



**DCMS Bolton Digital Switchover Trial  
Research Report**

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***Prepared for***

**Department for Culture, Media and Sport**

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## 1 INTRODUCTION

This executive report provides an overview of the research undertaken by Ipsos MORI on behalf of the Department for Culture, Media and Sport and the BBC among households participating in the digital TV switchover trial conducted in the Hulton ward of Bolton. The purpose of this trial was to understand the level of assistance required by groups vulnerable to the loss of TV when switching over to digital television. For the purpose of the trial, the vulnerable group were defined as any persons aged 70 years old or above.

Previous digital switchover trials of a similar nature have involved switching over non-digital households and measuring attitudinal shifts towards digital television pre and post installation, or indeed switching off the analogue signal altogether. However, the stipulations of this trial did not require the households to be non-digital, nor was the analogue signal within this area to be switched off. Both of these aspects ensured that the trial focussed on how difficult the vulnerable group perceived the installation of digital television to be and, as a result of this, the level of assistance required.

For this trial, households could choose which digital platform they wanted to have installed. If they chose Freeview, a set top box was provided free of charge and help was provided by the Project Team with installation and usage instructions. If they chose to receive digital via satellite or cable, they received a contribution to their installation costs and had access to the relevant platform operator's customer call centre. If required they also had access to post installation support by the Project Team.

The research was conducted in two stages – the first stage being conducted before the trial commenced (in October 2005) with the purpose of understanding how the digital offering, and the Bolton Digital Switchover Trial, had been communicated thus far, and the second stage being conducted after the installation of the equipment (in February 2006), with the purpose of understanding ease of the actual conversion process, how much help was required, and to what extent this was via family/friends or external agencies.

The following report details findings from each of these stages of research, with a summary of key findings from each stage at the beginning of each section (Pages 6 and 12). Final conclusions and recommendations can be found in the last section of the report (Page 25).

## 2 METHODOLOGY

<b>PRE-TRIAL STAGE OF RESEARCH</b>	
<b>Method</b>	Face to Face questionnaires, conducted door to door 15 minute questionnaire
<b>Survey Universe</b>	A list of 422 households who had registered their interest in participating in the digital switchover trial in the Hulton ward of Bolton was provided, and door to door interviews were conducted among this sample. Interviews could be conducted with more than one person per household.
<b>Fieldwork Period</b>	- Fieldwork start: 3 <sup>rd</sup> October 2005 - Fieldwork end: 16 <sup>th</sup> October 2005 Incentive: No incentive offered
<b>Achieved Sample Size</b>	303 completed interviews
<b>Analysis &amp; Weighting</b>	Data processing of questionnaires by Ipsos UK. No weighting undertaken on this survey

<b>POST-TRIAL STAGE OF RESEARCH</b>	
<b>Method</b>	Face to Face questionnaires, conducted door to door 15 minute questionnaire
<b>Survey Universe</b>	A list of 355 households who took part in the digital switchover trial in the Hulton ward of Bolton was provided, and door to door interviews were conducted among this sample. No more than one interview per household was allowed for this stage of the research.  (Not all participants in the trial were included in this list, as they had not installed their equipment in time for the research).
<b>Fieldwork Period</b>	- Fieldwork start: 7 <sup>th</sup> February 2006 - Fieldwork end: 21 <sup>st</sup> February 2006 Incentive: No incentive offered
<b>Achieved Sample Size</b>	294 completed interviews
<b>Analysis &amp; Weighting</b>	Data processing of questionnaires by Ipsos UK. No weighting undertaken on this survey

### 3 RESPONDENT PROFILE

Since no weighting of the survey data was undertaken at either stage, it is important to bear in mind that the surveys are only representative of those people who completed interviews.

	<b>PRE-TRIAL STAGE</b>	<b>POST-TRIAL STAGE</b>
<i>Base size</i>	<i>(N=303)</i>	<i>(N=294)</i>
	%	%
Male	42	37
Female	58	63
70-79 years	49	46
80+ years	51	54
ABC1	46	40
C2DE	53	59
Deaf/hard of hearing	33	29
Sight problems	14	11
Reduced mobility	26	27
Dexterity problems	N/A	5
Other disabled	6	3
Any disability	56	51
One person household	46	44
2+ person household	54	55

## 4 PRE-TRIAL QUANTITATIVE RESEARCH

### 4.1 Main Findings

- Awareness of digital television is very high, with 96% being aware of at least one form of digital TV. Within specific formats, satellite digital has the highest awareness at 90%, followed by digital cable (85%) and Freeview (76%).
- Most had heard about digital television through TV advertisements (63%), followed by word of mouth through family/friends (41%).
- Many knew other people who had digital TV in their households already (62%), and in most cases it was other family members who were the owners (83% of those who knew someone with digital). A higher proportion of 70-79 year olds knew someone with digital TV (than those aged 80 or above) and they were more likely to have friends who already had digital TV.
- The majority of households had more than one television (71% had two or more TV's) and many were already accessing digital channels (30%). Once again, this was more likely to be those respondents aged 70-79 years than the older group. The proportion of respondents accessing digital TV currently is in line with the proportion of the total 70+ year old population of Great Britain accessing digital TV, which also stands at 30% (Source: NRS Oct 04 – Sept 05). This is much lower, however, than the proportion of the total adult population in Great Britain accessing digital TV, which stands at around twice this proportion.
- Almost all were alerted about the Bolton Digital TV Trial via a letter sent to their house (96%). The main motivators for taking part were that it was a good opportunity to get digital (NET 52%), and the fact that it was free also played a key role (44%).
- Only a small proportion had concerns about taking part in the trial (10% of respondents), and these concerns were based around the extra expenses they may have to pay, or that digital TV would be too complicated to use once installed.
- The majority of respondents felt they would need some help with installation, with 69% stating they definitely would. This was higher among single person households. Among those who felt they would need help, females were more likely to claim they would call upon family members for help with installation (40% vs. 28% of males), while 55% of respondents claimed they would call upon some type of technical assistance.



- Awareness of the helpline was very low prior to the trial's commencement, with only 14% being aware of the service.
- The majority felt that a personalised letter was the best way in which to provide information on the digital switchover to their age group (63% of respondents), more so among females.

## 4.2 Detailed Reporting by Question

### 4.2.1 Awareness of digital television services

There were four questions within the questionnaire that were included to gauge the respondent's current level of awareness of digital television services available.

#### 4.2.1.1 *Awareness of digital television services and how heard about digital television (Pre-trial Tables 1-4, Q1/2)*

Of the 303 respondents who took part in the pre-trial stage of the research, the majority were aware of at least one digital television service, with only 4% stating they didn't know of any. Satellite digital service had the highest level of awareness at 90%, followed by cable at 85% and Freeview at 76%. Among 70-79 year olds, awareness of Freeview rose to 81%, compared with 70% for older respondents.

Of those respondents who were aware of digital television, the main way in which they had heard about it was via television advertisements (63%). This was followed by word of mouth through family/friends (41%), and then by letter (17%). 16% had heard about digital television through advertisements in newspapers, with males being significantly more likely than females to have heard about the service via this medium (21% vs 11%).

#### 4.2.1.2 *Other households known with digital television (Pre-trial Tables 11-14, Q6/7)*

Just over six in ten respondents (62%) know others who have digital television in their household, and this is significantly higher among 70-79 year olds when compared to those aged 80+ years (70% vs. 54%). It is also more likely to be respondents with a higher social grading who know other households with digital television (ABC1 68% vs. C2DE 56%), and respondents with more than one person in the household (2+ people 67% vs. 1 person 55%).

When asked who in particular they know of with digital television, 51% of all respondents have a family member who has digital television, while 15% have friends and 11% have neighbours accessing digital television. Those respondents within the 70-79 year age group are significantly more likely to have friends with digital television in their household (22% compared with only 8% of 80+ year olds).

## **4.2.2 Current television set-up in household**

### **4.2.2.1 Number of televisions in household (Pre-trial Tables 5-6, Q3)**

The majority of respondents surveyed in the pre-trial stage of the research had more than one television in the household (71% with 2 or more televisions). This proportion was higher among those aged 70-79 years (78% vs. 63% of those aged 80+ years), and among those of ABC1 social grade (79% vs. 64% of C2DE). In fact, one in four respondents had 3 or more televisions in the household (26%). This too was significantly higher among those of ABC1 social grade, among whom 34% had 3 or more televisions in the household.

### **4.2.2.2 Already receiving digital television (Pre-trial Tables 7-10, Q4/5)**

Respondents were also asked whether they could currently receive any channels other than BBC1, BBC2, ITV1, Channel 4 and Five, and it was found that 30% of the total sample were currently accessing additional channels. This incidence was higher among the 70-79 year old age group (38% vs. 23% of those 80+ yrs), and among males (39% vs. 24% of females). This indicates, along with what we have seen in Section 4.2.1, that the 70-79 year old age group are already more aware of and more comfortable with digital television technology than those respondents aged 80+ years.

The proportion of respondents accessing digital TV currently is in line with the proportion of the total 70+ year old population of Great Britain accessing digital TV, which also stands at 30% (Source: NRS Oct 04 – Sept 05). This is much lower, however, than the proportion of the total adult population in Great Britain accessing digital TV, which is around twice this proportion.

Of those respondents who were already accessing additional television channels, Freeview was the most common method of receiving these additional channels (57%), followed by cable (22%) and satellite (21%).

### **4.2.3 Awareness of and attitudes towards Bolton Digital TV Trial (Pre-trial Tables 15-22, Q8-11)**

Almost all respondents were alerted about the Bolton Digital TV Trial through a letter sent to their house (96%). There was a big gap between this and the next most common method of hearing about the trial, which was via a local newspaper (20%).

The desire to receive digital television and the fact that this was a good opportunity to do so was a main motivator in respondents wishing to take part in the digital switchover trial

(NET 52%), and the fact that the trial was free was not surprisingly another key motivator in registering their interest in the trial (44%). Other reasons for being likely to participate were that the trial sounded interesting (31%), and 24% were likely to participate because they did not want to be left behind. There were some key differences by age groups, where the 70-79 year old respondents were more likely to want to take part in the trial because it sounded interesting (38% vs. 24% of 80+ yrs), or because they didn't want to be left behind (30% vs. 19% of 80+ yrs).

Only a small proportion of respondents had any concerns about taking part in the trial (10%). The main concerns were extra expenses they may have to pay (2% felt they would have to buy an expensive aerial for digital TV, and 1% felt that digital TV in general was too expensive), or that digital TV would be too difficult/complicated to use once installed (3%). 1% were concerned with programme content (too much 'American' television, or lower quality programmes).

#### **4.2.4 Anticipated help required with installation**

##### ***(Pre-trial Tables 23-28, Q12-14)***

The majority of respondents anticipated they would require some help in installing the digital platform on their television (86%), with 69% feeling they would definitely require some help, and 17% feeling they would possibly require help. Those who were living on their own were more likely to feel they would definitely need help (76% vs. 64% in 2+ people households), as did those with reduced mobility (84% definitely) or who were visually impaired (83% definitely).

When asked who they would be most likely to call on to help with the installation, 50% of respondents said they would call upon a technician to help. This was significantly higher among those who did not already have digital TV (54% without vs. 40% with). Four in ten (38%) stated they would call upon family or close friends to help, while one in five (19%) stated they would contact the Bolton MBC Helpline for help with installation. Females were more likely to state they would call upon family than males (40% vs. 28%). The proportion of people who felt they would call upon a community member to help with the installation was relatively low, at 7% in total (largely charity, which was 5%). Clearly this avenue is not top of mind for the respondents when it comes to where they would turn to for help in switching to digital television.

In terms of help that would be freely available to households taking part in the digital switchover project, 75% of respondents expected home visits by a technician to be available, while 46% expected there would be some form of helpline. The home visits

by a technician were particularly seen to be an important form of help to those with reduced mobility, among whom nine in ten (89%) expected them to be freely available. Expectations of help being provided in electrical stores were very low, with only 4% expecting this form of help would be readily available.

#### **4.2.5 Project Helpline Awareness and Usage**

##### ***(Pre-trial Tables 29-36, Q15-18)***

Awareness of the helpline was very low among the respondents at the pre-trial stage of the research, with only 14% stating they were aware of the service. Among those who were aware, only 45% were able to name the helpline operator.

#### **4.2.6 Provision of information on digital switchover to those aged 75 years or over**

##### ***(Pre-trial Tables 37-38, Q19)***

Respondents were asked what they thought was the best way to provide information on the digital switchover to people in their age group, and the majority felt that via a personalised letter was the best way in which to do this (63%). This was significantly higher among females (69% vs. 54% of males) and people who were not currently receiving digital TV (69% vs. 50% of those who are already receiving). The next best method for reaching this target would be via the television, although there were significantly fewer respondents suggesting this method, at 33%. The local press was seen to be another option for providing information, followed by leaflets through the door, with 14% and 13% respectively. Those aged 70-79 years were more likely to suggest local press (18% vs. 10% among 80+ yrs).

## 5 POST-TRIAL QUANTITATIVE RESEARCH

### 5.1 Main Findings

- Almost all of the respondents had Freeview installed as their digital platform for the trial (99%). The main reasons given for this choice were that it seemed the easiest to use, and it was a cheap option.
- Overall, the majority of respondents found the installation process to be easy, with 69% finding it to be very easy, and 16% finding it somewhat easy. One in ten found the process to be difficult, and this was more likely to be the 70-79 year old age group. This is likely to be linked to the fact that they were more likely to try to install the equipment themselves.
- The majority of respondents received at least some form of help in installing the Freeview themselves (84% someone else did it all/I did it with help from someone else). This was particularly the case for females, those respondents who live on their own and those of C2DE social grade.
- The main source of help in installing the Freeview box was family and friends (63% of all respondents with Freeview). Only three in ten respondents sought outside assistance in installing their Freeview box (29%) and this was largely via an installation engineer (25%). Only 7% claimed to have called the project helpline, and this was more likely to be males than females. No respondents claimed to have called upon other community members to help them with the installation e.g. charities or church groups.
- If respondents had not been able to call upon anyone to help them, almost a third (31%) stated the Freeview box would not have been installed, and a further 22% were unsure as to what they would have done.
- Eight in ten respondents claimed to have received the Project Installation Guide, and of these people almost two-thirds (63%) read or used it. Males were more likely to have used the Installation Guide, as were those of ABC1 social grade. Overall, 92% of those who received the Installation Guide rated it as being helpful, with males much more likely to rate it as being 'very helpful' than females. The large majority were unable to name any improvements that could be made to the Guide (87%).
- Others made use of the Installation Guide too, with 70% of those who received help from friends or family claiming that these friends or family used the Installation Guide, and

30% of those who received outside assistance claiming that the installation engineer or technical helpline made use of the Installation Guide.

- There was a very positive response to the project helpline among those respondents who called, with 19 out of 20 respondents giving it a positive rating.
- Likewise, there was a high level of satisfaction among those who used a project engineer to help with the installation of their digital equipment, with 89% claiming to be satisfied overall (72% very satisfied, 17% somewhat satisfied). Only 5% had any negative comments to make about the engineer, and this was largely around the amount of time it took to install (4%).
- In terms of the most important elements in making the installation process as smooth as possible, these were considered to be having family and friends to support (52%), having some kind of outside help available such as an engineer or helpline (37%) and having a clear set of instructions provided (21%).
- Females were more likely than males to consider having family/friends to support them being important (60% vs. 38%), while males were more likely than females to consider having a clear set of instructions important (29% vs. 16%).
- 82% of respondents have experienced no problems with their television since its conversion to digital. Only 18% claimed to have experienced some problems, with the main difficulties being around picture quality or difficulty with channel and programme navigation.
- In terms of their television viewing experience 60% rate this as being better now compared with before they converted to digital television, while 38% don't feel that there is any difference. Only 1% feel it is worse (while 1% state they don't know).
- The main feature respondents are finding most appealing is the fact they can access more channels with digital TV, with 67% citing this as the aspect they like best.
- The electronic programme guide is not a particularly appealing feature for this age group, with only 2% stating that this is a feature they like most.
- Over three quarters of respondents would recommend digital television to others now (77%), with the additional channels being the main benefit they would cite.
- There appeared to be a lack of motivation for respondents to switch to digital before the trial, indicating that the benefits of switching to digital had not been effectively communicated to this group prior to the trial.

## 5.2 Detailed Reporting by Question

### 5.2.1 Current ownership of digital television

#### *(Post-trial Tables 1-4, Q1-2)*

Of the households surveyed who took part in the digital switchover trial, not many already had access to digital television, with only 14% stating that they had digital TV prior to the trial. These were more likely to be households with more than two members living there (20% vs. 6% of one person households). Of those that did already have digital, half were using Freeview (51%), 29% were using satellite such as Sky Digital, and 20% had a digital cable service.

### 5.2.2 Digital option installed for project

#### *(Post-trial Tables 5-14, Q3-6)*

Almost all of the respondents had Freeview installed as the digital platform for the trial (99%), with only one respondent having Sky subscription installed, and one household having NTL cable installed. For all but one household, the option they had installed was their first choice.

The main reasons for Freeview being the first choice for most households participating in the trial was that it seemed the easiest to use (32%) and it was a cheap option (28%). Cost was more important to those of social grade ABC1, who were more likely to choose Freeview because it was a cheap option (39% vs. 21% among C2DE), as were those with two or more people in the household (34% vs. 21% for one person households).

Three quarters of respondents (74%) had their digital option installed for more than a month at the time of interviewing, while a quarter had it installed within the last month (13% in the last fortnight). Those from the 70-79 year old age group were more likely to have had their digital platform installed more recently, with 21% having had it installed in the last fortnight (compared with 6% of respondents aged 80+ years). Those who received outside help in installing their digital platform (telephone helpline or installation engineer) were more likely to have had it installed more than a month ago (85%), indicating that those who either installed it themselves or had family/friends to help took a little while longer to organise the installation.

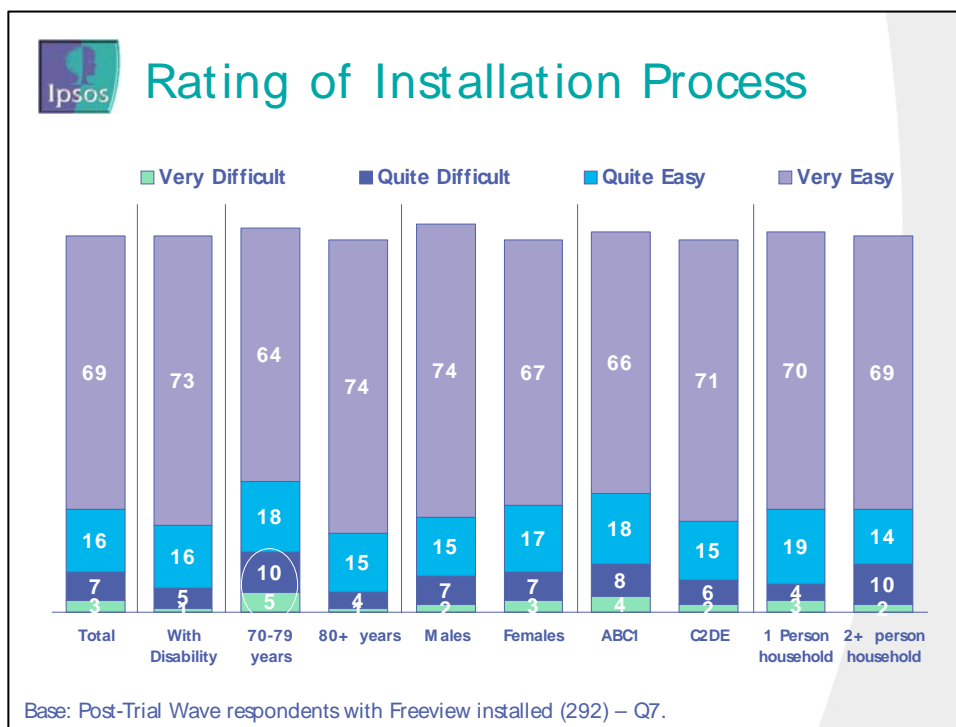
For the majority of respondents (88%), the digital platform was installed on their main television set in the lounge/sitting room. This was significantly higher among people living on their own (94% vs. 83% of those from households with two or more people),

which is in line with the fact that those in one person households were less likely to already have digital television before the trial.

### 5.2.3 Attitudes towards overall installation process

#### (Post-trial Tables 15-16, Q7)

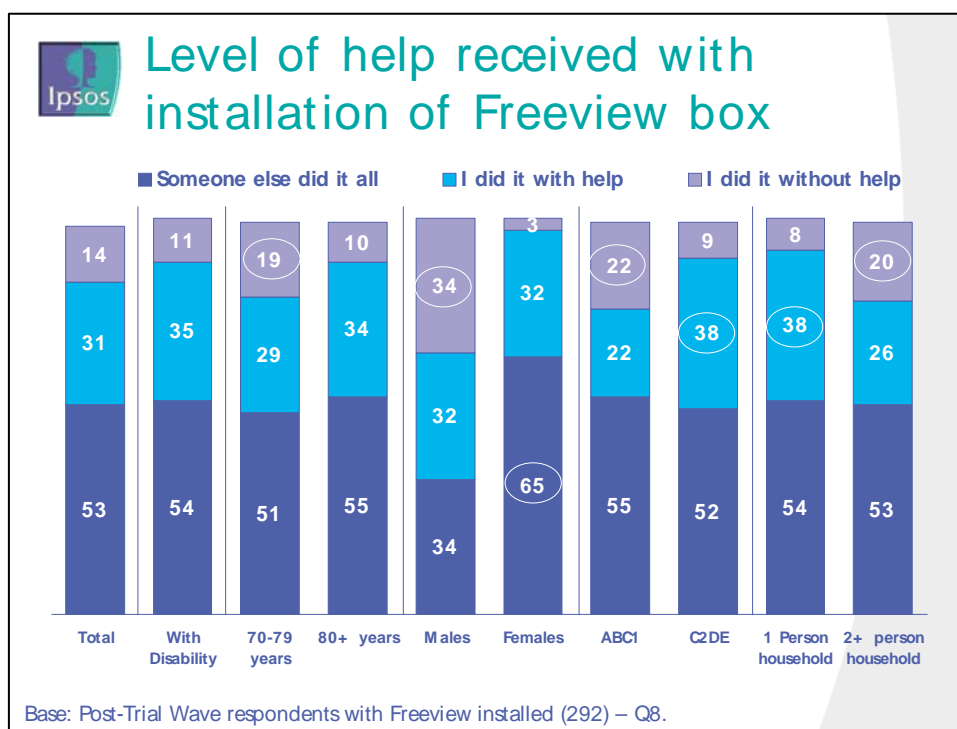
Overall, the installation process was regarded as being easy for the majority of respondents, with 69% rating it very easy and 16% rating it somewhat easy (85% easy in total). One in ten felt that the overall process was difficult, with 7% rating it as somewhat difficult, and 3% rating it very difficult. Interestingly, the process was more likely to be rated as difficult by the 70-79 year old age group (15% very/somewhat vs. 5% very/somewhat among those aged 80+ years). This is likely to be linked to the fact that this group were more likely to have attempted the installation themselves than those aged 80+ years. Three quarters (74%) of the 80+ year old age group rated the process as very easy, compared with 64% of the 70-79 year old age group. Similarly, 73% of those with any kind of disability rated the overall process as being very easy (89% very/somewhat easy), once again likely to be linked to the level of help received with the installation. Ratings of the ease of installation among these different segments are illustrated in the chart below.



## 5.2.4 Help received with installation process

*(Post-trial Tables 17-18/29-30/34-35, Q8/14/16)*

The majority of respondents received at least some form of help in installing their Freeview box, with 53% stating that someone else did the entire installation. A further 31% stated that they did the installation, but did so with help from someone else while 14% did the installation themselves with no help from anyone else (the remaining 2% stated they did not know). There are significant differences between groups however when it comes to the extent to which help was received, as can be seen in the chart following. The circles indicate where there are significant differences between groups at the 95% confidence level.



Those who were more likely to require help with the installation of their Freeview box were those aged 80+ years (89% requiring at least some help), females (97% requiring at least some help), people who live on their own (92% requiring at least some help) and those of C2DE social grade (90% requiring at least some help).

In terms of where help was sought in installing the Freeview box, the main source of help was family or friends, with 63% stating they sought help in this way. Children were the main source of help (33%), followed by other family members (10%), husband/wife (9%), friends (7%) and grandchildren (6%). Only three in ten respondents (29%) sought

outside assistance in installing their Freeview box, and the main source of help here was an installation engineer. 25% of respondents sought help from an installation engineer, while 7% called the project technical helpline for assistance with the installation. There were some key differences by gender, whereby males were less likely to have sought help from any outside source (I didn't seek any help – males 28% vs. females 2%), but for those males that did seek help, they were more likely to have called the technical helpline than females (11% vs. 4% among females). It indicates that the males had a greater level of confidence in attempting installation following instructions over the phone than females. Females were much more likely to call upon family or friends to help with the installation (73% vs. 45% of males), and this was largely via children or their partner. Household size also had an impact on the type of help sought, with those living alone significantly more likely to seek outside assistance (35% vs. 24% in households with 2+ people). This is tied in with the gender differences however, as respondents living alone are significantly more likely to be female (80% of 1 person households vs. 48% of respondents from 2+ people households).

It is important to note that no respondents called upon other community members for help such as charities or church members, however family and friends offered a large support base.

If respondents had not been able to call upon people to help them almost a third of respondents (31%) stated the Freeview box would not have been installed (this was higher among females (35%) and single person households (39%)). A further 22% of respondents stated that they did not know what would have happened if they didn't have access to help. 21% stated they would have had to have paid to get help if it had not been freely available, and 18% stated they would have eventually figured out how to install it themselves (this was much higher among males, at 36%).

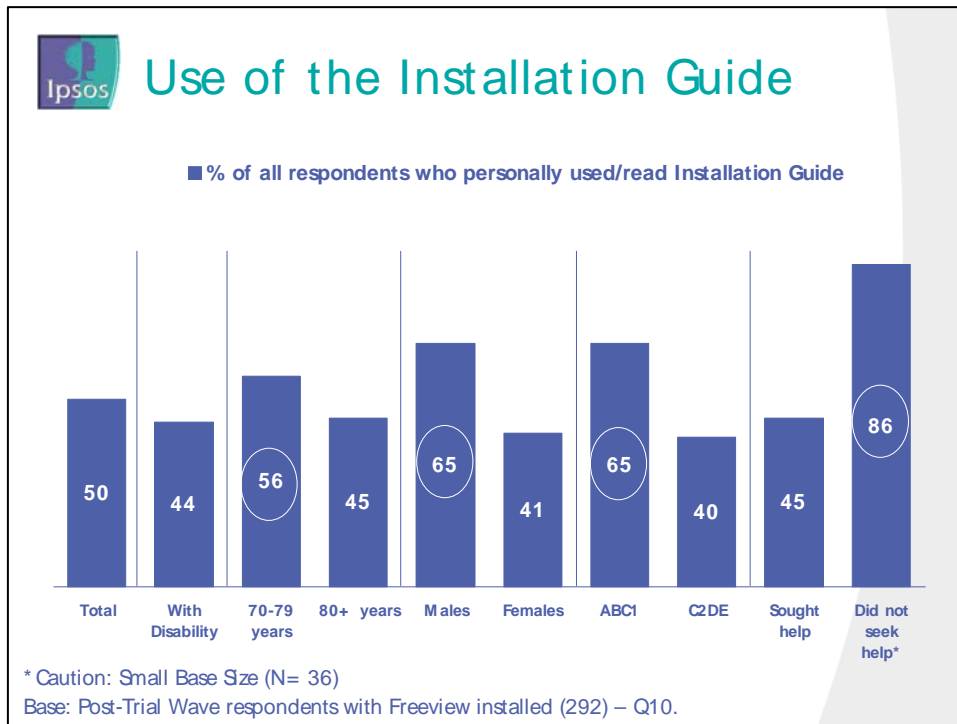
### **5.2.5 Awareness and usage of Installation Guide provided**

#### ***(Post-trial Tables 19-28/31-32, Q9-13/15)***

80% of respondents claimed to have received the 4-page Installation Guide provided by the project organisers, while 9% claimed they did not. 11% were unsure as to whether they received the Guide or not. Males were more likely to claim to be aware of receiving these instructions, with 86% stating they received the Installation Guide (compared with 76% of females).

Among those who claimed to have received the Installation Guide, almost two-thirds (63%) also claimed to have read or used the Guide. When we look at this figure across

all respondents (i.e. not just among those who claimed to have received the Installation Guide), in total we can see that half of all respondents claimed they read or used the Installation Guide. There were some differences in claimed usage of the Installation Guide by gender, social grade and amount of additional help received which are illustrated in the chart following. Significant differences at the 95% confidence level are circled.



As can be seen, the proportion was much higher among 70-79 year olds, males and those of ABC1 social grade. Of those respondents who did not seek any additional help with the installation, 86% used the Installation Guide (caution: small base size), while among those who sought help from others, a much lower proportion read or used the Installation Guide (45%). It should be noted however that this is likely to be related to the confidence of the respondents to attempt the installation themselves following instructions, rather than the usefulness of the Installation Guide itself.

The Installation Guide was also used by those people providing help to the respondents in installing the Freeview box. For those who received help from their family or friends, 70% stated that these family/friends used the Installation Guide to help them with the installation. The Installation Guide was even found to be of use to those receiving

outside help, with 30% of those who received help from an installation engineer or the telephone helpline stating that these sources too used the Installation Guide.

Those respondents who used the Installation Guide themselves were asked how helpful they found it to be, and the overall ratings were very positive, with 61% rating it as very helpful and a further 31% finding it to be somewhat helpful (92% giving a positive rating overall). Males were much more likely to rate the Installation Guide as being very helpful, with 75% giving it this rating compared with 48% of females. Similarly, those from households with two or more people were more likely to rate it as very helpful (73% compared with 46% among single person households), although as we have noted before, this is strongly correlated with gender.

The large majority of respondents who used the Installation Guide found it to be easy to follow (77%). Once again, it was more likely to be males who rated it as such, with 85% of males finding it to be easy to follow compared with 69% of females. 30% of respondents who used the Installation Guide found the illustrations to be easy to understand, while 11% felt it directed them to the right places (more so among males – 20% vs. 3% of females). However, 14% of respondents using the Installation Guide found it to be confusing, and this was directionally higher among females (19% vs. 8% of males) and those aged 80+ years (17% vs. 11% of those aged 70-79 years).

When asked what improvements could be made to the Installation Guide, the large majority were unable to name any (87%). And for those who did feel that there were improvements that could be made, they were around making it simpler (6%) or having larger print/text (5%).

## **5.2.6 Help provided by friends/family**

### ***(Post-trial Tables 40-41, Q19)***

There was an extremely high level of satisfaction with the help received from friends or family among those who sought help in this way. 90% were very satisfied, while a further 9% were somewhat satisfied. There was only one respondent who claimed to be very dissatisfied with the help they received.

## **5.2.7 Use of Mastercare Technical Helpline**

### ***(Post-trial Tables 36-39, Q17-18)***

It was only a small proportion of respondents who used the Mastercare technical helpline for assistance in installing their Freeview box (7%), so therefore the number of people who were asked questions in relation to this helpline is very small (N=20). The

following figures are therefore given in terms of the actual number of respondents rather than as a percentage point.

Among those who used the technical helpline (N=20), 12 respondents only had to call once, while 6 had to call twice and a further 2 respondents called three or more times.

Overall ratings of the technical helpline were very positive, with 19 of the 20 respondents giving it a positive rating, and only 1 respondent giving it a negative rating. 13 respondents stated that it helped them to solve their problem straight away, 5 respondents felt it was worth calling the technical helpline and a further 3 respondents felt the technical helpline gave good advice. 1 respondent felt that the technical helpline was not very helpful to them.

### **5.2.8 Use of Project Installation Engineers**

#### ***(Post-trial Tables 42-47, Q20-22)***

Of the respondents who used an engineer to help them with the installation of their digital television platform, the majority were very satisfied with the help they received. 72% stated they were very satisfied, and a further 17% claimed to be somewhat satisfied. Those aged 80+ years were more likely to give a rating of 'very satisfied' (79% vs. 65% among those aged 70-79 years). Those aged 70-79 years were still satisfied overall, but a larger proportion claimed to be 'somewhat satisfied' (27% vs. 8% of those aged 80+ years).

When asked whether or not they agreed with certain statements about the installation engineer, 91% of respondents agreed with positive statements about the engineer, while 5% felt that there were some negative aspects about the help they received. Eight in ten respondents agreed that the engineer knew what he/she was supposed to do (79%), and 30% felt that the engineer installed the digital equipment quickly. One quarter of respondents who received help from an engineer felt that they were helpful with any questions the respondent had.

Of the small proportion who felt there were negative aspects of the service they received, the main gripe was that the engineer took a long time to install the equipment (4%). One respondent found the engineer to be rude and unhelpful.

In most cases the engineer only had to be called out once to complete the installation (82%), while for 11% the engineer had to make two visits, and for 3% they had to be called out three or more times.

### **5.2.9 Most important element of installation process**

#### ***(Post-trial Tables 48-49, Q23)***

After they had been through the process of installing, or having installed, their digital television equipment, respondents were asked what they thought was the most important element that makes the transition to digital television as smooth as possible.

For 52% of respondents, this was having family or friends who could help them in the process. This element was more important for females (60% vs. 38% among males), and also for those who suffer reduced mobility (69%).

The next most important element was having clear instructions provided (21%), and this element was considered more important by males (29% vs. 16% of females).

Having a helpline to call if needed was considered important by 18% of respondents, having an engineer available to visit if needed by 14%, and having professional help on hand by 13%. When these three elements are combined, overall 37% felt it was important to have some kind of professional outside help available, whether it be a helpline, engineer or other professional.

### **5.2.10 Issues experienced since conversion to digital television**

#### ***(Post-trial Tables 50-53, Q24-25)***

Only 18% of respondents have experienced issues with their television since it was converted to digital TV. Surprisingly, this proportion is significantly higher among those who received outside help in installing their digital platform (27% having experienced problems among this group).

The main difficulties experienced have been to do with picture and sound quality, with 5% of respondents stating that the picture quality is worse than before installation, and 1% stating that the sound quality is worse than before installation. However it should be noted that at present the local transmitter is only operating at one tenth of the power it will be operating at after the digital switchover, and after the analogue signal is switched off power will be increased.

5% of all respondents found difficulty with channel and programme navigation. 3% have found it difficult to get to the channel they want, 1% have found it hard to know what channel they are on, 1% have found it difficult to go to the programme they want, and 1% have found it difficult to use the electronic programme guide. 2% have experienced difficulties with the remote control, more specifically that it is difficult to

understand what to use the different buttons for (2%) or the buttons on the remote are too small (1%).

### **5.2.11 Overall rating of digital television viewing experience**

#### ***(Post-trial Tables 54-59, Q26-28)***

Overall, 60% of respondents feel that their TV viewing experience is better now that they have digital television, with 27% stating it is much better and a further 33% finding it to be somewhat better. 38% find there to be no difference now compared with before they had digital TV installed, and only 1% claim that their television viewing experience is now worse than before the digital conversion. Those aged 80+ years in particular find their television viewing experience to be much better now compared with before they switched to digital (32% vs. 21% of those aged 70-79 years).

The main feature of digital television respondents find most appealing is the fact that they have access to more channels, with 67% citing this as the aspect they like best. This is particularly the case among households with two or more people in them, where 72% state having more channels is what they like most, compared with 60% of those who live on their own. The next most popular feature of digital TV is having better reception, with 20% citing this as one of the things they like most, while only 2% have listed the electronic programme guide as a feature they like most. This, however, is more popular with respondents who have other people in the household who are under the age of 75, with 9% of this group rating it as a feature they like most. This is in line with findings from previous digital television trials conducted, whereby the electronic programme guide was found to be more appealing among younger age groups, while those aged 75+ years were less likely to understand the feature and therefore not see it as a key benefit of digital television.

While the majority of respondents claim to still watch the same amount of television now compared to before they switched to digital (79%), the remainder (20%) claim to be watching more television, with only 1% now watching less television. In particular, the 80+ year old age group are more likely to have increased the amount of television they are watching (27% vs. 12% of those aged 70-79 years).

### **5.2.12 Likelihood of recommending digital television to others**

#### ***(Post-trial Tables 60-63, Q29-30)***

Over three-quarters of respondents (77%) who took part in the digital switchover trial would recommend digital television to their friends, neighbours or others. This is especially the case among male respondents, with 84% stating they would recommend digital television compared with 72% of females. 12% state that they would not recommend digital television, while 12% are unsure as to whether they would recommend or not.

In terms of what those who would recommend digital television would tell others as being the main benefits of this service, these are largely in line with what are claimed to be the most popular features outlined in Section 5.2.11. 81% of those who would recommend digital TV would cite having access to more channels as being the main benefit, while 32% would cite having better reception. The electronic programme guide is once again not seen as a major benefit to this age group, with only 2% claiming they would tell others about this feature.

### **5.2.13 Conversion to digital television before switchover**

#### ***(Post-trial Tables 64-67, Q31-32)***

It appears as though the main reason most respondents had not switched over to digital television before participating in the trial was that there was a lack of motivation. 40% stated that their previous set up had worked fine and there was no need to change, indicating that the benefits of switching to digital television had not been effectively communicated to them prior to the trial. This was particularly the case among the 70-79 year old age group, among whom 48% gave this as the main reason compared with 34% of the 80+ yrs age group. 8% of all respondents stated they did not even know digital television existed before taking part in this trial, and this was significantly higher among respondents who lived on their own (12% vs. 4% of those in households with two or more people).

There were some concerns about the expense required in converting, with 13% citing not wanting to spend additional money as a reason for not converting prior to the trial. 9% of respondents felt that digital television looked too complicated and therefore had not converted.

Only 38% of respondents claimed that they would definitely have converted over to digital television before 2009 if they had not taken part in the Bolton Digital Switchover



Trial. 47% did not feel that they would have switched over, while 15% were unsure as to whether they would have or not. This is quite a high proportion who did not feel that they would have changed to digital television before the switchover, and once again likely to be because they did not have the motivation to make the change. It highlights the need for effective communication to this group as to the benefits of digital television, and to allay any concerns over what the actual switchover process involves.

## 6 CONCLUSIONS & RECOMMENDATIONS

The digital switchover trial in Bolton appears to have been a success, with the majority of respondents finding the process of switching over to be easy and a clear idea having been gained about the type of help this 'vulnerable' group will seek when switching to digital television.

There are certain groups within the vulnerable definition who seemed to require more assistance than others, and these were largely females and/or those living on their own.

While many of the respondents relied on family and friends for help with the switchover, there were still three in ten who required outside assistance in setting up their Freeview box. The majority of these opted for a home visit by an installation engineer rather than calling the technical helpline. This indicates that there may be confidence issues for these respondents when it comes to following instructions over the phone or in an installation guide and completing the installation themselves. Male respondents were more likely than females to have used each of these resources and done the installation themselves.

Once the respondents have switched to digital television, they are very happy with it, in particular with having access to additional channels. There did not appear to be a high awareness of the benefits of digital television prior to the trial however, and therefore there was not a strong motivation for this group to switch to digital television had the trial not presented them with the opportunity. It is important to build awareness of the benefits of digital television among this vulnerable group to encourage them to switchover sooner rather than leaving it until the last minute, but it must be done via a channel of communication more effective in reaching this group, such as a personalised letter.

Therefore it is recommended that the following actions are considered in developing a program to assist the vulnerable group with the digital switchover process:

- Consider the balance of resources around installation with regards to those who are either able to install themselves or have family or friends to help with the installation vs. those who require outside professional help via home visits by engineers.
- Build awareness of the benefits of digital television among this vulnerable group to encourage switchover, if possible through a communication channel more suited to them such as a personalised letter.