around half the population understands that switchover will happen within a timeframe between 2008 and 2012.
- Knowledge of the local switchover date (when it is happening in your region) is limited in all but the Border region, where almost half of people (49%) know that switchover will happen there in 2008.

FIGURE 6 – UNDERSTANDING OF THE REGIONAL SWITCHOVER DATE

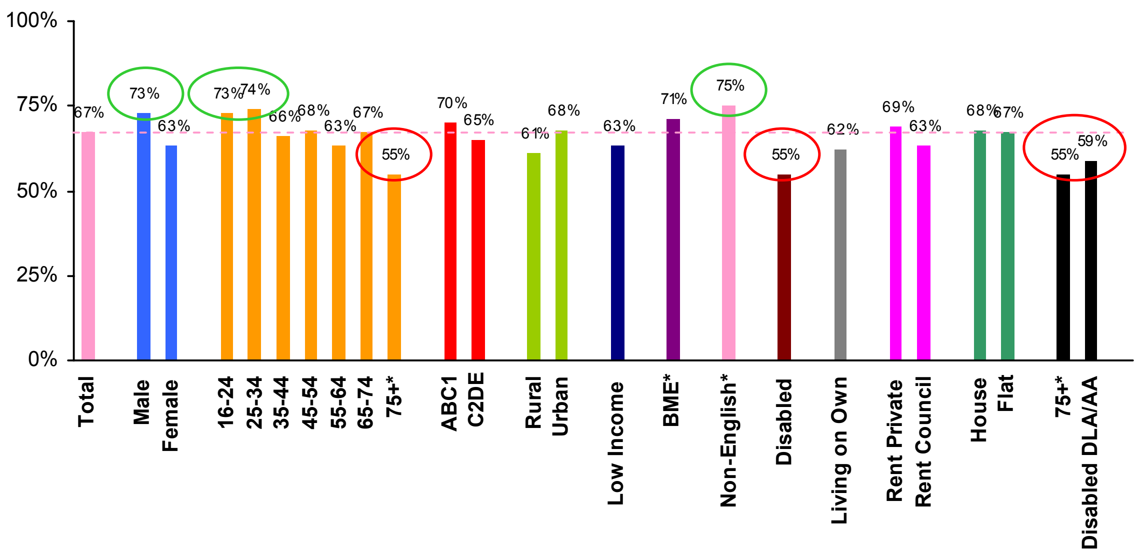


- 64% claim to know that they will need to convert every TV for switchover. Although encouraging, Digital UK and Ofcom believe that there is more to do to develop understanding of how to go digital and the range of options available. The Tracker is therefore now probing understanding of switchover, and future versions of this report will give further detail.

Attitudes

- There are two dimensions to people's attitudes about switchover. The first is what people think about the switchover policy. Some people will understand the benefits of switchover either for themselves or for the UK as a whole. Some may just see it as inevitable, and accept it as part of technological progress. Others will see it as unfair, particularly since it is a compulsory process; something that everyone must do in order to make switchover possible. This is the 'attitudes' metric shown on the dashboards.
- The second type of attitude is a feeling about the process of switching over. Some may be perfectly comfortable with digital TV or the prospect of digital TV. But we know that switching over will worry some people, and perhaps leave them feeling concerned or even threatened.
- It is possible that an individual might have contrary views on the two measures: they might oppose the switchover policy, and yet feel comfortable with the process. Conversely, they might understand and support the objectives of switchover but have concerns about how they, personally, will cope with the change.
- Looking at what people think about the switchover first, we see that a little over two-thirds of the UK (67%) regard switchover either as a good thing, or as inevitable: "one of those things and we'll have to get on with it".
- The chart below shows how this positive/neutral measure varies across the different consumer groups. We can see that men, younger people and minority ethnic groups and non-English speakers are generally more likely to feel positively about switchover. Older and disabled groups are more likely to feel negatively.

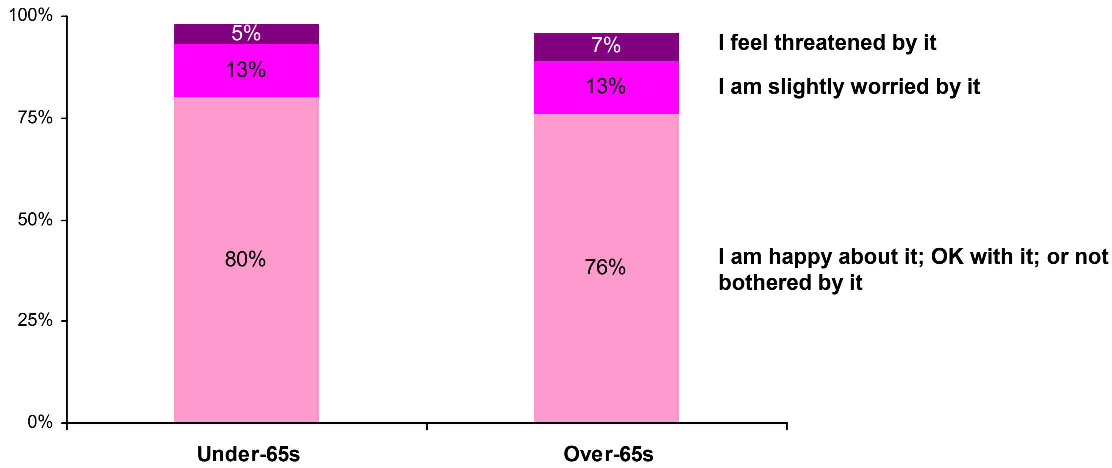
FIGURE 7 – POSITIVE/NEUTRAL ATTITUDES TOWARDS SWITCHOVER BY CONSUMER GROUP



- Attitudes may well be linked to the perceived reason for switchover. The most commonly cited reason, perceived as the principle reason for switchover by 42% of people is "to update and modernise the current aging broadcasting network". The percentage of people choosing this statement (against others including the extension of digital terrestrial coverage, freeing airwaves for other uses, and creating income for either the Government or retailers and manufacturers) is reasonably consistent for all but the older age groups, where only 30% of 65-74 year olds and 31% of the 75+ cite this reason. The 65-74s are slightly more likely than other age groups to believe that the purpose of switchover is to "make money", but the 75+ are twice as likely as any other age group to simply say they don't know (21% give this response, against 11% for the remainder of the population). It is possible that this uncertainty as to why switchover is happening means that the 75+ age group is less likely to feel positively about it.

- On the second measure, of whether people are comfortable with the process of switching over, the vast majority say that they are generally happy with switching over. Some feel slightly worried but less than 10% feel threatened by it. This is true of both younger and older age groups.

FIGURE 8 – HOW PEOPLE FEEL ABOUT SWITCHOVER; UNDER- AND OVER-65S[7]

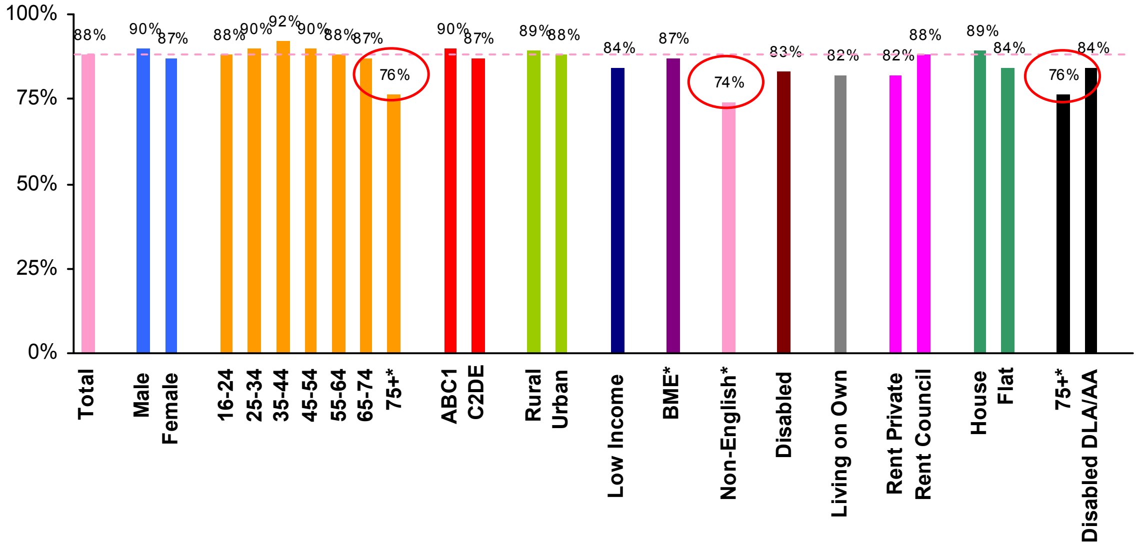


Intentions

- Almost 9 in 10 (88%) already have plans to convert at least one set for switchover. A minority (9%) don't yet know whether they will or not, but might be expected to eventually switch.
- Intentions to convert at least one set for switchover are reasonably consistent across the consumer groups. Those less likely to intend to convert for switchover are the over-75s and those who don't speak English as a first language.

[7] Note that this question was asked in the June survey only, and is therefore based on 646 respondents.

FIGURE 9 – INTENTIONS TO CONVERT AT LEAST ONE TV SET FOR SWITCHOVER



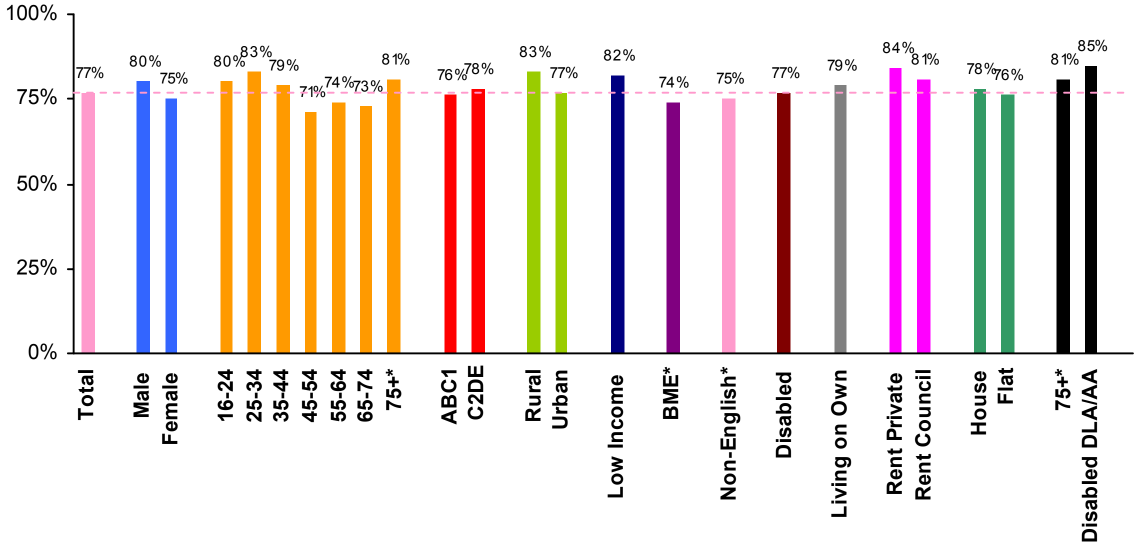
- 3% say that they won't convert for switchover. This figure is lower than similar figures seen in previous research. The survey conducted by The Generics Group on behalf of the DTI in November and December 2003 (published in March 2004 in the report 'The impact of digital switchover on consumer adoption of digital television') found that 5% of households claimed that they would not convert for switchover. At that point only just over 50% of households had converted to digital[8], compared to the 72.5% with digital TV in Q1 2006. We find it encouraging that as digital adoption has progressed the small minority who claim they won't convert for switchover has declined.
- When asked why they won't convert, most of this group say it is because TV is not important enough to them. We believe that they may fall into a segment of viewers who do not see television as a significant part of their lives, and are content to go without it. A similar phenomenon has been seen in Sweden, where the authorities have reported that the small minority who chose not to convert at switchover did so knowingly and because they were such light TV viewers that they were not bothered about watching television immediately after switchover. A minority of the group of resisters in the Tracker cite cost as a barrier, or have a principled objection to switchover.

[8] Ofcom's first 'Digital Television Update' published in February 2004 showed that digital TV conversion in Q4 2003 was 50.2%.

Satisfaction

- Satisfaction with digital TV is consistently high across all those who already have it, including amongst the older and disabled groups.
- Almost 8 in 10 (77%) say that digital TV is better than analogue TV, and a further 15% say they enjoy watching digital TV as much as analogue TV.

FIGURE 10 – SATISFACTION WITH DIGITAL TV BY CONSUMER GROUP[9]



[9] Groups marked with an asterisk are based on small base sizes, and data should be viewed as indicative only.

Chapter 4

Impact of the May Switchover Campaign

Digital UK's May Communications Campaign

On May 5 2006 Digital UK launched the first nationwide programme of switchover communications and support, consisting of:

- National television advertising on all the commercial terrestrial channels, plus a selection of digital channels;
- Supplementary television advertising in the first three regions to switch (Border, Westcountry and Wales) on BBC and ITV regional channels;
- National press advertising in all major newspapers, a selection of TV listings magazines, and electrical retail trade press;
- Regional press advertising in local newspapers in the first three regions;
- Local radio advertising on BBC stations in the first three regions;
- Distribution of 3 million switchover information leaflets to households in the first three regions;
- Distribution of retail packs (leaflets, dispensers and other display materials) to over 3,000 stores in the digital 'tick' logo scheme, and a further 1,000 stores in the first three regions;
- An updated helpline on 0845 6 50 50 50; and
- A revised website, including region-specific sections for Border, Westcountry and Wales.

The campaign ran over 6 weeks to mid-June. It was designed to reach 85-90% of the UK population and provide those in the first three regions with 13 opportunities to see the communications, and those in the rest of the UK with 7 opportunities.

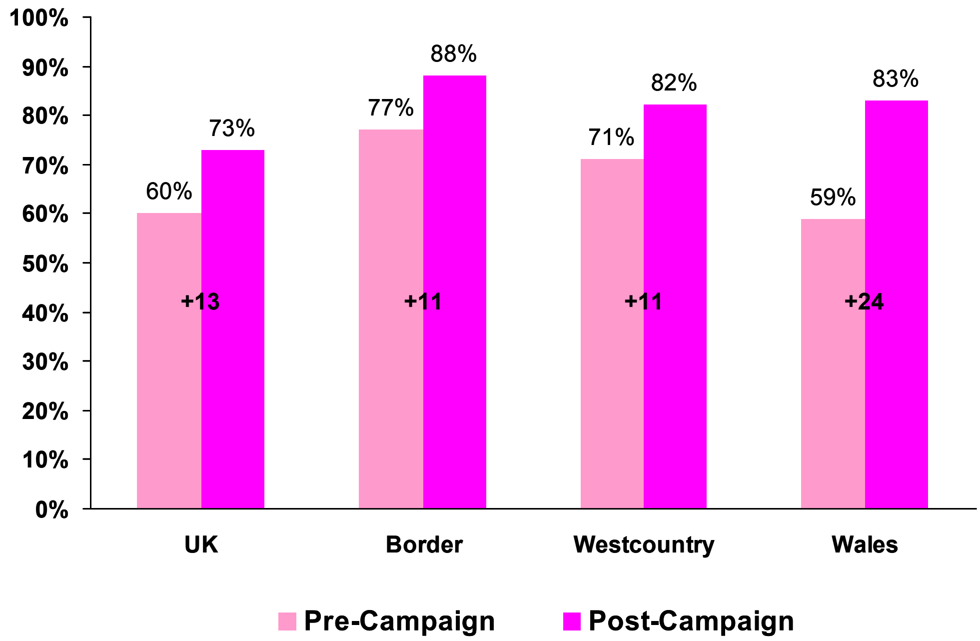
The campaign was supported by a wide range of switchover stakeholders including the retail and manufacturing industry, which adopted and promoted the digital 'tick' logo in-store; digital television platform operators, which began using the strapline 'get set for digital' and began explaining switchover to existing and future potential customers; and consumer groups (for example the Citizen's Advice Bureau, which has made information leaflets handed available in its centres).

Impact of the Campaign

In May and June 55% said that they had seen or heard advertising about switchover, and when prompted by being shown a clip of the TV advert, 66% said that they had seen the TV advertising. 80% of those people understood from it that you had to get ready for switchover. Strong secondary messages were that you need to act (65% agreed with this statement), that there are many ways to go digital (64%), and that Digital UK is here to help (62%).

These communications appeared to generate significant growth in switchover awareness in the lead regions as well as at a national level.

FIGURE 11 – SWITCHOVER AWARENESS PRE (APRIL) AND POST (MAY & JUNE) CAMPAIGN



Sustaining Momentum

Digital UK is planning another nationwide communications campaign in the Autumn and pre-Christmas period to capitalise on the progress made during May and June.

Key campaign themes will be "switchover is happening: why wait?" to encourage early conversion; a continuation of "look for the logo" advising those who are buying new TV equipment to ensure that it is 'switchover-ready'; and 'myth-busting' to overcome some of the consumer myths which perpetuate such as 'I'll need to buy a new TV for switchover'.

The campaign will include:
- For the first time, national airtime on BBC1 and BBC2;
- National BBC radio;
- National press;

- An updated website including guidance for tenants;
- An information leaflet to 3.2 million homes in the Granada region;
- Granada regional and ethnic minority press and radio; and
- A leaflet in the Christmas editions of the Radio Times and TV Times.

The Q4 module of the tracker survey will be used to assess the impact of the Autumn/Christmas campaign in the same way that the Q2 module was used to monitor the May campaign, and we will report the results of that in early 2007.

Chapter 5

Digital Switchover Logo Update

This report will update each quarter on the digital switchover logo; the 'tick' mark used on products and services that are switchover-ready:

The logo is used in four ways:

1. General promotions – Non-Certification Mark logo for use by Digital UK and others (including broadcasters and digital TV platforms) when promoting or explaining digital switchover
2. Products – as a certification mark for products provided by manufacturers and digital TV platforms to denote products and services, which will work through switchover
3. Aerial Installers – as a certification mark for use by aerial installers, accredited by the Registered Digital Installer scheme, launched in March 2006
4. Retail store staff– as a certification mark which can be used by switchover-trained retail staff, due to be launched in Autumn 2006

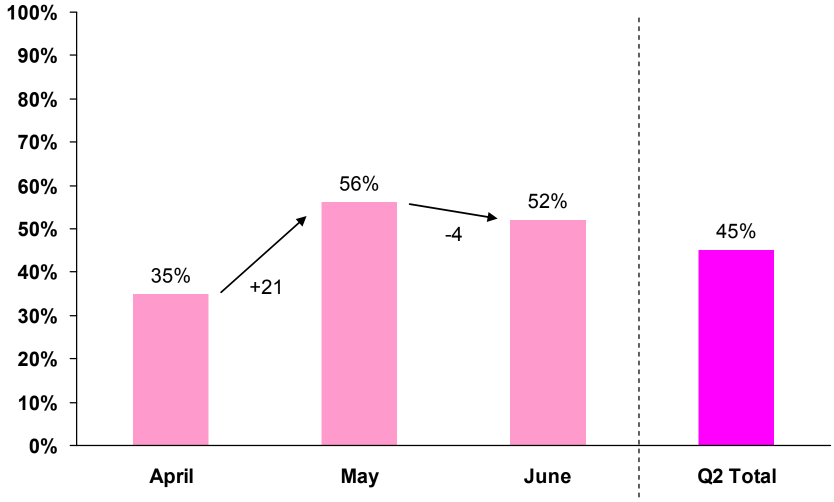
We have been greatly encouraged by the rate of adoption of the logo by trade partners, particularly retailers and manufacturers who used it extensively in support of the May communications campaign. By early June:

- A total of 2,070 retail premises had signed up to use the digital 'tick' logo, representing approximately half of all electrical retail firms and including 940 independent retail stores
- 33 equipment manufacturers had also signed up for the logo, including all the major brands of set-top box and digital TV makers and recommended set-top aerial manufacturers
- Many of the main digital TV platforms and broadcasters had signed up to use the promotional slogan 'get set for digital'.

Digital UK will continue to promote the logo amongst manufacturers, retailers and other stakeholders; and is working with the DTI (who own the logo) to build the Registered Digital Installer Scheme and develop a retail training scheme which will launch the 'ask digital' version of the logo.

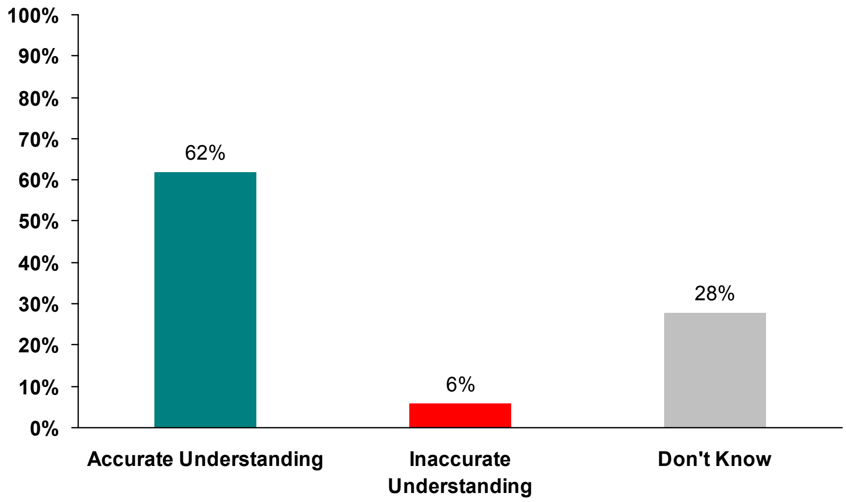
Consumer recognition of the logo is another aspect of switchover that will be monitored via the Tracker survey. Over the course of Q2 45% said that they had seen the logo, although this aggregated figure conceals a significant rise in awareness of the logo over the course of the May campaign.

FIGURE 12 – RECOGNITION OF THE SWITCHOVER LOGO



Once recognised, the logo is generally well understood as an indicator that a product is digital- or switchover-ready. A minority misconstrue the meaning of the logo, including 3% who think it means a product is high-definition ready.

FIGURE 13– WHAT DOES THE SWITCHOVER LOGO MEAN?



Digital UK will supplement tracking of consumer awareness of the logo with a programme of mystery shopping to audit use of the logo in-store and the type and level of advice given to shoppers at retail. Mystery shopping surveys will be conducted in the first four switchover regions over the course of the coming year, and results will be presented in future versions of this report.

Chapter 6

IN FOCUS:
Older People and Switchover

Older people tend to spend more time watching television, and are therefore more reliant on their TVs. They are also a growing proportion of the UK's population[10], and one of the groups of consumers who may be worried by, or face problems at switchover. Ofcom and Digital UK have therefore looked more closely at this particular group of consumers, to better understand how much they know and understand about digital switchover and their attitudes toward it.

Older People and Digital TV

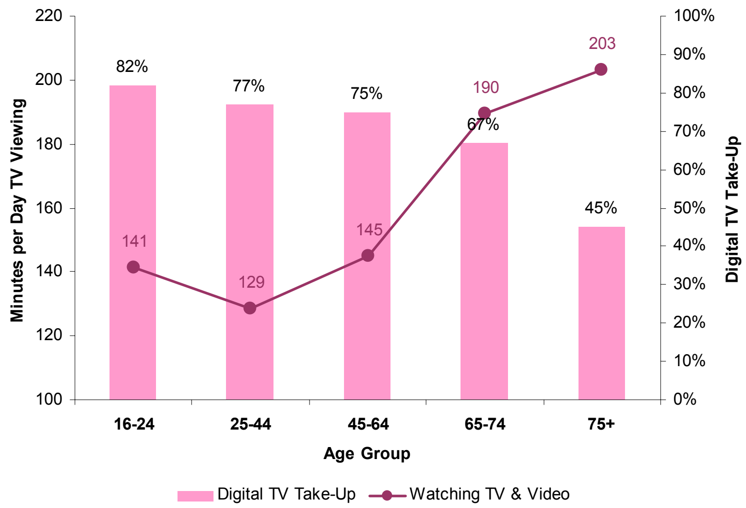
Digital TV brings not only a wider range of channels, but services which may be of particular interest to older people, including access to digital radio and re-runs of old favourite programmes. For older people with hearing impairments there is a wider range of subtitled programming available and digital TV also allows enhanced access for people with visual impairments through audio description of some programmes.

The Tracker shows that those older people who have digital TV do enjoy it: 75% of the 65+ age group with digital TV say that it is as good as or better than analogue TV (average satisfaction across all age groups is 77%).

Despite this, older people are currently less likely to have digital TV.

FIGURE 14 – TIME SPENT WATCHING TV & VIDEO AND DIGITAL TV TAKE-UP BY AGE GROUP

SOURCES: OFCOM / DIGITAL UK TRACKER, Q2 2006; 2000 TIME USE SURVEY



[10] The Government Actuary (2004) estimates that in 2006 over-65s constitute 16.0% of the UK population, but this proportion will grow 9% to 17.4% by the end of switchover in 2012.

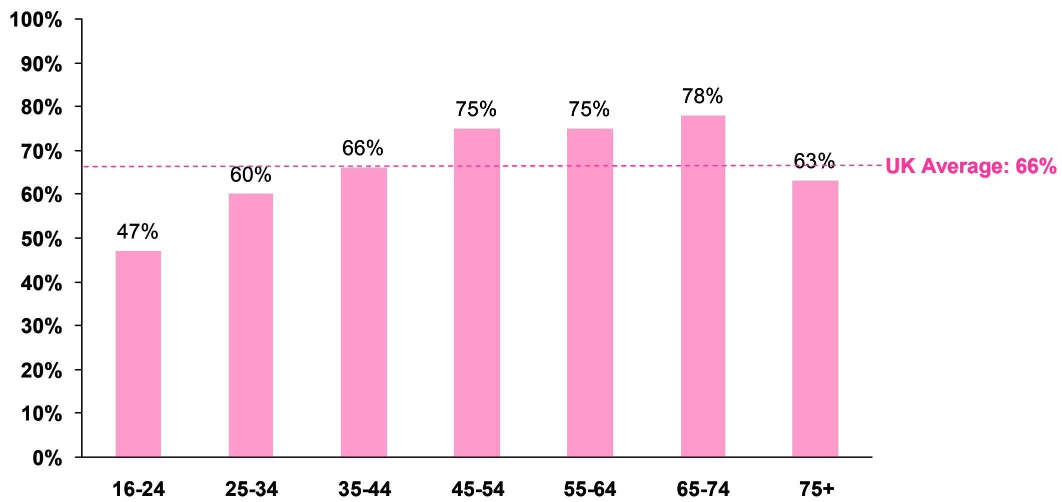
The Ofcom / Digital UK Tracker shows that awareness of digital TV is high amongst older people with 96% of 65-74 and 93% of 75+ year olds claiming to be aware. However, awareness of the term 'digital TV' does not necessarily imply understanding or an ability to describe digital TV. The Ofcom Consumer Panel survey found that older people were less likely to be able to describe the term, and the Ofcom Media Literacy Audit found that while 62% of the UK population felt that they would be able to describe to a friend what digital TV meant, this dropped to 38% amongst those aged over 65.

Older People's Awareness and Understanding of Switchover

Perhaps contrary to common expectations, awareness of switchover appears to be higher amongst the older age groups: 78% of 65-74 claim that they have heard of the term, compared with 66% of the total population. The figure is slightly lower for the 75+ at 63%.

FIGURE 15 – AWARENESS OF SWITCHOVER BY AGE GROUP

SOURCES: OFCOM / DIGITAL UK TRACKER, Q2 2006; 2000 TIME USE SURVEY



As with awareness of digital TV this relates to awareness of the term, not necessarily understanding of the implications or ability to describe. We do see that 43% of the 75+ age group explicitly state that they 'don't know' what digital TV switchover means, compared with 34% of the total. Amongst those that are aware of switchover still over a quarter (26%) state they don't know what it means.

This data seems to support the concept of a 'breaking point' in comfort with digital TV, and awareness and understanding of digital switchover, at the 75+ age bracket. Whilst the under-75s appear to behave much like the rest of the population, the over-75 age group are much more vulnerable. Over-75s are one of the groups eligible for the Government's Targeted Help Scheme that will provide assistance to the most vulnerable consumers at switchover[11], and this data indicates that this age group do need help through the switchover process.

How Older People Feel About Switchover

When asked how they feel about the switchover process, older people do not appear to be unduly concerned. 76% of over-65s feel comfortable with switchover, 13% say that they are 'slightly worried', and only 7% say that they 'feel threatened by it'. The under-65s show a broadly similar pattern of responses, with 80% comfortable with the process[12], 13% slightly worried, and 5% feeling threatened.

When asked about what they think of switchover 67% of the UK as a whole feels either positive or neutral about switchover. The 65-74 year old age group is also 67% neutral or positive, but approval tails off quite significantly for the over-75s, where the figure drops to 55%. Older people are also less likely to understand why switchover is happening. Whereas 42% of people understand that switchover is happening to modernise the current broadcasting system, this figure falls to 30% amongst the over-65s. 21% of 75+ respondents claim they 'don't know' what the perceived reason for switchover is compared to 12% of the total population.

In focus groups with older people[13], Digital UK has found that many older people, particularly in the 75+ category, show a perhaps surprising lack of concern about switchover. Many rely on others (friends, and particularly children or grandchildren) to take care of their electrical equipment, and many still see even two years as being a long way away, and said that it is too early to start worrying about switchover (although they did appreciate being given 'advance warning' of what was going to happen). This has highlighted the need to provide continued reassurance to older people, and to encourage people to assist older people with switchover. A theme of future Digital UK communications will be "a helping hand" – encouraging people to think of others who may need help in the run-up to switchover.

[11] Other eligible groups are disabled people in receipt of Disability Living Allowance, Attendance Allowance and the registered blind or partially sighted.
[12] Those responding either 'I am happy with it', 'I am OK with it', or 'I am not bothered by it' in response to the question "Which one of the following statements best describes how you feel about digital switchover" after it has been explained to them. July data only.
[13] Digital UK has held a series of focus groups with older people in the first three switchover regions: at the Carlisle Age Concern centre and at Langholm Day Care Centre in Border; at the Age Concern Centre in Plymouth, Westcountry; and in conjunction with Help the Aged in Cardiff, Wales.

Chapter 7

IN FOCUS:
The Border Region

Background to the Border TV Region

The Border TV region will lead the UK's switch to digital TV. Despite being the smallest TV region with around 301,000 households and under 1 million people (770,000; or 1% of the UK's population) it is also one of the more diverse, with four distinct local areas within it and three separate parliaments represented. It consists of the two Scottish regions of Dumfries & Galloway and Scottish Borders, along with English Cumbria, and the Isle of Man.

The region is relatively more rural than the UK as a whole (it incorporates the Lake District national park), and is demographically slightly older and lower income than the rest of the UK, and is less ethnically diverse[14]. It is also has lower levels of technology ownership: Border households are marginally less likely than the rest of the UK to own a digital portable music player, a flat screen TV, or have a computer or broadband internet connection[15].

The Border TV region has two main transmitters at Selkirk in Scottish Borders and Caldbeck in Cumbria. Digital TV options in the region include satellite, a limited amount of cable (Wight Cable operates a franchise in Carlisle), and digital terrestrial, although DTT coverage is around 50%, the lowest of any region in the country.

Border will be host to the first town to experience digital switchover: Whitehaven in Cumbria. After Ferryside and Llansteffan in Wales which converted to digital in March 2005, Whitehaven will be the next town in the UK to go fully digital in autumn 2007.

The rest of the region will convert from 2008. Selkirk and its associated 12 relay transmitters (serving Scottish Borders) will switch in Q4 2008. Caldbeck and its 59 relays (serving Cumbria and Dumfries and Galloway) will switch over in Q2 2009. The Border region will therefore be fully digital by mid-2009, at which point switchover will have started in the next region, Westcountry.

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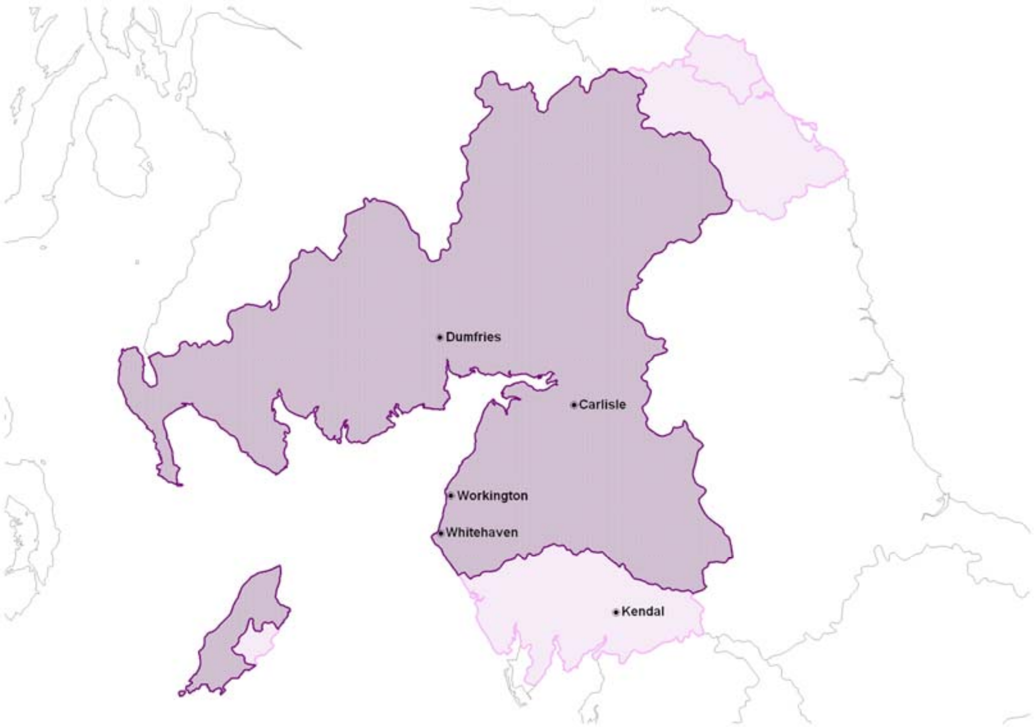
[14] The Ofcom / Digital UK Switchover Tracker suggests that mean household income in the region is £26,780 per annum against a national figure of shows of £29,293 per annum; and that 99% of Border respondents were white (British or Irish).

[15] The Ofcom / Digital UK Switchover Tracker indicates that 27% of UK households and 24% of Border households own a portable digital music player; that 18% of UK households and 14% of Border households own a flat screen TV, and that 46% of UK households have a PC with broadband internet connection at home, but only 37% of Border households have a PC and broadband.

FIGURE 16 – THE BORDER TV REGION

NOTE: Light shaded areas indicate overlap areas where a signal can be received from more than one television region



Activity in the Border TV Region

Digital UK's regional communications launch 3 years out from switchover in each region, and activity began in Border in November 2005 with a local communications campaign which included press ads in local newspapers and 40 second ads on local radio stations. Further activity focused on outdoor advertising, including posters on bus stops close to electrical retail stores encouraging people to look for the digital 'tick' logo when purchasing a television, and one local bus branded with the digital 'tick' logo.

At the same time, Digital UK began to establish a local presence in the region, holding a number of public meetings and introductory meetings with local stakeholders including local authorities, charities and consumer groups, community organisations, and the local elected representatives.

In May 2006 Digital UK launched its regional infrastructure by appointing a Border Regional Manager, John Askew, formerly of Scottish Borders Council; and the May national communications campaign was supplemented in Border (and Wales and Westcountry) with further local communications, including the delivery of an information leaflet on switchover to every Border household, TV adverts on ITV Border, radio adverts on regional radio stations, and the launch of a Border section on the Digital UK website[16].

FIGURE 17 – BORDER COMMUNICATIONS, MAY 2006

BORDER INFORMATION LEAFLET

BORDER PRESS ADVERTISING

BORDER WEB PAGES

On May 25 2006 Digital UK and Carlisle City Council jointly hosted a conference in Carlisle for over 150 local stakeholders to learn more about why switchover is happening, and how to prepare. This was followed by a seminar for local retailers and aerial installers, and a two day event in Carlisle city centre for the public to come and learn more about switchover and how to get digital TV.

Since then the Regional Manager has been engaged in setting up regional support groups in each of the four local areas. The Scottish Borders Regional Advisory Group, based in Melrose, has been established, with attendance from county, city and rural community councils; voluntary and consumer groups; the Citizen's Advice Bureau; and local Ofcom and broadcaster representatives. The Regional Manager has also extended the Border contact programme to other charities (including Age Concern centres in the area), trade (retailers and aerial installers) and parish councils. He continues to brief local media and works to support Digital UK's national communications and assistance activities.

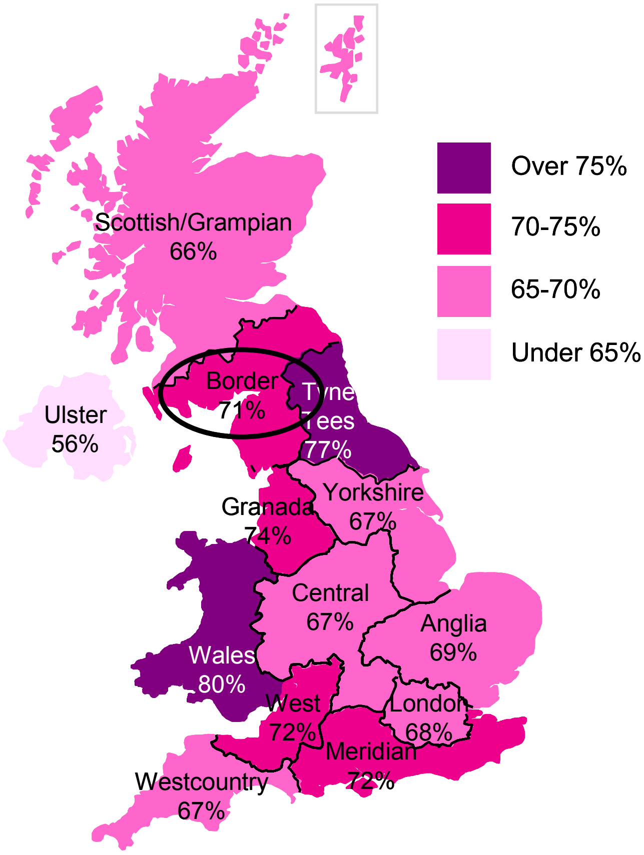
Digital Conversion in Border

Switchover begins in Border in a little over two years. Ofcom's Q1 2006 Digital Progress Report showed that in March 2006 71% of Border households had digital TV, up 17 percentage points in the quarter from 54% at the end of 2005; making Border's digital TV take-up the fastest growing of any region in

[16] See: http://www.digitaluk.co.uk/border

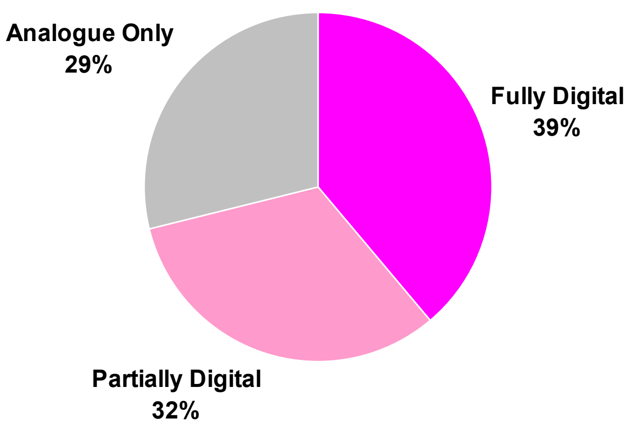
the country, and bringing it in line with national digital TV penetration of 72.5% despite the more limited availability of digital television in the region.

FIGURE 18 – DIGITAL TV TAKE-UP BY SWITCHOVER REGION
SOURCE: OFCOM, Q1 2006



Within the 71% of Border households with digital TV, we estimate that over half of them are fully converted to digital (i.e. they have converted every TV set they own).

FIGURE 19 –BORDER TV HOUSEHOLD CONVERSION
SOURCE: OFCOM; OFCOM / DIGITAL UK SWITCHOVER TRACKER, Q2 2006

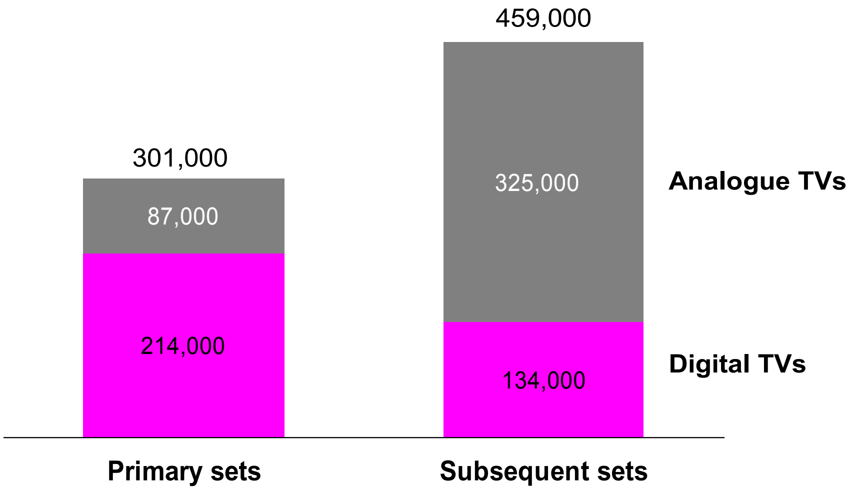


Our estimates suggest that 214,000 of Border's 301,000 primary TVs have already been converted, with 87,000 primary sets remaining to be converted.

However, in common with the rest of the country, most Border households have more than one television. The average number of televisions in a Border home is 2.5[17], and so a further 459,000 subsequent TVs (those beyond the main set) are in use. We estimate that 30% or 134,000 of these televisions have been converted, leaving 70% or 325,000 subsequent TVs remaining.

Looking at the universe of TV sets in the Border region shows that of the 760,000 TVs in use, 46% are now digital and 54% or 412,000 remain to be converted.

FIGURE 20 –BORDER TV CONVERSION
SOURCE: OFCOM / DIGITAL UK SWITCHOVER TRACKER; GFK CONSUMERSCOPE



The DTI researched the readiness of the housing and property sectors in the Border region in February and March 2006, and published the results in June[18]. They found that whilst 72% of institutions (including hospitals, day care centres, schools, hotels and social housing) were aware that digital switchover would be happening in the region during 2008 and 2009, only 9% said that they had already completed or nearly completed the conversion to digital, and over half (51%) had not yet started planning for switchover. Only 54% of those surveyed felt they would be ready for switchover by the end of 2008.

Digital UK and Government will continue to work with the public sector in the Border region to ensure that they are fully prepared for switchover, and we will continue to monitor the status of the housing and property sectors in this and other regions as switchover progresses.

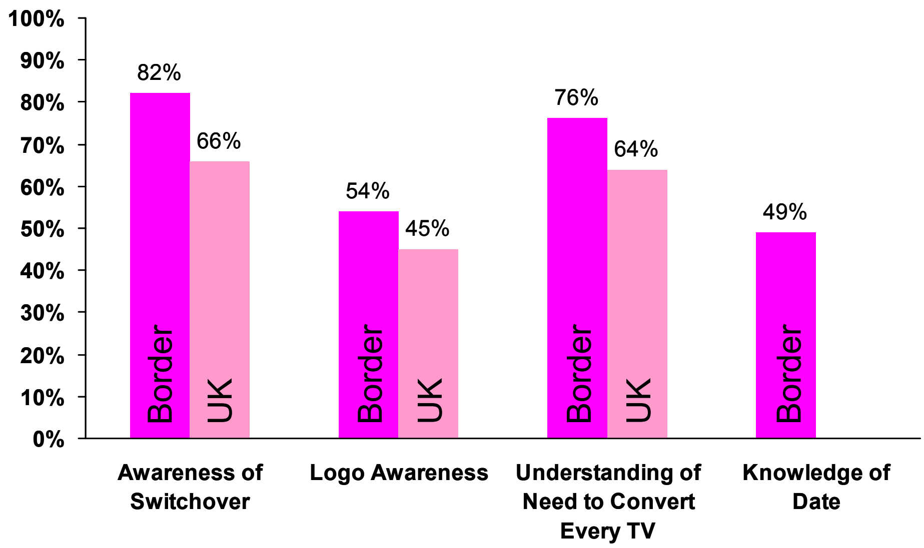
[17] Source: GfK ConsumerScope Q1 2006
[18] The report 'The Border TV Region and Readiness for Switchover', published 22 June 2006, can be found on the Government's website at www.digitaltelevision.gov.uk/publications/pub_border_report

Awareness and Understanding of Switchover in Border

As would be expected, Border leads the rest of the UK on all key consumer metrics:

- It has the highest awareness of switchover of any UK region at 82%;
- With London it has the highest awareness of the digital switchover logo at 54%;
- It has the highest levels of understanding of what switchover means, with 76% of respondents claiming to know that they will need to convert every TV set for switchover; and
- It has highest understanding of the local switchover start date (2008) by a significant margin, with almost half (49%) citing the 2008 date when no other region reaches 20% on the same measure.

FIGURE 21 –AWARENESS AND UNDERSTANDING IN BORDER



Border also has some of the highest levels of intention to convert to digital, with 91% of the region saying that the have converted or plan to convert at least one set for switchover, and only 3% saying they won't convert any set (between the two groups are those who are undecided).

Ofcom will continue to provide regular updates on digital TV conversion in Border and all other switchover regions, and both Digital UK and Ofcom will continue to closely monitor progress towards switchover in this lead region.

APPENDIX ONE: 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 Size

During Q2 2006 the Tracker interviewed 2,522 households:

- 1,225 in April, a boosted monthly sample to enable early reporting of results;
- 651 in May; and
- 646 in June.

The normal monthly sample is approximately 650 households, and so future quarters of the tracker will tend to report on a sample size of around 1,950 interviews.

The total Tracker sample for the first year will be approximately 8,400 interviews.

Regional Sample Sizes

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

During the first year this means that Border, Westcountry, Wales and Granada will achieve c.300 interviews per quarter, or 1,200 interviews each 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 only 24 interviews per quarter will be achieved. Until Ulster is boosted (in 2009) data for this region will be reported every six months.

National data is weighted to reflect the regions in their correct incidence, 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).

Ofcom and Digital UK are currently reviewing whether standard sampling will collect enough interviews from the relevant consumers groups, in particular some of the vulnerable groups, to enable the necessary in-depth analysis, and will seek to address any issues with these sample sizes. However, in many instances it is likely to be more efficient to conduct in-depth questioning to specific consumer groups via a re-contact survey (getting back in touch with those who said they didn't mind being asked follow-up questions) from the re-contact pool, which is always growing over time.

Sampling Method

Surveying 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 BARB 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.

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.

In April, GfK NOP carried out interviews on a sample of adults aged 16+ in the UK. The sample was targeted to achieve 1200 interviews, with 8 interviews taking place across each of 150 sampling points (1225 interviews were actually achieved).

In both May and June, GfK NOP carried out interviews on a sample of adults aged 16+ in the UK, with 8 interviews taking place at each of 80 sampling points, giving a targeted sample size of 640 (651 and 646 interviews were actually achieved in May and June respectively).

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.

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 who identify themselves as disabled under the Disability Discrimination Act definition
Socially Isolated	Those who do not come into contact with other people (other than people they live with) more than once a fortnight
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)