

Digital Television 2001

Final Report

Research Study Conducted for
Department for Culture, Media and Sport



MORI

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Preface

This final report contains the initial findings from the Digital Television 2001 survey carried out by MORI on behalf of the Department for Culture, Media and Sport (DCMS).

A previous version of this report was presented to the Viewer's Panel at their meeting of 26th March 2001. This final report incorporates the comments made at that meeting and the further information which was requested.

The aims of this survey are to:

- Provide an indication of the current ownership of televisions in Britain (both digital and non-digital).
- Provide an indication of the potential level of future digital television ownership.
- Assess awareness of digital television and the proposed switch-over of the analogue television signal to digital.
- Assess perceptions of digital television, in particular the advantages and disadvantages of the service.
- Establish the key drivers behind why people switch, or do not switch, to digital television.
- Establish if there are any groups in society more, or less, likely than others to switch to digital television.

The survey began with a qualitative stage. This stage was designed to inform the questionnaire design, and establish general perceptions of digital television.

Epsom and Stockport were chosen for two focus groups to explore attitudes prior to developing a questionnaire. These areas were selected because digital television could be received in the locality. Participants were only invited to attend if they did not have digital television in their homes. In this way the groups consisted of those who could have digital television if they wanted or were able to, but had not yet switched to the service.

In Epsom those invited were aged 20-30 and were in social grades C2DE. In Stockport participants were aged 50-65 and were in social grades ABC1. In both groups there was a near even split of males and females, and at least half of each group had children.

Summary and Implications

- There will be a steady progress of viewers to digital television, with at least 55% of households likely to have it by 2006, as a conservative estimate. Three in ten people (30%) are “**existing**” digital television viewers, a further 25% are “**likely**” viewers who predict that they will get digital over the next five years (by the end of 2006).
- One in seven respondents (15%) state that they will never get digital television, and it is therefore “**unlikely**” that they will adopt it by the end of 2006. This leaves 30% of the population who are “**possible**” digital television viewers, as they are unsure about when they might switch, but do not say they will never get the service.
- “**Existing**” and “**likely**” digital television viewers (55% of the population) are more likely to be male, in young age groups, to be in social grades ABC1, access to the internet or a computer, and to have children under 15 in their household (and if a parent to be in a parent couple rather than a single parent).
- Both these groups state that the main advantage of digital television is the extra channels and greater choice. However, the “**likely**” group also has a perception that the cost of the service is high, and is reluctant to switch to digital television until their existing television set breaks down or is replaced.
- Among those who have digital television satisfaction with the service is high, suggesting that word of mouth endorsements can play a vital role in broadening out access to digital television.
- “**Possible**” digital television viewers (30% of the population) are those who do not think they will get digital television over the next five years, but have not stated that they will never get it. This group are more likely to be female (55%), in older age groups (39% are 55+), to be in social grade C2DE (54%), to not have children under 15 in their household (25%), and to not have access to the internet or a computer (75%).
- “**Unlikely**” digital television viewers (15% of the population) are those who say they will never get digital television. As with “**possible**” digital television viewers this group is more likely to be female (62%), in older age groups (62% are 55+), to be in social grade C2DE (64%), to not have children under 15 in their household (19%), and to not have access to the internet or a computer (84%), although this is partly a function of age.
- Both groups are less likely to see the need to get digital television, to be happy with their existing television set, and are less likely to be able to meet

the perceived cost of the service. They are also less well informed about what digital television is.

- Both groups prefer to hear about digital television from friends and family. It is therefore likely that as more younger ABC1s take up digital, the more that non-digital viewers in this social grouping get the opportunity to watch and talk about digital television. Older C2DEs will have less opportunity to hear about digital television.
- There is also a link between the expected lifespan of television sets and the take-up of digital television. Although viewers do not have to buy a new television set, getting digital is often connected to getting a new television set. An important conclusion which can be drawn is that if digital television can be established as the norm, rather than an optional extra, when buying a new television set, the take-up of digital would be far greater. Conversely the longer digital is an optional extra, the more likely it will be that viewers will remain non-digital in the long-term.
- Less than half (44%) of the population say they are aware of the switchover. Awareness is higher among older age groups. This is a key driver for viewers who predict it is “likely” they will switch in the next five years. However, they will only switch as part of the natural upgrade of their television, whenever that may be at this stage. Knowledge of the switchover is a long-term encouragement, but does not encourage immediate adoption of the technology.

Conclusion

- The overall conclusion to be drawn from the data on “possible” and “unlikely” digital television viewers, is that they do not say they will never get digital television: rather they simply do not know what digital television has to offer.
- The risk is that at least 15% of the population by the end of 2006 will not only not have digital television, but will also not be aware of what it offers.
- “Existing” digital television viewers have switched because the service offers something they want - more channels. To move to a position where most of the population has digital television, more information needs to be made available on the costs and benefits of the service. This is the biggest concern that non-digital households have about digital, and is the key to understanding why 70% of the population has not yet switched to digital.

The survey questionnaire was developed between DCMS and MORI, from the issues raised by both the Viewer's Panel and the qualitative stage.

MORI interviewed a representative quota sample of 1,918 adults aged 15+ at 190 sampling points across Great Britain. Fieldwork was conducted face-to-face on 1-5 March 2001. Fieldwork was carried out by MORI/Field and Tab on MORI's Omnibus using CAPI (Computer Assisted Personal Interviewing). All interviews were conducted in the home, with only one interview per household. No incentives were offered to respondents. Data have been weighted to reflect the national population profile.

Publication of data

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The future of Digital Television

Four Different Groups of Digital Television Viewers

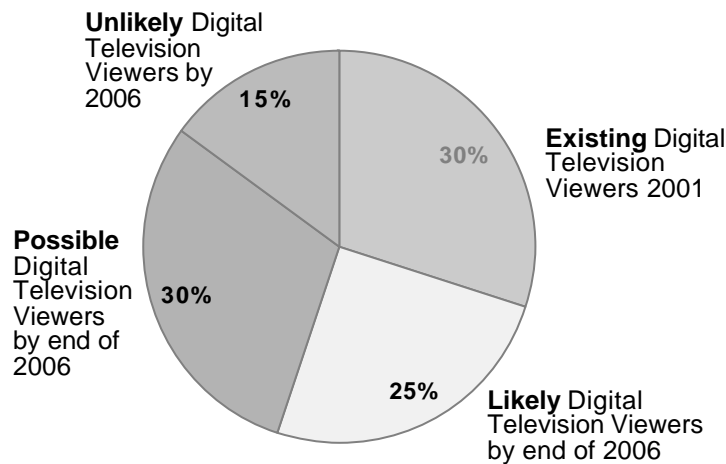
Three in ten respondents (30%) are “**existing**” digital television viewers, an increase from just four per cent of households two years ago.

A quarter of respondents (25%) predict that it is **likely** that their household will get digital television over the next five years (by the end of 2006).

Three in ten households (30%) are “**possible**” digital television viewers in the next five years – with respondents either predicting they will get digital television in 2007 or beyond (5%), or saying they don’t know when they will get it (25%). These respondents have been defined as “possible” because, even though they say they are unlikely to get digital by the end of 2006, they do not say they will never get it.

One in seven respondents (15%) state that they will never get digital television. These respondents are therefore “**unlikely**” to be digital television viewers by the end of 2006.

How many Digital Television Viewers by 2006?



Base: All respondents 15+, 1 - 5 March 2001 (1,918)

Source: MORI

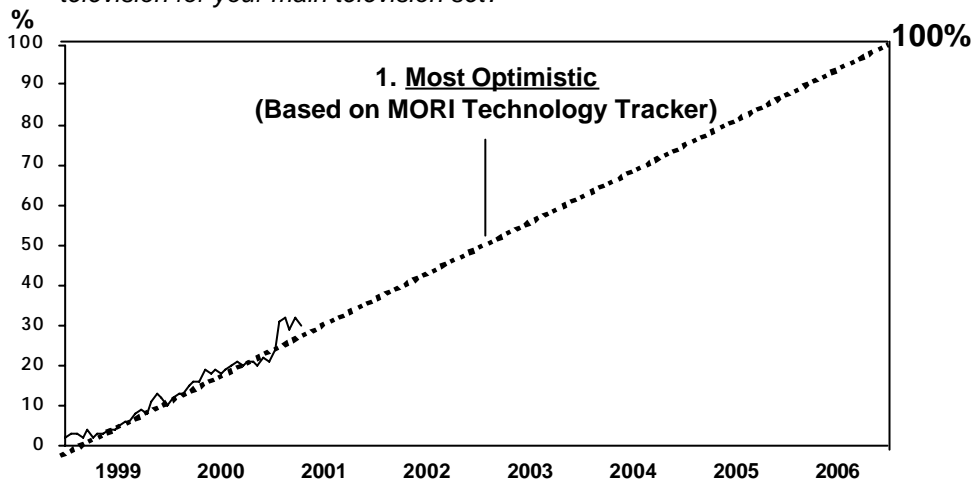
Potential Take-up of Digital Television

The graphs below shows the projected take-up of digital television over the next five years. They identify three possible future trends.

1. **Most Optimistic Trend** – An extrapolation based on the MORI Technology Tracker, which produces 100% of households with digital television by the end of 2006. However, this assumes the rapid take-up of digital television in the past two years (from only 4% of households two years ago) continues. It would therefore be unrealistic to expect this trend to be as strong over the next five years.

Most Optimistic take-up of Digital Television

Q In what year do you think it is most likely, if at all you will switch to Digital television for your main television set?



Base: MORI Technology Tracker 15+, 1999-2001 (c.2000)
All who do not have digital television 15+, 1 - 5 March 2001 (1,357)

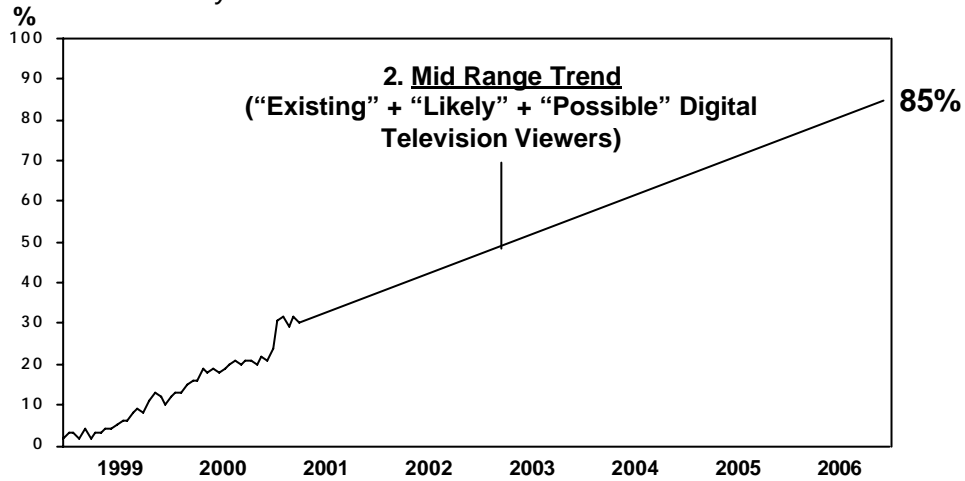
Source: MORI

2. **Mid Range Trend** – Three in ten (30%) households are unsure about when they will get digital television. If the concerns of this group can be met, the potential is that by the end of 2006 around 85% of households will have digital television.

Also as this group has a similar demographic profile to the “unlikely” digital television group, the possibility exists that by addressing the concerns of “possible” viewers that the concerns of “unlikely” viewers will be addressed as well – keeping the number of digital television viewers in line with the most optimistic rather than the conservative trend.

Mid Range take-up of Digital Television

Q In what year do you think it is most likely, if at all you will switch to Digital television for your main television set?



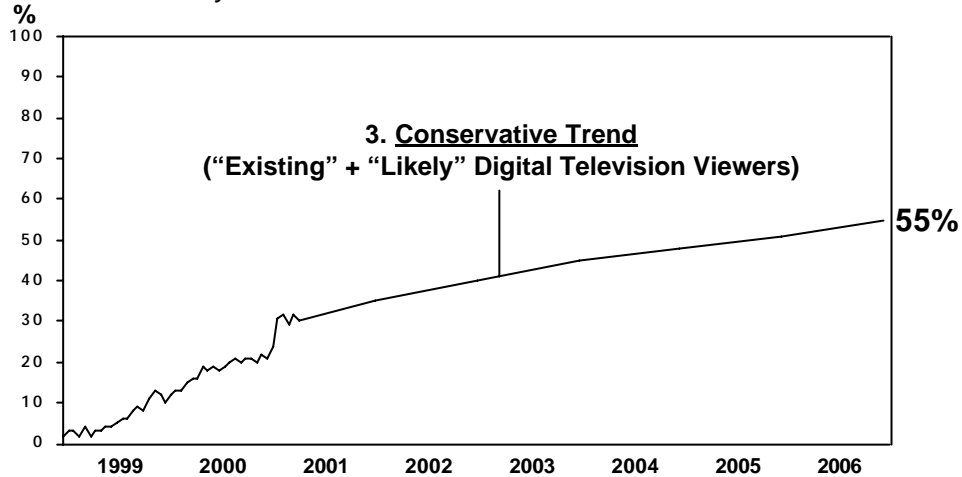
Base: MORI Technology Tracker 15+, 1999-2001 (c.2000)
All who do not have digital television 15+, 1 - 5 March 2001 (1,357)

Source: MORI

3. **Conservative Trend** – A quarter of households (25%) predict that they are “likely” to get digital television by the end of 2006. Therefore the conservative trend is for just over half of British households (55%) to have digital television by the end of 2006. Given the current situation this is the “best-guess” of the take-up of digital television over the next five years.

Conservative take-up of Digital Television

Q In what year do you think it is most likely, if at all you will switch to Digital television for your main television set?



Base: MORI Technology Tracker 15+, 1999-2001 (c.2000)
All who do not have digital television 15+, 1 - 5 March 2001 (1,357)

Source: MORI

There are two conclusions, which can be drawn from these findings, that could influence our predictions of the “likely” take-up of digital television.

1. Older viewers are less likely to foresee the need to get a new television set or to get digital television, and therefore under-predict whether they will switch. However, although they do not consider the possibility they might switch once their television breaks down, and they may be more likely to do so if digital television becomes the “norm” on new television sets. Therefore the benchmark trend may be artificially low, as older non-digital households are unaware that they will naturally switch before the end of 2006, as long as they are informed about digital television at the time of purchase.
2. The more analogue main sets that are sold, the less likely it is that “possible” digital television viewers will switch. One in five of the population have bought a new main television in the past two years, but have not got digital television. If these viewers had switched to digital at the same time as getting a new television set the current level of digital take-up would be 50%.

Taken together these two conclusions suggest that an important factor in maintaining the benchmark trend, and indeed any attempt to go beyond that trend is to keep up with the normal turnover of television sets. If digital television becomes seen as the norm, rather than an optional extra, the less viewers will opt-out of adopting the service when it comes to getting a new television set.

According to participants in our qualitative research, more work needs to be done to reassure potential buyers about new digital sets, for example a widely-understood kitemark guaranteeing quality.

Characteristics of the four key groups

The tables below highlights the key demographic differences between the four key groups, in comparison to each other and the population as a whole.

Table One: The four key groups of Digital Television viewers

	All	Existing Digital Television Viewers 2001	Likely Digital Television Viewers by end of 2006	Possible Digital Television Viewers by end of 2006	Unlikely Digital Television Viewers by end of 2006
<i>Base:</i>	(1,918)	(559)	(448)	(586)	(323)
	(%)	(%)	(%)	(%)	(%)
Male	49	54	54	45	38
Female	51	46	46	55	62
15-34	35	47	44	25	14
35-54	34	37	33	36	24
55+	32	16	23	39	62
ABC1	47	47	55	46	36
C2DE	53	53	45	54	64
Children in household	31	39	35	25	19
No Children in household	69	61	65	75	81
Single Parent	5	3	5	6	4
Parent Couple	23	33	25	17	11
Personally uses computer or internet at home, work or elsewhere	39	48	49	32	16
Does not personally use computer or internet at home, work or elsewhere	61	52	51	68	84

Source: MORI

“Existing” & “Likely” Digital Television Viewers

Profile of “Existing” and “Likely” Digital Television Viewers

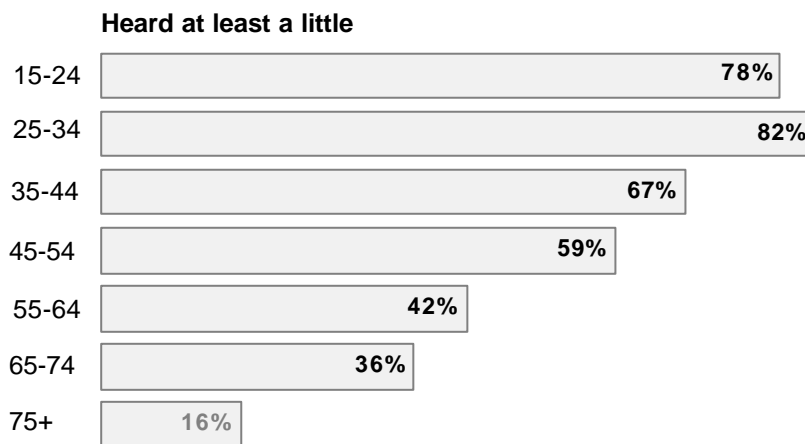
“Existing” and “likely” digital television viewers (making up 55% of the population) have a very similar demographic profile.

“Existing” and “likely” digital television viewers are more likely than the population as a whole, to be male (54% compared with 49%), and between 15 and 34 years old (47% of “existing” and 44% of “likely” digital television viewers, compared with 35% overall).

However, this profile should be used with caution, as these are the demographics of respondents, not households. It might be an indication that younger respondents are more aware of digital television being in their household. Four in five (80%) 15 to 34 year olds state that they have heard at least a little about digital television, compared to three in five (60%) in the population as a whole. In general the older the respondent the less they know about digital television.

Awareness of Digital Television - Age

Q How much, if at all, would you say you know about digital television?



Base: All respondents 15+, 1 - 5 March 2001 (1,918)

Source: MORI

Even with this qualification we can use the data to indicate that digital television households are more likely to have younger males in them than non-digital households.

The data also indicates that “existing” and “likely” digital households have more access to computers and the internet (“existing” 48%, “likely” 49%, overall 39%), and are more likely to have children under 15 in them (“existing” 39%, “likely” 35%, overall 31%) - although this is partly a reflection of their younger age profile.

If a parent of a child under 16, “existing” and “likely” digital television viewers are more likely to be in a couple than the population as a whole (“existing” 33%, “likely” 25%, overall 23%). One in five single parents (20%) say that they currently have digital television, compared with 20% overall. Twenty-eight per cent of single parents say that it is likely they will get digital television by 2006 (similar to the population as a whole).

By social grade “existing” digital television households match the profile of the population as a whole (ABC1 47%, C2DE 53%). However, once we look at “likely” digital television viewers a gap begins to open up between grades, as over half of “likely” digital television households (55%) are in social grade ABC1 compared with the 45% who are C2DEs.

“Existing” and “likely” digital television viewers are therefore very similar, backing up the idea that, with all other things being equal, by the end of 2006 just over half (55%) of households will have digital television. The factors which have influenced “existing” digital television viewers, are likely to be those which influence “likely” viewers over the next five years.

“Wanting” Digital Television vs an Inevitable Switch

Nonetheless, there must be a reason why there is only a gradual take-up among younger, more male, and higher social grade households – rather than immediate universal adoption now. The answer to this question lies in the difference between viewers who actively want digital television, and those who think the switchover is inevitable.

Nearly two in five “existing” digital television households (38%) in part switched to digital television for more, or a wider range of, channels in general. One in seven specifically switched for football or sports channels (15%) or for the better picture quality (14%). Only 3% of “existing” digital television households switched because they have heard the television signal is being switched to digital.

Similarly a quarter of those who are “likely” digital television viewers (29%) will switch partly because of more, or a wider range of, channels in general. However, nearly one in five (19%) of them say they will switch because the television signal is being switched over to digital. Around one in seven (15%) will get digital television when their current main television is replaced.

“Existing” digital television viewers have therefore switched because they want the service now, “likely” digital television viewers will mainly switch out of a broader necessity brought on by either the natural lifespan of their television set, or the inevitability of the television signal being switched to digital. Both can see

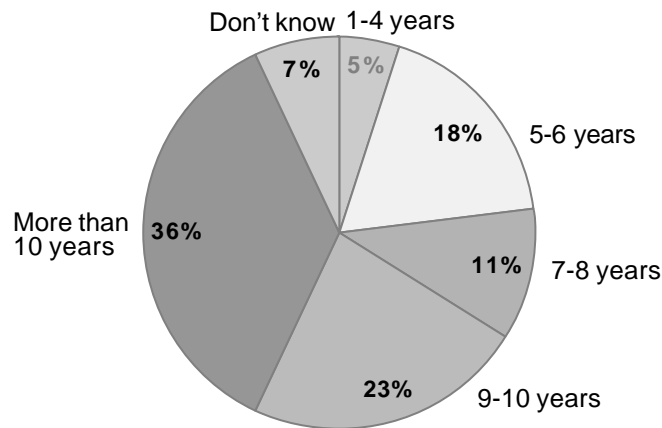
the benefits of digital television, but “possible” digital viewers are willing to wait – the switchover is a long-term concern.

Therefore, an important aspect in understanding when “likely” digital television viewers are going to switch is the expected lifespan of a television set.

A third of all respondents (36%) expect a television set to last longer than 10 years.

Expected lifespan of a television set

Q On average, how many years do you expect a television set to last before it need to be replaced?



Base: All respondents 15+, 1 - 5 March 2001 (1,918)

Source: MORI

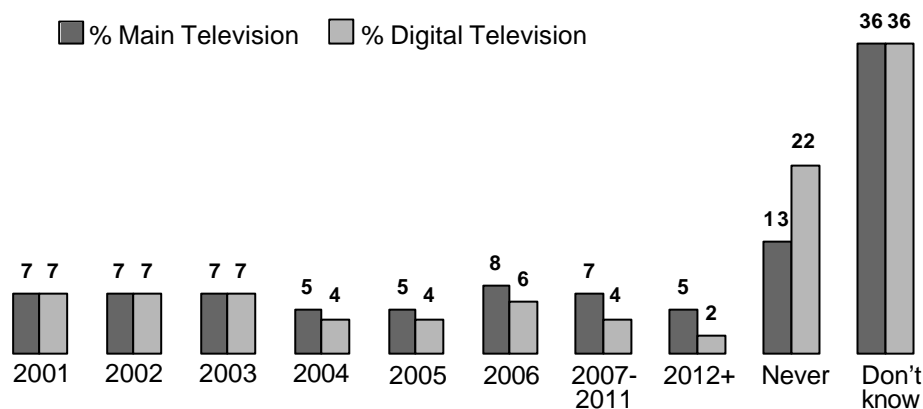
Switching to digital television is different to buying a new television set, as viewers can buy set-top boxes rather than an integrated set.

Predictions from non-digital television households of when they will get a new television, compared to when they will switch to digital, are virtually identical. Yet, there is a greater willingness to accept the need for a new television set than digital television; only 13% of non-digital households state that they will never get a new television set, compared to the 22% who say they will never get digital.

New Television Sets and Digital Television

- Q In what year do you think it is most likely, if at all, that you or someone in your household will be buying, or will be given a new main television set?
- Q In what year do you think it is most likely, if at all, you will switch to digital television for you main television set?

■ % Main Television □ % Digital Television



Base: All who do not have digital television 15+, 1 - 5 March 2001 (1,357)

Source: MORI

This suggests that a lack of understanding of what digital television has to offer is a barrier to households adopting the technology. If viewers do not see the need for it, then they will not see the need to switch.

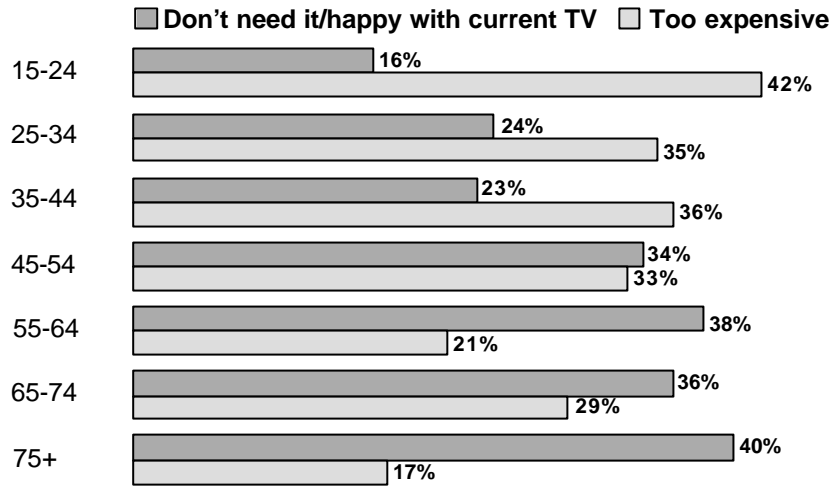
As already discussed, it is older viewers who know less about digital television and are therefore less likely to be able to commit themselves to switching. In addition to this older respondents are also more likely to have older television sets. A third (34%) of those aged 55 or over bought or were given their television set more than eight years ago (1993 or before), compared with 14% of 15 to 34 years olds. Nearly half (47%) of those aged 55 or over think a television set should last longer than 10 years, compared with 27% of 15 to 34 year olds.

Three in ten of those “unlikely” to switch over the next two years (31%) say that they are “unlikely” to do so because they don’t need it, or are happy with their current television set. A further 30% see it as too expensive. The next top answer is the one in ten (10%) who are waiting for their current television to break down or be replaced.

From the top two answers the divide between younger and older viewers is revealing. Younger viewers are put off by the perceived cost of digital television, whereas older viewers do not see the need for the service.

Unlikely to switch

Q Why do you say you are unlikely to switch to digital television over the next two years?



Base: All who are unlikely to switch to digital television in the next two years (1,083) Source: MORI

Satisfaction with Digital Television

Among those who have seen digital television, 86% are satisfied with the picture and sound quality, and 75% are satisfied with the quality and content of the channels and programmes they have seen.

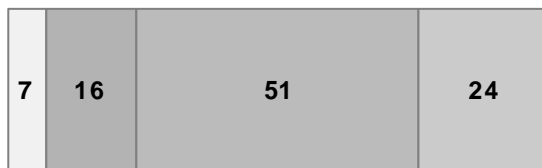
Satisfaction with Digital Television

Legend: % Dissatisfied (lightest grey), % Neither Satisfied nor Dissatisfied (medium-light grey), % Fairly Satisfied (medium-dark grey), % Very Satisfied (darkest grey)

Overall, how satisfied or dissatisfied have you been with the **pictures and sound quality**, when you have watched digital television?



...how satisfied or dissatisfied are you with the **quality of the content** of digital television channels/programmes you have seen?



Base: All who have digital television, or have seen it 15+, 1 - 5 March 2001 (662) Source: MORI

Again this is vital, as word of mouth is one of the best means of meeting the concerns of potential digital television viewers. The more households which take up digital television, and like the service, the more they will tell their friends and family, or will give them an opportunity to experience digital television for themselves.

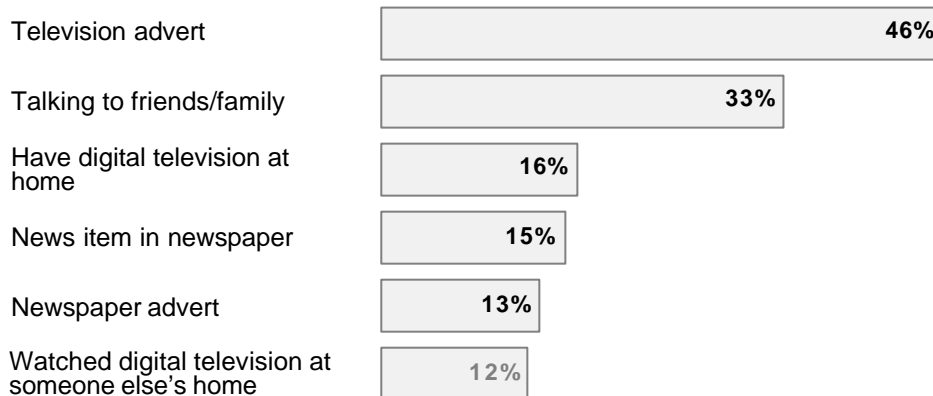
Information about digital television

Of those who have heard of digital television nearly half (46%) have heard about it from a television advert. One third (33%) have talked to friends or family about it.

Where viewers have heard about Digital Television

Q From where did you hear about digital television?

Top six answers



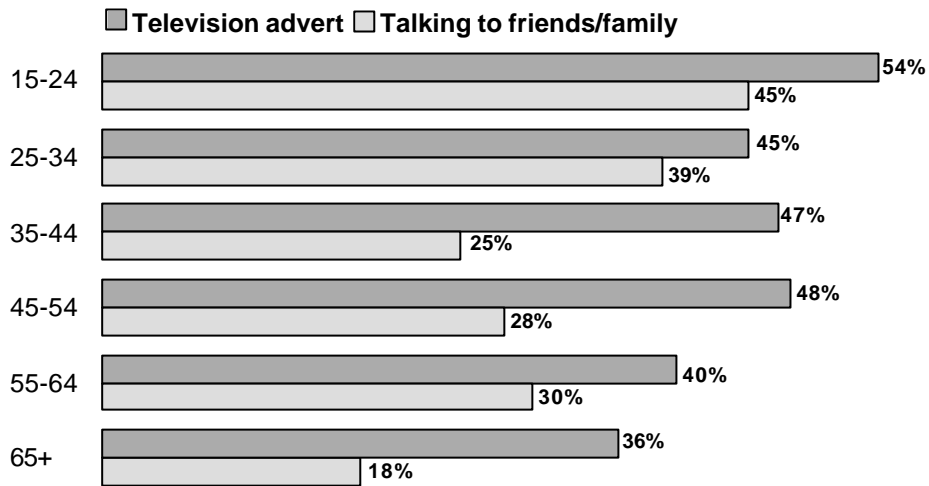
Base: All who have heard at least a little about digital television 15+,
1 - 5 March 2001 (1,085)

Source: MORI

The breakdown of the top two answers by age is again revealing. Two-thirds of 15 to 24 year olds (64%) have seen a television advert, compared to just over a third (36%) of those aged 65 or over. Nearly half of 15 to 24 year olds (46%) have spoken to family and friends, compared to only 18% of those aged 65 or over.

Sources of information - age

Q From where did you hear about digital television?



Base: All who have heard at least a little about digital television 15+, 1 - 5 March 2001 (1,085)

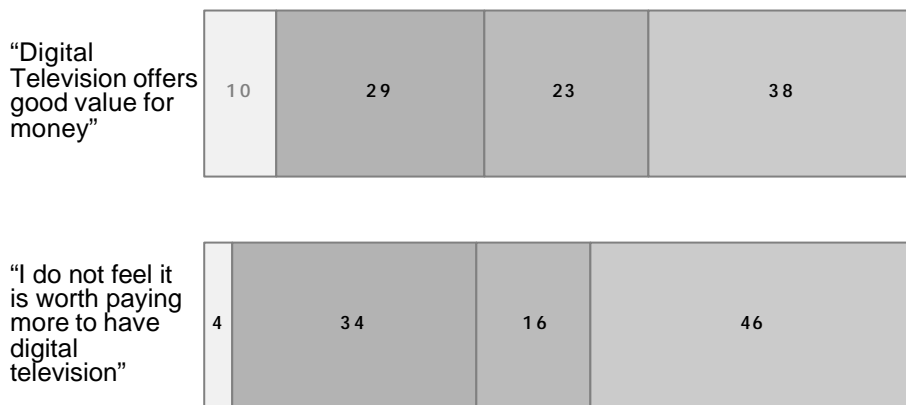
Source: MORI

It is likely that part of the reason that households with younger males in them are more likely to be “existing” or “likely” digital television viewers is that they get more opportunities to experience it and develop a desire to switch.

However, when it comes to costs, opinion is divided among those who have heard at least a little about digital television. Nearly two in five (38%) agree that digital television provides good value for money, compared with 29% who disagree. In contrast, 46% do not think it is worth paying more for digital television, compared with 34% who think it is.

Perceptions of Digital Television

□ % Don't know ■ % Disagree ■ % Neither Agree nor Disagree ■ % Agree



Base: All who have heard at least a little about digital television, 1 - 5 March 2001 (1,085) Source: MORI

Similarly, when asked to identify the disadvantages of digital television, a third (32%) state that it is too expensive, 9% that you have to pay for a subscription, and 8% that there are too many channels and choice.

Over half of those who have heard at least a little about the service identify more or a wider range of channels (53%), better picture quality (43%), and better sound quality (22%) as key benefits. These are similar to the reasons that have encouraged "existing" digital television viewers to take-up the service. The qualitative research also suggests that range of channels is seen as the key advantage of digital television, with cost the key barrier.

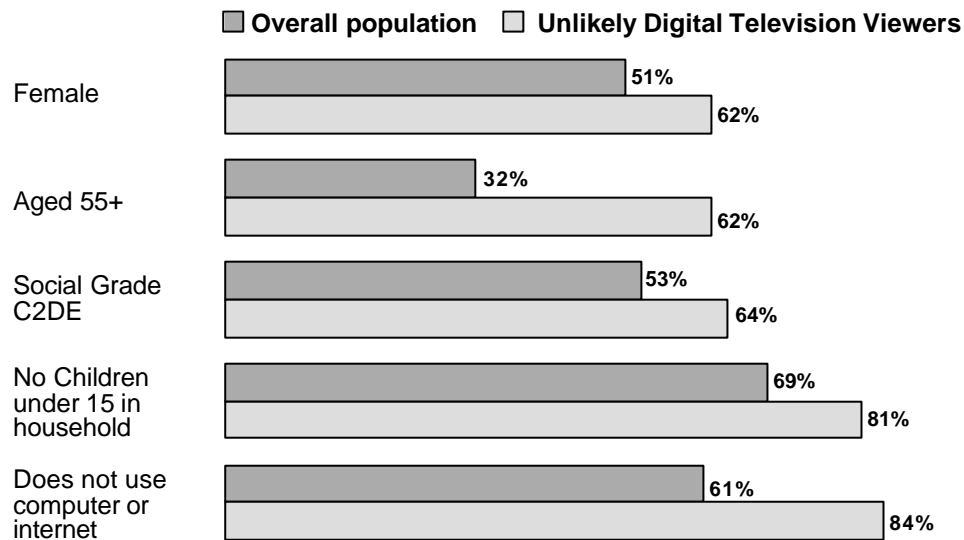
Demand for digital television is determined in large part by viewers weighing up the benefits of the service against the cost involved. "Existing" viewers have switched because the benefits outweigh the financial cost. For non-digital households, the perceived financial costs at present outweigh the benefits of the service. Indeed, for those "unlikely" to switch in the next five years there are very few perceived benefits in comparison to existing analogue television.

“Possible” & “Unlikely” Digital Television Viewers

Profile of “Possible” and “Unlikely” Digital Television Viewers

“Unlikely” digital television viewers are the 15% of the population who say that they will never get the service. As the chart below shows, in comparison to the population as a whole, these viewers to be female (62%), in older age groups (62% are 55 or over), in social class C2DE (64%), and to not have children under 15 in the household (81%), nor access to a computer or the internet (84%).

Unlikely Digital Television Viewers by end of 2006



Base: All 15+ (1,918), Unlikely Digital Television Viewers (323), 1 – 5 March 2001

Source: MORI

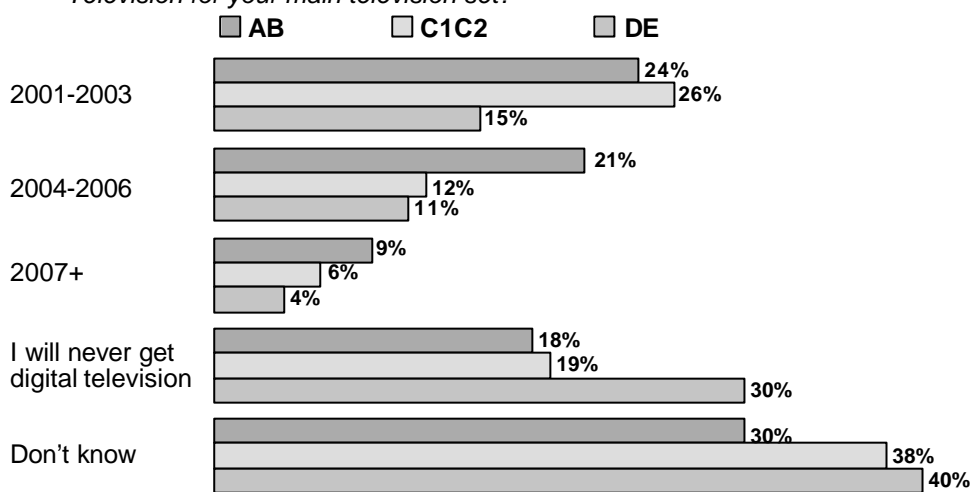
The profile of “possible” digital television viewers by 2006 is similar. These are the respondents who say they are likely to get digital television after 2006, or don’t know when they might get it. Again these viewers are more likely to be female (55%), aged 55 or over (39%), to be in social class C2DE (54%), to have no children in their household under the age of 15 (75%) and not have access to a computer or the internet (68%).

“Possible” digital television viewers are those who are unsure about the service. The profile should therefore not be unexpected, as over half of all women (51%) and those in social grade DE (52%) state that they have heard nothing or don’t know about digital television, compared with two in five (40%) in the population as a whole. This suggests that lack of knowledge of what digital television is, is a key part of understanding why these viewers are reluctant to commit to digital television by the end of 2006.

It is important to remember that “possible” and “unlikely” digital television viewers are the people who are most vulnerable to being left behind in a more technically advanced Britain. As more young households, of a relatively high social grade, with children and access to computers or the internet switch to digital television other groups in society proportionately are not switching. It is a particular concern that over four in five of those “unlikely” to switch to digital television (84%) also do not personally use a computer or the internet (compared to 61% across Britain). This suggests that a digital or technology divide could be opening up.

Predicting take-up of Digital Television - Social Grade

Q In what year, do you think it is most likely, if at all, you will switch to Digital Television for your main television set?



Base: All who do not have digital television 15+, 1 - 5 March 2001 (1,357)

Source: MORI

As the main disadvantage of digital television is the perceived cost of the service, it is not surprising to find those in social grade DE are the most unlikely to predict that they will be digital television viewers by the end of 2006.

The Cost of Digital Television

Perceptions of the cost of switching to digital television vary with widespread lack of knowledge. When “existing” digital television viewers are asked to estimate the costs they incurred installing different aspects of the service a large proportion do not know or say that there was no cost.

The cost that most “existing” digital television viewers can estimate is that of the subscription, over the course of the year, but not including the license fee. Over half of digital television viewers (52%) estimate that this cost is more than £100, while three in ten (28%) estimate that it is between £301 and £500 a year.

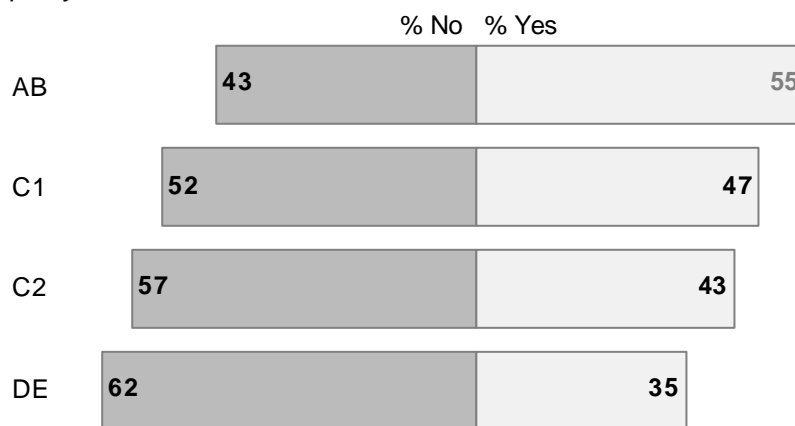
If those without digital television are getting information about digital television from friends and family who are “existing” digital television viewers, it is not surprising that the cost of digital television is seen to be the main disadvantage of the service.

Awareness of the Switchover

As already seen one of the key drivers for “likely” digital television viewers to switch over the next five years, is an awareness that the government will switch over the television signal to digital (19% state this is a reason why they will switch). Only 35% of those in social grade DE state that they have heard of this plan before, compared with 55% of ABs. Overall, 44% of the population have heard of this plan.

Awareness of the Switchover - Social Grade

Q The Government plans to switch off the normal analogue signal between 2006 and 2010, so everyone will have to be able to receive digital television by then. Before this interview started had you heard of this policy?



Base: All respondents 15+, 1 - 5 March 2001 (1,918)

Source: MORI

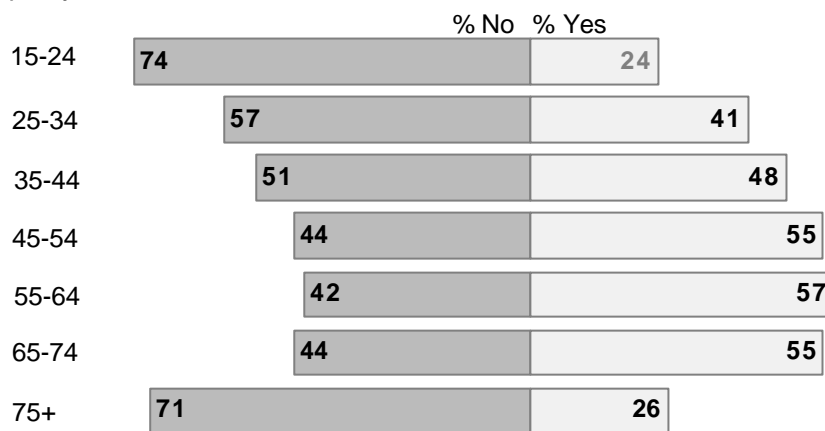
Single parents also have a low awareness of the switchover. Just three in ten single parents (27%) have heard of the plan, compared to nearly half of parent couples (47%). This reflects their lower awareness of digital television in general.

Despite their younger age profile, 56% of single parents with children under 16 say they know at least a little about digital television, compared with 77% of parent couples.

Following the analysis in this paper so far we would expect older viewers to be also less aware of the switchover, however, this is not the case - awareness is higher for older age groups (apart from those aged 75 or over).

Awareness of the Switchover - Age

Q The Government plans to switch off the normal analogue signal between 2006 and 2010, so everyone will have to be able to receive digital television by then. Before this interview started had you heard of this policy?



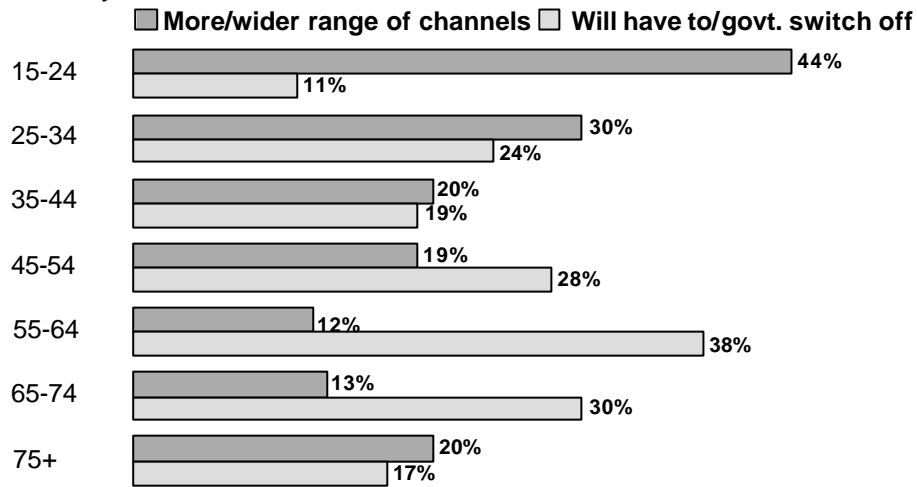
Base: All respondents 15+, 1 - 5 March 2001 (1,918)

Source: MORI

This suggests that older age groups are less likely to mention the benefits of digital television, but that they have heard of the switchover. Among those likely to switch in the next two years, younger respondents tend towards more channels, whereas older respondents will switch because of the switchover. The switchover is in the long-term, more channels can be experienced now. This helps explain why take-up has been quicker among younger age groups. If all they know about digital television is the switchover, then there is no reason for older viewers to switch until they need a new television set.

Likely to switch

Q Why do you say you are likely to switch to digital television over the next two years?



Base: All who are likely to switch to digital television in the next two years (530)

Source: MORI

Informing Viewers about Digital Television

Three in ten “possible” digital television viewers (30%) would talk to family and friends if they wanted to know more about the advantages and disadvantages of digital television, as would 28% of “unlikely” digital television viewers.

Nearly a quarter of “possible” digital television viewers (24%) would want to watch it around someone else’s home, compared to only 17% of “unlikely” digital television viewers – perhaps reflecting the lower overall interest in the service in among this group.

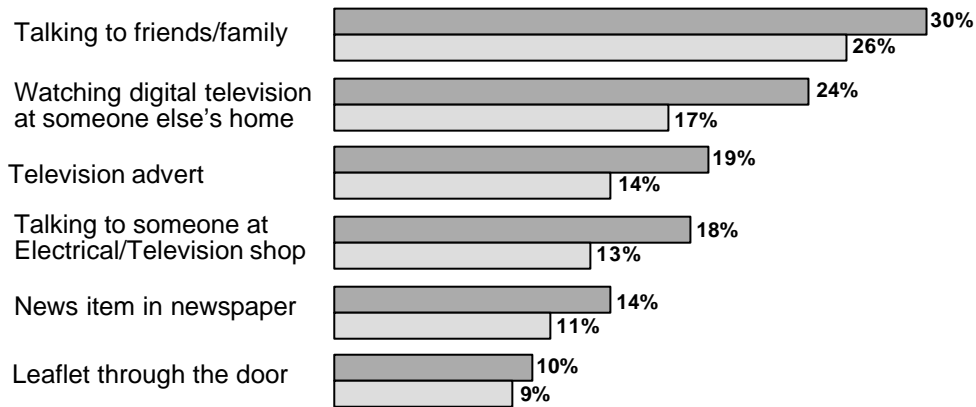
Word of mouth is therefore very important in encouraging take-up of digital television in the population as a whole.

Sources of information

Q From which of these sources of information, if any, would you most like to find out about the advantages and disadvantages of digital television?

■ Possible Digital Viewers by 2006 □ Unlikely Digital Viewers by 2006

Top six answers



Base: Possible Digital Television Viewers (586), Unlikely Digital Television Viewers (323), 15+, 1 – 5 March 2001

Source: MORI

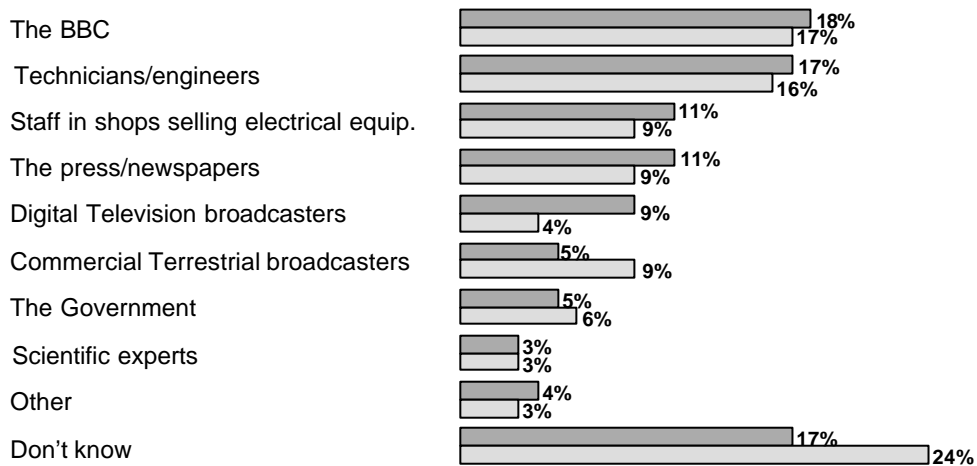
Beyond friends and family “possible” and “unlikely” digital television viewers trust the BBC (18% and 17% respectively) to inform them the most about the advantages and disadvantages of digital television. This is closely followed by technician and engineers (“possible” 17%, “unlikely” 16%).

The chart below shows the choices by respondents from a list of organisations presented to them. It suggests that people are open to being presented with the technical reasons behind the switchover, and the move to digital television. Information which is difficult to get from family and friends. In MORI’s experience, people are often more likely to trust organisations they perceive as “professional” and “independent” than the Government, or those companies seen as having an interest in the topic.

Sources of information - trusted organisations

Q From which of these organisations, if any, would you trust the most to inform you about the advantages and disadvantages of Digital Television?

■ Possible Digital Viewers by 2006 □ Unlikely Digital Viewers by 2006



Base: Possible Digital Television Viewers (586), Unlikely Digital Television Viewers (323), 15+, 1 – 5 March 2001

Source: MORI

Summary - Non-Digital Television Viewers

Seven in ten respondents do not have digital television in their home (70%), and are therefore non-digital television viewers – this combines the “Likely”, “Possible” and “Unlikely” digital television viewers.

Existing digital television viewers have already been discussed. Their demographic profile tends to be more male than the population as a whole, to be in younger age groups, to have access to computers or the internet, and to have children in their household (and if a parent to be in a couple). As would be expected non-digital television viewers are the reverse, they are more female than the population as a whole, in older age-groups, likely to have no children in their household and to not have access to computers or the internet.

Table Two: Digital and Non-Digital Viewers

	All	Digital Television Viewers	Non-Digital Television Viewers
<i>Base:</i>	<i>(1,918)</i>	<i>(559)</i>	<i>(1,359)</i>
	<i>(%)</i>	<i>(%)</i>	<i>(%)</i>
Male	49	54	46
Female	51	46	54
15-34	35	47	29
35-54	34	37	32
55+	32	16	38
ABC1	47	47	46
C2DE	53	53	54
Children in household	31	39	28
No Children in household	69	61	72
Single Parent	5	3	5
Parent Couple	23	33	19
Personally uses computer or internet at home, work or elsewhere	39	48	35
Does not personally use computer or internet at home, work or elsewhere	61	52	65

Source: MORI

The table illustrates that there are differences between digital and non-digital television viewers. Our more detailed analysis allows us to explore this in more depth.

For example table two shows that social grade is not at present related to uptake of digital television. Over half of digital television viewers are in social grade C2DE (53%), as are over half of non-digital television viewers (54%). However, over the next few years the earlier analysis suggests that a divide will open up. Nearly two-thirds of those earlier identified as “unlikely” digital television viewers (those who say they will never get it), are in social grade C2DE (64%). This suggests that there is a difference in the underlying attitude to adopting digital television in this social group. Over time we would expect this difference will become more apparent.

Similarly table one shows that currently two in five non-digital television viewers are aged over 55 (38%), which is slightly more than the number of people aged over 55 in the population as a whole (32%). However, three in five “unlikely” digital television viewers are aged over 55 (62%). Thus, the particular concerns of older people need to be addressed right from the start if they are not going to be progressively left behind in the switch to digital television.

The comparison of how to classify non digital television viewers is very useful, as it suggests that the take-up of digital television is currently in flux, that Britain is in the middle of a trend rather than at a plateau.

It is helpful to remember that the adoption of digital television by 30% of the population has been rapid - over only two to three years. We cannot as yet state that all those who do not currently have digital television will never get it. Instead many of the key drivers already identified for “existing” digital television viewers will encourage others to take up the technology over the next two to three years.

However, what this paper has identified is that over the passage of time a gap could open up. As more people adopt digital television the more likely it is that proportionally those without digital television will be those who say they will never get it. This suggests that the strategy for informing viewers about digital television, and reaching those who are unwilling to switch, will change over time. The fewer non-digital television viewers there are, the more focused any strategy will have to be in addressing their key concerns.

Appendices

Technical Details

Sample Design

There are 641 parliamentary constituencies in Great Britain. From these, we selected 210 to be used as the main sampling points on the Omnibus. These were chosen to be representative of the whole country by region, class, voting patterns and other variables. Within each constituency, two mapped areas each containing 5,000 addresses are selected to represent the socio-demographic makeup of the constituency. For each Wave of the Omnibus, we rotate between these two areas, covering one per Omnibus. Interviewers approach a different set of addresses each time, with the mapped area ensuring representatives.

Within each point, twelve respondents were to be interviewed. Respondents were selected by means of a 10-cell quota with which the interviewer has been provided. The quotas used are:

Sex: (Male, Female)

Household Tenure: (Owner occupied, Council/HAT, Other)

Age: (15-24, 25-44, 45+)

Working status: (Full-time, part time/not working)

These quotas were devised by an analysis of a full year's data on the National Readership Survey and the 1991 Census and Registrar-General's mid-year estimates. In each area, quotas represent the makeup of that area. Overall, quotas ensure that the demographic profile of the sample matches the actual profile of the country. The sample is thus representative of all adults in Great Britain aged 15+. The total sample set was 10 x 210 sample points = 2,100.

Fieldwork

Fieldwork was carried out by MORI/Field & Tab on MORI's Omnibus using CAPI. Interviewers were provided with a list of addresses within each point. All interviews were conducted in the home, with only one interview per household. No incentives were offered to respondents.

Weighting and Data Processing

Data entry and analysis were carried out by Infocorp Data Processing Ltd. The data were weighted using target rim weights for social class, standard region, unemployment within region, cars in household, and age within sex. This was to adjust for any discrepancies in the coverage of individual sampling points and to ensure representatives.

Statistical Reliability

The sample tolerances that apply to the percentage results in this report are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results.

Approximate sampling tolerances applicable to percentages at or near these levels			
	10% or 90%	30% or 70%	50%
<i>Base:</i>	?	?	?
Size of sample on which survey result is based			
2,000	2	2	2
1,500	2	2	3
1,000	2	3	3
500	3	4	4
250	4	6	6

Source: MORI

For example, on a question where 50% of the people in a weighted sample of 2,000 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than 2 percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

Tolerances are also involved in the comparison of results from different parts of the sample. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table is a guide to the sampling tolerances applicable to comparisons.

Differences required for significance at or near these percentages			
	10% or 90%	30% or 70%	50%
<i>Base:</i>			
Size of sample on which survey result is based			
1,000 and 1,000	3	4	4
500 and 500	4	6	6
250 and 250	5	8	9

Source: MORI

Definition of Social Grades

This appendix contains a brief list of social class definitions as used by the Institute of Practitioners in Advertising. These groups are standard on all surveys carried out by Market & Opinion Research International Limited.

Social Grades			
	Social Class	Occupation of Chief Income Earner	Percentage of Population
A	Upper Middle Class	Higher managerial, administrative or professional	2.9
B	Middle Class	Intermediate managerial, administrative or professional	18.9
C1	Lower Middle Class	Supervisor or clerical and junior managerial, administrative or professional	27.0
C2	Skilled Working Class	Skilled manual workers	22.6
D	Working Class	Semi and unskilled manual workers	16.9
E	Those at the lowest levels of subsistence	State pensioners, etc, with no other earnings	11.7