

GO Digital Trial: Measuring the impact of radio switchover on consumers

Report on research conducted for the
Department for Culture, Media and Sport

June 2013
12-076048-01

Legal notice

© 2013 Ipsos MORI – all rights reserved.

The contents of this report constitute the sole and exclusive property of Ipsos MORI.

Ipsos MORI retains all right, title and interest, including without limitation copyright, in or to any Ipsos MORI trademarks, technologies, methodologies, products, analyses, software and know-how included or arising out of this report or used in connection with the preparation of this report. No license under any copyright is hereby granted or implied.

The contents of this report are of a commercially sensitive and confidential nature and intended solely for the review and consideration of the person or entity to which it is addressed. No other use is permitted and the addressee undertakes not to disclose all or part of this report to any third party (including but not limited, where applicable, pursuant to the Freedom of Information Act 2000) without the prior written consent of the Company Secretary of Ipsos MORI.

Contents

Executive Summary	3
Acknowledgements	10
1. Introduction	13
1.1 Background and objectives	13
1.2 Methodology	14
1.2.1 Overview of the trial	14
1.2.2 Quantitative phase	16
1.2.3 Qualitative phase	18
2. Radio listening, awareness and attitudes before the trial	20
Chapter Summary	20
2.1. The role of radio and listening habits	21
2.2. Ownership of DAB sets and digital listening across platforms	22
2.3. Awareness and attitudes to a potential radio switchover	24
2.3.1. Awareness of digital radio and the switchover	24
2.3.2. Perceived benefits of digital radio	26
2.3.3. Concerns about a potential switchover	27
3. Installation and usability	30
Chapter Summary	30
3.1. Set-up of the DAB radio sets (or 'out of the box' experience)	31
3.2. Usability of the DAB radio sets	34
3.3. Car conversion	37
4. Perceptions of digital radio	41
Chapter Summary	41
4.1. Overall perceptions of the digital radio listening experience	41
4.2. Experienced benefits of digital radio	42
4.3. Experienced drawbacks or issues related to digital radio	46
5. Changes in listening habits	48

Chapter Summary	48
5.1 Frequency and time spent listening	49
5.2 Choice of stations	52
5.3 Expected future listening habits	56
5.4 Listening on other platforms	56
5.5 Likelihood to recommend	57
6. The Digital Switchover	58
Chapter Summary	58
6.1 Attitudes towards the switchover	59
6.2 Conversion options and listening on different platforms	64
6.3 Barriers and drivers to switchover	65
6.4 Participant recommendations	66
7. Household Typologies	70
7.1 Enthusiastic or Complacent converter	70
7.2 Unexpected converter	71
7.3 Ill-informed converter	72
7.4 Ill-informed struggler	73
8. Conclusions	75
Appendices	78
Appendix 1: Qualitative materials	78
Appendix 2: Quantitative materials	110

Executive Summary

Executive Summary

Background and methodology

Ipsos MORI was commissioned by the Department for Culture, Media and Sport (DCMS) to conduct a digital radio switchover pilot, to document and explore the conversion experience of households from an analogue to digital-only radio environment. The research aimed to understand the issues experienced and potential barriers for conversion, particularly for potentially vulnerable consumers such as the elderly and people with disabilities. The specific objectives for the study were to:

- evaluate the impact on listening behaviour of various conversion options on individual listeners/households;
- explore and quantify any difficulties with setting up and using the new digital radios (including in-car);
- explore and measure the perceived benefits, attitudes and understanding of digital radio by listeners; and
- consider barriers to the take-up and enjoyment of digital radio.

The trial took place in Bath and its surrounding area, and focused on households not already fully converted to digital radio. A multi-stage and mixed methodology approach was employed. The main phase of the project was quantitative, involving interviews with decision-makers in 237 households (197 with the general public and a boost of 40 with vulnerable groups). Alongside this, there were qualitative deep-dive interviews with an additional 25 households recruited (15 general public and 10 with vulnerable groups). Both the quantitative and qualitative research had three stages – before, during and after conversion. Fifteen respondents (11 quantitative and 4 qualitative) also had their cars converted to digital radio. For the purpose of the research, vulnerable respondents were defined as elderly (aged over 75), those living in assisted accommodation with 24 hour care, blind or partially sighted people, or people with other physical disabilities.

Pre-trial thoughts and awareness of digital radio

This research was conducted with households who were not fully digitally converted. This included some who had no experience of digital radio and others who did listen on digital platforms alongside analogue radios. In line with this, at the pre-trial stage there was a wide range in knowledge about digital radio with some able to cite differences between digital and analogue (although often only when prompted) while others had little or no awareness of digital radio. There was a general **lack of awareness about a potential switchover** (46% rising to 64% among those aged 65 or over). Despite this lack of awareness, more than half (55%) thought that **a switchover would be a good thing** for the UK at the pre-trial stage while approaching one third (31%) were unsure.

The main perceived benefits at the pre-trial stage were **improved sound quality** (50%), ease of tuning (28%) and station choice (28%). In the qualitative research, the better sound quality was seen as the main benefit, although sound quality, reception and clarity were often used interchangeably at this stage. Low levels of knowledge of digital radio meant that many were not able to name any benefits of digital radio, particularly among the vulnerable groups (49%). This was supported in the qualitative research with older respondents citing that they were 'not very technological', visibly reluctant to offer unprompted benefits because they were worried that they would be wrong.

Over half (54%) could not think of any drawbacks to a digital switchover. Vulnerable people, in particular, stated that they did not know enough about the switchover to offer drawbacks at this stage (46%). It is important to note that this **low level of concern may reflect a lack of awareness** rather than informed opinion. The qualitative research revealed that the lack of awareness about digital radio among some, particularly in the vulnerable groups, resulted in a lack of concern with some assuming that a switchover would not change anything, even the radio on which they listen. For those who did name concerns, the main one at the pre-trial stage was the need to replace current equipment (58%). This was particularly true for in-car equipment, often spontaneously mentioned in the qualitative interviews by both car owners and those without a car.

Installation and usability

The large majority of respondents, including vulnerable people, found the set-up of the radios fairly **straightforward** and were **pleasantly surprised about how easy** it was to set up and tune in the radios. Among those who did it themselves, more than four in five (86%) stated that they found it easy, although **older people were more likely to have difficulties in setting up the radios**, with some requiring help. Just under a third (30%) of those aged 65 years or over found the initial set up difficult, compared to 8% overall. It took older people longer to understand how to use the radios, tune in the stations, set up presets and set the alarm, in some cases, but most generally managed to do it in the end; in the case of a minority of qualitative respondents, this was only with help from others. The same was true for partially-sighted and blind respondents who were given specially adapted radio sets. Although most did not have significant problems with the set-up of their relevant equipment, some required someone else's help.

The **barriers** to set-up related to the **language** used on the radio and in the instruction manual, and in the lay-out of **the instructions** more generally. In line with the low levels of confidence shown by older people before the trial, some of these in the qualitative interviews revealed that they found the language, such as the word 'mode', confusing. Furthermore, across the groups, there was a sense that the instructions could be made easier and more 'step-by-step'.

Following set-up, the vast majority found the DAB radios easy to use with four in five (79%) finding the radios **easier to use than they initially anticipated**. This was also true for vulnerable groups with three quarters (75%) stating that they had thought they would be more difficult to use than they were. Only around one in ten (11%) found the DAB sets **more difficult to use** than expected, increasing with age and higher among vulnerable people (19%), in particular elderly women (25%¹). The qualitative research revealed that the difficulties encountered by older people tended to be related to the initial set up due to lack of confidence and awareness of how the radios would work. For the minority (15% of general public; 20% of vulnerable group) who had difficulties following set-up, the most cited problem was reception issues (35%²). An important finding to emerge from the qualitative research is that even those who only used the radios in a minimal way and were not aware of all their functions, still tended to be positive about digital radio.

¹ Base size under 50

² Base size under 50

Experience of digital radio

The experience of listening to digital radio during the trial was **very positive**. Four in five found digital radio a lot or a little better than analogue radio (with 61% saying a lot better) and only 5% finding it worse. The main experienced benefits cited in the quantitative research were **better sound quality** (69%), **ease of use** (69%), better **reception or signal** (68%) and the **additional numbers of stations** available (64%). This was supported in the qualitative research with the exception of ease of use, which was not often stated unprompted as a benefit. It is important to note that, as with at the pre-trial stage, sound quality, clarity and reception were often used interchangeably by respondents. Furthermore, improved sound quality was cited by the small number who had mistakenly been listening to FM, which suggests it may be the novelty of the radio set rather than the digital platform that was influencing their opinion.

Although a minority had encountered problems in setting up and using the digital radios, **almost all qualitative respondents could not think of any drawbacks experienced in using digital radio**. In the quantitative research, of the small minority (5% of all respondents and 7% of vulnerable people) who thought that digital radio was worse than analogue at the end of the trial, the main problems they experienced were related to reception and sound quality.

Listening frequency by the end of trial had increased for almost half (47%) of respondents, although it is important to note that this could be related to the nature of the trial and the novelty of owning new equipment and may not suggest long term changes in behaviour. This was particularly among the younger age groups and children; the latter particularly emerging in the qualitative research with some children who had previously been disengaged in radio becoming visibly more animated in the light of their household digital switchover. Many respondents **enjoyed trying out new stations** and seeing what additional stations were available and some had changed their regular stations; however, it is important to note that even for those who had not changed their listening, they still cited station choice as a potential benefit for themselves and other family members and friends. The **vulnerable**, particularly those aged 75+, were less likely to have increased both their listening frequency and the range of stations they chose to listen to. This was supported in the qualitative research with older people tending to stick to the same listening habits as they had with analogue radios.

Attitudes towards switchover

Attitudes towards a potential switchover shifted during the course of the trial. At the start of the trial, there were many who had little awareness about it and some who showed real concerns; this was seen across the quantitative and qualitative research. At the post-trial stage, the qualitative respondents were broadly positive with a potential switchover being seen by most to be less daunting and for many as something inevitable in 'moving with the times'. In the quantitative research, the number of people who perceived digital radio switchover to be a good thing had risen slightly to 60% by the end of the trial (from 55% at the start). However, there remained a significant number who still did not perceive a switchover to be a good idea for the UK at present. Those who were previously undecided had become more likely to form an opinion and most of these perceived it to be a bad thing (rising from 14% to 25%). An important finding is that, **vulnerable** respondents were more likely to have been convinced of the benefits of digital radio after the trial. Almost three in five (58%) claimed to see switchover as a good thing for the UK (compared with 33% pre-trial) while 23% were against it, in line with the general public.

The main reason given against the switchover was related to the cost implications in both the qualitative and quantitative research; in the former respondents were reluctant to discuss this in relation to their own financial position but expressed it in their concern for others on low incomes. The main **barrier** to the digital switchover was thus perceived to be **cost** among both those who had reservations about the switchover and the general public overall (68% and 41% respectively). The **scale** of the switchover, particularly for **car radios**, was also deemed to be a barrier for all members of the general public to convert to digital radio. In the qualitative research, other potential barriers that emerged included knowledge about digital radio generally (for example, that digital reception is different to analogue), the reluctance to replace units (such as existing hi-fi systems), lack of awareness about alternative ways to listen to the radio and the difficulty of set-up. The latter two were particularly shared among **vulnerable** respondents.

Given the positive experience that most had in the trial, it emerged that the main **driver** for a digital switchover is **direct experience** and **increased awareness of the benefits** of digital radio. Other drivers included the removal of some of the main barriers, for example in the provision of step-by-step instructions in less technical language to aid in set-up. Simple information about the differences between digital and analogue radio and the implications for usability and set-up would be an enabler for older people with little or no knowledge of digital radio.

Across the qualitative and quantitative research, there was a widespread proposal for the Government to follow a similar process for a digital radio switchover as that conducted for digital television switchover. This was particularly because many looked back positively at the process of switching televisions to digital. Specific **recommendations** included:

- The provision of information about digital radio and the switchover, including why it is happening, and sufficient time for the general public to prepare for it;
- Running advertisements on all media;
- Offering financial support by subsidising equipment (this was particularly felt by vulnerable people with 40% saying this should be a top priority); and
- Providing face-to-face assistance in set-up for vulnerable groups.

Car conversion

Across the qualitative and quantitative research, **the installation experience and usability of the converted car radio equipment** was positive for the majority. A few experienced issues, primarily with reception. By the end of the trial, nearly all (10 out of 11) felt confident in using the new digital radio equipment in their car. However, it is important to note that only 5 out of 11 found using the new digital radio equipment in their car easier to use than initially anticipated with the main reasons for this being safety, security concerns and the inconvenience of removing the equipment at night.

The conversion of car radios was a significant barrier highlighted in the main phase of the research with approaching half (47%) showing concern at the post-trial stage for this in the event of a switchover. Furthermore, in the event of a switchover, respondents stated that they were less likely to convert their car radios.

Household typologies

Through the qualitative research, four household typologies were identified based on their awareness for, attitudes towards and experience of digital radio. These are:

Enthusiastic or complacent converter: at the pre-trial stage, these **raised few concerns** about digital radio and the switchover and, on receiving the radios, did not encounter any significant problems in set-up or general usability. They tended to enjoy digital radio with some, particularly younger household members, listening more regularly than before the trial. They do not raise any concerns if there were to be a switchover.

Reluctant converter: these had **reservations about digital radio** at the pre-trial stage, often because of affection to analogue radio, which is the principal media in the household. They had a broadly positive experience of switching to digital radio and **changed their opinion** and cited a number of benefits by the end of the trial. This group may be resistant at first to a digital switchover but do not represent significant concerns given that their opinions can be altered on buying digital radios.

Ill-informed converter: This group tended to have **very little knowledge** of digital radio and the potential switchover at the pre-trial stage. Following the experience of switching over, they were **very positive** about the process they had been through and the idea of a digital switchover as a whole. However, this group **may be a cause for concern** because they will not actively seek information about a digital radio switchover and it includes some vulnerable and elderly respondents who are less knowledgeable about what digital radio means. To engage this group, **clear language** and **targeted advertising** to raise awareness about the benefits of digital radio will be needed.

Ill-informed struggler: This group is mainly comprised of elderly respondents who lack confidence in using digital radios and so would cause **most concern** and **need most support** if there were a digital switchover. They tend to **know little about digital radio** or the switchover but were not resistant to the idea of it. They are most likely to encounter problems in setting up the DAB radios often driven by lack of knowledge about digital radio and an expectation that the radios will work in the same way as their old analogue system. They were mainly positive about the experience of switching to digital radio but their experience suggests that in the event of a switchover, they would rely on support from others. They need help to fully understand the benefits and how to use digital radio and the Government may need to offer support to those who do not have friends and family to help set up the radios.

Acknowledgements

Acknowledgements

The authors would like to thank:

- John Mottram, Gareth McCallion and Lee Smith from the Department for Culture, Media and Sport for their input and comments on the research,
- Members of the Consumer Expert Group (which advises government on consumer issues relating to the digital switchovers of television and radio) for their assistance with vulnerable participants,
- Pure, Roberts, Sony, British Wireless for the Blind Fund and Halfords for supplying digital radio equipment and
- Tim Moss and the staff at Moss of Bath.

1. Introduction

1. Introduction

1.1 Background and objectives

In 2010, the Government launched the joint Government-industry Digital Radio Action Plan (DRAP) to ensure that if, or when, the market is ready for a radio switchover it can be delivered in a way that protects the needs of listeners and results in a radio industry fit for a digital age. Radio switchover is the point at which all national and large local stations currently broadcasting on both Digital Audio Broadcasting (DAB) and analogue frequencies will cease to broadcast on analogue. Listening to analogue radio will still be possible but only for small local and community stations which will use the vacated FM spectrum.

The purpose of this Action Plan is to provide the information to allow for a well-informed decision by Government on whether to proceed with a radio switchover. The Action Plan addresses a wide range of issues, including DAB coverage planning, waste disposal and energy consumption; which have been key themes of the public debate around a Digital Radio Switchover. In addition, the Action Plan will also establish the framework for how such a transition would be implemented and delivered. Another key element of the Action Plan is the development of the Cost Benefit Analysis of the radio switchover policy. The purpose of which will be to quantify the benefits and costs of the proposed radio switchover and to determine whether such a policy is in the interest of the UK.

The UK leads the world in the take-up of digital radio and the market continues to grow; over 15 million DAB radios have been sold to around 42%³ per cent of households. Around a quarter of all new cars now include DAB radio as standard⁴. There has also been progress against the Government's switchover criteria:

- at least 50% of all radio listening should be via digital platforms; and
- national DAB coverage should be comparable to FM, and local DAB reach 90% of the population and all major roads.

The latest Radio Joint Audience Research (RAJAR) data indicates that digital listening to radio across all digital platforms now accounts for 33%⁵ percent of all radio listening, up 14% year on year. In relation to the second target, the British Broadcasting Corporation (BBC) has committed to expanding its national networks to cover 97% of the population, and at least five new local multiplexes will launch in the next year.

The Government will, by the end of 2013, make a decision on whether a radio switchover is in the best interests of broadcasters, manufacturers and, most importantly, consumers. This decision will provide a clear statement of the Government's intentions and set out in detail how any future radio switchover would be funded and implemented. As part of the cost benefit analysis that will feed into this decision in 2013, the Department of Culture, Media and Sport (DCMS) need to understand the impact of any future radio switchover on households and specific consumer groups, such as the elderly and vulnerable groups, in a controlled testing environment and the potential barriers to conversion.

³ RAJAR Q4 2012 results

⁴ CAP Q2 2012 analysis

⁵ RAJAR Q4 2012 results

To this end, the DCMS commissioned Ipsos MORI to conduct a switchover pilot in the first quarter of 2013. The principal aim of this research was to understand and record the listener experience of various household conversion options from an analogue to digital-only radio environment and the potential barriers of such conversion for some consumer groups. In particular, the research aimed to **explore conversion issues with potentially vulnerable consumers** such as the elderly and people with disabilities.

The specific objectives for the study were to:

- evaluate the impact on listening behaviour of various conversion options on individual listeners/households;
- explore and quantify any difficulties with setting up and using the new digital radios (including in-car);
- explore and measure the perceived benefits, attitudes and understanding of digital radio by listeners; and
- consider barriers to the take-up and enjoyment of digital radio.

1.2 Methodology

1.2.1 Overview of the trial

Bath and its surrounding area was chosen as the location for the trial, as it has good DAB coverage, covers a mix of urban, suburban and rural areas and is a location where TV switchover has been fully completed for a long period of time.

The research focused on households not already fully converted to digital radio. This included households who only listened to analogue radio, as well as those who listened to both AM/FM and digital radio, regardless of whether they already owned a DAB radio set. Based on Q4 2012 RAJAR data, this represents about 78.3% of all adults aged 15+ in the UK (39.5% AM/FM only versus 38.8% listening to both AM/FM and digital radio). The only excluded households were those where no one listened to the radio at home or in their car and those where people only listened via digital platforms.

A multi-stage approach was employed. In all cases, the households' analogue radio devices that the main respondent listened to **at least once a week** were removed and replaced with a DAB radio set, or sets, so as to understand the impact of this conversion (in all parts of the house and/or car) on the normal behaviour and attitudes of the household, as well as to explore potential barriers for key groups⁶.

To meet the research objectives, a mixed-method methodology was assessed to be the most appropriate approach with a combination of **quantitative and qualitative** methodologies. The main phase of the project was **quantitative** and involved recruiting and conducting interviews with decision makers in **237 households** (197 with the general public and a boost of 40 with vulnerable groups) **before, during and after conversion**, in order to provide robust findings on the impact of a full digital conversion on listening behaviours and attitudes. In parallel to the quantitative phase, an additional **25 households were recruited** (15 general public and 10 with vulnerable groups) and **a three stage qualitative exercise was also conducted** before, during and after conversion to enrich and add depth to the findings

⁶ Analogue radios were not physically removed from homes but all respondents were asked to only listen to radio on the DAB radios and other digital platforms.

from the quantitative phase. This was to enable a better understanding of the impact of the digital conversion on all members of the households and to allow for more exploration of potential issues for vulnerable groups.

Across the quantitative and qualitative research, households were given DAB radios that as much as possible were of a similar function to the analogue radios they already owned; for example, in replacing an analogue alarm clock radio with a DAB one. Where possible, households were allocated a different range of models, to enable them to try out more than one brand of radio. Partially sighted and blind respondents were given DAB radios specifically designed for those with visual impairment. In the quantitative sample, up to four analogue radio sets were replaced (those that the main respondent (decision maker) listened to at least once a week). In the qualitative sample, all analogue sets that members of the households listened to at least once a week were replaced (up to seven for one household).

It is important to note that the trial was an artificial process and does not necessarily match what would happen for these households if there were to be a switchover. For example, the household who received up to seven new DAB radios replacing all the analogue sets people regularly used in that household, may not have had the finances to do so all at once in real life. Respondents were also not given a choice of the model they received as they would be able to in real life. In the trial, we used a range of entry level or mid-range DAB portable radio sets and did not replace larger items such as hi-fi's with DAB equivalents. Respondents who regularly listened to the radio on a hi-fi, home sound system or a CD player, were asked to continue to use their existing equipment to listen to CDs, tapes etc. but asked to use the new portable DAB radio set(s) to listen to the radio. This could contribute towards some negative feedback about the specific radios they received, which in turn could impact on their overall assessment of digital radio across the household and car radios.

Twenty respondents (15 quantitative and 5 qualitative) were also initially recruited for the car conversion. Out of these 20 respondents, 15 (**11 quantitative and 4 qualitative**) went on to get their **car radio converted** to digital at their local car accessory retailer, with a choice of a new built-in DAB unit replacing their car stereo or a DAB adaptor attached to their existing car radio, depending on their car brand and model and personal preferences. The remaining 5 decided to drop out of the trial. This was due mainly to respondent availability during the required field period and willingness to either make a product choice, or travel the distance with their car to the designated store. Due to the nature of the trial, this was expected, given that there was no 'want' or 'need' for the product to be provided or installed coming from the respondent's side. This would be likely to be different in a real situation, as the demand would come from the customer, who would therefore be more engaged with the process. It is worth noting that a couple of respondents also decided to drop out of the trial due to reception issues.

1.2.2 Quantitative phase

Methodology

As the trial required changing the radio equipment in each household and car(s), we recruited and interviewed a key decision maker in the household aged 18 or over, i.e. the chief income earner or main shopper. This was to ensure that the person recruited had sufficient authority within the household to agree to such a trial on behalf of all members of the household. The quantitative survey universe was therefore defined as all **decision makers aged 18 or over** living in Bath and surrounding area, listening to an **analogue radio set at least once a week** at home or in the car, and **not fully converted** to digital radio at home.

The quantitative phase was conducted in **3 stages** between the middle of January 2013 to the end of March 2013, as outlined below:

Stage 1 (mid to end of January 2013):

The recruitment and a 20 minute pre-trial interview were conducted face-to-face in home with a household decision maker, in mid to late January, using CAPI (Computer Assisted Personal Interviewing). This first stage interview was designed to screen for eligibility, explain the pilot and obtain co-operation. It also aimed to provide a benchmark for awareness of and attitudes towards digital radio, its benefits and digital radio switchover (and their attitudes to digital TV switchover), collect information about the household's radio equipment (including cars); establish current radio listening habits and station repertoire in detail and collect demographic information and details of all household members.

Stage 2 (early to mid February 2013):

This was followed by a 10 minute telephone interview shortly after installation of the digital radios with the main contact person, designed to obtain initial reactions to the new equipment; ascertain ease of set-up of the new equipment; establish whether they have tried any new stations or had difficulty in tuning into their favourite stations etc.

Stage 3 (mid to end of March 2013):

A final 20 minute CAPI interview was conducted face-to-face five to six weeks after the conversion, to collect detailed reactions to the trial in terms of the equipment and the perceived difficulties and benefits of digital radio, establish current radio listening and station repertoire (to compare with pre-installation findings) and respondents' own perceptions of how their radio listening had changed, if at all, and compare any changes in attitudes to a potential switchover.

To encourage people to take part in the trial, the households were allowed to keep the digital equipment at the end of the trial.

Sample sizes

In total, **237 households** representative of households not already fully converted to digital radio took part in all 3 stages of the quantitative phase. This also included a boost of 40 **vulnerable households**, defined as elderly (aged over 75), those living in assisted accommodation with 24 hour care, blind or partially sighted people, or people with other physical disabilities. As vulnerable people were also found in the main sample, the quantitative phase provided a total analysable sample of 81 vulnerable people, as detailed in the table below.

Analysable sample sizes	Total 237
General public	197
Analogue radios replaced by DAB sets at home	186
Analogue car radios converted	11
Vulnerable	81
Blind/partially sighted (all ages)	9
Requiring assisted care (all ages)	12
Elderly (aged 75+) with disabilities/health issues	32
Elderly (aged 75+) with no specific disability/health issue	36

For the main sample, sample points were selected to be representative of the target population living in the area. Non-interlocking quotas were then set in order to ensure a representative sample of the target population, according to gender, age, working status, household size, ownership of DAB radio set and listening to digital radio, using the latest RAJAR data. For the vulnerable sample, we used a mix of contacts from charities, free finding and snowballing.

In the quantitative phase the same key decision maker was interviewed at all 3 stages of the trial (before, during and after) to understand the impact of the conversion on their behaviour and the behaviour of the rest of the household in general. The qualitative phase explored in more detail the impact of the trial on all of the family.

Interpretation of the quantitative data

All interviews were processed and computer analysed by Ipsos MORI. The final data for the main sample (general public) were weighted to be representative of the target population (using the latest RAJAR data), according to gender, age, working status, social grade, household size and DAB ownership. The data from the vulnerable sample (N=81) and car conversion sample (N=11), however, were not weighted due to the small sample sizes involved and the different types of vulnerable people interviewed.

It is important to bear in mind that the quantitative survey is only representative of those people who completed the trial and not the entire population of Bath. Consequently, all results are subject to sampling tolerances, which means that not all differences are statistically significant. In addition, please note that base sizes of less than 50 should be treated with caution, and as indicative rather than definitive. In these cases we have highlighted this in the report.

1.2.3 Qualitative phase

The qualitative research was conducted in parallel to the quantitative phase over the same three stages. This enabled a ‘deep dive’ approach to fully explore each individual household’s experiences of switching over to digital radio and whether this led to shifting attitudes towards digital radio and a potential switchover.

Stage 1 (mid January 2013)

At the pre-trial stage, face-to-face depth interviews were conducted with all households recruited for the research. These were held in-home to enable as full an understanding as possible of the **contextual issues**, and allow participants to offer **real examples** of the role that radio currently plays in their lives. This enabled us to ascertain a baseline understanding of current attitudes and behaviours; to establish current radio listening habits/repertoire in detail; and to explore any concerns the participants may have had in anticipation of the switchover.

Stage 2 (early February 2013)

Shortly after the respondents collected and set up their DAB radios, telephone interviews took place with a designated respondent aged 18 or over in the household. This served as a ‘check-in’ point for giving **feedback on the out of box, and installation process** and for probing any **early changes** in listening habits. This stage was designed to gauge initial reactions to the new equipment; to explore personal experiences of the installation process, including how they dealt with any arising challenges and why they chose these strategies; to discuss any early changes in behaviour (e.g. use of new stations) and the reasons behind them.

Stage 3 (mid March 2013)

At the final stage of the study, interviewers returned to households in home for a final in-depth, face-to-face depth interview to **explore the full impact of the conversion in detail**. Objectives of this final stage were to explore whether reactions to the equipment had changed since installation, and why; to discuss take up and enjoyment of digital radio and probe the barriers to this in detail; to discuss how and why listening habits had changed, if at all, and gauge respondents’ reactions to this change; to compare the process of switchover to respondents’ initial expectations, probing on whether they differed, and if so how and why. As far as possible, the same interviewer conducted interviews across the three stages so as to enable coherence and contextual inputs across qualitative research.

Qualitative Sample

	General Public	Vulnerable consumers
Stage 1: Before conversion	15 x 2 hour face-to-face family interviews	10 x 2 hour face-to-face family interviews
Stage 2: During conversion	15 x 1 hour telephone depths	10 x 1 hour telephone depths
Stage 3: After conversion	15 x 2 hour face-to-face family interviews	10 x 2 hour face-to-face family interviews

Twenty general public households were recruited across Bath with quotas placed on life stages, number of people in the household and socio-economic groups to reflect different household types. All households had at least one member who listened regularly to the radio and owned at least one analogue radio.

Of the 20 who were recruited, five did not continue to the end of the trial. The final 15 households included five single occupancy homes, one with two adults and nine were multi-occupancy with children living in the home (although two of these had children below the age of five and so were not involved in the research).

In addition, 10 households defined as 'vulnerable' were also recruited, defined as elderly or as having a disability. A good mix of those who are blind / partially sighted, elderly, disabled, isolated and/or living in poverty was aimed for. Three of these households had a member who was blind / partially sighted, while seven had a household member who was elderly (over 75), disabled or who lived alone in sheltered accommodation. While the head of the household was recruited, the research with all households was conducted in family groups to capture the opinions of as many radio listeners as possible.

Interpretation of qualitative data

Qualitative research is not designed to provide statistically reliable data on what the population as a whole is thinking. Instead, qualitative research is illustrative and does not permit conclusions to be drawn about the extent to which something is happening.

Qualitative research is often used to shed light on why people hold particular views and how these views relate to demographic characteristics and the experiences of those concerned. A multi-stage 'deep dive' approach allowed for whole families to participate in the comfort of their own homes and interviewers to observe how radios were used, for example which rooms they were in.

Throughout this report, verbatim quotes are referenced from across the households. Where this is the case, it is important to remember that views expressed do not necessarily represent the views of the household as a whole or the particular group (for example, the vulnerable), although normally the verbatim is representative of at least a minority of households and not a single person. It is also worth bearing in mind that the qualitative research explores perceptions at the time of the deep dives rather than facts that will stay static over time.

When referring to the qualitative and quantitative data, this report uses the term '**qualitative respondents**' and '**quantitative respondents**'. Verbatim quotes are given from both the qualitative deep dives and the open ended sections of the quantitative surveys. It is made clear whether the quote is from the qualitative or quantitative research and gender (F for Female and M for Male), age and type of vulnerability (where appropriate) are also specified.

2. Radio listening, awareness and attitudes before the trial

Chapter Summary

Approaching half (49%) of the quantitative households taking part in the trial already owned a DAB set at home but the majority of households still listened most often on an analogue set (75%). Among those who did not already have a DAB set at home, the majority (67%) said they were likely to buy one in the future, with just one in five (20%) unlikely to do so.

Vulnerable people, particularly the elderly, are more likely to listen to analogue radio. More than half listen only to analogue (56% compared with 31% of all households) while 86% listen most often on an analogue set. They are also less likely to own a DAB set (38% compared with 49% of all households).

Across the qualitative and quantitative research, the majority had some awareness of digital radio and could cite some differences between digital and analogue, although this was often only when prompted. There was a general lack of awareness about a potential switchover. More than half (54%) were not aware of a potential digital radio switchover before the trial, rising to nearly two thirds (65%) of respondents without a DAB set at home not aware.

At the pre-trial stage, there was some confusion about the process of switching over to digital radio with a number of misconceptions cited about, for example, what would happen to people's radios in the case of a switchover. This confusion and lack of knowledge resulted in a lack of concern among some who felt that the digital switchover would change nothing, not even the radio on which they listen.

More than half (55%) thought a digital switchover would be a good thing for the UK, before the start of the trial with a similar proportion (54%) not able to see any drawbacks to a switchover. However, a third (33%) raised concerns about a switchover with a significant minority still undecided (13%), rising to 36% among vulnerable respondents.

The main concern voiced at the pre-trial stage about a digital switchover was the anticipated need to replace their current equipment (58%). Many also did not think that they knew enough about a potential switchover. This was particularly among the vulnerable with approaching half (46%) stating this as the pre-trial stage.

2.1. The role of radio and listening habits

All households included in the trial owned at least one analogue radio (at home or in the car), which the main respondent listened to at least once a week. In most qualitative households, all adult family members listened to the radio, while children listened in varying degrees.

Most respondents listened to radio everyday (72%), and listened primarily at home (98%) or in their car / vehicle (67%). Older people were more likely to listen everyday, 89% of those aged 65 years or over listened to the radio daily compared with 59% of those aged under 45 years. They were also more likely to listen to the radio for longer, listening on average 27 hours a week compared to 21 for those aged under 45 years.

Some of the qualitative households relied upon radio as their principal media and when prompted, most stated that they could not live without the radio. This was across the age groups but again, particularly noted among the elderly and vulnerable. Older qualitative respondents tended to feel attached to the radio; with some of those living alone stating that it was like having a companion in the home:

'I love my radio. I rely on the radio more than anything else... You have the radio to cheer you up, it's a way of life and I would really be lost without it.'

(Qualitative, M, 76, vulnerable – blind/partially sighted)

'The radio is on 24/7, even if I pop down to the village the radio stays on, it's like there is someone home when you get back in...I'd be lost without the radio, it's like having a person being in the house...if the radio broke it would be like the electricity went and I can't put on the kettle.'

(Qualitative, F, 74, vulnerable – sheltered accommodation)

However, this sense of strong attachment to the radio was not restricted to older respondents. One woman, in particular, spoke about the radio with great affection:

'It is where I find out everything about what is going on...I would be lost without the radio, I feel like it is a trusted friend...I really would feel bereft without it...it's like an institution.'

(Qualitative, F, 40)

At the other end of the spectrum, there were some qualitative and quantitative respondents for whom radio was a part of their life but they did not rely upon it or feel that it was essential. Interestingly, among the qualitative respondents, some of these were the households for whom their main listening was outside of the house, either in the car or at work. Children also tended to be less engaged in the radio, using alternative media such as listening to MP3 players or watching television. In the qualitative interviews, it was often difficult for the interviewers to engage children and teenagers in the interview about the radio with some seeming completely disinterested in radio.

Across all the qualitative interviews at the pre-trial stage, it emerged that radio was considered a distinctly different medium and not comparable to watching television. Radio listening is very much linked to individual and household routines among the qualitative respondents and the stations and programmes that people listen to are habitual. Listening tended to be split between those who listened to specific programmes and those who had the radio on as a constant in the background.

The kitchen (67%), the car (62%) and the bedroom (54%) were the most popular locations to listen to any radio set, while vulnerable people were more likely to listen to a radio set in the lounge or dining area - 58% compared to 41% of all respondents - alongside their bedroom (57%) and the kitchen (53%). This was supported by the qualitative research in which older respondents tended to have radios in the living room; this was often to listen to specific programmes on a daily or weekly basis.

2.2. Ownership of DAB sets and digital listening across platforms

Just under half of the quantitative households (49%) taking part in the trial already owned a DAB set at home. Digital listening was generally higher than the general UK population with 69% listening to both analogue and digital radio at least once a week either through a DAB set or on other platforms, compared to 31% only listening to analogue radio. This was reflective of the area, with Bath being a more affluent and upmarket part of the UK. However, the majority of quantitative respondents **still listened most often on an analogue set** (75%), rising to 86% among vulnerable people. This was also true for half of those with a DAB set at home.

56% of vulnerable people only listened to analogue radio, compared to 31% of all respondents.

Digital listening was higher than DAB ownership due to **listening on other platforms**. Nearly three quarters (71%) claimed to have ever listened to radio on a television set, computer, tablet or a smartphone, though fewer did this on a regular basis. The most popular device to listen to the radio, beside a radio set, was a television, with a quarter (26%) listening on their television at least once week, one in five (19%) on a desktop/laptop computer or a tablet at home, and only 9% listening on a smartphone online or via an app (rising to 16% of smartphone owners).

As expected, **vulnerable** people, and the elderly in particular, were **more likely to only listen to analogue radio** (56% of vulnerable people listened to analogue only versus 31% of all respondents) and less likely to own a DAB set (38% versus 49%). They were also much less likely to use other devices to listen to the radio (22% listened on other platforms at least once a week compared to 45% of all respondents) and this was primarily through their television set.

Through the qualitative interviews, it emerged that few listened to digital radio on other platforms. In a few cases, the television was used as a replacement radio in rooms where there was not an analogue radio available, or respondents had looked to use their phone to listen to the radio on the move but had not continued to use their phone regularly in this way. One couple in their 70s, where the man was almost completely blind, listened to the radio on their television on a daily basis and had a rigid radio and television routine. They had found the radio stations by chance and did not know that some of the stations they listened to, for example LBC, were only available to them because they were using a digital platform.

The average respondent listened to just under three radio sets (2.6) at least once a week either at home (2.1) or in the car (0.7). Of these, two were analogue (2.1) and less than one (0.6) were DAB or internet sets on average. This was similar to the findings in the qualitative research, although there was one household that had seven analogue radios, which were all used regularly by different members of the family. These ranged from traditional portable radios (69%), larger hi-fi or home stereo systems (50%), in-car radios (63%) and clock radios (36%).

The average person listens to 2.6 radio sets on average on a weekly basis (2 analogue and less than 1 DAB sets)

Among those who did not already have a DAB set at home, two thirds (67%) said they were likely to buy one in the future, with just one in five (20%) unlikely to do so. This rose to 40% of **vulnerable people** saying they were **unlikely to buy a DAB set** in the future. Half (50%) were **happy with their analogue radio**; they got all the stations that they wanted and did not feel they needed a DAB set. Over a quarter also mentioned the **expense** while 19% felt they **did not know enough about it** or were concerned they would not know how it works. Inertia ('I don't need one') was the main reason for older people and vulnerable groups, followed by a lack of awareness and confidence, illustrated by some of the quotes below:

'Never thought about it.'

(Quantitative, M, 80-84, Vulnerable - elderly)

'I would buy one if my analogue radio stopped working.'

(Quantitative, F, 65-74, Vulnerable - elderly)

'I had an expensive (model) radio which broke after 2 years and I didn't feel inclined to buy another. My analogue has gone on forever.'

(Quantitative, M, 75-79, Vulnerable - elderly)

'Nothing I have heard or read would make me think it might be a good thing to have.'

(Quantitative, F, 75-79, Vulnerable - elderly)

'(There are) more important things to pay out for.'

(Quantitative, F, 55-64)

2.3. Awareness and attitudes to a potential radio switchover

2.3.1. Awareness of digital radio and the switchover

Across the qualitative and quantitative research, there was a range in unprompted knowledge about digital radio, generally, and about a potential switchover, specifically. The majority had some awareness of digital radio and could cite some of the differences between digital and analogue, although this was often only when prompted.

However, there was a general **lack of awareness about a potential switchover**. Less than half (46%) were aware of a potential digital radio switchover before the trial. This was highest among men (57% versus 35% of women) and those aged 65 years or over (64% versus 40% of those aged 18-44 years). Those with some existing experience of digital radio, whether through owning a DAB set or listening to digital radio generally, were more likely to be aware of a potential switchover than those without this experience. Nearly two thirds (65%) of respondents without a DAB set at home were not aware of a potential switchover. Across the qualitative respondents who had heard about a potential switchover, there was a **lack of certainty** about where they had found this information. Radio, newspapers and technology websites were all cited but this was more based on assumption than a particular example that could be provided.

Only 46% aware of a potential radio switchover before the trial (32% of analogue only listeners)

The qualitative phase also uncovered some important **misconceptions** about what would happen to people's radios in the case of a switchover. There was a significant level of **confusion** in that some of the respondents did not know the difference between digital and analogue and they assumed that they could still listen on the same radio set with digital radio automatically replacing analogue. A few respondents were also confused about the types of stations available on digital radio, especially among older people. A couple of older qualitative respondents seemed surprised to learn that there were stations available only on the digital platform. This **confusion** and **lack of knowledge resulted in a lack of concern** among some who felt that the digital switchover would change nothing, not even the radio on which they listen.

On the other hand, a few qualitative respondents had extensive knowledge about digital radio and strong opinions about the perceived benefits and drawbacks of fully moving over to digital. These self-proclaimed **audiophiles** tended to be initially **sceptical** about a potential digital switchover, comparing it to the shift away from vinyl. They had some awareness about the potential of a digital radio switchover, but they did not think that they knew a lot about it or that it had been widely publicised. One man, for example, was surprised that he had not heard more about it given that he regularly read technology websites.

'It hasn't been trumpeted like digital TV – there was a huge hoo-haa about the TV switchover.'

(Qualitative, M, 55)

Despite the lack of awareness of a potential switchover, more than half (55%) thought it would be a **good thing** for the UK, before the start of the trial. Just 14% felt it would be a bad thing and under a third (31%) were still **undecided** at this point. The younger respondents were more likely to be in favour (66% of those aged 18-44 years) despite showing lower awareness than over 65s (only 29% of whom felt it would be a good thing). Those who already listened to digital radio before the trial were not universally in favour, with 16% perceiving it to be a bad thing, as did 18% of those who already had a DAB set in their homes. **Vulnerable** people, the elderly in particular, were more likely to be **undecided (51%)**, with a third saying it was a good thing and 16% more negative.

Before the trial, 55% said switchover would be a good thing, 14% a bad thing and 31% were undecided.

The balance of perceptions about a switchover was also seen in the qualitative research. This depended, to some extent, on **individual experiences of the digital television switchover**, with those who were widely unaffected by the switchover tending to be positive about the same thing happening with radio. However, there were a number of concerns raised across respondents, as discussed in section 2.3.3.

When respondents were asked, before the start of the trial, **what they would do** with their existing analogue home radio(s) in the event of a digital switchover, 60% said that they would buy a new DAB set, however 19% claimed they would stop listening in that particular room (rising to 26% among vulnerable people), 13% said they would listen on another device and 9% would replace it by a DAB set they already own. A small minority (4%) planned to keep their analogue radio to listen to small local and community stations (rising to 12% among vulnerable people)⁷. A few qualitative respondents were visibly unengaged in thinking or talking about digital radio and the potential of a switchover:

Interviewer: 'How would [the digital radio switchover] affect people you know?'

Respondent: I don't know, my friends, we wouldn't be that bothered. You'd have to go out and buy a digital radio, other than that we're not worried...I don't know, I'm not worried or concerned about anything.'

(Qualitative, F, 41)

However, in the event of a switchover, respondents were **less likely to convert car radios**. **Among those who listened to analogue radio in the car**, only a third (34%) said they would convert their car to digital radio in the event of a switchover. **A third (33%) were at risk of losing radio altogether** as they claimed they would stop listening to the radio in their car. Just over 1 in 10 (11%) planned to wait until they bought a new car, while 7% would continue listening to small local and community stations and 5% would listen to digital radio in their car via another device. Concern for car radio conversion was also shown in the qualitative research, as discussed in the concerns section 2.3.3 overleaf.

⁷ Under current plans, in the event of a radio switchover, listening to analogue radio would only be possible for small local and community stations. All other stations would only be available on DAB radios or other digital platforms.

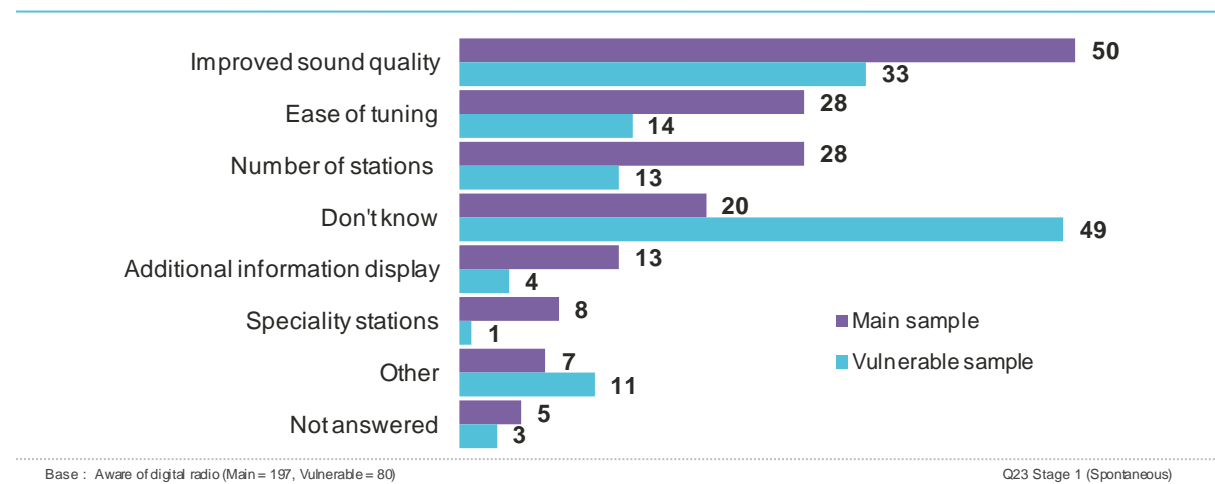
2.3.2. Perceived benefits of digital radio

Overall, before the trial started, few respondents were able to name specific benefits of digital radio unprompted, mostly due to a **lack of awareness**. As shown in the chart below, the improved sound quality (50%) was spontaneously mentioned as the main perceived benefit of digital radio, ahead of the number of stations available and ease of tuning. One in five (20%) did not know and were not able to answer at the start of the trial, rising to 34% among analogue only listeners. All other perceived benefits such as pause/rewind, speciality stations and better reception were spontaneously raised by fewer than one in ten (10%) of all respondents surveyed.

Vulnerable respondents were less likely to think of any perceived benefits of digital radio spontaneously with **half (49%) unable to name any** (rising to 66% among vulnerable only listening to analogue radio⁸). Those who could think of benefits also mentioned improved sound quality (33%), followed by ease of tuning and the number of stations.

50% mentioned 'improved sound quality' but many unable to name benefits of digital radio due to a lack of awareness

Perceived benefits of digital radio pre-trial (spontaneous)



These findings were supported by the qualitative research, where many respondents were not able to name any benefits of digital radio unprompted and where some seemed visibly nervous and uninformed. A number of respondents repeatedly said '*I'm not very technological*' and were reluctant to offer possible benefits in case they were wrong. These tended to be, but were not exclusively, among the older age category. For those who did name benefits unprompted, **better reception, sound quality and tone** were all mentioned. It is important to note that at that stage, for some respondents these three aspects were sometimes used interchangeably. For example, they mentioned sound quality and went on to talk about clarity of reception to explain this. When prompted, most respondents in the qualitative research thought that there would be more stations available on digital than analogue and some could think of specific stations (such as BBC 1Xtra and 6 Music). Auto-tuning and pre-select buttons were also assumed by some to be additional benefits of digital radio. Those who had DAB radios were asked for the reasons that they bought their radio and whether they related to the benefits prompted on here. Respondents stated that they

⁸ Base size under 50

wanted to be up to date, ‘keeping up with the Jones’ and a sense of progress. Aesthetic reasons were also noted by some.

‘I bought it because my daughter has one and I had always admired the tone of it and it blends in well with the furniture, it is not an eyesore like so many analogue radios are...I really like the look of my radio and I thought this is a technological advance. I think you have to go with this and that’s why I’m in favour of it.’

(Qualitative, M, 87, Vulnerable - elderly)

It is important to note that some had bought appliances with a digital radio function but that this was not part of the decision making process. For example, one family had an iPod docking station that had a DAB radio function but they had never used it. Furthermore, the benefits were more likely to relate to the aesthetic of a particular model of DAB radio rather than digital radio generally. No respondents in the qualitative interviews talked about potential benefits of digital radio on any other platform than a DAB radio set.

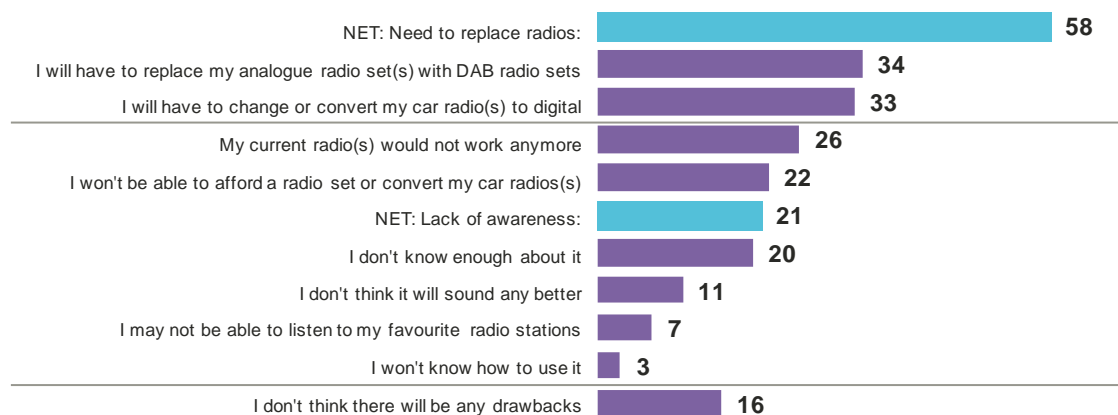
2.3.3. Concerns about a potential switchover

Although over half (54%) of respondents could not see any drawbacks to a switchover before the trial, opinions were divided with a third (33%) raising concerns and a significant minority still undecided (13%), rising to 36% among vulnerable respondents. This reflected **the lack of knowledge** about digital radio among some vulnerable and the elderly revealed in the qualitative interviews.

58% concerned about having to replace current radio equipment, and the cost implications.

The **main concern** about a digital switchover before the start of the trial involved the **need to replace** their current equipment, as shown in the chart overleaf, with a third concerned about having to replace their **existing analogue radios** in working order with DAB sets and another third specifically raising the issue of having to change or **convert their car radios to digital**. Other concerns included existing radios simply no longer working, affordability and the general lack of awareness and knowledge about it.

Concerns about a potential switchover (pre-trial)



Base: All respondents (Main sample = 197)

Q27 Stage 1

© Ipsos MORI

Vulnerable people, in particular, felt they **didn't know enough** about it (46%). They were worried about having to replace their existing radios (36%) and that their current radios would not work anymore (27%). They were also worried they would not be able to afford it (23%), while one in five were sceptical that digital would sound any better and 16% were concerned they would not know how to use it. The lack of awareness and knowledge was the overwhelming concern for vulnerable respondents who currently only listened to analogue radio (71%⁹).

The concern of not knowing enough about digital radio and a fear about whether they would be able to access their usual stations was also observed in the qualitative interviews. However, among qualitative respondents, there was a lack of concern about the set-up of the new equipment and most felt that they would be able to get help from other people to show them how to use it. Older and vulnerable respondents tended to offer previous examples of 'something new or technical' that they had **got family or friends to help with**, for example in setting up their digital TV or a new computer.

For qualitative respondents, replacing their current radio equipment and the cost involved was the main concern. Some felt very attached to their current radio (for example, one married couple had a radio as old as their marriage, which they would be reluctant to throw away). Others had a radio as part of a CD player or Hi-Fi system, which they did not want to replace just because one part of it stopped functioning. **Cost** was given as an important factor together with a feeling **of being forced** into switchover, and that the Government were expecting individuals to take on the cost of the digital conversion.

'I think it is unfair to expect everyone to have to buy new equipment when it is not essential and I personally would begrudge buying a new radio for the car.'

(Qualitative, F, 32)

While the concern regarding cost was an important one given that some respondents were visibly anxious about the potential financial implication for their household, it is also worth noting that there was a **misconception amongst some about the cost of a DAB radio** with figures between £60 and over £100 stated. It is possible that some were looking at only the top of the range radios and were not aware that there were cheaper models of around £30 available.

'I was genuinely surprised by the price of them when I looked to buy one. If I had £150 I would choose to buy something else.'

(Qualitative, M, 49)

This may be related to the fact that people tended to associate digital radio with the more aesthetically pleasing DAB radios (both those who already owned these and those who did not). Furthermore, all qualitative respondents thought that they would need to replace their radios and did not consider digital radio on alternative platforms, such as the television or their computer.

Away from cost, the main concern was **whether there was a need for a switchover at all**. A small number of respondents were resistant to change and seemed visibly worried about a digital switchover.

⁹ Base size under 50

'I can't get my head around it [the switchover], I don't know why they're doing it, I don't take in the full extent of what things are on what and what I won't be able to listen to any more. At the moment I can because the car has LW, I'll be very angry, that's all I'll say.'

(Qualitative, F, 65)

The **conversion of car radios** was a specific **concern** raised in both the quantitative and qualitative research by car owners and non-car owners alike, in particular among those already converted to digital at home. **Among those who specifically mentioned concerns with car conversions**, most (68%) were primarily concerned with the **cost of it**, feeling that they would not be able to afford to convert their car radio(s). Beside the cost, the **lack of knowledge** about how to convert car radios (22%) and the **inconvenience** of having to go to a car dealer or car accessories retailer to make the upgrade (17%) were the main issues. Other spontaneously mentioned concerns about car switchover included:

'Difficulty of installing radio into a bespoke dashboard.'

(Quantitative, M, 35-44)

'The radio needs to be integrated to all the car's electronic systems.'

(Quantitative, M, 25-34)

'I don't think they work very well - people who do have them in their cars say it fades and is not very good.'

(Quantitative, M, 75-79, Vulnerable - elderly)

In the qualitative research, there was also a **concern** about **the size** of the switchover to get all cars digitally converted and an assumption by some that there could not be a switchover until all new cars had digital radio installed. For a small number of car drivers and non-car owners, their first question was about what would happen in cars. This was particularly felt amongst the car drivers who could not imagine time in their car without having the radio on and those who worried that they could not afford to buy a new radio for their car.

'Oh god everyone would have to get new radios in the cars!'

(Qualitative, F, 34)

'99% of cars don't have DAB in them so if the FM transmitters are switched off, I can't see it working because of all those people in cars; I don't see millions of drivers going out and buying a DAB car radio.'

(Qualitative, M, 48)

3. Installation and usability

Chapter Summary

For the majority, setting up the new digital radios was straightforward and most were pleasantly surprised about how easy it was to set up and tune in the radios, taking less than 15 minutes to do so without any help for the majority.

Most vulnerable people stated that they found the set-up process easy but it tended to take them longer to do it. However, older people were more likely to experience difficulties in set-up and need help from friends/family. Just under a third (30%) of those aged 65 years or over found the initial set up difficult, compared to 8% overall.

There was widespread feedback across groups that the accessibility of instructions affected their out-of-box experience with many proposing that the instructions could be improved to make them easier to understand.

Most found the DAB radios easier to use than they had initially anticipated and felt a lot more confident with using them by the end of the trial. This was particularly among those who were self-proclaimed less technologically minded at the start of the trial, including vulnerable people.

Only around one in ten (11%) found the DAB sets more difficult to use than expected, rising to 19% among vulnerable people at the highest for elderly women (25%). The main issue regarding usability that emerged among the vulnerable in the qualitative research was related to initial set up driven by a lack of confidence and awareness of how the radios would work compared to their previous analogue models.

The installation experience for car radios was mainly positive with nearly all respondents stating confidence with using the new digital radio equipment in their car. However, only 5 out of 11 found using the car equipment easier than initially anticipated due to safety, security and ease of use concerns. Overall, the car conversion respondents rated the quality of reception of their new DAB car radios slightly lower than those listening to digital radio at home.

3.1. Set-up of the DAB radio sets (or ‘out of the box’ experience)

The large majority of respondents, including vulnerable people, found the set-up of the radios fairly **straightforward** and were **pleasantly surprised about how easy** it was to set up and tune in the radios. Quantitative respondents spontaneously stated that they found the set up ‘*dead easy – plug in and go*’ (F, 35-44), that it was ‘*surprisingly easy*’ (F, 75-79, Vulnerable), ‘*easy despite me not being very technically minded*’ (F, 45-54). Most (78%) had actually set up and tuned in the new DAB radio set(s) **by themselves**, and in less than 15 minutes (and 89% of these under 30 minutes), while 17% set it up with someone else. Only a minority (5%) got someone else to do it for them, either because they did not feel confident enough (2%) or did not have any interest or time to do it themselves (3%).

86% found the DAB radios easy to set up and tune it

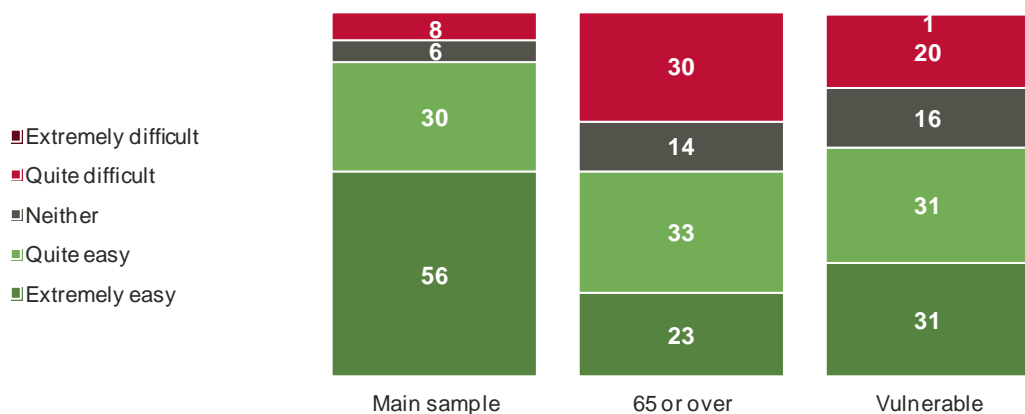
63% of vulnerable people found it easy

More than four in five (86%) of those who set up the radios themselves stated that they found it easy, though this varied by model. For example, one respondent remarked that ‘*...one was completely easy, took me 2 minutes; the other was more difficult, took me longer*’ (M, 85+, Vulnerable). This was mirrored in the qualitative research with most saying that they found the set-up easy; many of these unreservedly shared their **surprise** at how easy it had been given that they were expecting it to be a more complicated process.

‘It was so easy, I was really surprised. I have been playing with the buttons and had no problems at all. It’s been quite fun to do. Bit of trial and error.’

(Qualitative, F, 45)

Ease of set-up of DAB radio(s)



Base : All respondents who successfully set-up and tuned in the DAB radio(s) (Main sample = 173 , Vulnerable sample = 70, Aged 65 or over = 50) Stage 2 (Q3)
 © Ipsos MORI

As expected, **older people** were the ones more **likely to experience difficulties and require help**. Just under a third of those aged 65 years or over found the initial set up difficult, compared to 8% overall, as shown on the chart above. A very small minority of respondents from the qualitative research assumed that their radios were broken or that there was no reception in the bedroom because there was no sound coming from the radio. It transpired that this was because the radios needed to have the time and date set before the

radio would function and the respondents were not aware and had found the instructions confusing so they had given up. One man in his 80s, whose experience of the trial is one of the case studies in section 7, narrated his frustration at setting up the alarm function on the radio, which impacted on his assessment of the radio set, but interestingly not digital radio as a whole, as he continued to be very positive. In general, it also took vulnerable people longer to understand how to use to radios, tune in the stations, set up presets and set the alarm, in some cases, but most managed to do it in the end. Overall, those living alone (15%¹⁰) and women (13%) were also more likely to find it difficult, compared to rest of the sample, but this remained a minority.

Despite some of these issues, it is important to note that the majority of the vulnerable respondents (64%) and older people (56% of those aged 65+) did not have any problems with setting up the equipment, but they were more likely to **seek help from someone else**, often a younger family member or a friend more confident and interested in technology. A third (32%) of those aged 65 years or over, compared with 17% overall, set it up with another person and 1 in 10 got someone else to do it for them because they felt they could not do it (versus 2% in total). About a third of women and those who only listened to analogue radio were also more likely to require someone else's help, as the following examples suggest:

'It was fine but I'm not sure I could have done it without my daughter.'

(Quantitative, F, 75-79, Vulnerable - elderly)

'It was confusing so my daughter helped me. Too many buttons but it was ok after a while.'

(Quantitative, F, 80-84, Vulnerable - elderly)

Overall, only 1 in 10 respondents (12%) found the initial set up difficult or needed the help of someone else, rising to 36% among vulnerable groups. Most of them were **women aged over 65, and living alone**¹¹. This was reflected, to some extent, in the qualitative research where older respondents tended to ask for help from family members or friends.

Only 12% found it difficult or needed the help of someone else

However, an interesting finding to emerge was in the language that older respondents used regarding setting up the radios. In line with their concern about not being 'technologically minded' and a lack of confidence, there was a sense among older respondents that they needed to 'apply themselves' (M, 77) and practise using the radios so as to feel comfortable with the process of using digital radio. For example, one older respondent spent hours reading the instructions and going through the process of setting up and using the digital radios so that he would feel comfortable in using the equipment. Among the older quantitative respondents, a **sense of achievement** was also witnessed. For example, one man stated – *'I thought I would not be able to do it but I did manage and I'm quite pleased with myself'* (Quantitative, M, 80-84, Vulnerable).

The **accessibility of the instructions**, across the groups, was a driver for how people felt about their out-of-box experience. Some felt that the instructions were very clear and made the set-up process problem-free. The partially sighted and blind were particularly positive about the set-up and usability of their radios and were very happy with the instructions to the radios – both the CD and the larger print booklets. One blind man in the qualitative research

¹⁰ Base size under 50

¹¹ Base size under 50

was very positive about the CD, which clearly explained each step that he needed to take in setting up the radio through simple language. This was also supported in the quantitative research where the set-up was praised as *'very easy using the instruction books'* (Quantitative, M, 75-79, vulnerable).

While not necessarily an issue for them, there was widespread feedback that the instructions could be improved to make them more accessible to all users. This included those who had encountered difficulties themselves and also a wider concern that others, such as elderly relatives, would not be able to follow them. Among the minority who experienced problems with set-up, the **main issue** raised across both the quantitative and qualitative respondents was related to the **instructions** that came with the radio, which they felt were **not very clear and they could not understand (59%)**.

'I find the instructions confusing.'

(Quantitative, F, 65-74)

'It was okay but a few things that weren't that clear in the booklet.'

(Quantitative, M, 65-74)

Across the vulnerable and general public respondents, it was felt that the instructions could be improved to make them easier to understand. Step-by-step instructions and diagrams were both thought to be particularly useful. Some also remarked on the small size of the print in the instructions, which made them difficult to follow. It was particularly expressed in the qualitative interviews that the language used in the instructions could be changed to make it more accessible to the less-technologically minded.

'There's a lot of information on how to do one thing in the instructions... [I wish for] just simpler instructions with illustrations with step by step instructions... [they] could be clearer or more basic in plain English.'

(Qualitative, F, 74, vulnerable – sheltered accommodation)

'They're [instruction manuals] all written by computer specialists. Old people are not used to this language. Even the word 'mode', I can't pinpoint it in my mind; in this case it means DAB or FM. I've got more or less the idea, but I find these handbooks a bit daunting, frankly...you have to read these things about 6 times to know what it's saying.'

(Qualitative, M, 87, Vulnerable - elderly)

Where the language was confusing on the radio itself, for example the word 'mode' to signify FM or DAB settings, some respondents looked in the instructions for help and were not able to identify clear explanations of what the word meant. It was felt that there was an assumption in how the instructions were written that everyone will know about digital radio. Clearer explanation of digital radio, generally, would be helpful so as to prevent situations such as that of the respondents who believed their radio could not pick up reception. Clearer guidelines would also help in the situations where respondents ended up on FM by accident and were unaware:

'I've no complaints about it although it has been a struggle with the signal, I had to keep fiddling with it [pointing to button]. I was surprised it never picked up more stations, I'm sure there's something not right with it.'

(Qualitative, M, 65)

Most likely linked to problems understanding the instructions, a third¹² of **vulnerable** people who had difficulties with set-up mentioned **problems with tuning and storing the stations**. This was further reflected in the qualitative research, with the preset function confusing some older respondents. For example, one woman in her 70s switches off all electrical appliances at night and became frustrated by the fact that the presets were wiped every time she switched off the radio. Generally, most people sought the help of a friend or family member, while some persevered with the instructions and managed to sort the problems out themselves.

'It was a fuff around, I just plodded on and it was not difficult really when I had done the first one. It was presetting the stations, which was more difficult.'

(Quantitative, F, 55-64)

Other issues that emerged were the use of a singular button for multiple functions, the alarm function and the size of the display. Although these are specific to certain radio models, the qualitative research suggests that such specific issues can be frustrating for individuals and impact on their overall experience of digital radio.

'Little bit tricky, but followed the instructions. The volume button has two functions and this wasn't made clear.'

(Quantitative, F, 55-64, vulnerable - hearing difficulties)

'The alarm function was difficult to set, I still haven't done it, but the radio itself was easy.'

(Quantitative, M, 55-64)

'I wear glasses and found it difficult to read the information about what they're playing.'

(Quantitative, F, 55-64)

A few were also frustrated by the fact that batteries were not supplied with the radios or that they had to buy a separate rechargeable battery. A couple of people also did not like that some models did not have an on/off button, which meant they had to manually switch the radio off to reduce power consumption.

3.2. Usability of the DAB radio sets

As expected, at end of the trial, most felt a lot more confident with using the DAB radios than they were initially, with 87% very confident compared to 58% at the start of the trial. In particular, those who are less technologically minded and were less confident at the start such as vulnerable respondents (73% now very confident compared to 40% at the start of the trial), those who only listened to analogue radio before the trial, those living on their own and women.

79% felt the DAB radios easier to use than anticipated (75 % of vulnerable)

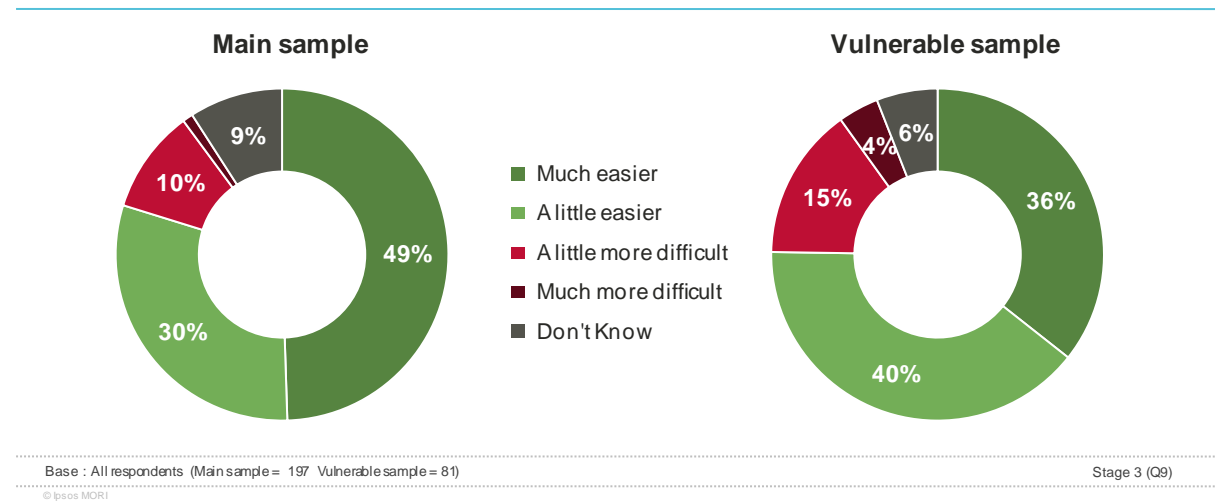
¹² Base size under 50

Looking back, most respondents (79%) actually found the DAB radios **easier to use than they initially anticipated** (49% much easier and 30% a little easier). Nearly all (89%) respondents who had only listened to analogue radio before the trial found it easier to use and over half of women (54%) said it was much easier than they thought compared to 44% of men.

'I wasn't too happy to use something new but they were surprisingly easy to use.'

(Quantitative, F, 55-64)

Easier or more difficult to use than initially anticipated



The main reason stated for finding the radios easier to use than expected was **how simple it was to tune in the stations**. They only needed to press one button and all the stations were tuned in instantly. They also found it easier to change and store stations as presets, with the display on screen.

'You just plug them in and they do everything for you including setting the time.'

(Quantitative, M, 25-34)

'I just plugged it in and that was it. I thought I'd have to faff around with the presets.'

(Quantitative, F, 25-34)

Generally, most respondents naturally got used to using the radios over time, with the help of the instructions, and found them easier to use once they knew what to do. As they were not sure what to expect, vulnerable people and those generally less confident with technology thought it would be more complicated than it was to set-up and use. Three quarters of **vulnerable people** found the DAB radios they were given simpler to use than expected. This was supported by some in the qualitative research including those in the older and vulnerable groups. However, it is important to note that older people felt they needed to 'apply themselves' and 'give it my full concentration' to be able to set up and use the DAB radios.

'In this day and age, with this new technology, being the age we are, it can be very difficult but I found this quite easy... I had no problems whatsoever, it was 'plug-in-play'...the radio alarm needs a bit of concentrating but I got there.'

(Qualitative, M, 72, Vulnerable - elderly)

'Marvellous, I have no problem, most of it is preset. I turn it on and I find it easy to work and it's only me using it so there is no-one to mess around with it. I'm using it is a treat. There is nothing to turn and search, I just press and something is available.'

(Quantitative, F, 80-84, Vulnerable - blind/partially sighted)

Overall, a **minority** (11%) found the DAB sets **more difficult to use** than expected. This generally increased with age and was higher among vulnerable people (19%), in particular elderly women (25%¹³). The main issues regarding usability that emerged among the vulnerable respondents in the qualitative research were related to initial set up due to lack of confidence and awareness of how the radios would work. A key finding to come out of the qualitative research is that even those that had problems with the set-up of the radio or were only using them in a limited way still tended to be mainly positive about the radios and their usability.

Interestingly, a significant minority (18%) switched their new DAB radios on to the AM/FM setting during the trial, mostly to compare the sound quality between analogue and digital (62%) but also to listen to stations they could not get on digital (17%). In the qualitative research, no respondents had chosen to change to AM/FM but there were three who were listening on AM/FM without realising that they had changed the settings.

Overall, 15% percent experienced some **problems** with their DAB radios **after the initial set-up**. Again, this was higher among vulnerable people (20%), and in particular the elderly and those living alone. A third of the problems encountered were related to **reception issues** (35%¹⁴). Other issues ranged from trouble tuning in stations (16%), problems with setting and locating stored presets (14%), a poor battery life (12%) and problems with the alarm function on clock radios (8%). These issues were mentioned across models, and not specific to a particular model. Out of the 16¹⁵ **vulnerable** people who had issues after the initial set-up, six had problems tuning in stations, five with presets and four mentioned a poorer signal. These statements reflect some of the issues that individual respondents had:

'Bad reception. Cuts out twice in every minute. Have tried relocating but resetting it was very difficult. Initial set up was very difficult as instructions were too small to see and it drove me mad!'

(Quantitative, F, 75-79, vulnerable - elderly)

'I know you can program it but I find it difficult to switch the stations, not difficult, more inconvenient.'

(Quantitative, F, 65-74, vulnerable - blind/partially sighted)

¹³ Base size under 50

¹⁴ Base size under 50

¹⁵ Please note that this sentence is expressed in terms of number of people rather than percentages as only 16 out of the 81 quantitative vulnerable sample experienced issues after the initial set-up.

'I did not enjoy the experience the presets were confusing to set.'

(Quantitative, M, 65-74, vulnerable – health issues)

'...the buttons are confusing, the volume button is the same as the tuning button. It is not easy to tune, you have to ensure that there are two arrows on the screen before tuning. I know that sounds simple but it is not.'

(Quantitative, F, 75-79, vulnerable - elderly)

To overcome these, respondents sought **help from various people and sources**, some got the help from a family member or a friend, others used the instructions from the manual, some bought replacement batteries, a couple went back to the retailer, one called the manufacturer, but nearly half did not actually manage to overcome the problems. However, overall, the **majority** of respondents (87%) **did not feel they needed extra help, on top of what was already available** to them. The rest suggested clearer or simpler instructions (10%), rising to 31% among those aged over 65 years. Some elderly respondents suggested manuals with bigger print and simple instructions, simple steps and diagrams. Others also suggested including a chart showing the stations available inside the instruction manuals. Some respondents also suggested help from a retailer (4%) or a leaflet explaining how to use a typical digital radio (4%). Other options were mentioned by less than 2% of the sample. For **vulnerable** people, although over two thirds (68%) did not feel the need for extra help, those who did also wanted clearer and simpler instructions (16%), help from a retailer (9%, rising to 16% among those were new to digital) or a more user-friendly model (4%).

It is important to note that the qualitative research suggests that, perhaps due to the nature of the trial or the novelty of the equipment, people will be positive about digital radio despite the fact that they are using them in a limited way because of a lack of awareness of some of its benefits (for example, station choice). Examples of these include a woman in her 30s who was talking about how great digital radio was even though she had not been able to access most stations and an older man who could not think of any problems with the radios but had not set up the preset buttons or realised there were more stations available.

3.3. Car conversion

The **installation experience** for car radios was **mainly positive**. Out of the 12¹⁶ respondents who had radios installed in the quantitative sample, five had a DAB car adaptor fixed to their existing car stereo while seven had a new DAB car radio installed in their car replacing their existing analogue radio. Most were given a choice between the two options although the car accessory retailer advised respondents on the best solution based on the age and model of their car. The installation of the chosen solution took 53 minutes on average, but lasted nearly 2 hours for one respondent.

Most were completely or fairly **satisfied with the installation process** (11 out of 12) and the level of customer service provided, when interviewed straight after the conversion. Respondents felt they were given instructions on how to operate the new radio and the

¹⁶ Please note that figures in this section are expressed in terms of number of people rather than percentages due to the small number of respondents who had their car radio converted to digital.

steering controller. A couple of respondents felt that the installation was straightforward and claimed they did not need extra instructions. One particularly knowledgeable respondent, requested to pick up the required equipment from the car accessory retailer so that he could fit it himself. Only one person in the quantitative research was very dissatisfied but the issue was related to the length of the installation. Of the four in the qualitative study, most were very happy with the service they got from the car accessory retailer where they were given a clear explanation as to how the radio worked. The amount of help that they received in, for example, autotuning and setting the preset stations, impacted on this. As one respondent remarked:

'If I had to do it myself I'm not sure I could do it.'

(Qualitative, F, 43)

One qualitative respondent had a particularly difficult experience in the installation of car radio. Although the specifics of this case are not of great relevance for this study, this experience did impact on her perceptions of digital radio as a whole.

Initial reactions to digital radio after installation were **mainly positive**. The majority of those in the quantitative sample who listened to their new digital radio in their car after installation were very happy with the experience (9 out of 11) and had no issues. Two thirds (7 out of 11) felt it was an improvement on their previous analogue car radio, citing a better sound quality and clarity of reception (6 out of 7), and the additional number of new stations (4 out of 7) as the main benefits and differences with their previous analogue radio. For example, one respondent remarked that she was *'getting reception where not previously possible'* (Quantitative, F, 18-24, built-in DAB radio) and another that she now had *'clear reception and can listen to new stations.'* (Quantitative, F, 35-44, DAB adaptor).

7 out of 11 felt that digital radio in the car was better than analogue citing better sound quality, reception and choice as the main reasons.

A few respondents, however, experienced **reception issues** and claimed the **signal was not as good** as their previous analogue car radio. Of these, one was related to reception issues with the DAB car adaptor due to a heated windscreen in the car. The respondent contacted the car accessory retailer after the installation to try and solve the problem. The fitter then attended the respondent's home and resolved the reported reception issue by installing an alternative antenna solution to the car. It is worth bearing in mind that this would not necessarily reflect a typical customer service.

Due to the reception problem after conversion, another decided to use the FM setting as he could not get a digital signal in Bath, although it worked well outside Bath. This respondent subsequently dropped out of the trial. Another respondent had the opposite problem with good reception in central Bath but weak when on the outskirts. Overall, the car conversion respondents rated the **quality of reception** of their new DAB car radios slightly lower than those listening to digital radio at home (3.7 out of 5 on average for car radios versus 4.5 for home radios). Interestingly, problems with reception were not cited by the respondents in the qualitative study.

Over the course of the six weeks trial, four out of the final 11 car respondents **experienced some issues**. These included loss of reception and specific issues with the usability of the radio, in particular one had the adaptor fall off the dashboard and one had left after

installation without instructions, which made it more difficult to use later. Three of them sought the **help of the car accessory retailer** to solve the issues, while the last person got help from someone else (e.g. friend/family/neighbour). As the retailer installed and fitted everyone's car, bar one, with a DAB adaptor or a full unit, respondents felt generally happy with the process and did not think they would have liked any further help. Only 2 out of 11 suggested simpler instructions or a more user friendly model. One qualitative respondent had to return to the store because she switched to FM by mistake and was not able to return it to the original settings. Another got home from the retailer and realised that she did not know how to turn off the radio but found the instruction manual to be very helpful in solving this problem.

Nearly all respondents (10 out of 11) are now confident with using the new digital radio equipment in their car, as they became used to it over time and got all their preferred stations programmed. Increased confidence in using the radios was also found in the qualitative research. However, **only 5 out of 11** found using the new digital radio equipment in their car **easier** than initially anticipated. The main reasons cited by the 6 respondents who did not find them easier were related to **safety, security** concerns and the **inconvenience** of having to take it out of the car after each journey:

'Fewer functions in older analogue/ now actively searching for new stations/ have to take face off radio when leaving / security worries/ not needed before.'

(Quantitative, F, 35-44, new DAB unit)

'Because it is easily knocked out from its stand and difficult/unsafe to put back while on the move.'

(Quantitative, M, 45-54, DAB adaptor)

'Convenience, hassle to take it out of car each journey.'

(Quantitative, M, 35-44, new DAB unit)

Across the qualitative and quantitative research, **most were positive about having digital radio in their car** compared with analogue. Most cited better sound quality and the reception as the main reason as well as the additional stations, but two out of 11 people did not think it made a real difference to them and felt it was exactly the same as analogue, while two respondents thought it was worse because of the reception issues they were experiencing and had to switch back to FM, as explained by the following respondents:

'Not perfect, lose signal, getting white noise. Requires attention to change stations whilst driving.'

(Quantitative, F, 45-54, DAB adaptor)

'Signal not always strong, ok in town, not so good, and here no signal at all at my home - no signal in the drive.'

(Quantitative, F, 25-34, DAB adaptor)

Key lessons learnt: installation and usability

The majority had no problems with setting up or using the digital radios. For those that did, they tended to be related to a lack of knowledge about the differences between digital and analogue radio, generally, and the difficulty of understanding the radio instructions. This suggests the importance of clear instructions for the set-up of the radios but also more generally for an explanation of how digital radio works.

Vulnerable and older people tended to have more difficulties with set-up. In the event of a switchover, offering support, in person and via leaflets, would help in setting up and explaining the basics of digital radio.

4. Perceptions of digital radio

Chapter Summary

The experience of listening to digital radio during the trial was generally very positive with three in five (61%) finding it much better than analogue radio. Many of those who were initially sceptical about the potential switchover changed their opinion in the light of direct experience of digital radio.

The main experienced benefits cited, in varying degrees, across the qualitative and quantitative research were better sound quality, better reception or signal, ease of use and the additional numbers of stations available. For vulnerable people, sound quality emerged as the main benefit.

Almost all qualitative respondents could not think of any drawbacks that they had experienced in using digital radio, despite some of the problems they encountered, as described in the previous section. In the quantitative research, the main drawbacks experienced related to reception and sound quality.

4.1. Overall perceptions of the digital radio listening experience

The experience of listening to digital radio during the trial was **very positive** across the qualitative and quantitative research. In the latter, 61% of respondents rated it as a lot better than analogue radio (80% a lot or a little better), 15% the same and 5% worse, as shown in the chart overleaf. The total average score out of five is 4.35, where 5 means digital radio is a lot better than analogue radio and 1 means is a lot worse.

61% digital radio 'a lot' better than analogue after 6 weeks trial

Although this view was similar overall to their initial reaction right after the set-up, it varied by key subgroups.

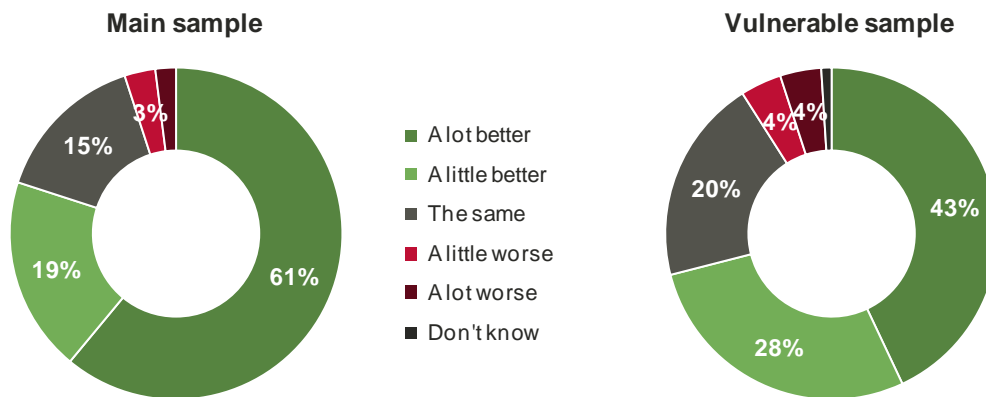
Those who were more **sceptical** at the start were more likely to have **changed their mind by the end of the trial**. This was the case for vulnerable groups, with 72% saying digital radio was better than listening to their analogue radio compared to 62% at the start of the trial. The elderly aged 75 years or over (75% versus 60% initially), and elderly women in particular, were also more likely to have changed their minds (73%¹⁷ now versus 57% initially), as well as vulnerable people who only listened to analogue radio before the trial (78%¹⁸ versus 71%).

*'Great, wouldn't be without it now'
(Quantitative, M, 18-24)*

¹⁷ Base size under 50

¹⁸ Base size under 50

Experience of digital radio versus analogue radio



Base : All respondents (Main sample = 173 Vulnerable sample = 81)

Stage 3 (Q13)

© Ipsos MORI

It is interesting to note that those who did not already have a DAB set in their home and only listened to analogue radio prior to the start of the trial were more likely to be positive than those who already had a DAB set in the house. This was also true for those who generally listened to radio less often.

The overall positivity was also reflected in the qualitative research where respondents were widely positive about digital radio; this was true across those who experienced difficulties in setting up and using the radios, as discussed in the previous section, and those who had very positive experiences of the trial.

4.2. Experienced benefits of digital radio

Overall, for most, the **better sound quality** (69%), **ease of use** (69%), better **reception or signal** (68%) and the **additional numbers of stations** available (64%) were seen as the key benefits of digital radio compared to analogue, even among those who had been resistant or hesitant about digital radio pre-trial.

'Brilliant, it's good quality, good reception, easy to find the channels, easy to turn on and off. I'm very pleased.'

(Quantitative, M, 55-64)

'Very nice model, easy to use, clear sound and lots more stations full BBC inc World Service, very happy.'

(Quantitative, M, 80-84, vulnerable - elderly)

Clearer reception was spontaneously mentioned by all qualitative respondents with many comparing it directly to the reception on their analogue radios that they found 'fuzzy' or 'crackly' beforehand. In some cases, reception was cited as an improvement in comparison with problems that some had encountered finding particular stations on analogue radio. The auto-tuning of stations was highlighted as a key benefit supporting this, as people no longer had to fiddle around to get good reception to find a particular station:

'It's perfect every time – crisp.'

(Qualitative, M, 69)

'It's brilliant...there's no interference.'

(Qualitative, F, 49)

'Well it's better as I get better reception. I didn't really get any reception in the kitchen before but now I do!'

(Quantitative, F, 80-84, Vulnerable – blind/partially sighted)

'I thought it was a bit clearer and the reception is a lot better. The signal is maintained throughout the day, it wasn't before.'

(Quantitative, F, 65-74)

'Better signal, ...clearer. Instead of having to adjust it all the time, now I just press the button and it changes. Much easier to use.'

(Quantitative, M, 55-64)

Better sound quality, in general, was mentioned by most respondents. In the qualitative research, one of the most resistant to the switchover at the pre-trial stage and a self-confessed audiophile was very happy with the sound quality and reception admitted to changing his opinion of digital radio through taking part in the trial:

'I simply hadn't realised how good the reception was and improved the listening experience. It's a hell of a lot better than I was expecting. It actually works really well...it is intricately beautiful. The sound quality is consistently good across all the radios whereas it wasn't on analogue.'

(Qualitative, M, 54)

However, as seen at the pre-trial stage, with some in the qualitative research it was **unclear** whether respondents meant **sound quality** or **clarity** (and so referring to the clearer reception). It is also important to note while visiting households at the end of the trial, we became aware that three qualitative respondents were **accidentally listening to FM** and they all stated sound quality as a benefit of digital radio. This suggests that it may be that the radios were new, rather than the digital-only platform, which captured the positive response. One elderly gentleman was speaking at length about the benefits of sound quality on digital radio as compared with analogue before it transpired that he had changed to FM by accident and not realised a difference:

'With the old one, you get the feeling they're in a studio and the sound is coming over the airwaves, with this, it feels like they're in the room.'

(Qualitative, M, 87, Vulnerable - Elderly)

The extra **choice of stations** available on digital radio also emerged as one of the key benefits, especially to younger people who were more likely to try new stations. The impact on listening habits is covered in more detail in section 5.

Although this was a key benefit for quantitative respondents, few in the qualitative research spontaneously mentioned **ease of use** as a benefit of digital radio but many did agree when prompted. Ease of use particularly focused on auto-tuning and the display functions. The use of presets was also mentioned, as some may have found difficult to set-up but admitted that, once they were set-up, it made the radio much easier to use. This was particularly true among those who had previously owned analogue radios without pre-set functionality, so it was a new function for them.

'It is so much easier to find a station and to then go back to it using the presets. Obviously this makes it very convenient and easier than fiddling.'

(Quantitative, F, 55-64)

'Found it simple. I found loads of stations I didn't know about.'

(Quantitative, F, 75-79 Vulnerable - Elderly)

'Easy to tune and I like the scroll along the bottom telling me what I am listening to!'

(Quantitative, F, 65-74)

As could be expected, respondents were more likely to spontaneously mention the ease of use and the extra choice of stations available at the end of the trial than initially, as this was something they most likely discovered over time, as detailed in Section 5. Additional features such as the station and song **information on display** (45%), in particular for under 44 year olds, and the overall look and design of the radios (28%) were also mentioned as key benefits in the quantitative research. Those who **only listened to analogue** radio before the trial were more likely to mention the better sound quality (81%), ease of use (76%) and better reception (62%) as their top three benefits, while those without a DAB set at home cited similar features such as ease of use (76%); better reception (71%); and better sound quality (68%) but they also liked to see the station and song information displayed on the radio, as this was new to them (54% versus 45 % overall).

As shown in the chart overleaf, for **vulnerable** people, the **sound quality** was seen as **the main benefit**, ahead of the better reception or signal, extra information on display, ease of use, additional stations and the look and design of the radios. This was similar across the different vulnerable groups although, much like all respondents, the ease of use and better reception were more likely to be mentioned by those who only listened to analogue before or did not already have a DAB set at home, compared to those who did.

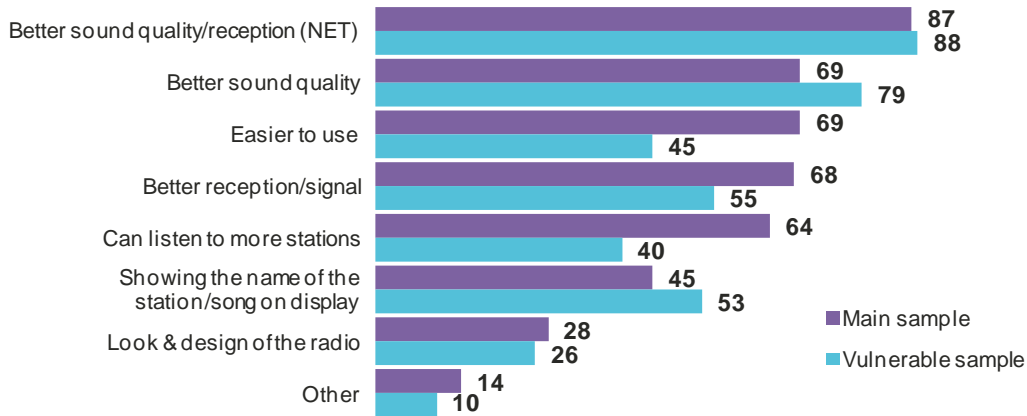
'Very clear for speech.'

(Quantitative, F, 85+, Vulnerable - elderly)

'Much clearer and instant tuning.'

(Quantitative, F, 85+, Vulnerable - blind/partially sighted)

Reasons why digital radio is better than analogue radio



Base : All who think that digital radio is better than analogue (Main = 156, Vulnerable = 58)

Q14 Stage (3)

© Ipsos MORI

When asked to **rate** their new DAB radios on **various aspects** on a scale of 1 to 5, where 5 means very good and 1 is very poor, most respondents rated them very highly on all aspects, as shown in the table below. This varied by model, however all models were rated as 4 or above on all aspects. Vulnerable people gave similar ratings, if only a little lower.

Average ratings out of 5 across all DAB models	Main sample	Vulnerable sample
Reception and signal	4.6	4.5
Choice of stations	4.6	4.3
Sound quality	4.4	4.4
Ease of use	4.5	4.1
Screen display	4.4	4.3

4.3. Experienced drawbacks or issues related to digital radio

Although a small number of respondents overall encountered problems in setting up and fully using the digital radios, almost all qualitative respondents **could not think of any drawbacks** that they had experienced in trialling digital radio. The positivity of respondents could relate to the nature of the trial; however, it also suggests a lack of awareness and confidence in knowing the drawbacks that were specific to digital. One of the older women who had struggled with setting up one of the radios and could not set the presets of the other without help, kept saying how wonderful the radios were and that there were no drawbacks, even when prompted. Based on their experiences discussed in section 3, the main drawbacks identified in the qualitative research related to the initial set-up (especially where they differ to analogue radio and people are not sure how to use them). This was supported by the quantitative research, which only identified a small **minority** (5% of all respondents and 7% of vulnerable people) who thought that digital radio was worse than analogue at the end of the trial. This was mainly due to problems they experienced with the **reception** and with **sound quality**:

At the end of the trial only 5% claim to prefer analogue

'Lousy - it keeps breaking up.'

(Quantitative, F, 75-79, vulnerable - elderly)

'Not as good as analogue. All of them are, to us, distorted compared to the radios we already have, muffled (except for one which is clear).'

(Quantitative, M, 75-79, vulnerable - elderly)

'I thought it was very poor / the sound quality I thought was bad - tinny / it was just the sound quality I didn't like.'

(Quantitative, M, 75-79, vulnerable - elderly)

A small number of respondents in the quantitative phase **missed the ability to control the base and treble**, but were often comparing an entry level portable digital radio to a high end Hi-Fi with larger speakers. It is worth bearing in mind that this would be less likely to happen in a real switchover situation as the consumer would be able to choose a higher end model that better suited their needs.

'On Radio 3 and Classic FM I do not think that the music quality is as good especially on the treble when I switch between FM and DAB on the new radio. The FM is a much richer sound with a bigger frequency range.'

(Quantitative, M, 65-74)

'Heavier on base and treble and has no adjustment.'

(Quantitative, M, 45-54)

'The quality of the sound is not as good as my Bose. Obviously the range of programme is better.'

(Quantitative, F, 65-74)

Just one qualitative respondent shared that they thought the **sound quality** on digital radio was **worse than analogue** (despite three expressing concern pre-trial). At the stage two interview, this man said:

'My wife and I have been trying to work out what it is about the radio that means that we don't love them. My wife came up with it, she said that the sound is rather insubstantial. I agree, although it is clearer, it just seems to be lacking in beef.'

(Qualitative, M, 55)

This remained the case at the post-trial stage:

'M: [The sound is] Insubstantial, it has less presence, that's how I feel, kind of a weedy sound quality.'

F: I'd say it's clearer, less interference, but quieter, less of a tonal range that engages you.'

(Qualitative, M, 55 & F, 40)

This was supported by a small number of quantitative respondents:

'Clear sound, all the same, doesn't have the colour or depth of analogue.'

(Quantitative, M, 55-64)

'Disappointing, the fidelity, the quality of sound was worse than FM. Less frequency range, no tone controls. The general sound was muddy.'

(Quantitative, M, 75-79, Vulnerable - elderly)

It is interesting to note that a small minority (12%) also admitted to **using their old analogue radios during the trial**, rising to 31% among people aged 65 or more and 23% among vulnerable people, mainly because they wanted to use additional radios throughout their house but also because they thought it sounded better or it was easier to use¹⁹.

¹⁹ Base size under 50

5. Changes in listening habits

Chapter Summary

Overall, the majority were very positive about digital radio and advocacy was very high by the end of the trial. At this time, a significant number were listening more regularly (47%) and for longer (43%) than then had been beforehand. The main reasons given for this increased listening were better reception and sound quality, more and new stations to listen to and ease of use compared with analogue.

Many (68%) enjoyed trying out new stations and seeing what additional stations were available; the majority (60%) discovered these stations by accident while under half (46%) knew the stations and searched for them. However, despite enjoying trying out new stations, over half (52%) claimed that it had not changed how often they listened to their old favourite stations. Only a quarter (26%) listened to their preferred station less often and just two percent no longer listened to their old favourites.

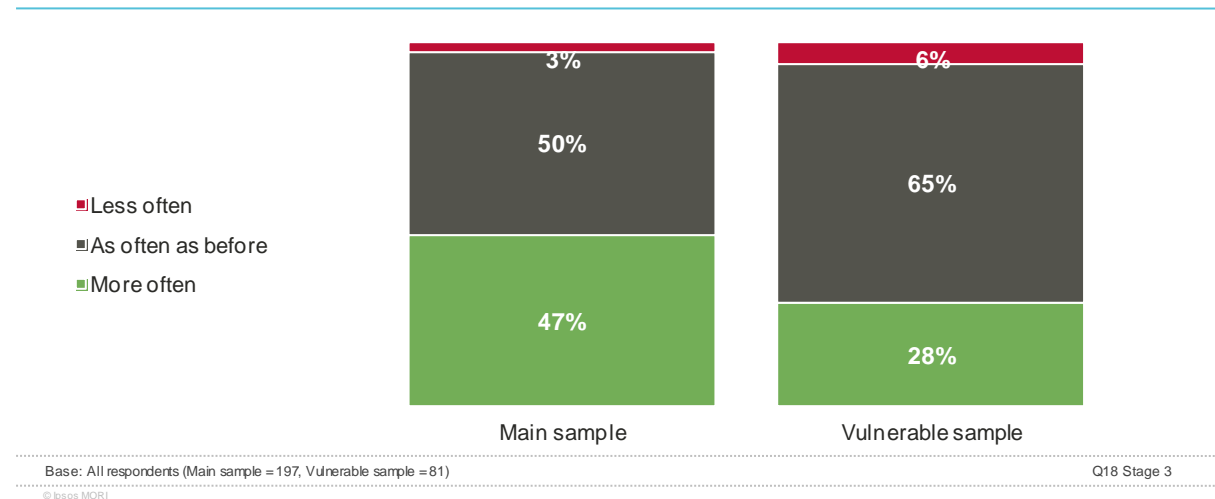
Although it is important to note the nature of the trial means that this may reflect the novelty of new equipment, there was a sense among many of those who had changed their habits in the qualitative research that they would continue to listen in this new way.

Vulnerable people were less likely to have altered their listening habits with the majority (65%) listening the same amount as before. This group also tended to continue listening to their favourite radio stations and programmes rather than trying out new stations.

5.1 Frequency and time spent listening

Almost half (47%) of respondents claimed to be listening to the radio more often at the end of the trial than they were at the start of it. This even increased during the trial from 33% after set-up to 47% at the end of the six weeks trial. The other half (50%) claimed to listen to the radio as often as they did before, with only 3% listening less often.

Change in frequency of listening to radio (post-trial)



Those who did not already have a DAB set at home prior to the trial were also significantly more likely to claim to listen to the radio more often (57%), compared to those who already owned a DAB set (37%), and had increased frequency of listening since the initial set-up. The trial also appeared to have affected those who did not listen to radio as much before the trial, with over half of 'low' radio listeners now claiming to listen more often. However, this could have been due to the trial itself rather than a long-term change in behaviour.

Younger age groups and children claimed to have increased their listening across the quantitative and qualitative research. Those aged 18 to 44 years were more likely to listen to the radio more often compared to older age groups, and even more so throughout the period of the trial from 42% after set-up to 55% now listening to the radio more often, compared to 22% of those aged over 65.

Younger people (18-44 years) are more likely to have increased frequency of listening. 42% listened more often after set up, 55% by the end of the trial.

Nearly 2 in 5 (39%) claimed that digital radio had affected the listening habits of **other members of the household**, either listening more often or for longer than they used to, while over half (55%) claimed digital radio did not change anyone else's radio consumption. A significant finding from the qualitative interviews was the increased interest in the radio seen among **children** in many households. Although they tended not to have changed the stations they liked to listen to, they claimed to listen on a more regular basis.

'My son has never listened before but you can hear this all over the house now and everybody wants to hear something on the radio and they're interested in the radio which is surprising.'

(Quantitative, F, 55-64)

In one household with children aged ten and eight, the children were initially disengaged in the subject of radio and the interviewer struggled to get them to answer questions about it. The 10 year old listened sporadically to an old analogue radio in her bedroom and had this replaced with a Sony iPod docking alarm radio. At the post-trial interview, she was actively engaged throughout the interview and spoke animatedly about the radio and how she now listened every morning to Kiss before going to school and sometimes in the afternoon when her friends came round. In another household, a mother shared with us that her 14 year old was listening to the digital radio so much more often that she was considering buying her a DAB radio for her bedroom where she previously had no radio set.

By contrast, **vulnerable** people, in general, were **less likely to have changed** their listening habits during the course of the trial. Two thirds (65%) said they listened as often as they were before the trial, with 28% claiming to listen more often and 6% less often. Among this group, older people in particular, were less likely to have changed their listening habits (70% of over 65s listened as often as before). Qualitative findings suggest that this is because for older people, radio tended to continue to play the same role in their daily routine and some felt attached to particular stations and programmes. Similarly to all respondents, those who did not have a DAB set at home before were more likely to say they now listened more often (38%, compared to 13% of vulnerable people who already own a DAB set).

'I have listened a lot more and longer in the mornings, I like waking up to it and going to sleep to it. It's has expanded my life.'

(Quantitative, F, 75-79, vulnerable – elderly, analogue only)

'This is a new radio. It is portable and I listen every night which I didn't used to.'

(Quantitative, F, 85+, vulnerable - blind/partially sighted)

The main reasons given for increased frequency of listening were **better reception and sound quality** (64%), more and **new stations to listen to** (64%) and ease of use compared with analogue (47%). Many of the qualitative respondents also claimed to listen to the radio more often at the end of the trial, citing **sound quality** and **range of stations** as the main reason. For a few, radio had replaced television at certain times of day. For example, one mother of small children previously had the television on for most of the day as background company, finding the reception of the analogue radio as providing *'additional noise that I can't cope with'*. The clarity of the digital reception was a major driver for listening to the radio instead post-trial. Another respondent mentioned that there are times of day where the radio is the sole media playing in the household now for all the family, but she still listens more often than other household members as it's *'my radio'*. In addition to listening to it more often than others, she also listens more than she used to as *'I would just give up with analogue before'*. However, there was a sense that some qualitative respondents had listened to the radio more often because they were participating in the trial. In the quantitative research, over one in 11 mentioned it was due to their participation in the trial, and it is difficult to predict if respondents would continue to listen to the radio as often in the foreseeable future.

'I'm probably getting fed up with television and I would rather put the radio on sometimes.'

(Quantitative, M, 55-64)

Women, younger people and those who only listened to analogue before were more likely to mention the additional stations²⁰ as reasons for increasing their listening, while men were more interested in the sound quality. For **vulnerable** people, the **wider choice of stations** and the better **sound quality and reception** were also the main reasons for listening more, as well as **the ease of use**:

'I use the extra stations; the extra choice has made a difference. The reception is much better for certain stations in particular Radio 2.'

(Quantitative, F, 65-74)

'I get a lot of programmes / people phoning in / people talking about politics and get the news on the hour / sometimes get people talking about scriptures / I learn a lot from that.'

(Quantitative, F, 80-84, vulnerable – elderly with hearing and physical difficulties)

'I get more stations, more local music and chat, a bit of history, questions and answers. I enjoy BBC 4 more than on FM and BBC Bristol.'

(Quantitative, M, 80-84 Vulnerable – elderly with physical difficulties)

'Listening to more drama and World Service.'

(Quantitative, M, 75-79, vulnerable – elderly)

Similarly 43% of respondents claim to listen **for longer** while 56% say they listened the same amount as before, and for similar reasons: more and new stations (70%) and better sound quality and reception (67%). We also noticed the same differences by subgroups than for frequency of listening. Younger people are more likely to spend more time listening (50%) than older people (17%), as well as those who did not have a DAB set at home before (50% spent more time listening). The **very few**²¹ who claimed to listen **less often** or spend **less time** listening to the radio did so mainly because of reception issues or an inferior sound quality.

'Because when it is knocked off stand I lose the connection as it just dangles.'

(Quantitative, M, 45-54, Car conversion, DAB adaptor)

'I could not use disc CD on one of them, so I could only listen to English music on it. I listen to a lot of Indian music but I couldn't get an Indian station / with my eyes I couldn't see well enough to find the right station.'

(Quantitative, M, 85+, vulnerable - blind/partially sighted)

²⁰ Base size under 50

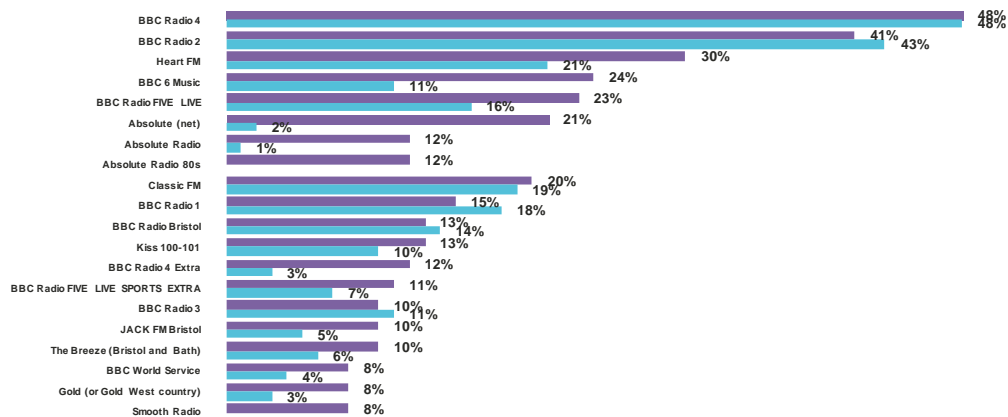
²¹ Base size under 50

5.2 Choice of stations

Before the start of the trial, only a quarter (24%) of respondents listened to digital only stations. After the six week trial, this increased to **over half** (56%) claiming to listen to **digital only stations** at least once a week, and more significantly among men (66%) and under 44 year olds (68%). At the start of the trial, only 5% of vulnerable (including elderly) respondents listened to digital only stations; this increased to 33% after the trial. As shown in the chart below, Radio 4 and Radio 2 were still the most popular stations but digital-only stations saw large increases in regular listening. The Absolute stations, for example, were now listened by 1 in 5 at least once a week compared to 2% before the start of the trial, and in particular Absolute Radio and Absolute 80s. BBC 6 Music also saw a significant increase in listening, as well as Heart, Radio 4 Extra and Radio 5 Live. Generally most stations saw either an increase or no change in listening, except Radio 1, which saw a small decline and Radio 2 to a lesser extent.

At the start of the trial, only 5% of vulnerable (including elderly) listened to digital only stations; This was up to 33% after the trial.

Top 20 stations listened to at least once a week



Base: All respondents (Main sample = 197, Vulnerable sample = 81)

Q14 Stage (3)

© Ipsos MORI

For vulnerable groups, Radio 4 and BBC Radio Bristol were still the most popular stations, followed by Classic FM and Radio 2. However, the biggest increases were for Radio 4 Extra (from none to 1 in 5 now listening at least once a week), Radio 5 Live (from 11% to 20%) and 5 Live Extra and BBC World Service (both from 2% to 10%).

Many respondents **enjoyed trying out new stations** and seeing what additional stations were available:

'Just thought 'why not?' especially a station like 'Gold' with old memories.'

(Quantitative, F, 55-64)

'I prefer having choice about the new stations which I wouldn't have without digital. I have been about Radio 4 person but now I have digital it prompted me to look around and find new stations.'

(Quantitative, F, 25-34)

'I listened to stations we did not normally listen to because of the choice and had a wider spectrum of stations to tune into.'

(Quantitative, F, 25-34)

'...there is a wider choice of stations but a lot of them are too commercial or vacuous for my liking.'

(Quantitative, M, 55-64)

Two thirds of respondents (68%) tried new stations during the trial and the majority (60%) had **discovered them by accident** while using their new DAB radio, such as the Absolute stations as they came first when scrolling through. Just under half (46%) knew the stations and searched for them. Qualitative findings suggest that these were primarily the extra BBC radio stations, which they had heard about on the sister BBC stations (for example, Radio 4 Xtra). Over 1 in 10 (13%) had followed a recommendation, rising to 20% among women and 22% among those who only listened to analogue before. Six percent searched for the new stations after seeing or hearing an advertisement.

'It's amazing. I can get the stations I used to get when I was in London. I have it on all day.'

(Quantitative, F, 25-34)

Just under half of **vulnerable** people had **tried new stations** (47% versus 68% in total), with a third citing Radio 4 Extra as the main new station they discovered. Half discovered them by accident while using the radio while 37% were aware of the stations and searched for them. However, vulnerable people were more likely to follow recommendations (21%) than all respondents or search for a station after seeing or hearing advertising (11%). The reluctance of many older people to try new stations was reflected in the qualitative research, as discussed overleaf.

An interesting finding is that, despite many finding and listening to new stations, only a quarter (26%) said they listened to their preferred station less often and just 2% no longer listened to their old favourites. Over half (52%) claimed that it had **not changed** how often they listened to their old favourite stations.

'The first couple of weeks it was interesting looking at the new stations but I soon reverted to my old favourites, they are a little clearer now on digital.'

(Quantitative, M 25-34)

This was also reflected in the qualitative research where most respondents had tried out new stations, however only some had started to listen to these regularly or in place of their previously preferred stations. This supports the finding from the pre-trial stage that the **majority of people listen to the radio in a very habitual way** and breaking this habit was something that they found hard to do. Some explicitly stated that they were '*creatures of habit*' or that they simply know what they like; this was across those who tried new stations and listened to them sporadically and those who continued to listen to the same stations as before, but tended to be most strongly stated by the older respondents. **Vulnerable** people either listened to their preferred stations as often as before (55%) or were more likely than all respondents to have increased their listening to their favourite stations (29% versus 20% in total)²². Only 16% claimed they were listening less often to their previously favourite stations (mainly Radio 2).

52% stated that listening to new stations had not changed how often they listened to their old favourite stations

'No, I didn't listen to any new stations, I thought about looking through when I saw how many stations there were but I like Radio 4, I've always liked Radio 4, so why would I change?'

(Qualitative, M, 74, Vulnerable)

'I've never checked properly all the stations I can use on these digital radios, just Radio 2 and 4 but I haven't had much time to channel hop but I will. However, I can't see it changing anything; I'm sure I will stick with 2 and 4 as they provide all the music and light entertainment I want.'

(Qualitative, M, 87, Vulnerable - Elderly)

This did not impact on their perceptions of digital radio, although they were more likely to cite the improved sound quality and reception compared with station-related benefits. For those who had started to listen to new stations on a regular basis, this was if these had been adopted into the household routine. For example, the family who had seven radios throughout the house who had been particularly hesitant about changing over to digital radio, saw station choice as a major benefit.

'The biggest difference is the ease of station access. 6Music in particular is a station which has been accepted into the fold by the whole family.'

(Qualitative, M, 54)

²² Base size under 50

For some who had started to listen to more stations, there was some **confusion** about whether they were listening to **digital-only stations**. Due to cited reasons such as poor reception or the age of the analogue device, some households had not been able to access all FM and AM stations before the trial. They had begun to listen to more stations but these were not always digital-only stations. This may also be explained by the fact that the respondents were given new radios and so were prompted to mix up their routine that they had established for many years.

'Heart was the only station we could listen to before as our radio wouldn't play any other station. This was fine but it the same songs with such regularity that we could tell by the time of day what was going to be played. Now we listen to Absolute 60s, Absolute 90s, Classic and Jack.'

(Qualitative, M, 25)

Other reasons cited for changed listening habits included that particular radio stations played music that *'can lift the mood'* and that the sound quality of the digital radio makes listening to music more enjoyable, as suggested by this respondent:

'I listened to Smooth 70s vaguely before but now it's become my favourite, mostly due to the sound quality on the Evoke 1S. I would listen to plays before and The Archers if the radio was on, but music has now become far, far more important.'

(Qualitative, F, 45)

Both qualitative and quantitative respondents were asked to **suggest types of stations they would like to find on digital radio**, which they thought were not currently available. The large majority were happy with the choice of stations already available and could not think of anything missing. There was no clear gap in what was currently available, but suggestions were varied and ranged from different types of music such as country and western music, folk music, blues, easy listening or 40s to 60s music, different classic and jazz stations; to more educational programmes and specialised speech stations similar to what is available on television (e.g. history, arts, plays, science, politics, business, cooking and gardening). A few people also mentioned they wanted to be able to listen to foreign stations and a higher number were keen on still being able to listen to local stations on digital, and some were also interested in local radio from other regions of the UK (e.g. Kent, Cornwall, Ulster). A couple of people also suggested a station playing birdsong on a loop. In the qualitative interviews, some mothers shared that they would like there to be more children-friendly stations available. This was both for toddlers and pre-school similar to CBeebies on the television and stations which cater for the musical taste of teenagers and pre-teens.

5.3 Expected future listening habits

There was a sense among some of the qualitative respondents who had changed their habits during the trial that they would continue to listen in this new way. For example, the household with seven radios were convinced that they would stick to their new routine:

'No one radio has made a difference; digital radio in general has had a huge effect on our listening habits which have been well and truly changed.'

(Qualitative, M, 54)

In some other households, some showed surprise in response to the question of whether they may not continue to listen in the same way in the future. Together with the assumption that digital radio represented progress and development, some felt that they would be going backwards themselves if they reverted to their previous listening habits. However, there is definitely a sense of the novelty factor and given that the trial was relatively short, it is difficult to ascertain the sustainability in frequency and diversity of listening. At the start of the trial, most quantitative respondents tried new stations that were not accessible to them previously with 77% trying digital only stations. However, this had gone down to 42% at the end of the trial. When asked which of the new stations they would continue listening to regularly, 16% mentioned BBC 6 Music, followed by Radio 4 Extra (12%), Absolute 80s (11%), Absolute Radio (10%), Jack FM Bristol (10%) and The Breeze (10%). Among vulnerable people who tried new stations²³, a quarter (26%) planned to continue listening to BBC Radio 4 Extra, followed by The Breeze (16%) and Gold (11%).

5.4 Listening on other platforms

As discussed in section 2.2, two thirds (67%) had previously listened to the radio on different devices before the start of the trial, and this was highest among under 45 year olds. Over 1 in 5 (22%) had never used another device to listen to the radio but were aware that they could (rising to 34% among 65 year olds or over) and 11% did not know about this before the trial (rising to 19% among 'analogue only' respondents). The most popular device, beside a typical radio set, was a television (70%). Over half (54%) had also listened on a computer or tablet and 17% on a smartphone. Younger people were more likely to have listened on computers or through their phone.

Vulnerable people were **less likely** to have ever used other platforms to listen to the radio (46% versus 67% in total), 28% did not know that it was possible before the trial (versus 11% in total) and 26% knew but only used a radio set (versus 22% in total). As for all respondents, the **television** was the alternative device mostly used (86%²⁴ of those who had used an alternative).

During the period of the trial, the majority (60%) of respondents (78% of vulnerable groups), did not use other devices to listen to the radio and only used their new DAB sets. Over a quarter (27%) listened on their television, 18% on a computer or tablet and 9% on a smartphone. In the qualitative research, in line with the fact that very few listened to the radio on different platforms beforehand, few were revealed to be listening to digital radio on anything other than the DAB radios they were given (or already owned). For the few who had listened on the television before, they tended to have replaced this with the DAB radio (by,

²³ Base size under 50

²⁴ Base size under 50

for example, moving them into the lounge so they could do this). There continued to be **some confusion** about whether you **could listen on other platforms**. It is important to note that there was some disbelief among older respondents that digital radio was available on the television or other platforms.

Respondent: Old people would say TV is for TV, radio is for radio, computer is for computer.

Interviewer: If you were made aware that you can listen to radio on TV?

R: It's very unlikely to make any difference.

I: Is there anything that could encourage you?

R: No .

(Qualitative, M, 87, vulnerable - elderly)

5.5 Likelihood to recommend

Overall, respondents were very positive about digital radio. **Advocacy** was **very high** at the end of the trial, with an average score of 8.55 on a scale of 1 to 10 on how likely they are to recommend digital radio to friends, family and other people they know among quantitative respondents. This varied by age with younger people more likely to recommend it to others than older people. Women were also significantly more likely to give a rating a 10 out 10 rating than men (62% of women gave 10 rating versus 45% of men).

The average score of 8.55 was similar to their initial opinion when asked a similar question right at the start of the trial (8.51). However, recommendation from older respondents (65 or over) who were more sceptical at the start increased from 7.61 to 7.86 at the end of the trial, as well as those who only listened to analogue previously (from 8.45 to 8.78). Advocacy among **vulnerable** groups was also very high with an average score of 7.95 (from 7.71 at the beginning of the trial).

However, the 11 respondents who got their **car radio** converted to digital were, on average, less likely to recommend digital radio in the car to other people, with an average recommendation score of 4.9 out of 10, right after the installation. It is worth noting this was only asked of 'car respondents' right after the installation, rather than at the end of the trial.

6. The Digital Switchover

Chapter Summary

After the experience of listening to digital radio, most (60%) felt that a switchover was a good thing for the UK; this rose slightly from the start of the trial. However, a quarter think it is a bad thing after the trial (25% up from 14%) with 15% remaining undecided. For those who thought switchover was a bad thing after the trial, the main reason given against the switchover was related to the cost implications since it was deemed to be too expensive or unnecessary.

At the end of the trial, people tended to feel more informed and a higher proportion could not identify any drawbacks to a switchover (26% rising from 16% at the start of the trial). Across all groups, there remained significant concerns with car conversion and cost implications of replacing existing radios (both in the car and in the home) the most cited. Financial outlay was the major concern about a potential switchover for vulnerable people.

The main barriers to conversion in a digital switchover are cost and the sheer scale of the switchover, particularly for in-car radios. Other barriers identified include lack of knowledge about digital radio, difficulties with setting up and using the equipment, reluctance to replace existing units and lack of awareness about alternative platforms for listening to the radio.

The main drivers to conversion in the event of a digital switchover are direct experience and a heightened awareness of the benefits of digital radio.

It was widely recommended that the Government follow a similar process for a digital radio switchover as that for the digital television switchover, including providing general information, advertisements, providing financial assistance and offering assistance for the vulnerable and elderly.

6.1 Attitudes towards the switchover

Attitudes towards a potential switchover **changed** during the course of the trial. At the start of the trial, there were many who had little awareness about it and some who showed real concerns. At the post-trial stage, attitudes were **broadly positive**. The task was seen by most to be less daunting and many saw it as something inevitable for ‘moving with the times’. For example, one qualitative respondent who had been most hesitant about a move away from analogue admitted that he was no longer negative about the possible switchover and compared it with the television switchover:

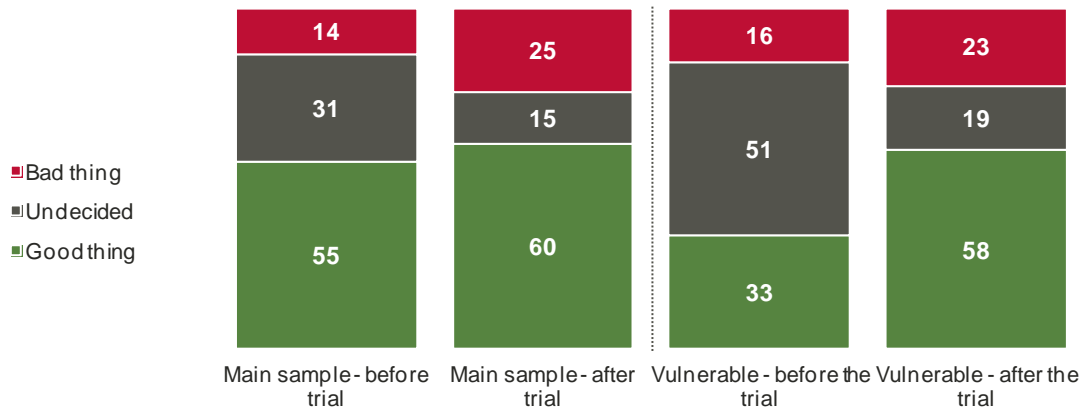
‘Turning off analogue will have less impact than the TV switchover did. I feel it will be less controversial.’

(Qualitative, M, 54)

In general, after the experience of using a digital radio, most (60%) felt slightly more or much more positive about a switchover than at the beginning of the trial. Only 6% felt more negative, the remaining 34% felt the same as they did before the trial. Those without a DAB set in the household prior to the trial were feeling more positive than those with a set (71% versus 48% respectively). A similar story can be seen among vulnerable respondents, with 56% feeling more positive and only 4% more negative and the remaining 41% felt the same as before.

However, as shown in the chart below, there remained a significant number who still did not perceive a switchover as a good idea for the UK at present.

Radio switchover – Good or bad for the UK?



Base : All respondents (Main sample = 197, Vulnerable sample = 81)

© Ipsos MORI

Before the trial began, just over half (55%) perceived a switchover to be a good thing for the UK, 14% thought it would be a bad thing while 31% were unsure at that point. By the end of the trial, the proportion of people who perceived digital radio to be a good thing had risen slightly to 60%. However, those undecided had become more likely to form an opinion, with 25% now thinking it may be a bad thing (25%) and 15% still undecided. Interestingly, **vulnerable** people were more likely to have been converted. Here we witnessed greater uplift in the proportion perceiving digital radio switchover as a good thing over the course the trial, from 33% pre-trial to 58% post-trial, with 23% against and 19% still undecided.

'I don't know the advantages, what are the benefits and costs, what is the argument? Nobody has explained.'
(Quantitative, F, 75-79, vulnerable - elderly)

Among the few who thought switchover was still a bad thing after the trial, the **main reason** given **against the switchover** was related to the **cost implications** (68%), seen as too expensive or unnecessary. This was also spontaneously mentioned by respondents when asked for additional comments and feedback, suggesting that some people felt very strongly about the potential cost implications of a digital radio switchover. Some of their unprompted reasons included how the elderly and those on low incomes would be able to afford a new radio set in the current economic climate.

'Economically it would be an added expense for people on low incomes. It would be better to wait for a couple of years when the economic climate has settled down.'

(Quantitative, M, 80-84, vulnerable – elderly)

'I think it is a lot of expense if we got to get another radio completely to listen to ... I just think it's going to be expensive for all the people that don't understand all the technology of changing up stuff.'

(Quantitative, F, 65-74)

'The country can't afford to scrap all the analogue radios.'

(Quantitative, M, 55-64)

'Well, the problem, the big drawback is the expense for poor people, and there are people for whom £50 is an awful lot of money and people couldn't afford that.'

(Qualitative, M, 87, Vulnerable - Elderly)

'Not everyone can be part of it [the switchover] and can lose ability to listen to radio just because they can't afford it.'

(Qualitative, M, 25)

All qualitative respondents said that if the digital radio that they owned broke, then they would have to replace it with another digital set. When prompted on cost, most said that they would be able to afford to do this, although they would have to replace a number of radios gradually. Some assumed that if there was a switchover that the price of digital radios would have to come down to a price around £20 that they, and most others, would be able to afford.

However, a small number admitted that they could not afford to replace a model immediately and would have to save up or buy it in a catalogue. It is important to note that some may have felt they should say that they would replace their radios given they had received the radios for free as part of the trial and did not wish to appear ungrateful (something that some said repeatedly when offering any negative comment about the radios). For those who had worried about cost pre-trial, this remained an issue, although often less forcibly.

As shown in table 1, after cost, the **other reasons** mentioned by those who perceived switchover to be a bad thing for the UK related to the fact that it was being **forced on them** and that all **analogue radios would no longer work** as a result. The issue of **car conversions** also came up, with 29% citing the difficulty inherent in converting the UK's vehicles to digital radio. Many also took the opportunity to defend analogue at this point, with 28% **happy with** the choice they already had on **analogue** radio and 1 in 5 (20%) voicing the opinion that digital sounded inferior to analogue or the signal was not always reliable. Others did not trust the Government's reasons for doing it, while some still felt that digital radio was too complicated to use. Other reasons mentioned by some included the fear that car radios would become obsolete, that local stations would be edged out or that DAB would be soon be redundant and replaced by internet radio. Finally, concerns were raised about what would happen to the analogue radios that would stop being used and the **environmental** impact.

Table 1: Reasons why people think switchover is a bad thing for the UK

NET: Too expensive/ unnecessary	68%
It is an unnecessary expense	46%
It is too expensive	45%
It is being forced on us	35%
All analogue radios will no longer work	33%
It will be difficult to convert the UK's vehicles to digital	29%
NET: Happy with choice on analogue	28%
I am happy with the stations I had on analogue	20%
There is enough choice on analogue already	11%
It sounds inferior to analogue	20%
I don't trust the Government's reasons for doing it	13%
It is too complicated to use	11%
Other	19%
Base: All those who say switchover is a bad thing for the UK at the end of the trial (55)	Stage 3 Q39

'There's a broader environmental issue, what would happen to the analogue radios? Going back to the radio in the car, there's a reluctance to throw away the whole CD player which works fine just because of the radio.'

(Qualitative, M, 55)

'I don't like to think of all the old radios going to landfill when they work perfectly well.'

(Quantitative, M, 65-74)

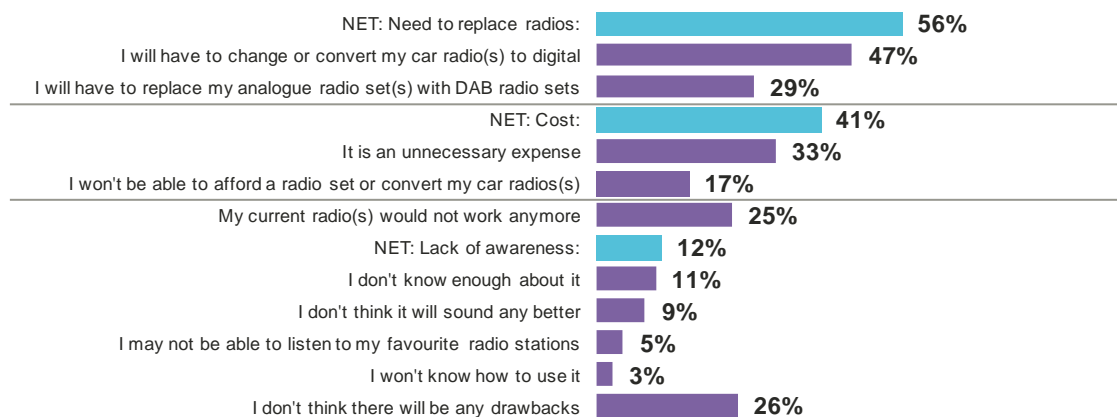
'Government should consider buy back scheme at switchover.'

(Quantitative, M, 45-54)

At the end of the trial, as expected, people felt more informed and a higher proportion did not see any drawbacks to a switchover (rising from 16% at the start of the trial to 26% at the end). However, as shown in the chart below, most respondents still had **major concerns**, and this was even the case among those who are positive about switchover. In particular, **car conversion** is now perceived to be the **biggest issue**, with the number of people concerned about having to change their car radios rising significantly from 33% before the trial to nearly half (47%) at the end, followed by the **cost implication** (41%) of changing car radios and replacing all radios in the home.

47% concerned about having to replace car radios

Concerns about a potential switchover (post-trial)



Base: All respondents (Main sample = 197)

Q42 Stage (3)

© Ipsos MORI

Specifically, for most people concerned about the car conversion **the cost** was the **core issue** (73%), with 60% citing this as an unnecessary expense or one that they simply could not afford (27%). This also emerged in the qualitative research, as well as the **extent of conversion to digital for cars**. As at the pre-trial stage, this was among car drivers and non-car drivers alike, perhaps reflecting the concern that would potentially exist across the general public.

'Just car radios this is quite a concern when you have more than one car.'

(Quantitative, F, 35-44)

'I would like to think that there would be subsidized models to help people with the switch over/losing radio in the car would mean losing traffic reports and news items in the car.'

(Quantitative, F, 55-64)

Other reasons mentioned included the **lack of knowledge or awareness** about how to upgrade car radios (28%) and the **inconvenience**, with around 1 in 5 (22%) feeling they could not be bothered to visit a dealer or retailer to convert their car radios. Other concerns regarding car conversions included coverage across the UK and abroad and the difficulties with car radios being integrated into dashboards and linked to other functions.

'Radio is linked to other systems in the car and I worry that changing the radio could jeopardise them.'

(Quantitative, M, 24-34)

'Not convinced there is national coverage on digital.'

(Quantitative, M, 65-74)

'It would be forced on me and I would be resentful. If it isn't broken, don't fix it.'

(Quantitative, F, 45-54)

For **vulnerable people**, their main concern about a potential switchover was the **financial outlay**, with 46% deeming it an unnecessary expense. The lack of awareness or knowledge about digital radio was understandably less of an issue at the end of the trial, falling from 53% before the trial to 31% at the post-trial stage. About a third were still concerned that their current radios would no longer work (31% versus 27% at pre-trial), the inconvenience of having to replace analogue sets with digital (30% versus 36% at pre-trial) and convert car radios to digital (27%, a slight increase from 16% at the pre-trial).

6.2 Conversion options and listening on different platforms

At the end of the trial, when asked **what they would do** with their analogue radios **in the event of a switchover**, respondents were divided. Over a third (36%) said they would buy new DAB set(s), 32% said they would use ones they already have, 28% would listen on other platforms, 15% would keep it to listen to local stations and 15% would stop listening at home. Older people (aged 65 or over) were more likely to buy new DAB sets (48% versus 36%), than stop listening to radio altogether (5% versus 15%), compared to all respondents. As for **car radios**, a third of car owners (34%) planned to convert their car radio to digital, a quarter claimed they would stop listening to radio in their car and 21% would wait until they needed to buy a new car. Only 7% would use another device and 11% were not sure.

The minority (31%) who had never listened on **platforms other than an actual radio set** before the trial were asked at the end if they would ever consider doing so. Those were split with half (49%) saying they would consider listening on other digital platforms, and 45% saying they would not consider it (rising with age to 66% among those aged 65), with the remainder unsure at this point.

Among those who would consider it²⁵, larger, static devices were most likely to be chosen, with two thirds (65%) opting for the **television** and just under half (47%) choosing a **desktop computer** as a platform for digital radio consumption. One in seven (69%) overall would consider listening on a computer or tablet, while 20% would consider listening on a smartphone either through apps or by going online.

Among those who did not consider other platforms²⁵, just under half (45%) simply **did not think about listening to the radio** when using these devices at home, while the same proportion thought it was **not as convenient** as just using a standard radio set, or that these devices were in different rooms to where they usually listen to the radio (13%). Other reasons given by the main quantitative sample included:

'TV uses too much energy just for radio listening.'

(Quantitative, F, 45-54)

'I am a stickler for the traditional.'

(Quantitative, F, 65-74)

Vulnerable people were much **less likely** to consider listening on other platforms, with 81% saying they **would not do this**. Of the very few who would²⁵, most would listen via a television set. The most common reasons for not considering listening on other platforms included not thinking of radio when using other devices (32%), not knowing how to go about it (26%) or other devices not being seen to be as convenient as actual radio sets (24%).

'TV is for TV. If I want radio, I go in another room.'

(Quantitative, M, 85+, Vulnerable – Elderly)

'Sound quality on TV is dreadful.'

(Quantitative, M, 75-79, Vulnerable – Elderly)

²⁵ Base size under 50

6.3 Barriers and drivers to switchover

In the light of the concerns mentioned during the trial, the major barriers that were identified to a potential digital switchover can be summarised as:

- **Cost:** particularly for those on low incomes and the elderly. There is a worry that some would not be able to replace their current analogue radios, which would act as a barrier to being able to enjoy digital radio; and
- **Size:** the sheer extent of a switchover and a worry that some would 'slip through the net' in understanding and engaging with digital radio. Concerns about the **numbers of cars** that would need converting and what would happen to the old radios that needed to be replaced were commonly raised.

The perceived core benefits of digital radio were spontaneously mentioned after digital radio has been experienced, by a significantly higher proportion of respondents than at the pre-trial stage

Some other barriers to the uptake of digital radio that emerged through analysis include:

- **Knowledge about digital radio generally:** many of the problems that individuals encountered regarding their DAB sets were about not understanding how digital radio works (for example, that digital reception will be different to analogue).
- **Usability and set-up:** those who had easily set up their radios and understood the instructions tended to be most positive about the experience of trying out digital radio. It emerged that there was a real need to make instructions easier to follow and in less 'technical' language to make them accessible to all, particularly elderly people.

At the pre-trial stage, half (49%) of vulnerable respondents were unable to spontaneously name any benefits of digital radio. At the post-trial only 8% were unable to answer.

- **Reluctance to replace units:** this is particularly true regarding radios that are also hi-fis, CD players etc.

- **Lack of awareness about alternative ways to listen to the radio:** especially among the older respondents, there was a sense that, as one elderly man explained, 'old people would say TV is for TV, radio is for radio, computer is for computer' (M, 87,

Elderly). However, this man went on to say that there was nothing that could encourage him to listen to the radio on his television and so information-raising may not be sufficient to remove this barrier.

The drivers for successful uptake of a digital switchover, in many ways, involve the removal of some of the barriers mentioned above. However, many were also surprised by a number of the benefits of digital radio that they had not expected to experience. As well as the removal of some of the barriers, **direct experience** so as to **learn about the benefits** of digital radio could be the main driver for uptake of digital radio. The technical aspect of setting up digital radios was a fear for many initially but most found the radios easier to use than they had expected, including among the vulnerable groups. Promoting how easy it is to use is a potential key driver for the uptake of digital radio.

At the post-trial stage, all respondents were asked what they thought were the main benefits of digital radio and all the qualitative respondents were able to name at least one; only 8% in

the quantitative research failed to name any. The benefits cited by significantly more respondents at the post-trial stage, compared with before the trial begun, were **ease of tuning** (65% up from 28%) and **the number of stations** (61% up from the pre-trial high of 28%). The on-screen display was also mentioned as a benefit by 40% at the post-trial compared to 13% at the pre-trial stage. **Improved sound quality** was the only comparatively popular choice from the pre-trial stage not to see a significant uplift at the end of the trial, rising from 50% to 56% over time. However, improved sound quality was the most cited benefit among the qualitative respondents. Even among those with some previous experience of digital radio, either through owning a DAB set or listening to digital radio regularly, the core benefits have seen uplift over the course of the trial across the qualitative and quantitative research. Men (70%) were more likely than women (53%) to mention number of stations as a core benefit, just as under 65 year olds (68%) were more likely than those aged over 65 years (35%).

Vulnerable respondents, following direct experience of digital radio, were more likely to be able to name benefits of digital radio than before the trial. In the qualitative research, those who already owned a DAB radio named the same benefits as before, but those with first time experience of digital radio, were able to name more benefits – sound quality and number of stations particularly. Over half of the vulnerable group in the quantitative research named ease of tuning (59%) and improved sound quality (56%) as core benefits of digital radio, compared with 14% and 33% respectively at the pre-trial stage. 42% mentioned the number of stations compared with 13% previously and while fewer than 10% mentioned the on screen display at the beginning, it was now seen as a core benefit among 40% of the vulnerable sample. **Knowing the main benefits** and experiencing them can thus be seen as **the major driver** for enjoying digital radio across the vulnerable and main groups.

6.4 Participant recommendations

There was a widespread proposal for the Government to follow a **similar process** for a digital radio switchover as that conducted for **digital television switchover**; particularly as many looked back positively at the process of switching television to digital.

'I hope it goes well because it went alright with the television, and it is obviously the same with the radio. It is better; it is progress.'

(Quantitative, M, 55-64)

'Use same process of information distribution as for TV switchover; treat radio as an equal to TV.'

(Quantitative, M, 35-44)

This covered **planning, advertising** and **offering support** in setting up and using the equipment. It was widely felt that it was the Government's responsibility to provide general information with sufficient time for the general public to prepare for a switchover. In the qualitative research, this tended to be said particularly with the vulnerable and elderly in mind:

'If you're elderly, you need time. As you get older, everything slows down. You need give people a few years to get used to it.'

(Quantitative, M, 69)

Giving sufficient time for the general public to learn about the switchover was felt to be particularly important. There had been **very little awareness** about the potential of a digital radio switchover pre-trial and the qualitative respondents tended to refer back to this and the fact that they would not know anything about it if they had not been involved in the trial. The emphasis placed on information in the quantitative research supports this finding.

Across the research, it emerged that **providing information** was the most important way to provide for a successful transition from analogue to digital. The majority (54%) of respondents thought that the government needed to provide more information about it as they felt they did not know enough already. This included information about what switchover means to people (28%), the reasons for a switchover (27%), the differences between analogue and digital (26%). To a lesser extent this also included more information on how to recycle existing radios (17%), information on the impact on cars (14%) and finally, information on how to continue to use existing radios post switchover (11%).

'I think there needs to be good communications to the general public. What it involves (particularly with regards to the implications for car radios). Old people may find the change over stressful and not know what to do.'

(Quantitative, F, 45-54)

'We all need to understand the rationale behind the changeover.'

(Quantitative, M, 45-54)

The proportion of those who felt the provision of information will aid switchover is the same for **vulnerable** respondents (54%), with 33% requesting information on the reasons for a switchover and 26% requiring information about what switchover means to people.

'FM / HZ, what does it mean? That means nothing to me.'

(Quantitative, M, 85+, Vulnerable – elderly with hearing difficulties)

'Why is anyone doing this? What is the point of it?'

(Quantitative, F, 75-79, Vulnerable – elderly)

Running advertisements/features on all media was cited as the main recommendation (38%), particularly among those who only listened to analogue before the trial (46%). Some examples of the best way to go about this included leaflets and advertising on television and the radio. It was felt that these should not only cover details of the switchover but also some basic details about what digital radio is, how it is different to analogue radio, some of the benefits and explaining alternative platforms to DAB stand-alone radios on which digital radio can be listened to. Where people could get help in setting up their new equipment was also felt to be an important piece of information to make widely available. Among older respondents, some requested that there was not an assumption that everyone will go online to find out more information and that information was made available in detail offline.

*'One thing I will say is can we not just get a leaflet that says go to **www.whatever** to get more information. I can't do that and I know most of the other people living round here (in sheltered accommodation) won't do it either.'*

(Quantitative, M, Vulnerable - elderly)

Offering financial support for those who cannot afford the change was **cited by a third (33%)**, with women more likely to raise this than men (41% versus 25% respectively). Offering financial support ranked **highest among vulnerable respondents** with 4 in 10 (40%) saying this should be a top priority for the Government. This is perhaps not surprising given that **cost emerged as the main barrier** for digital radio take-up. The potential for **subsidising** was also raised in the qualitative research:

'Provided an incentive to buy digital radio.'

(Quantitative, F, 45-54)

'Financial contribution to each household to ease the switchover.'

(Quantitative, M, 75-79, Vulnerable - elderly)

'I would like to think that there would be subsidised models to help people with the switchover. Losing radio in the car would mean losing traffic reports and news items in the car.'

(Quantitative, F, 55-64)

'There should be some sort of system for those on basic pension. You can get heating allowances, why not include something for the switchover.'

(Qualitative, M, 69)

In line with the main driver for engagement with digital radio being the experience of using one, a number of respondents thought that **offering face-to-face assistance (29%)** to those who are less likely to understand technology or those with disabilities would help at the time of the switchover, and this was especially favoured by women (40%) versus males (17%). For example, community pop-up shops and demonstrations were suggested by some, especially for those who may not be able to access support from family or friends to help in setting up the new equipment. A couple of elderly respondents also discussed the possibility of the Government producing a short film of advertisement break length, showing just how

easy it is to set up a digital radio, from getting it out of the box to having the presets ready to use.

'You can read things but it's not the same as somebody sitting down and telling / showing it to you.'

(Quantitative, M, 75-79, Vulnerable – elderly with health issues)

'Give very simple instructions for use of digital radio / run short evening classes where people could just drop in and find out exactly what to do.'

(Quantitative, F, 75-79, Vulnerable – elderly)

7. Household Typologies

The qualitative households can be primarily placed into four categories. These are:

- ❖ **Enthusiastic or Complacent converter**
- ❖ **Reluctant converter**
- ❖ **Ill-informed converter**
- ❖ **Ill-informed struggler**

7.1 Enthusiastic or Complacent converter

This group includes respondents who at the pre-trial stage **raised few concerns** about digital radio and the switchover. Some of these complacent converters were positive about the idea of a switchover, while others showed nonchalant attitudes. Some were knowledgeable about digital radio – often because they were semi-switched in their household already. It also included some who, although some in the household listened to the radio regularly, were not digitally converted and knew little about digital radio or the switchover.

This group **did not encounter any significant problems** either in set-up or general usability and any problems were quickly resolved through support from friends, family and, in the case of car-radio owners, the car accessory retailer. They also **enjoyed digital radio** and named a number of benefits of digital radio with some household members, particularly children, listening more through the switchover.

This group wants information to be widely shared about a potential switchover but **does not raise any concerns if there were to be a switchover**.

This group includes a few vulnerable respondents but it is important to note that this may be only in the context of this trial when the partially sighted were given appropriate radios with helpful CDs and instructions for set-up, which helped to explain the set-up process.

Case study

Sarah²⁶ (38) lives with her husband, John (38), 10 year old daughter, Ellie and eight year old son Nathan. This household represents one of the more positive within the group. Before the trial, the main radio listening for both Sarah and John was in the car on the way to work and in the van, for John's work. Sarah also listened occasionally to an analogue radio in the kitchen when she is home alone as company while doing the housework. She is fond of her kitchen radio because it is a fashionable design. Ellie had an analogue radio in her bedroom which she sometimes listened to in the morning but she showed little interest in talking about the radio. The whole family had no knowledge of a switchover and little of digital radio – for example, they owned a docking station but they had not realised that it was also a DAB radio. They showed few concerns about the possibility of a switchover:

'Digital is more modern, it must be better and more up to date technology.' (Sarah)

'Yeah, we don't want to be stuck in the dark ages.' (John)

²⁶ Names in this section are pseudonyms.

In the trial, they received three digital radios – a portable radio for the kitchen, an alarm clock radio with a docking station for Ellie’s bedroom and a car radio for Sarah’s car. They had no problems in setting up the home radios:

‘I was really impressed, I just plugged them in and off I went.’ (Sarah)

Listening at home has increased for both Sarah and Ellie with Ellie’s change in attitude to the radio something which surprised her mother because she became ‘really taken with it’. However, the main radio listening for the family continues to be in the car and van. Sarah was also very positive about the digital radio in her car but she received a lot of help from the car accessory retailer in the set-up.

Following the trial, the whole family think that a digital switchover is a good thing and could not think of any drawbacks. If there were to be a switchover, households like this one would adapt as necessary and perhaps become more engaged in the radio because of it.

7.2 Unexpected converter

Unexpected converters were those **who had reservations about digital radio** and the switchover at the pre-trial stage but by taking part in the trial changed their opinions to being more positive. These tended to be households where radio was very important to some, if not all, individuals including some who had radio as their principal media. They also tended to have limited experience of digital radio but some knowledge about the perceived benefits and drawbacks; some also knew that there was a potential switchover.

Although **initially hesitant**, this group had a mainly **positive experience** of switching to digital radio and this changed their opinion of the potential switchover. Some still mentioned drawbacks of digital radio – for example, sound quality – but they were far more positive than before the trial, often showing their surprise at this.

This group may be resistant at first to a digital switchover but do not represent significant concerns given that their opinions can be altered in buying digital radios. Furthermore, given the importance placed on radio listening, this group will engage in the switchover, albeit they may not be able to replace all their radios at one go since they mentioned **cost** as a potential barrier to uptake. Their concerns post-trial became about other people rather than for themselves – support for the elderly and vulnerable was most often cited as a recommendation if there were a switchover.

This group did not include any from the vulnerable groups.

Case study

The Gould family were the most avid radio listeners we met in the qualitative research. Simon (54), Gillian (53), Anna (18) and Joseph (13) all listen to one of the seven analogue radios in the house on a daily basis:

‘Whenever we were at home, that was just there. It was always on, always discussed...the radio was in the family room. It was a permanent part of our life.’ (Simon)

At the pre-trial stage, the whole family were reluctant about a digital switchover. They had limited experience of using digital radio but could see some of the benefits that digital radio would offer. Their main concern was that sound quality would be inferior on a digital platform.

'We'd be bereft; we can't live without them' (Simon)

They had anticipated difficulties in setting up the radios but they had found all seven radios easy and user-friendly. The experience of switching to digital radio was "overwhelmingly positive" for them after initial set-up and remained mainly positive after six weeks. They had changed their listening habits to include many digital only stations and were surprised by the sound quality on a digital platform, although this depended on the radio.

'A year ago I could have walked into a room and most certainly there would have been Radio 1. Now I can walk into any room and there can be anything playing from Jazz FM, to whatever, 5 Live' (Simon)

They are now positive about a digital switchover but showed some concerns for the elderly and vulnerable who may struggle with the change; however, they believe that everyone has someone that can help them.

7.3 Ill-informed converter

This group tended to **know very little** about digital radio and the potential switchover at the pre-trial stage. Some listened on a digital platform but in some cases were unaware that they were doing so, when, for example, they were listening via their television.

Following the experience of switching over, this group was **very positive** about the process they had been through and the idea of a digital switchover as a whole. They did not have usability issues but some were not using the radios to their full ability – for example, not using the preset buttons or varying listening habits. They tended to talk in language like it was a challenge, but not one that was unpleasant. They talked about 'applying themselves' or 'getting to grips with it'.

This group may be a cause for concern because they will not seek information about a switchover and includes some vulnerable and elderly respondents who are less knowledgeable about digital radio. **Clear language** and **targeted advertising** about the benefits of digital radio in clear language will be important to engage this group.

Case study

Alec is 78 and lives with his wife, Mary, 73 in sheltered accommodation. They used to watch a lot of television but since Alec has become partially sighted, it hurts his eyes to watch too much TV so they now listen to a lot more radio. The radio or television is on 24 hours a day since Alec rarely leaves the house and he finds it difficult to sleep at night so he flicks between spoken word stations knowing by feel how to find these on a manual tuner on the radio by his bed.

'The radio is very important to me, especially at night when it feels like company' (Alec, 78)

During the day, they listen to a lot of digital radio through their television, including LBC and other digital-only stations but they were not aware that this was digital radio.

He had limited awareness of a digital switchover and some of the perceived benefits but only spoke about these in reference to DAB radio sets; she was actively surprised and visibly concerned about the idea of a switchover in the pre-trial discussions.

They received two radios for the partially-sighted and were broadly positive about digital radio, citing sound quality and lack of interference as the main benefits. The switchover did not affect their listening behaviour. This couple live on a low income and the cost of digital radios was a big concern to them. Advertising that explains that digital radio is available through freeview TV would be useful for other households similar to Alec's.

7.4 Ill-informed struggler

This is the group that would cause most concern and need most support if there were a digital switchover. These respondents tended to **know little about digital radio** as a whole; some owned DAB radios but cited specific benefits of the radio set itself. They had **no knowledge** of the switchover. They listen in varying degrees to the radio but all felt that radio was an important aspect of their life. They tended not to listen to digital radio on other platforms. They are unlikely to voice concern or resistance to a digital switchover.

This group was most likely to have **encountered problems in setting up** and using the DAB radios. This was often driven by lack of knowledge about digital radio and expecting the radios to work in the exact same way as their old analogue system.

They were **mainly positive about digital radio**, most often citing sound quality and improved reception as the benefits following the trial. However, their experience suggests that they would struggle in the event of a digital switchover and would rely on the support of friends and family to assist in switching over.

This group is mainly, but not solely, **elderly** respondents who lack confidence in using new equipment.

The Government would **need to help** this category to fully understand the benefits and how to use digital radio and may need to offer support to those who do not have friends and family to help set up the radios.

Case Study

James is 87 years old and lives alone in sheltered accommodation although his family live nearby. He enjoys listening to the radio – almost exclusively Radio 4 – and habitually listens to particular programmes at different times of the day. He owns one DAB radio, which he thinks has a better sound quality, as well as being aesthetically pleasing. However, he says that he would replace his analogue radio with another analogue one if it were to break because of cost. He was not aware of the potential switchover

He received one alarm clock digital radio for the trial and he encountered a number of issues in setting it up and using it:

'It drove me mad. I had to crack the alarm because I wanted to use it from time to time... You should see the palaver with that (digital radio). Makes me wonder the people who designed

these things that they have to make them more complicated to make you think it's an improvement...this radio is more complex, setting the alarm for example, the actual sequencing, its unnecessarily complex' (James)

When we visited him post-trial, he continued to be very positive about digital radio continuing to cite sound clarity and tone as the benefits. However, when we looked at his digital radio it emerged that he had by accident switched to analogue by pressing the 'mode' button so the cited benefits reflect the radio itself rather than the fact that it was digital.

James, thus, struggled with both the complexity of using the radio and the language used in the instruction manuals and on the radio itself (for example, 'mode'). He believes that *'old people will get used to [the switchover] as long as they haven't gone bonkers before that because they are trying to work out'*.

James's example is indicative of the fact that this group is the most likely to encounter issues but among the least likely to speak out.

8. Conclusions

Most households had a positive conversion experience.

The majority of households enjoyed switching over to digital radio and advocacy was very high by the end of the trial. Many were listening more often to a range of stations, including some that are digital-only. Other experienced benefits include improved sound quality, better reception and ease of use. Those that enjoyed trying out digital radio included some (*'unexpected converters'*) who had initially voiced concerns about a switchover but changed their mind in the light of direct experience. It also included many (*'enthusiastic or complacent converters'*) who were positive about digital radio throughout the trial.

A minority encountered difficulties regarding conversion.

While most found setting up and using digital radio easier than they anticipated, there was a small minority who had problems, particularly at set-up stage, across home and car radios. Vulnerable and older people tended to have more difficulties with set-up and to rely on support from friends and family members. For those that had problems, they were often related to difficulty in understanding the radio instructions.

The qualitative research revealed limited understanding of digital radio and how it compares to analogue.

At the pre-trial stage, there was a wide range of knowledge about digital radio, including many who knew little or nothing about it. Awareness was particularly low about the potential switchover. For those that encountered difficulties in set-up and usability, they tended to be related to a lack of knowledge about the differences between digital and analogue radio.

The two household typologies that present possible concern for the Government in the event of a digital switchover – *'ill-informed converters'* and *'ill-informed strugglers'* – had limited awareness about digital radio and this impacted on usability; for example, in anticipating digital radio to be available on analogue airwaves.

The main drivers to the take-up of digital radio are direct experience and heightened awareness of how it compares favourably with analogue.

The key concerns cited by respondents, if there were to be a digital radio switchover, were cost and scale, particularly related to in-car radios. Another key barrier identified is lack of knowledge about digital radio as shown by the experienced difficulties with set-up and usability. In the light of this, the main drivers in the event of a digital switchover, for these target groups, are direct experience and a heightened awareness of the benefits of digital radio. Providing general information with targeted advertising will be critical to remove the barrier of lack of knowledge about digital radio.

Appendices

Appendices

Appendix 1: Qualitative materials

DCMS Digital Radio (12076048) - Ipsos MediaCT

Stage 1 discussion guide: Family Deep Dives

Project Objectives

DCMS needs to understand the impact of household conversion to digital radio on consumer behaviour, and the potential barriers to conversion. This digital switchover pilot is being conducted to enable DCMS to gain insight into the listener experience of various household conversion options, from an analogue to digital-only radio environment, and the potential barriers to this type of conversion.

Specifically, the project objectives are to:

- evaluate the impact on listening behaviour of various conversion options on individual listeners/households;
- explore and quantify any difficulties with setting up and using the new equipment;
- explore and measure the perceived benefits, attitudes and understanding of digital radio by listeners;
- help validate spectrum planning assumptions with practical assessment of indoor radio reception;
- consider usability of digital radios (including in-car); and
- consider barriers to the take-up and enjoyment of digital radio.

Stage 1 Objectives

Stage 1 of the qualitative component of the project will take place prior to conversion, and will be conducted as two-hour long, face-to-face family deep dives. The principal objectives of this stage are to:

- gain a baseline understanding of current attitudes and behaviours;
- establish current radio listening habits/repertoire in detail;
- explore any concerns the participants may have in anticipation of the switchover.

Summary of the discussion guide

Timing		Overview
5 mins	Introduction	
45 mins	Current habits	This section will be used to establish the current radio listening habits and station repertoire of as many members of the household as possible. We would encourage family members to show us the location of the radios they use in the house, and give us as much information as possible about how listening fits into their daily routine.
35 mins	Awareness & attitudes	This section will be used to provide a benchmark for awareness of and attitudes towards digital radio. It will assess familiarity and current experience with digital radio, perceived benefits and drawbacks compared to analogue, and awareness of the proposed digital switchover.
30 mins	Expectations & concerns	This section will be used to determine the expectations of the household with respect to the conversion, and discuss any concerns they may have. We will discuss their experiences of digital TV switchover. We will talk in detail about the impact they expect the radio conversion pilot to have on the listening habits of the household, and cover any outcomes (positive or negative) that they expect to emerge.
5 mins	Final thoughts	This section ties up the session and advises participants of how the next stage of the pilot will be conducted.

MODERATOR NOTE:

Involve as many members of the household as possible throughout the discussion, obtaining a range of feedback of to each question asked. Particular attention must be paid to engage children if present: it may be preferable to consult them on their opinions during the first part of the discussion only, where they can talk through their listening habits. Parents should be consulted at the start of the session to ensure that this is appropriate.

	<i>Key Questions</i>	<i>Interviewer notes</i>
	<u>Introduction</u>	
5 mins	<p>Explain:</p> <ul style="list-style-type: none"> - About Ipsos MORI – independent research company - Ground rules – not a test to catch out respondent/ no right or wrong answers - Confidentiality - Permission to audio record <p><u>Introduction to family deep dive</u></p> <p>Moderator to explain:</p> <p>I'm here today to talk to you and your household about digital radio. As you are aware, this is the first step in a process with several stages, where we will be replacing the analogue radios in your home (and / or car) with digital radios. This is the first of three separate occasions when we will be speaking to you. The purpose of our discussion today is to have a general discussion about how you feel about digital radio, your current radio listening habits and whether you have considered listening to digital radio. Since we will be talking about the radio listening habits of various members of the household, I would also like it if you could show me where the radios are in the home during our discussion.</p> <p>Please be assured that I am not here to test you: there are no right or wrong answers. The purpose of my visit is to have an open and honest discussion about your radio listening habits.</p>	

	<p>ASK LEAD RECRUIT:</p> <p>Please introduce me to the rest of your household / the other people here with you today.</p> <p>TO EACH PARTICIPANT IN TURN:</p> <p>Please tell me a little about yourself.</p> <p>Can you remember your earliest (or strongest) memory of listening to the radio?</p> <p>Tell me about that time...</p> <ul style="list-style-type: none"> - What do you remember? - Where were you? - Who were you with? - What was on the radio? 	<p>If unable to recall a memory, prompt for favourite times for listening to the radio (e.g. Archers on Sunday morning).</p>
45 mins	<u>CURRENT HABITS</u>	
	<p>To begin with, I'd like to talk to each of you in turn about your current radio listening habits.</p> <p>ASK EACH PARTICIPANT IN TURN:</p> <ul style="list-style-type: none"> - When do you listen to the radio? What times of day / days of the week? - What radio stations or programmes do you like to listen to? Why is that? Is this your choice or someone else in your house? - What do you enjoy about these stations / programmes? - Do you typically listen to the same stations or do you tune to see what else is on? - When listening to the radio do you tend to flick or stick with a single station? - What content do you like listening to on the radio? Music? Talk? News? - Do you listen to radio at the weekends? If so, how, if at all, does this differ from your radio listening during the week? - Does the station you listen to vary depending on the time of day? If so, how? - Does your radio listening outside the home (e.g. at work) differ from what you listen to inside the home? - What about in the car? Do you mostly listen to the radio or music in the car? Does it differ if it is just you, or if other people are in car? 	

	<p>ESTABLISH ROLE OF RADIO:</p> <p>Moderator note: Show Stimulus A: Role of Radio</p> <p>Which of the following statements best reflects how radio fits into your life?</p> <p>I can't live without the radio</p> <p>Listening to the radio is central to everything, or nearly everything I do</p> <p>I only listen to the radio occasionally, but it is important to me</p> <p>I listen to the radio now and again, but would not miss it if it was not there</p> <p>I avoid listening to the radio where I can</p> <p>I only listen to the radio now and again but would like it to play a bigger role in my life</p> <p>Tell me a bit more about the statement you have picked, and how radio fits into your life.</p> <p>Do you see your radio listening habits changing in the next 12 months?</p> <ul style="list-style-type: none"> - IF YES: why and how do you see it changing? - IF NO: why not? <p>If you don't listen to the radio at the moment, do you plan to start listening?</p> <ul style="list-style-type: none"> - IF YES: why and how do you plan to start doing this? - IF NO: why not? 	<p>Ask each member of the household</p> <p>As each member of the household</p>
--	--	--

<p>FAMILY WALKAROUND:</p> <p>I would really like you to take me around your home, and show me each of the devices you use to listen to the radio.</p> <p>As we make our way through the home, please tell me about the way in which each radio is used: when, for which stations / programmes and by whom.</p> <p>COMPLETE FAMILY WALKAROUND RECORD SHEET, AND FOR EACH DEVICE ASK:</p> <ul style="list-style-type: none"> - Who uses this radio? - When, and how often, is it used? - Does use vary depending on the time of day / day of week (e.g. weekday vs. weekend)? - Which programmes / stations is it used for? - Do the programmes / stations vary depending on who is using the radio at the time? - Which is the most frequently used radio in the home? Who is it used by, when, and for which programmes / stations? <p>Ensure that the following are covered:</p> <ul style="list-style-type: none"> - Devices with online connectivity (e.g. desktop, laptop, tablet, smartphone) - In-car devices <p>IF THE DEVICE IS A DIGITAL RADIO, ALSO ASK:</p> <ul style="list-style-type: none"> - How long have you had this digital radio? - Why was it decided to purchase this as a digital radio rather than analogue? - Was it a deliberate decision to purchase this as a digital device, or coincidental? - Tell me about your decision making process... <p>Moderator note: Show Stimulus B: Laminate showing different devices, and ASK:</p> <p>Are there any devices here that we have not seen or spoken about, that any of your household use to listen to the radio?</p>	<p>It is not necessary to see the in car radio, but ensure you ask about it.</p>
---	--

35 mins	<u>AWARENESS & ATTITUDES</u>	
	<p>ASSESS FAMILIARITY WITH AND EXPERIENCE OF DIGITAL RADIO:</p> <p>IF DIGITAL RADIOS HAVE BEEN IDENTIFIED ON THE FAMILY WALKAROUND:</p> <p>Tell me more about the digital radio(s) you own:</p> <ul style="list-style-type: none"> - How confident are you using these radios? Why is this? - Do you find it / them easy or difficult to use? Why is this? - In addition to playing radio stations, are you aware of any other functions on the device? <ul style="list-style-type: none"> o Probe: song and station display, quick tuning, extra channels - What is your opinion of digital radio based on your experience so far? <p>IF DIGITAL RADIOS HAVE <u>NOT</u> BEEN IDENTIFIED ON THE FAMILY WALKAROUND:</p> <ul style="list-style-type: none"> - Have you ever used or had access to a digital radio? Tell me about this... - Why is it that you do not currently have any digital radios in your home (other than radio accessed through smartphone / PC / TV etc.)? - Do you plan to use or purchase a digital radio in future? Why / why not? - What is the most important consideration for you when choosing between analogue and digital radio? <p>ASSESS AWARENESS OF DIGITAL RADIO AND DIGITAL SWITCHOVER:</p> <p>What is the difference between digital and analogue radio?</p> <ul style="list-style-type: none"> - How does digital radio compare to analogue? - Are you aware of any potential benefits of digital radio over analogue? What about any drawbacks? - Probe: song and station display, quick tuning, extra channels, sound quality <p>Are you aware that there is a proposed switchover to digital radio in the UK?</p> <p>IF YES:</p> <ul style="list-style-type: none"> - Tell me what you know about this (probe for dates, details) 	<p>Be aware of devices such as smartphones, computers and televisions that will provide access to digital radio</p>

	<ul style="list-style-type: none"> - How do you feel about it? - How do you think it might affect you? - Have you seen any information relating to the planned digital radio switchover? - Where did you come across this information? - What type of information was this? What source was it from? What do you remember about it? <p>IF NO:</p> <ul style="list-style-type: none"> - What do you think this might involve? - How do you feel about this conversion? <p>MODERATOR TO READ OUT</p> <p>With the successful switchover to digital TV now complete, the Government plans to announce a decision on digital radio switchover near the end of 2013. Very much like digital TV switchover, this would mean a move for the majority of radio stations from FM/MW to a digital platform.</p> <ul style="list-style-type: none"> - How do you think it might affect you? 	
30 mins	<u>EXPECTATIONS & CONCERNS</u>	
	<p>I'd like us to cast our minds back for a moment to the digital TV switchover...</p> <p>What was your experience of this?</p> <ul style="list-style-type: none"> - Tell me about what happened (how and when you replaced your equipment etc). - How did this affect you and your household? - Did you experience any problems or difficulties in setting up new equipment? If so, what were these and how did you overcome them? - How did you feel about the switchover at the time? Do you feel differently about it now? Why is this? - Have you found any advantages or disadvantages of digital TV compared with analogue TV? - Would you have switched over to digital TV if there had not been a UK switchover? Why / why not? 	

	<p>Let's think now about what will happen in the next stage of this process, when the analogue radios in your home (and / or car) are replaced with digital ones:</p> <ul style="list-style-type: none"> - How are you feeling about the conversion? - What are you expecting to happen? What makes you think this will happen? - How do you think you personally will be affected? Why is this? - Who do you expect will be affected the most? What makes you say this? - Do you expect to listen to different radio stations than you do now? Why / why not? - Do you think you will listen to the radio any more or less than you do now? Why do you say that? - Do you expect the listening habits of you or your family to change in any way? If so, how and why? If not, why not? - Do you anticipate any difficulties with setting up or using the new equipment? - What do you think these will be, and how will you overcome them? - Do you have any concerns about the conversion? If so, what concerns do you have any why? 	
5 mins	<u>FINAL THOUGHTS</u>	
	<p>Do you have any questions or comments about this conversion process?</p> <p>Is there any more information about the current radio listening habits or preferences of you or your family that you would like to add?</p>	
	<u>WRAP UP</u>	
	<p>Wrap up:</p> <ul style="list-style-type: none"> - Brief household on procedure for collection of equipment - Confirm time and date of Stage 2 telephone interview and Stage 3 family deep dive 	

DCMS Digital Radio (12076048) - Ipsos MediaCT

Stage 2 discussion guide: Telephone Interviews

Project Objectives

The DCMS needs to understand the impact of household conversion to digital radio on consumer behaviour, and the potential barriers to conversion. This digital switchover pilot is being conducted to enable DCMS to gain insight into the listener experience of various household conversion options, from an analogue to digital-only radio environment, and the potential barriers to this type of conversion.

Specifically, the project objectives are to:

- evaluate the impact on listening behaviour of various conversion options on individual listeners/households;
- explore and quantify any difficulties with setting up and using the new equipment;
- explore and measure the perceived benefits, attitudes and understanding of digital radio by listeners;
- help validate spectrum planning assumptions with practical assessment of indoor radio reception;
- consider usability of digital radios (including in-car); and
- consider barriers to the take-up and enjoyment of digital radio.

Stage 2 Objectives

Stage 2 of the qualitative component of the project will take place shortly following conversion, and will be conducted as a one-hour long telephone interview with the lead member of each household. The principal objectives of this stage are to:

- obtain initial reactions to the new equipment;
- explore personal experiences of the installation process;
- probe for any early changes in listening habits.

Summary of the discussion guide

Timing		Overview
5 mins	Introduction	
15 mins	Installation process	This section will be used to explore the household's experiences of the installation process, and probe for any arising problems or issues.
20 mins	Initial reactions to conversion	This section will be used to obtain initial reactions to the conversion, and the impact it has had on the household in the early days following switchover.
20 mins	Changes in listening habits	This section will be used to determine any early changes in listening habits of the household, to include use of any new stations, any difficulties experienced in tuning into their favourite stations or changes in frequency or duration of radio listening.
5 mins	Final thoughts Wrap up	This section will be used to allow the participants to cover anything else with regards to the conversion. Issue incentives and confirm next interview.

MODERATOR NOTE:

Throughout the discussion, ensure that the participant is answering not only on their own behalf, but on behalf of the various members of their household. Prompt for feedback regarding other members of the family if this not spontaneously mentioned.

	<i>Key Questions</i>	<i>Interviewer notes</i>
	<u>Introduction</u>	
5 mins	<p>Explain:</p> <ul style="list-style-type: none"> - About Ipsos MORI – independent research company - Ground rules – not a test to catch out respondent/ no right or wrong answers - Confidentiality - Permission to audio record <p><u>Introduction to mini group</u></p> <p>Moderator to explain:</p> <p>I'm calling you today to continue our discussion about digital radio. As you are aware, this is part of a multi-stage process where we are replacing the analogue radios in your home (and / or car) with digital radios. This is the second of three separate occasions when we will be speaking to you. The purpose of our discussion today is to get your initial reactions and feedback following the switchover of your analogue radios to digital. Throughout our discussion, I would like you to tell me not just about your own opinions and experiences, but also about those of other members of your household.</p> <p>Please be assured that you are not being tested: there are no right or wrong answers. The purpose of our discussion is to have an open and honest talk about your experiences and opinions.</p>	

15 mins	<u>INSTALLATION PROCESS</u>	
	<p>What equipment did you pick up, and what was it replacing?</p> <p>Tell me about the process of collecting your new digital radio equipment and setting it up at home...</p> <ul style="list-style-type: none"> - What advice did you receive from the shop where you picked up your radio/s? - What happened when you first got the equipment home? - Who set it up? Why was this? Did they require any help? - How easy or difficult was it to set up? - How long did it take to set up? - How did you find this experience? - Did you come across any problems or difficulties in setting up new equipment? If so, what were these and how did you overcome them? - Were some radios easier to set up than others? Why was this? <p>How easy or difficult did you find setting up and using the various functions of each radio?</p> <ul style="list-style-type: none"> - Did you need to set the date / time? How easy or difficult did you find this? - Do any of the radios have an alarm function? If so, have you used it? How was this? - How easy or difficult was it to tune to different stations? Why? - Did you set any preset channels? Why / why not? How easy or difficult was this to do? - Does the radio(s) have any other functions (e.g. an iPod dock)? Have you used these? Why / why not? How did you find it? <p>What happened after each radio was set up?</p> <ul style="list-style-type: none"> - What station(s) did you tune it to? - Did you keep the radios in the same place as the replaced analogue radios? - Did you notice any differences compared to your previous equipment? What were these? 	<p>Moderator: compare this with list of what they should have received.</p>

	<p>Have you had any technical problems or difficulties following the initial set-up of each radio?</p> <p>IF YES:</p> <ul style="list-style-type: none"> - What were these? - How did you attempt to resolve the problem? What happened? - Did you speak to anyone (e.g. friends / family)? Was this helpful? Why / why not? - Did you go online to look for information? Why / why not? - Did you look to any other sources for help? Why / why not? If yes, what were these? - Are these problems solved now? - How could these problems have been prevented or resolved? <p>ASK IF VISUALLY IMPAIRED:</p> <ul style="list-style-type: none"> - Did you run into any specific problems because of your visual impairment? - Were you able to read the instructions? - Could you see the buttons and information on the radio(s) clearly? <p>ASK IF ELDERLY:</p> <ul style="list-style-type: none"> - Were you able to read the instructions? - Could you see the buttons and information on the radio(s) clearly? - Did you have any problems working the buttons / dials on the radio(s)? 	
20 mins	<u>INITIAL REACTIONS TO CONVERSION</u>	
	<p>Tell me about how you have found the change so far...</p> <ul style="list-style-type: none"> - What have you noticed about digital radio? - What has been the biggest difference that you have noticed? - What other differences have you noticed? - How are you feeling about digital radio at this stage? - What has been your initial reaction of your household? 	

Have you noticed any positive changes as a result of the switch to digital?

PROBE FOR:

- Sound quality
- Usability of equipment
- Station choice
- Showing name of station / song on display

What about any negative ones?

PROBE FOR:

- Usability of equipment
- Difficulty in accessing favourite stations

Has one member of the family been affected by the change more than others?

Who is this and why?

Have there been any affects of the switch to digital which have surprised you, or any other members of your family?

If so, what were these and why?

How have the new radios compared to your analogue ones?

- Any features of the new radio you prefer to your old radio? Why is this?
- Any features you like less?

How do the radios compare to each other?

	<ul style="list-style-type: none"> - Have you preferred any radios over others, or disliked any more than others? Why is this? - Has a particular radio made more of a difference than the others? If so, how and why? - Have some been easier or more difficult to use? <p>Have you or any of your family missed your old analogue radios?</p> <p>Why was this? What did you do?</p>	
20 mins	<u>CHANGES IN LISTENING HABITS</u>	
	<p>Have you noticed any changes at this early stage to the radio listening habits of you or any of your household?</p> <p>IF YES, what are these?</p> <p>Are there any positive changes you've noticed?</p> <p>What about any negative ones?</p> <p>Have you been listening to your favourite stations?</p> <p>IF YES, have you noticed any differences with the new equipment?</p> <p>IF NO, why is this? Have you experienced any difficulties tuning in?</p> <p>Have you tried any new stations since obtaining the new equipment?</p> <p>If so, which ones? How did you find this new station? PROBE if accidentally came across it, or specifically searched through etc.</p> <p>How was this experience?</p> <p>Has the range of stations you listen to changed at all? How and why is this?</p>	

	<p>Were you aware before this that there were different stations on digital radio?</p> <p>Have you (or any members of your household) noticed a change in how frequently you listen to the radio?</p> <p>IF YES, have you (or any members of your household) been listening to the radio more or less frequently than before?</p> <p>Tell me more about this...</p> <p>Have you (or any members of your household) noticed a change in how long you listen to the radio for?</p> <p>IF YES, have you (or any members of your household) been listening to the radio for more or less time than before?</p> <p>Tell me more about this...</p> <p>How have the new radios affected your listening habits?</p> <ul style="list-style-type: none"> - Has one radio changed your habits more than others? Which one and why? <p>IF IN-CAR RADIO HAS BEEN FITTED:</p> <p>How has your listening in the car been affected?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - Does it make you want to spend more / less time in your car? - Have you listened to any new stations? If so, which and why? - Have you noticed a difference in sound quality? In what way? - What other changes (positive or negative) have you noticed? - Has the new radio affected your radio listening habits in the car in any other ways? In what way? <p>Would you recommend a digital in-car radio to others? Why / why not?</p>	
--	---	--

5 mins	<u>FINAL THOUGHTS</u>	
	<p>Do you have any questions or comments about switching over to digital?</p> <p>Is there any more information about the current radio listening habits or preferences of you or your family that you would like to add?</p>	
	<u>WRAP UP</u>	
	<p>Wrap up:</p> <ul style="list-style-type: none"> - Confirm time and date of Stage 3 family depth interview 	

DCMS Digital Radio (12076048) - Ipsos MediaCT

Stage 3 Discussion Guide: Family Deep Dives

Project Objectives

DCMS needs to understand the impact of household conversion to digital radio on consumer behaviour and the potential barriers to conversion. This digital switchover pilot is being conducted to enable DCMS to gain insight into the listener experience of various household conversion options, from analogue to digital-only radio environment, and the potential barriers to this type of conversion.

Specifically, the project objectives are to:

- evaluate the impact on listening behaviour of various conversion options on individual listeners/households;
- explore and quantify any difficulties with setting up and using the new equipment;
- explore and measure the perceived benefits, attitudes and understanding of digital radio by listeners;
- help validate spectrum planning assumptions with practical assessment of indoor radio reception;
- consider usability of digital radios (including in-car);
- consider barriers to the take-up and enjoyment of digital radio.

Stage 3 Objectives

Stage 3 of the qualitative component of the project will take place after conversion, and will be conducted as two-hour long, face-to-face family deep dives. Objectives of this final stage will be to:

- explore whether reactions to the equipment have changed since installation, and why;
- to discuss take up and enjoyment of digital radio;
- respondents' own perceptions of how their radio listening has changed, if at all;
- to discuss how and why listening habits have changed, and gauge participants' reactions to this change;
- to compare the process of switchover to initial expectations, probing on whether they differ, and if so how and why; and
- explore the perceived difficulties/benefits of digital radio.

Summary of the discussion guide

Timing		Overview
10 mins	Introduction	This section covers the content of the discussion, reiterates our information, ground rules, confidentiality etc.
10 mins	Equipment installation & switchover process	This section covers how they found the installation process, any difficulties they had and potential solutions for these.
25 mins	Listening experience & changes in attitude	This section discusses whether their listening experience has/hasn't changed during the project.
25 mins	Radio functions	This section covers digital radio functions, usability and reactions to these functions.
20 mins	Walkaround	During this section, the respondent walks us around their house, discussing each of the radios in turn.
20 mins	The future	This section focuses on future behaviour and whether they think their digital radio use will change.
5 mins	Final thoughts	This section ties up the session.
5 mins	Wrap up	Any questions, issue incentives.

MODERATOR NOTE:

Involve as many members of the household as possible throughout the discussion, obtaining a range of feedback of to each question asked. Particular attention must be paid to engage children if present: it may be preferable to consult them on their opinions during the first part of the discussion only, where they can talk through their listening habits. Parents should be consulted at the start of the session to ensure that this is appropriate.

	<i>Key Questions</i>	<i>Interviewer notes</i>
10 mins	<u>Introduction</u>	
	<p>Explain:</p> <ul style="list-style-type: none"> - About Ipsos MORI – independent research company - Ground rules – not a test to catch out respondent/ no right or wrong answers - Confidentiality - Permission to audio record <p><u>Introduction to family deep dive</u></p> <p>Moderator to explain:</p> <p>I'm here again today to talk to you and your household about digital radio. We have now replaced the analogue radios in your home (and / or car) with digital radios and the purpose of our discussion today is to talk about your experience with the digital radios provided in this project: from the installation and first impression, to potential changes in behaviour and opinions on digital radio after taking part.</p> <p>Please be assured that I am not here to test you: there are no right or wrong answers. The purpose of my visit is to have an open and honest discussion about your radio listening habits.</p>	

10 mins	<u>EQUIPMENT INSTALLATION & SWITCHOVER</u>	
	<p>To begin with, I'd like to talk about the installation of the digital radios:</p> <p>ASK THE DECISION MAKER/INSTALLER:</p> <p>When we first met we spoke about digital radios and you had (use as appropriate): used them before / had a bit of experience / had never used one before.</p> <p>We spoke about the installation process in your telephone interview. Is there anything else you would like to add?</p> <p>PROBE:</p> <ul style="list-style-type: none"> - How did you find the instructions? - How long did it take you to completely set up the radio/s? - Did you need any help? <ul style="list-style-type: none"> - From who? At what point did you ask for help? What was it specifically that you needed help with? What could have helped you to do it yourself? - How would you change the instructions in order to help with the set up? - Was anything complicated or confusing? <ul style="list-style-type: none"> - What could have helped this? Instructions? Design of radios? - For you, are there any drawbacks to digital radio when it comes to the set up and installation? How does it compare to analogue? 	<p>REVISIT NOTES FROM STAGE 1 and 2 BEFORE INTERVIEW</p>

	<p>VEHICLE:</p> <ul style="list-style-type: none"> - How hard was it to get used to a digital car radio compared to analogue? - Was there anything you missed about your car analogue radio? - How confident were you using the digital radios at first? Why is this? - How confident are you using the digital radios now? Why is this? - Do you find it / them more easy or difficult to use that you thought you would? Why is this? 	
25 mins	LISTENING EXPERIENCE & CHANGES IN ATTITUDES	
	<p>So, tell me what it has been like having digital radio.</p> <p>Have you enjoyed having it? If so, why? What have you liked, disliked about digital radio?</p> <p>What is your opinion of digital radio based on your experience so far?</p> <p>What general differences have you found in the digital radio compared to analogue?</p> <p>What do you like in particular about digital radio? How does that compare to analogue?</p> <p>What do you dislike in particular about digital radio? How does that compare to analogue?</p> <p>Is there anything you would like to change about the digital radio to appeal more to you?</p> <ul style="list-style-type: none"> - PROBE: set up, equipment design, usability, features, stations available, service and reception? <p>Tell me about your listening time, have you noticed a change in your listening habits? Why do you think that is?</p> <ul style="list-style-type: none"> - PROBE: increased/decreased listening? 	

	<p>Have you noticed a change in your family's listening habits? Has one person in particular engaged with digital more than others? Why do you think that is?</p> <ul style="list-style-type: none"> - PROBE: increased/decreased listening? <p>Have you or your family replaced something else with radio? (i.e. less TV, more radio)</p> <p>Have you felt that you have listen to the radio more or differently since the swap?</p> <ul style="list-style-type: none"> - PROBE: listened more frequently, listened at different times to usual, listened during different activities, listened to different stations? - Probe: understand whether this is because it is new to them, or whether they think it will continue. 	
25 mins	RADIO FUNCTIONS	
	<p>Tell me what it was like to use the radios and find stations</p> <ul style="list-style-type: none"> - Did you find it easy or difficult to tune the radio/s? Was it easy or difficult to find stations? - Have you listened to different stations? <ul style="list-style-type: none"> - If you have, did you discover these by accident, or did you search for them? - If you searched for them, how did you hear about them? Recommended? Read in magazine, newspaper? Heard about on other radio station? - What did you think to these new stations? <ul style="list-style-type: none"> - Surprised? Disappointed? Better than stations listened to previously? Aimed at you/ not for you? - Have they been added to your listening selection? <ul style="list-style-type: none"> - If yes, why? Have the replaced something else? - If no, why? Would you listen to them again? 	

	<ul style="list-style-type: none"> - Were there any stations missing? Were there any stations you would like/expect to find on digital radio? - In addition to playing radio stations, are you aware of any other functions on the device? <ul style="list-style-type: none"> - Probe: song and station display, quick tuning, extra stations - Did you use these added functions? - If listened to extra stations – do you prefer any of these over your regular stations? Will you continue to listen to these? - Have you listened to digital radio <u>online</u> at all/more since your switchover? Do you think you will be more likely to in future? - Have you listened to digital radio using a tablet or smartphone since your switchover? Do you think you will be more likely to in future? <p>Now that you have used digital radio for a period of time, how would you describe the difference between digital and analogue radio?</p> <ul style="list-style-type: none"> - For you, are there any benefits of digital radio over analogue in general? <ul style="list-style-type: none"> - PROBE: different stations, song and station display, quick tuning, sound quality, ease of use, design of radio, feel up to date... - For you, are there any drawbacks to digital radio in general? <ul style="list-style-type: none"> - PROBE: song and station display, quick tuning, extra stations, sound quality - When we spoke in your first interview, you mentioned that you had some concerns about digital radio before this project. Have these concerns changed since you have received the radio? 	<p>REVISIT NOTES FROM STAGE 1 PRE-INTERVIEW</p> <p>e.g. uses more electricity, hard to read; some stations not found due to non-perfect tuning; sound quality not as good for audiophiles etc.</p>
--	--	--

20 mins	<u>WALKAROUND</u>	
	<p>FAMILY WALKAROUND:</p> <p>As we did in the first interview, I would really like you to take me around your home, and show me where the digital radios were placed.</p> <p>As we make our way through the home, please tell me about any <u>changes</u> in the way in which each radio is used: when, for which stations / programmes and by whom.</p> <p>COMPLETE FAMILY WALKAROUND RECORD SHEET, AND FOR EACH DEVICE ASK:</p> <ul style="list-style-type: none"> - Who uses this radio? Has this changed since you switched to a digital radio? - When, and how often, is it used? Has this changed since you switched to a digital radio? If so, why? - Who uses it the most? Has this changed since you switched to a digital radio? If so, why? - Does use vary depending on the time of day / day of week (e.g. weekday vs. weekend)? Has this changed since you switched to a digital radio? If so, why? - Which programmes / stations is it used for? Has this changed since you switched to a digital radio? If so, why? - Do the programmes / stations vary depending on who is using the radio at the time? Has this changed since you switched to a digital radio? If so, why? - Which is the most frequently used radio in the home? Who is it used by, when, and for which programmes / stations? Has this changed since you switched to a digital radio? If so, why? <p>Ensure that the following are covered:</p> <ul style="list-style-type: none"> - Devices with online connectivity (e.g. desktop, laptop, tablet, smartphone) - In-car devices 	<p>MAKE PRE-NOTES ON what was there before, how does the new radio differ (size, quality, functions etc.)</p>

20 mins	<u>FUTURE HABITS</u>	
	<p>Now that you've tried digital radio, do you see your listening habits changing in the next 12 months?</p> <ul style="list-style-type: none"> - IF YES: why and how do you see it changing? - IF NO: why not? <p>If you didn't listen to the radio much before this project, do you plan to start listening more in the future?</p> <ul style="list-style-type: none"> - IF YES: why and how do you plan to start doing this? - IF NO: why not? - After this project do you plan to use / purchase any more digital radios? Why / why not? - What is the most important consideration for you when choosing between analogue and digital radio? Has this changed since we swapped your radios? - Have you recommended digital radio to your friends/family? Would you? If so, why? <p>MODERATOR TO READ OUT</p> <p>With the successful switchover to digital TV now complete, the Government plans to announce a decision on digital radio switchover near the end of 2013. Very much like digital TV switchover, this would mean a move for the majority of radio stations from FM/MW to a digital platform.</p> <p>When we first met we spoke about how you felt about the potential switchover and you mentioned... [GO OVER 1ST STAGE NOTES]. How do you feel about those initial questions/concerns/lack of concern now? Did you have any other feelings about the change that we didn't cover?</p> <ul style="list-style-type: none"> - How do you think it would affect you now that you have taken part in this trial? - Who do you think was most affected by the change? Why? Was this surprising? - How do you think it would affect other people you know? - How do you feel about it now? 	

5 mins	<u>FINAL THOUGHTS</u>	
	<p>Your opinions and experiences are helping to directly feed into the research on the potential digital radio switchover. If you were to give advice to the government on how to handle the switchover, what would you recommend?</p> <p>What help/supoprtdid you feel was necessary or important for you in this process? What could have made the switchover smoother or easier for you? Can you think of others who might struggle with the switchover? How could they be helped in this process?</p> <p>We spoke in your first interview about the Digital TV switchover and the way that was carried out. What lessons could the Government take from the Digital TV switchover to ensure awareness, and it is successful and easy for people to understand?</p> <ul style="list-style-type: none"> - PROBE: information, adverts, leaflets, help for vulnerable, warning that it's happening... <p>Now that you have taken part in this project, in your experience what could the Government do should a Digital Radio switchover take place?</p> <ul style="list-style-type: none"> - PROBE: information, adverts, leaflets, help for vulnerable, warning that it's happening... <p>Do you have any questions or comments about this conversion process?</p> <p>Is there any more information about the current radio listening habits or preferences of you or your family that you would like to add?</p>	<p>Get top of mind suggestions before probing with below questions, which recap from 1st stage...</p>
5 mins	<u>WRAP UP</u>	
	<p>Thank the participant for taking part in the pilot. Inform them they are able to keep the digital radios they have been provided with.</p>	

Appendix 2: Quantitative materials

12-076048-01/CLB

10/01/2013

Digital Radio Switchover Trial in Bath – Recruitment Quant Questionnaire - FINAL

INTRO TO MAIN SAMPLE:

Good morning/afternoon/evening. My name is from Ipsos MORI (SHOW ID CARD), a market research organisation. I am looking for people to take part in a research project about radio on behalf of the Department of Culture, Media and Sport.

Could I please speak to someone aged 18 or over living at this address and who would be mainly or jointly responsible for purchasing audio or radio equipment for the household?

INTERVIEWER: IF NEEDED FOR QUOTAS: At the moment I am particularly looking for men/women /people aged...

INTERVIEWER: EXPLAIN TRIAL AND GAIN CO-OPERATION (+ MRS standard text)

Now that the digital TV switchover is complete, the Government is thinking of a similar move for radio. So, very much like what happened with the digital TV switchover, this would mean that the majority of radio stations would move to digital platforms (like DAB radio sets, online or digital TV) and would no longer be available on FM and MW.

The Government plans to announce a decision near the end of 2013 about if, and when a radio switchover may happen.

Before making a decision, the Government wants to understand more about what switchover might mean for households. So, the Department for Culture, Media and Sport has commissioned Ipsos MORI to conduct a **radio switchover trial in Bath**. This is an opportunity for radio listeners to have their say on the proposals and to help inform the Government's decision in 2013 on whether radio should join TV in the move to digital.

I am here today looking for people to participate in this important research project. For this project we are looking for **radio listeners**, who have **at least one analogue radio** left in their house, including car radios, that they listen to **at least once a week**.

The Go DIGITAL Radio Trial in Bath:

- Starts in January until the end of March.
- Will be used to help us understand the listener experience, when various households are **switched to a digital-only** radio environment.
- Participants will be asked to replace their existing analogue radios with digital equivalents, for the period of the trial. Some car radios will also be converted to digital radio at no cost to you.
- Radios will be provided by Ipsos MORI through a retailer in Bath.
- The trial will run for 6 weeks and participants will be asked to complete some simple questions at the beginning (now), middle (early February) and end of the trial (end of March).
- Ipsos MORI will also provide the relevant support during the trial.
- All the information collected will be kept anonymous and used for research purposes only.(MRS)
- As a thank you for taking part, you will be able to **keep the digital radio(s) used in the trial** (including any converted car radios).

INTERVIEWER: REFER TO FULL INSTRUCTIONS FOR MORE DETAIL ABOUT TRIAL IF QUERIES.

INTERVIEWER: IF INTERESTED IN TAKING PART, CHECK ELIGIBILITY AND QUOTAS.

PAPER SCREENER – MAIN SAMPLE

We are looking for particular groups of people, so I would first like to ask you a few questions to make sure you are eligible to take part in the trial as we need to interview a representative sample of radio listeners in Bath. All information collected will be anonymous and not used for sales purposes.

S0 First, can I just double check that you are aged 18 or over, living at this address and are mainly or jointly responsible for purchasing audio or radio equipment for the household?

SP. DO NOT ALLOW DK/NULL

Yes	1	CONTINUE
No.....	2	ASK TO SPEAK TO DECISION MAKER

SHOWCARD S1

S1 I would like to ask whether you or any of your immediate family work in any of the following industries or occupations?

MP. DO NOT ALLOW DK/NULL

Advertising	1	CONTINUE
Banking	2	CONTINUE
Gas/Electricity Supply	3	CONTINUE
Food manufacture/ retailing.....	4	CONTINUE
Marketing	5	CONTINUE
Market Research	6	CLOSE
Journalism.....	7	CLOSE
TV broadcasting.....	8	CLOSE
Radio broadcasting.....	9	CLOSE
Other	10	CONTINUE

SHOWCARD S2

S2 How often do you listen to the radio these days, in any location, including your car(s)? This could be via any device like a radio set, a TV, computer, tablet, or a mobile phone.

SP. DO NOT ALLOW DK/NULL

Every day	1	CONTINUE
Most days.....	2	CONTINUE
About once a week	3	CONTINUE
About once a month.....	4	CLOSE
Less often	5	CLOSE
Never.....	6	CLOSE

SHOWCARD S3

S3 Where do you currently listen to the radio at least once a week? This could be via any device like a radio set, a TV, computer, tablet, or a mobile phone. Please pick as many as apply.

MP. DO NOT ALLOW DK/NULL

At home.....	1	CONTINUE
In my car/other vehicle	2	CONTINUE
On the move using a personal radio	3	CONTINUE
At work	4	CLOSE IF SP
At school/college/university	5	CLOSE IF SP
At someone else's home	6	CLOSE IF SP
Other	7	CLOSE IF SP

SHOWCARD S4 WITH DEFINITIONS & IMAGES (SEE BELOW)

S4 Which types of radio do you listen to at home or in your car(s) at least once a week?

SP. DO NOT ALLOW DK/NULL

I only listen to analogue radio.....	1	CHECK QUOTAS
I listen to both analogue and digital radio (via a DAB radio set, DAB car radio adaptor, TV or the internet..	2	CHECK QUOTAS
I only listen to digital radio (via a DAB radio set, DAB car radio adaptor, TV or the internet	3	CLOSE

INTERVIEWER: IF NEEDED: Unless you have converted your car radio to digital you most likely are listening through the analogue platform. The radio in your car can be converted by qualified installers such as Halfords. Also, car manufacturers have committed to fit DAB as standard in all new cars by 2013.

SHOWCARD S4 - Analogue radio and digital radio are different types of transmission systems.

ANALOGUE RADIO:

By analogue radio, we mean conventional radio sets that broadcast on AM or FM, including portable radios, Hi-Fi systems, car radios etc. Please note that AM includes Short Wave, Medium Wave and Long Wave.

DIGITAL RADIO:

Digital radio is another transmission system, not just an FM/AM radio with a digital display. Digital radio can be listened to in a number of ways including a DAB radio set, in your car via a DAB car adaptor, and via digital TV or broadband internet.

- On a DAB Digital Radio set (or in your car through a DAB car adaptor).
Digital radios are sometimes called D-A-B radios Digital Radio sets and may have one of the se 2 logos.



A DAB digital radio set offers more radio stations than a normal radio and a clear signal with no interference. It receives existing AM and FM stations plus digital-only stations like 6 Music, Absolute Radio 80s, JazzFM, BBC Radio 4 extra and Radio 5 Live Sports Extra.

- On TV
Any radio services that are broadcast on Sky, Freeview, Virgin Media, Freesat and Youview. If you are listening to a radio via a TV there are not moving images, it shows either a blank screen or a logo. The following services broadcast as both radio stations and TV channels on TV: Kerrang!, Kiss Network, Magic, Q, Smash Hits Radio.
- Online or using an app
All stations can be listened to online, using a PC, laptop, notebook or tablet. Additionally, several stations can be accessed through a smartphone via an app.

SHOWCARD S5 WITH EXAMPLES OF DAB SETS

S5 Do you or anyone in your household own a DAB radio set – not necessarily one of the models shown?

SP. DO NOT ALLOW DK/NULL

- Yes 1 CHECK QUOTAS
- No 2 CHECK QUOTAS

SHOWCARD S6

S6 In which of these locations do you personally listen to an analogue radio set at least once a week? By analogue radio, we mean conventional radio sets that broadcast on AM or FM.

SP. DO NOT ALLOW DK/NULL

- I listen to analogue radio(s) at home only 1 CONTINUE
- I listen to analogue radio(s) at home and in a car/van 2 CONTINUE
- I listen to analogue radio(s) only in a car/van 3 CHECK QUOTAS

INTERVIEWER: CODE

S7 RESPONDENT'S GENDER

SP. DO NOT ALLOW DK/NULL

- Male 1 CHECK QUOTAS
- Female 2 CHECK QUOTAS

SHOWCARD S8

S8 Please can I just check which age band you fall into?

SP. DO NOT ALLOW DK/NULL

- 18-24 1)
- 25-34 2)
- 35-44 3) CHECK
- 45-54 4) QUOTAS
- 55-64 5)
- 65-74 6)
- 75-79 7)
- 80-84 8)
- 85+ 9)

S9 How many people, of any age, live in your household, including yourself?

SP. DO NOT ALLOW DK/NULL

- 1 1)
- 2 2) CHECK
- 3 3) QUOTAS
- 4 4)
- 5 or more 5)

SHOWCARD S10

S10 Which of these best describes your working status?

SP. ALLOW REF. DO NOT ALLOW DK/NULL

- Full time (30 or more hours a week) 1)
- Part time (less than 30 hours a week) 2) CHECK
- Full time Education (e.g. School, College, University, etc) 3) QUOTAS
- Unemployed – looking for employment 4)
- Not Working – not seeking employment 5)
- Retired 6)

FOR VULNERABLE GROUPS: *Name and contact details provided*

Good morning/afternoon/evening. My name is from Ipsos MORI, a market research organisation. Could I please speak to <NAME OF PRE-IDENTIFIED CONTACT>?

You recently agreed to take part in the Go Digital research project about digital radio switchover, which we are conducting in Bath on behalf of the Department of Culture, Media and Sport.

I am contacting you today to give you more details about the trial and make sure you are eligible to take part in the trial.

INTERVIEWER: *Introduce trial again, gain co-operation and screen for eligibility (as for main sample)*

ELIGIBLE= Listens to the radio at least once a week, on at least one analogue radio, including cars/vans and personal radios.

AND EITHER:

- *Elderly– defined as aged 75 or over*
- *Blind or partially sighted (under or over 75)*
- *Needing assisted care for daily activities (under or over 75)*

NOT ELIGIBLE:

- *Do not listen to radio at least once a week*
- *Only listen in workplace or other locations where we cannot convert radios*
- *Only listen to radio on digital platforms.*

Minimum quotas set only on gender or any of the 3 vulnerable groups above.

MAIN QUESTIONNAIRE – CAPI SCRIPT

DO NOT READ OUT**QX INTERVIEWER CODE SAMPLE TYPE.**

Main sample.....	1	CONTINUE
Boost vulnerable group.....	2	CONTINUE

INTERVIEWER: ENTER INFORMATION FROM SCREENER.

S0 ...

EQUIPMENT:

Firstly, I would like to ask you a few questions about the radio sets that you regularly listen to either at home or in the car.

ASK ALL

Q1 How many radio sets do you personally listen to at least once a week, including car radios? This also includes devices such as Hi-Fi systems or personal radios which you can use to listen to the radio.

SP. DO NOT ALLOW DK/NULL

Enter number between 1 and 20.

NEXT SCREEN

Now please think about each of these radio sets individually. For each one, I'm going to ask you where you tend to keep it, whether it's an analogue or DAB digital radio set, what type of radio it is and who else in your household listens to it.

NEXT SCREEN**SHOWCARD A****ASK ALL**

Q2 Firstly, thinking about the radio set you listen to most often, which of these best describes where you tend to keep it?

SP. DO NOT ALLOW DK/NULL

- Kitchen
- Lounge / dining area
- My bedroom
- Someone else's bedroom
- Bathroom
- My car
- Someone else's car
- Garden shed / greenhouse
- Garage / workshop
- On the move (e.g. personal radios)
- Somewhere else (*specify*)

SHOWCARD B

ASK ALL

Q3 Is it a conventional analogue (AM/FM) radio, a DAB digital radio set or an internet radio set?

SP. ALLOW DK/NULL

Analogue (AM/FM)

DAB Digital radio

Internet radio

SHOWCARD C

ASK ALL

Q4 What type of radio set is it?

SP. ALLOW DK/NULL

Portable radio

Clock radio

Hi-Fi / Home stereo / micro system

Personal / pocket radio / walkman

In-car radio

Radio via an iPod/MP3 (either through the device itself or through a connector)

Other (*specify*)

SHOWCARD D

ASK IF MORE THAN 1 PERSON IN HOUSEHOLD FROM S9

Q5 Does anyone else, living in your household, listen to that radio set at least once a week?

MP. ALLOW DK/NULL.

1. No - only me (SP)
2. Yes - a child/teen 15 or under
3. Yes - a teen aged 16 or 17
4. Yes - another adult aged 18-24
5. Yes - another adult aged 25-64
6. Yes - another adult aged 65-74
7. Yes - another adult aged 75 or over

Now thinking about the 2nd radio set you listen to at least once a week, including car radios...

REPEAT Q2 TO Q5 FOR ALL RADIO SETS THE DECISION MAKER LISTENS TO AT LEAST ONCE A WEEK (MAY NEED TO TWEAK THE WORDING)

THEN SHOW ON SCREEN A SUMMARY OF ALL RADIOS THE RESPONDENT LISTENS TO AT LEAST ONCE A WEEK FOR THEM TO CHECK AND AMEND DETAILS IF NEEDED.

ASK IF MORE THAN 1 PERSON IN HOUSEHOLD FROM S9

Q6 Is there anybody else aged 16 or over, living in your household, who listens to the radio at least once a week, on a DIFFERENT ANALOGUE radio set to those mentioned before? This could be either at home or in a car/van.

SP. ALLOW DK/NULL

Yes

No

IF YES AT Q6

SHOWCARD DX

Q5X Who does listen to an additional ANALOGUE radio set at least once a week?

MP. ALLOW DK/NULL.

1. A teen aged 16 or 17
2. Another adult aged 18-24
3. Another adult aged 25-64
4. Another adult aged 65-74
5. Another adult aged 75 or over

Q5Y – information collected for another household member.

CURRENT RADIO LISTENING (DECISION MAKER)

Now I would like to ask you a few questions about your current listening to the radio.

ASK ALL

Q7 On how many days do you tend to listen to the radio in an average week? Please include any radio listening in any location and on any platform.

SP. ALLOW DK/NULL

- 1 day
- 2 days
- 3 days
- 4 days
- 5 days
- 6 days
- 7 days

ASK ALL

SHOWSCREEN

Q8 How many hours would you say you listen to the radio on an average weekday? Please include any radio listening in any location and on any platform.

SP. ALLOW DK/NULL

- Less than 1 hour
- 1 hour (less than 2)
- 2 hours (less than 3)
- 3 hours (less than 4)
- 4 hours (less than 5)
- 5 hours (less than 6)
- 6 hours (less than 7)

- 7 hours (less than 8)
- 8 hours (less than 9)
- 9 hours or more
- I never listen to the radio on a weekday

ASK ALL

SHOW SCREEN

Q9 How many hours would you say you listen to the radio on an average weekend day?

SP. ALLOW DK/NULL

- Less than 1 hour
- 1 hour (less than 2)
- 2 hours (less than 3)
- 3 hours (less than 4)
- 4 hours (less than 5)
- 5 hours (less than 6)
- 6 hours (less than 7)
- 7 hours (less than 8)
- 8 hours (less than 9)
- 9 hours or more
- I never listen to the radio on a weekend day

ASK ALL

Q10 Which radio station(s) do you listen to at least once a week? Please mention as many as apply.

MP. ALLOW DK/NULL

DO NOT READ OUT

PROBE: Any others?

- Absolute Radio
- Absolute Radio 00s
- Absolute Radio 60s
- Absolute Radio 70s
- Absolute Radio 80s
- Absolute Radio 90s
- Absolute Radio Classic Rock
- BBC Asian Network UK
- BBC Radio 1
- BBC Radio 1Xtra
- BBC Radio 2
- BBC Radio 3
- BBC Radio 4
- BBC Radio 4 Extra
- BBC Radio FIVE LIVE
- BBC Radio FIVE LIVE SPORTS EXTRA
- BBC 6 Music
- BBC Radio Bristol
- BBC Somerset
- BBC Wiltshire
- BBC other local

BBC World Service
Capital
Choice
Classic FM
Gold (or Gold West country)
Heart FM (or Heart West Country)
Heat
JACK FM Bristol (was Original 106.5)
Jazz FM
Kerrang!
Kiss 100-101
LBC
Magic
Midwest Radio
Planet Rock
Q
Real Radio
Smash Hits Radio
Smooth 70s
Smooth Radio
Sunrise Radio National
TalkSPORT
The Breeze (Bristol and Bath, was Star Radio)
The Hits
XFM (UK)
Other (*please specify*)

FILTER FROM Q9

Q11 Which one of these stations do you listen to most often?

SP. ALLOW DK/NULL

Precoded list of radio stations in the area + other (specify)

FILTER FROM Q10

Q12 And which radio station do you listen to 2nd most often?

SP. ALLOW DK/NULL

Precoded list of radio stations in the area + other (specify)

ASK ALL

SHOW SCREEN

Q13 When in the day do you tend to listen to the radio? Please include any radio listening in any location and on any platform. ~~Please pick as many as apply.~~

MP. ALLOW DK/NULL

PROBE: Any other times?

Morning (Between 6am – 8.59am)

Mid morning (Between 9am – 11.59am)

Early afternoon (Between 12pm – 2.59pm)

Late afternoon (Between 3pm – 6.59pm)

Early evening (Between 7pm – 9.59pm)

Late evening (Between 10pm – 11.59pm)
During the night (Between 12am – 5.59am)

ASK ALL

SHOWCARD F

Q14 How often, if at all, do you tend to listen to the radio via your TV set?

SP. ALLOW DK

- Every day
- Most days
- About once a week
- About once a month
- Less often
- Never
- I don't have a TV set at home

ASK ALL

SHOWCARD G

Q15 How often, if at all, do you tend to access the internet AT HOME on a desktop or a laptop computer, or via a tablet?

SP. ALLOW DK

- Every day
- Most days
- About once a week
- About once a month
- Less often
- Never

SHOWCARD G

ASK IF ACCESS INTERNET AT HOME ON COMPUTER, LAPTOP OR TABLET

Q16 How often, if at all, do you tend to listen to the radio via the internet AT HOME on a desktop or laptop computer, or via a tablet?

SP. ALLOW DK

- Every day
- Most days
- About once a week
- About once a month
- Less often
- Never

SHOWCARD H

ASK ALL

Q17 How often, if at all, do you tend to listen to the radio via the internet ON THE MOVE via a laptop computer or a tablet?

SP. ALLOW DK

- Every day
- Most days
- About once a week
- About once a month
- Less often
- Never
- I don't have a laptop or tablet with internet access

SHOWCARD I

ASK ALL

Q18 Which of the following do you own?

MP. ALLOW DK

IF NEEDED: A smartphone is a mobile phone which has advanced capabilities, often with PC like functionalities.

A standard mobile phone (not a smartphone)

iPhone

BlackBerry

Smartphone that runs the ANDROID operating system (such as Samsung, HTC, LG)

Smartphone that runs the WINDOWS PHONE operating system

Smartphone - other type

Don't own a mobile phone (SP)

SHOWCARD G

ASK ALL WITH A SMARTPHONE

Q19 How often, if at all, do you tend to listen to digital radio on your smartphone, via an app or online?

SP. ALLOW DK

Every day

Most days

About once a week

About once a month

Less often

Never

SHOWCARD G

ASK ALL WITH STANDARD MOBILE PHONE

Q20 How often, if at all, do you tend to listen to analogue radio on a standard mobile phone (not smartphone)?

SP. ALLOW DK

Every day

Most days

About once a week

About once a month

Less often

Never

AWARENESS OF RADIO SWITCHOVER AND BENEFITS

I would now like to ask you a few more questions about digital radio and the proposed switchover from AM/FM to digital platforms.

SHOWCARD J

ASK IF DON'T HAVE DAB SET FROM S5

Q21 You mentioned at the start of the interview that you currently do not have a DAB digital radio set in your house. How likely are you to get one in the future?

SP. ALLOW DK

Definitely

Very likely

Fairly likely

Not very likely

Not at all likely

Definitely will not

IF DON'T HAVE DAB SET FROM S5

Q22 Can you tell me why you have not bought a DAB digital radio up till now?

MP. ALLOW DK/NULL.

DO NOT READ OUT

PROBE: Any other reasons?

I don't need one

I'm happy with analogue

I can't be bothered

It's too expensive

I can listen to digital radio on other devices (computer, TV, mobile)

I only listen to the radio in my car

I don't know enough about it

I don't think the sound quality/reception will be better

Digital sound quality/reception is poor in my area

It's too complicated / I wouldn't understand how it works

There is nothing new on it that I want to listen to

I get all the stations I want already on analogue

The specific station(s) I like are not on digital

I hadn't heard of digital radio before today

Other (*specify*)

AWARE OF DIGITAL RADIO

- THOSE WITH A DAB SET AT S5 OR (NO DAB SET AT S5 BUT AWARE OF DIGITAL RADIO (ALL EXCEPT CODE 14 AT Q22))

Q23 Are you aware of any benefits of digital radio? If so, which ones?

IF NEEDED: Don't worry, there is no right or wrong answer, we just want to find out how much people know about digital radio.

MP. ALLOW DK/NULL.

DO NOT READ OUT

PROBE: Any other reasons?

Ease of tuning

Additional information display (station names, tracks etc.)

Pause/rewind

Number of stations

Speciality stations

Improved sound quality

Other (*specify*)

ASK ALL

SHOWCARD K AND ASK RESPONDENT TO READ

As mentioned at the start of the interview, the government is considering the date for a radio switchover, which would mean all UK national, regional and large local radio stations would move from analogue (FM/AM) to digital radio (DAB, Internet and Digital TV) only. Only very small local stations and community stations would continue to broadcast via analogue on FM.

No decision has been taken at this time, as the Government wants to fully understand the possible impact on listeners and radio businesses. Even if a decision is made to implement a switchover policy, it would only occur once the majority of listeners have already replaced analogue with digital as their preferred means of listening to the radio.

This trial is also part of a programme of research that will help inform the Government's decision.

AWARE OF DIGITAL RADIO

- THOSE WITH A DAB SET AT S5 OR (NO DAB SET AT S5 BUT AWARE OF DIGITAL RADIO (ALL EXCEPT CODE 14 AT Q22))

Q24 Had you heard about a potential radio switchover, before today, similar to what happened with TV?

SP. ALLOW DK/NULL

Yes

No

ASK ALL

Q25 Do you think that digital radio is a good thing or a bad thing for you and your household?

SP. ALLOW DK

Good thing

Bad thing

ASK ALL

Q26 Do you think that there may be drawbacks for you and your household?

SP. ALLOW DK

Yes

No

ASK ALL

PROMPT WITH SHOWCARD L

Q27 Here are some concerns people have voiced about a possible radio switchover.

Which, if any, do you share?

MP. ALLOW DK/NULL

PROBE: Any other reasons?

I don't know enough about it

I may not be able to listen to my favourite radio stations

I won't know how to use it

I don't think it will sound any better

My current radio(s) would not work anymore

I will have to replace my analogue radio set(s) by DAB radio sets

I will have to change or convert my car radio to digital

I won't be able to afford a radio set or convert my car radio

I don't think there will be any drawbacks (SP)

Other (specify)

IF Q27 – CODE 'I WILL HAVE TO CHANGE OR CONVERT MY CAR RADIO TO DIGITAL'

Q27X You said that you are concerned that you would have to change or convert your car radio? What particular concerns do you have, if any?

MP. ALLOW DK/NULL

PROBE: Any other reasons?

DO NOT READ OUT

I don't know enough about it

I don't know how to go about upgrading my car radio to digital

I may not be able to listen to my favourite radio stations

I don't think it will sound any better

I can't be bothered going to a car dealer or car accessories retailer

I can't afford it

I won't know how to use it

I don't have time to do it

Other (specify)

IF WON'T KNOW HOW TO USE IT AT Q27 OR Q27X

Q28 Do you know other people who may be able to help you with how to use it?

SP. ALLOW DK/NULL

Yes

No

Please, be reassured, that as for the TV Switchover, the Government would most likely set up a Help Scheme to assist people in converting to digital radio.

SHOWCARD M

ASK ALL ANALOGUE ONLY FROM S4

Q29 Here are some key benefits that some have said digital radio provides.

Which would you be most interested in?

MP. ALLOW DK/NULL

PROBE: Any other reasons?

Ease of tuning

Additional information display (station names, tracks etc.)

Pause/rewind

Number of stations

Speciality stations

Improved sound quality

Other (*specify*)

SHOWCARD N

ASK ALL

Q30 If radio switchover happened next week, what would you do with each of the analogue radio sets that you listen to at least once a week, including car radios?

Remember you would no longer be able to listen to most radio stations on an analogue set, either at home or in your car, or any other location. Only very small local stations and community stations would continue to broadcast via analogue on FM.

MP. ALLOW DK/NULL

ASK FOR EACH ANALOGUE RADIO SET THEY LISTEN TO AT LEAST ONCE A WEEK (FROM Q2-Q5)

I would replace it with a DAB digital radio set I already own

I would buy a new DAB digital radio set

I would listen to the radio in this room but on another digital device (either on TV, computer, tablet or mobile phone)

I would stop listening to the radio in this room

I would keep it to listen to small local and community stations

FOR CAR RADIOS AMEND WORDING TO:

I would get my car radio converted to digital

I would wait until I buy a new car

I would listen to the radio in my car through another device like a smartphone or tablet connected to the internet

I would stop listening to the radio in my car

I would keep my car radio to listen to small local and community stations

Finally we would just like to ask you a few questions about yourself and your household to help us classify your answers.

SHOWCARD O

ASK ALL

QX1 Which of these best describes your home?

SP. ALLOW REF/NULL

Detached House

Semi Detached House

Terraced House

Flat, Maisonette or apartment - Purpose built block

Flat, Maisonette or apartment - Part of converted/shared house

Flat, Maisonette or apartment - in a commercial building

Caravan or other mobile/temporary structure

Shared Dwelling

Other (*specify*)

ASK ALL

QX2 How many adults aged 15 or over are living here including yourself?

SP. DO NOT ALLOW DK/NULL

1

2

3

4

5 or more

ASK IN 2 + HOUSEHOLDS FROM S9

QX3 Are there any children under the age of 15 living here? IF YES: How many?

SP. DO NOT ALLOW DK/NULL

1

2

3

4

5 or more

No/ None

ASK ALL

QX4 How many cars or light vans are owned, or normally used privately by members of your household?

SP. ALLOW DK/NULL

None

1

2

3

4

5 or more

IF CAR OR VAN IN HH

QX5 How many of these cars or light vans are you the main driver of?

SP. ALLOW DK/NULL

1

2

3

4

5 or more

ASK ALL

SHOWCARD P

QX6 Which, if any, is the highest educational or professional qualification that you have obtained?

SP. ALLOW REF/NULL

GCSE/O-Level/CSE

Vocational qualifications (=NVQ1+2)

A-Level or equivalent (=NVQ3)

Bachelor Degree or equivalent (=NVQ4)

Masters/PhD or equivalent

Other professional qualification

No formal qualifications

Still studying

QX7 Are you the chief income earner for your household?

SP. ALLOW REF. DO NOT ALLOW DK/NULL

Yes

No

QX8 INTERVIEWER: PLEASE ASK & TYPE Occupation details for the chief income earner

PLEASE PROBE FULLY, AS INFORMATION IS NEEDED TO CODE SOCIAL GRADE

Occupation.....
Industry
Qualifications/Apprenticeships
No. responsible for
No. in establishment

QX9 Interviewer, record social grade

SP. DO NOT ALLOW REF

AB
C1
C2
DE

ASK ALL

QX10 Do you have any long-term disability, health problem or illness which limits your daily activities?

SP. ALLOW DK/NULL/REF

Yes
No

IF YES AT QX10

QX12 Which of the following difficulties apply to you?

MP. ALLOW DK/NULL/REF

READ OUT

Difficulty in hearing
Difficulty in seeing
Other physical difficulties
Other health problems or disabilities

IF YES AT QX10

QX13 Are you registered as disabled?

SP. ALLOW DK/NULL/REF

Yes
No

IF YES AT QX10

QX14 Do you require assistance from a carer for your daily activities?

SP. ALLOW DK/NULL/REF

Yes
No

SHOWCARD Q

ASK ALL

QX15 Finally, which of these ethnic groups do you consider yourself to belong to?

SP. DO NOT ALLOW DK/NULL/REF

IF REF - USE BEST IMPRESSION

White

01. White

Mixed

02. White & Black Caribbean

03. White & Black African

04. White & Asian

05. Any Other Mixed Background

Black or Black British

06. Black Caribbean

07. Black African

08. Black British

09. Any Other Black Background

Asian or Asian British

10. Indian

11. Pakistani

12. Bangladeshi

13. Asian British

14. Any Other Asian Background

Chinese or Other Ethnic Group

15. Chinese

16. Any other ethnic group

NEXT SCREEN

This is the end of the first interview. Thank you very much for agreeing to take part in this trial.

INTERVIEWER: EXPLAIN NEXT STAGES OF THE RESEARCH AND COLLECT CONTACT DETAILS.

12-076048-01/BG/CLB/RW

01/02/2013

**Digital Radio Switchover Trial in Bath
Stage 2 Quant Questionnaire – FINAL**

SCRIPT 1: Q1 TO Q28. ASK ALL EXCEPT CAR-ONLY RECRUITS

INTRODUCTION

Good morning/afternoon/evening. Could I please speak to <INSERT NAME OF MAIN CONTACT>.

My name is from Ipsos MORI. We met recently, when you agreed to take part in a digital radio trial on behalf of the Department of Culture, Media and Sport. I have been informed that you have now collected the radio(s) from Moss of Bath. As agreed during our first interview, I would now like to ask you a few questions about your initial experiences of the trial.

INTERVIEWER: IF AVAILABLE, CONTINUE TO Q1. IF NOT, MAKE AN APPOINTMENT FOR AS SOON AS POSSIBLE.

MAIN QUESTIONNAIRE – INSTALLATION PROCESS (EXCL. CAR CONVERSION)

ASK ALL

Q1 Since you collected the new DAB digital radio set(s), have you or somebody else been able to set up and tune in the equipment successfully?

SP. DO NOT ALLOW DK/REF

DO NOT READ OUT

All radio sets have been set up – CONTINUE TO Q2

Some radio sets have been set up, but not all – CONTINUE TO Q2

No radio sets have been set up – SKIP TO Q11

ASK ALL WHO HAVE SET UP ALL OR SOME RADIOS (C.1 OR 2 AT Q1)

Q2 Thinking about the new DAB digital radio set(s) that you've been able to successfully set up, did you set it/them up yourself, or did you require help from somebody else?

SP. DO NOT ALLOW DK/REF

INTERVIEWER: IF MORE THAN 1 SET, PLEASE ASK TO ANSWER 'IN GENERAL'.

DO NOT READ OUT

I set it up by myself

I set it up with the help from someone else

Somebody else set it up, because I couldn't do it myself

Somebody else set it up, but I could have done it myself without help

ASK ALL WHO HAVE SET UP A RADIO BY THEMSELVES WITH OR WITHOUT HELP (C.1-2 AT Q2)

Q3 How easy, or difficult, was it to set up your new DAB digital radio set(s) by yourself? Was it...?

SP. ALLOW DK

INTERVIEWER: IF MORE THAN 1 SET, PLEASE ASK TO ANSWER 'IN GENERAL'.

READ OUT OPTIONS

Extremely easy

Quite easy

Neither easy nor difficult

Quite difficult

Extremely difficult

ASK ALL WHO HAVE SET UP A RADIO BY THEMSELVES WITH OR WITHOUT HELP (C.1-2 AT Q2)

Q4 How long did it take you to set up your new DAB digital radio set(s)?

SP. ALLOW DK

INTERVIEWER: IF MORE THAN 1 SET, PLEASE ASK TO ANSWER 'IN GENERAL'.

READ OUT OPTIONS

Less than 15 minutes

15-30 minutes

30 minutes to an hour

1 hour or more

ASK ALL WHO HAVE SET UP A RADIO BY THEMSELVES WITH OR WITHOUT HELP (C.1-2 AT Q2)

Q5 How did you generally find the experience?

OPEN-ENDED.

PROBE FULLY

ASK ALL WHO NEEDED HELP FROM SOMEONE ELSE TO SET UP (C.2-4 AT Q2), OR SET-UP THEMSELVES BUT FOUND IT DIFFICULT (C.4-5 AT Q3)

Q6 What problems, if any, did you have in setting up your new DAB digital radio set(s)?

MP. ALLOW DK

PROMPT WITH THE LIST IF NEEDED

PROBE – Anything else?

No problems setting up the radio(s) (SP)

I didn't have the time to do it myself

I couldn't be bothered doing it myself

I couldn't understand the instructions that came with the radio

I couldn't read the instructions that came with the radio

I couldn't tune the stations

I couldn't listen to my favourite stations

I couldn't set up the alarm on the clock radio

I couldn't read the text on the screen

I couldn't find the button I needed
I couldn't work the buttons / dials on the radio set(s)
I couldn't find the AM/FM setting
Poor reception / signal
Poorer sound quality than expected
Too nervous / generally not confident with technology
Other (specify)

ASK ALL WHO NEEDED HELP FROM SOMEONE ELSE TO SET UP (C.2-4 AT Q2), OR SET-UP THEMSELVES BUT FOUND IT DIFFICULT (C.4-5 AT Q3)

Q7 Following any difficulties or problems that you may have encountered when setting up your new DAB digital radio set(s), are you now able to use it/them?

SP. DO NOT ALLOW DK

PROMPT WITH ANSWERS IF NEEDED

Yes - I didn't really have any problems - **GO TO Q9**

Yes - I / someone else managed to resolve the problem(s) – **GO TO Q8**

No, I still haven't set up or still have problem(s) with at least one DAB digital radio(s) – **(ONLY SHOW OPTION 3 IF CODE 2 'SOME' AT Q1) – THEN GO TO Q9/Q10 AND THEN Q12 FOR THOSE SET UP SUCCESSFULLY.**

ASK ALL WHO MANAGED TO SOLVE PROBLEMS (C.2 AT Q7)

Q8 How did you overcome the problems you encountered when setting up the new DAB digital radio set(s)?

MP. ALLOW DK

PROMPT WITH THE LIST IF NEEDED

PROBE – Anything else?

I got help from someone else (e.g. friend/family)

I used the instructions from the manual

I went online to look for information

I called the research project helpline

I called the manufacturer

Other (specify)

ASK ALL WHO HAVE SET UP ALL OR SOME RADIOS (C.1 OR 2 AT Q1)

Q9 Have you kept the new DAB digital radio(s) in the same place as the analogue radio(s) you replaced it/them with?

SP. ALLOW DK

Yes

No

ASK ALL WHO MOVED THE RADIO SET(S) (C.2 AT Q9)

Q10 Can you tell me where you moved the new DAB digital radio set(s), and why?

OPEN-ENDED

PROBE FULLY

ASK ALL WHO HAVE **NOT YET SET UP ANY RADIOS (C.3 AT Q1) OR SET UP SOME RADIOS AND HAD NO PROBLEMS OR GOT THEM RESOLVED (CODE 2 AT Q1 AND Q7 NOT C.3)**

Q11 You said you haven't set up any, or you haven't set up some, of the new DAB digital radio(s) yet, why is that?

MP. ALLOW DK

PROMPT WITH THE LIST IF NEEDED

PROBE – anything else?

I haven't had the time to do it myself yet

I am waiting for someone else to do it for me as I'm too nervous / not confident to do it myself

I am waiting for someone else to do it for me as I don't have time / can't be bothered doing it myself

I can't understand the instructions

I can't read the instructions

I can't tune the stations

I can't set up the alarm on the clock radio

I can't read the text on the screen

I can't find the button I need

I can't work the buttons / dials on the radio set(s)

I still don't really understand what DAB digital radio is

Other (specify)

THOSE WHO HAVE SET UP SOME OR ALL RADIOS – CONTINUE
THOSE WHO HAVE NOT SET UP ANY RADIOS – SKIP TO Q28

MAIN QUESTIONNAIRE - LISTENING

ASK ALL WHO HAVE SET UP AT LEAST ONE SET (C.1-2 AT Q1)

Q12 Now, thinking about the new DAB digital radio(s) you have successfully set-up, have you, or somebody else in your household, listened to it/them yet?

MP. ALLOW DK

DO NOT READ OUT

Yes – I have listened

Yes – Somebody else in my household has listened

No – Nobody has listened yet (SP)

ASK ALL SAY NO AT Q12 (C.3 AT Q12)

Q13 Is there a particular reason why no one in the household has listened to the DAB digital radio set(s) yet?

MP. ALLOW DK. DO NOT READ OUT

PROBE – Anything else?

No particular reason (SP)

I haven't had the time yet

I couldn't tune in the stations I wanted

I don't like using the new radio

Poor reception/signal

It's not as easy to use

I don't know how to use it

Other (specify)

ASK ALL WHO HAVE LISTENED TO THEIR RADIO (C.1 AT Q12)

Q14 Have you noticed anything different about digital radio yet, compared to your AM/FM analogue radio set(s)?

SP. ALLOW DK

DO NOT READ OUT

Yes

No

ASK ALL WHO SAY YES AT Q14

Q15 What differences have you noticed so far?

OPEN-ENDED.

PROBE FULLY

ASK ALL WHO HAVE LISTENED TO THEIR RADIO (C.1 AT Q12)

Q16 Overall, how satisfied are you with digital radio so far?

SP. ALLOW DK

READ OUT

Completely satisfied

Quite satisfied

Neither satisfied nor dissatisfied

Quite dissatisfied

Completely dissatisfied

ASK ALL WHO HAVE LISTENED TO THEIR RADIO (C.1 AT Q12)

Q17 So far, would you say your experience of digital radio is better, worse or the same as listening to your old analogue radio? Is it...

SP. ALLOW DK

READ OUT

A lot better

A little better

The same

A little worse

A lot worse

ASK ALL WHO THINK IT IS BETTER THAN ANALOGUE (C.1-2 AT Q17)

Q18 Why would you say it is better?

MP. ALLOWDK

PROMPT WITH THE LIST IF NEEDED

PROBE – Anything else?

Easier to use

Better sound quality

Can listen to more stations

Showing name of station / song on display

Additional functions (please specify)

The look / design of the radio

Other (specify)

ASK ALL WHO THINK IT IS WORSE THAN ANALOGUE (C.4-5 AT Q17)

Q19 Why would you say it is worse?

MP. ALLOW DK

PROMPT WITH THE LIST IF NEEDED

PROBE – Anything else?

- More difficult to use
- Inferior sound quality
- The signal is not as good
- Can no longer listen to preferred stations
- Not as many stations as I was expecting
- The look / design of the radio
- Other (specify)

IF SAY 'CAN NO LONGER LISTEN TO PREFERRED STATIONS' AT Q19

Q20 You said you can no longer listen to your favourite stations? Can you tell me which one(s) in particular?

MP. ADD LIST OF STATIONS FROM STAGE1.

ASK ALL WHO HAVE LISTENED TO THEIR RADIO (C.1-2 AT Q12)

Q21 Have you, or anybody else in your household, listened to any radio stations on your new DAB digital radio set(s) that you could not previously access on your old analogue radio?

SP. ALLOW DK

- Yes
- No

IF YES AT Q21

Q22 Can you tell me which one(s)?

MP. ALLOW DK

MP. ADD LIST OF STATIONS FROM STAGE1.

PROBE – Any others?

ASK ALL WHO HAVE LISTENED TO THEIR RADIO (C.1 AT Q12)

Q23 On a scale of 1 to 5, where 5 is very good and 1 is very poor, how would you rate the reception on your new DAB digital radio set(s)?

SP. ALLOW DK

INTERVIEWER: IF MORE THAN 1 SET, PLEASE ASK TO ANSWER FOR BOTH 'IN GENERAL'

- 5 – Very good
- 4
- 3
- 2
- 1 – Very poor

ASK ALL WHO HAVE SET UP AT LEAST ONE SET (C.1-2 AT Q1)

Q24 As part of the trial, we ask participants not to use the analogue radio set(s) we are replacing and use the DAB digital radio set(s) instead. However, we appreciate that sometimes some people will prefer using their old radio set, which is also part of what we are trying to find out with this research.

So, can I please ask if you have used your old analogue radio set(s) since the switch to digital? Please be reassured that your answers will not impact on your participation in the trial.

SP. ALLOW DK

Yes

No

IF YES AT Q24

Q25 Why is that?

OPEN-ENDED

PROBE FULLY

IF YES AT Q24

Q25x In order to make the most of the research and get your views on digital radio at the end of the 6 weeks trial, we would encourage you to try and listen to the DAB digital radio set(s), instead of the replaced analogue set. Thank you for your cooperation.

OPEN-ENDED

DO NOT ASK BUT COLLECT ANY ISSUES / RELEVANT COMMENT

DO NOT FORCE ANSWER - ALLOW BLANK

ASK ALL WHO HAVE LISTENED TO THEIR RADIO (C.1 AT Q12)

Q26 Have you noticed any change in how frequently you listen to the radio so far?

SP. ALLOW DK

READ OUT

Yes – listen more often

Yes – listen less often

No – listen as often I did before

ASK ALL WHO HAVE LISTENED TO THEIR RADIO (C.1 AT Q12)

Q27 At this stage, how likely, if at all, would you be to recommend digital radio to friends, family, colleagues or people you know?

Please answer on a scale from 1 to 10, where 1 means you are not at all likely to recommend digital radio and 10 means you are certain to.

SP. ALLOW DK

1 to 10 scale

FOLLOW UP

ASK ALL WHO HAVE NOT SET UP A RADIO (C.2-3 AT Q1)

Q28 In order to make the most out of this trial, it is important that you are able to set up any DAB digital radio sets that you have not already successfully set up. Would you like me to organise some help with this?

SP. DO NOT ALLOW DK

DO NOT READ OUT

Yes – ARRANGE A CALL BY HELPLINE (ONCE ISSUE SORTED – INTERVIEWER TO CALL AGAIN TO FINISH INTERVIEW)

No – I will set it up myself

No – I don't want to take part in the study anymore – DO NOT READ OUT

Thank and close.

SCRIPT 2: Q1 TO Q19. ASK TO CAR-ONLY RECRUITS

INTRODUCTION

Good morning/afternoon/evening. Could I please speak to <INSERT NAME OF MAIN CONTACT>.

My name is from Ipsos MORI. We met recently, when you agreed to take part in a digital radio trial on behalf of the Department of Culture, Media and Sport. I have been informed that (CAR ACCESSORY RETAILER) has now converted your car radio to digital radio. As agreed during our first interview, I would now like to ask you a few questions about your initial experiences of the trial.

INTERVIEWER: IF AVAILABLE, CONTINUE TO Q1. IF NOT, MAKE AN APPOINTMENT FOR AS SOON AS POSSIBLE.

CAR CONVERSION – INSTALLATION PROCESS

ASK ALL CAR-ONLY RECRUITS

Q1 First, can you please let me know what type of digital radio (RETAILER) installed in your car? Is it?

SP. DO NOT ALLOW DK

READ OUT

A DAB car adaptor fixed to your existing analogue car stereo

A new DAB car radio replacing your existing analogue car stereo

ASK ALL CAR-ONLY RECRUITS

Q2 Were you given a choice between an adaptor and a new DAB car radio?

SP. ALLOW DK

READ OUT

Yes

No

IF YES

Q3 Why did you choose a <CONVERSION TYPE> for your car?

OPEN ENDED

CONVERSION TYPE: USE WORDING BELOW TO FILTER (BASED ON Q1)

DAB car adaptor

new DAB car radio

ASK ALL CAR-ONLY RECRUITS

Q4 How long did it take for (RETAILER) to install the <CONVERSION TYPE> in your car?

SP. ALLOW DK

READ OUT OPTIONS

Less than 15 minutes

15-30 minutes

30 minutes to an hour

1 hour – 1.5 hours

1.5 hours – 2 hours

2 hours or more

ASK ALL CAR-ONLY RECRUITS

Q5 In general, what did you think of the installation process?

OPEN-ENDED

PROBE FULLY

ASK ALL CAR-ONLY RECRUITS

Q6 Overall, how satisfied or dissatisfied are you with the installation process?

SP. ALLOW DK

READ OUT

Completely satisfied

Quite satisfied

Neither satisfied nor dissatisfied

Quite dissatisfied

Completely dissatisfied

IF NOT SATISFIED (CODE 4-5 AT Q6)

Q7 Why do you say that?

MP. ALLOW DK

DO NOT READ OUT

PROBE – Anything else?

It took too long to organise an appointment

It took too long to get it installed

It was not convenient to travel to Bristol to get it fitted

It looks clunky / not appealing

I can't use my old car stereo

I can't find the AM/FM setting

I can't work the buttons / dials

I don't know how to use it

I wasn't told how to use it

Poor reception / signal

Poorer sound quality than expected

I can't listen to my favourite stations

Other (*please specify*)

CAR CONVERSION - LISTENING

ASK ALL CAR-ONLY RECRUITS

Q8 Have you listened to digital radio in your car yet, either through your new adaptor or your new DAB car radio?

SP. DO NOT ALLOW DK

DO NOT READ OUT

Yes

No

ASK ALL SAY NO AT Q8 (C.2 AT Q8)

Q9 Is there a particular reason why you haven't listened to digital radio in your car yet?

MP. ALLOW DK

DO NOT READ OUT

PROBE – Anything else?

I haven't used my car since it was installed

I couldn't tune in the stations I wanted

I don't like using the new radio / adaptor

Poor reception/signal

It's not as easy to use

I don't know how to use it

Other (specify)

ASK ALL WHO HAVE LISTENED TO DIGITAL RADIO IN THEIR CAR (C.1 AT Q8)

Q10 Have you noticed anything different about digital radio yet, compared to your previous analogue AM/FM car stereo?

SP. ALLOW DK

DO NOT READ OUT

Yes

No

ASK ALL WHO SAY YES AT Q10

Q11 What differences have you noticed so far?

OPEN-ENDED.

PROBE FULLY

ASK ALL WHO HAVE LISTENED TO DIGITAL RADIO IN THEIR CAR (C.1 AT Q8)

Q12 Overall, how satisfied are you with digital radio in your car so far?

SP. ALLOW DK

READ OUT

Completely satisfied

Quite satisfied

Neither satisfied nor dissatisfied

Quite dissatisfied

Completely dissatisfied

ASK ALL WHO HAVE LISTENED TO DIGITAL RADIO IN THEIR CAR (C.1 AT Q8)

Q13 So far, would you say your experience of digital radio is better, worse or the same as listening to your previous analogue car radio? Is it...

SP. ALLOW DK

READ OUT

- A lot better
- A little better
- The same
- A little worse
- A lot worse

ASK ALL WHO THINK IT IS BETTER THAN ANALOGUE (C.1-2 AT Q13)

Q14 Why would you say it is better?

MP. ALLOWDK

PROMPT WITH THE LIST IF NEEDED

PROBE – Anything else?

- Easier to use
- Better sound quality
- Can listen to more stations
- Showing name of station / song on display
- Additional functions (please specify)
- The look / design of the radio or adaptor
- Other (specify)

ASK ALL WHO THINK IT IS WORSE THAN ANALOGUE (C.4-5 AT Q13)

Q15 Why would you say it is worse?

MP. ALLOW DK

PROMPT WITH THE LIST IF NEEDED

PROBE – Anything else?

- More difficult to use
- Inferior sound quality
- The signal is not as good
- Can no longer listen to preferred stations
- Not as many stations as I was expecting
- The look / design of the radio or adaptor
- Other (specify)

IF SAY 'CAN NO LONGER LISTEN TO PREFERRED STATIONS' AT Q15

Q16 You said you can no longer listen to your favourite stations? Can you tell me which one(s) in particular?

MP. ADD LIST OF STATIONS (INCLUDING 'OTHER'SPECIFY).

ASK ALL WHO HAVE LISTENED TO DIGITAL RADIO IN THEIR CAR (C.1 AT Q8)

Q17 On a scale of 1 to 5, where 5 is very good and 1 is very poor, how would you rate the reception on your new DAB car radio or through your DAB adaptor?

SP. ALLOW DK

5 – Very good

4

3

2

1 – Very poor

ASK ALL WHO HAVE LISTENED TO DIGITAL RADIO IN THEIR CAR (C.1 AT Q8)

Q16X Have you listened to any radio stations on your new DAB car radio that you could not previously access on your previous analogue car radio?

SP. ALLOW DK

Yes

No

IF YES AT Q16X

Q17X Can you tell me which one(s)?

MP. ALLOW DK

ADD LIST OF STATIONS.

PROBE – Any others?

ASK ALL WHO HAVE LISTENED TO DIGITAL RADIO IN THEIR CAR (C.1 AT Q8)

Q18 Have you noticed any change in how frequently you listen to the radio in your car so far?

SP. ALLOW DK

READ OUT

Yes – listen more often

Yes – listen less often

No – listen as often I did before

ASK ALL WHO HAVE LISTENED TO DIGITAL RADIO IN THEIR CAR (C.1 AT Q8)

Q19 At this stage, how likely, if at all, would you be to recommend getting digital radio in your car to friends, family, colleagues or people you know?

Please answer on a scale from 1 to 10, where 1 means you are not at all likely to recommend digital radio and 10 means you are certain to.

SP. ALLOW DK

1 to 10 scale

ASK ALL CAR-ONLY RECRUITS

Thank you very much for your time today and for your help in the trial so far. Your feedback will help the Government when making their decision about a potential radio switchover in the future.

Please listen to digital radio in your car as you would normally do for the next 6 weeks. I will come and see you again in mid March to conduct the last interview of the trial.

ARRANGE AN APPOINTMENT FOR STAGE 3.

12-076048-01/RW/CLB
13/03/2013

**Digital Radio Switchover Trial in Bath
Stage 3 Quant Questionnaire – FINAL**

TEXT DIFFERENCES FOR HOME AND CARS ARE SHOWN IN YELLOW HIGHLIGHTING.

INTRODUCTION

Good morning/afternoon/evening. Could I please speak to <NAME OF MAIN CONTACT>.

This is from Ipsos MORI. Over the last few weeks, you have been taking part in a digital radio trial on behalf of the Department of Culture, Media and Sport, using new digital radio(s) collected from <RETAILER (home)> / using a DAB digital car radio or adaptor fitted by <RETAILER (car)>. As agreed in our last conversation in February, I would now like to conduct a final interview with you (<and PERSON 2 NAME>) about your overall experience of the digital radio trial and your views on a potential radio switchover in the future.

SECTION 1 – INSTALLATION & USAGE SINCE STAGE 2

HOME SCRIPT ONLY

ASK ALL

SHOWCARD A WITH IMAGES OF THE RADIOS

Q1a From the radios on this list, can you please confirm which model(s) you were given?

MP. DO NOT ALLOW DK/ALLOW NULL

RECORD ALL RADIOS GIVEN.

Pure - One Mini Black Series 2 (portable)

Pure - Evoke-1S Maple (portable)

Pure - Siesta Mi Black Series 2 (clock radio)

Sony - XDRDS16IP (clock radio / iPod dock)

Sony – XDRS56DBP.CEK (portable)

Roberts – ecologic 1 (portable)

Roberts – Dreamtime 2 (clock radio)

Roberts – Concerto2 (portable) - Blind/partially sighted

Roberts – Duet2 (portable) - Blind/partially sighted

Other radio (DO NOT READ OUT)

CAR SCRIPT ONLY

ASK ALL

Q1b Firstly, can you please remind me what type of digital radio (RETAILER) installed in your car? Is it?

SP. DO NOT ALLOW DK

READ OUT

A DAB car adaptor fixed to your existing analogue car stereo

A new DAB car radio replacing your existing analogue car stereo

HOME AND CAR

ASK ALL

Q2 Since the last time we spoke, have you had any problems of any kind with the DAB digital radio set(s) you were given (HOME) / with the DAB car radio or adaptor that was installed in your car (CAR)?

SP. DO NOT ALLOW DK.

Yes

No

HOME SCRIPT ONLY

ASK ALL WHO ANSWERED CODE 1 AT Q2 (DON'T ASK Q3 IF ONLY ONE MODEL AT Q1a)

Q3 From the list provided, please identify the radio set(s) that caused you problems.

MP. SHOW RADIOS SELECTED AT Q1A. DO NOT ALLOW DK

Pure - One Mini Black Series 2 (portable)

Pure – Evoke-1S Maple (portable)

Pure - Siesta Mi Black Series 2 (clock radio)

Sony - XDRDS16IP (clock radio / iPod dock)

Sony – XDRS56DBP.CEK (portable)

Roberts – ecologic 1 (portable)

Roberts – Dreamtime 2 (clock radio)

Roberts – Concerto2 (portable) - Blind/partially sighted

Roberts – Duet2 (portable) - Blind/partially sighted

Other radio (DO NOT READ OUT)

Question loop for those for who answered yes at Q2

HOME AND CAR

Q4 What problems did you have with the **<HOME - INSERT RADIO FROM Q3 HOME>**
/ <CAR - DAB car radio / adaptor that was installed in your car?

MP. PROMPT WITH LIST ON SCREEN IF NEEDED. DO NOT ALLOW DK.
PROBE FULLY, SELECT ALL RELEVANT AND ADD DETAIL IN 'SPECIFY' IF
NEEDED – What else?

I have not been able to turn it on / off

I had problems with the alarm function – NOT IN CAR SCRIPT

I have not been able to set presets

I have not been able to locate my presets once I had set them

I have not been able to tune in to any stations at all

I had problems tuning in to specific stations

I did not know how to switch between stations

The on-screen display is too confusing / not clear

The on-screen display is too small/I can't read

The reception / signal is not good

The sound quality is not good

It doesn't work well **in certain areas of my home / depending on where I'm driving**

I didn't understand the instructions

I couldn't read the instructions / the text was too small

The radio is not user-friendly / it's confusing

It has broken

I don't like the look/design of it

The lead was too short – NOT IN CAR SCRIPT

I had to get batteries – NOT IN CAR SCRIPT

Other (*specify*)

HOME AND CAR

Q5 How did you overcome the problems you encountered when using the <RADIO MODEL> ?

MP. DO NOT ALLOW DK.

PROMPT WITH LIST ON SCREEN IF NEEDED.

PROBE – What else?

I got help from someone else (e.g. friend/family/neighbour)

I used the instructions from the manual

I went online to look for information

I called the research project helpline/interviewer

I called the manufacturer

I called/visited <RETAILER> – HOME SCRIPT ONLY

I called/visited <CAR ACCESSORY RETAILER> – CAR SCRIPT ONLY

I called/visited a garage/mechanic – CAR SCRIPT ONLY

I didn't overcome the problems with this radio (SP).

Other (specify)

END OF QUESTION LOOP

HOME AND CAR

ASK ALL

Q6 Is there any help you would have liked to have received for your radio(s) (HOME) / DAB car radio / adaptor (CAR), but that was not available to you? If so, what else would have helped?

MP. ALLOW DK/NULL.

PROMPT WITH LIST ON SCREEN IF NEEDED.

PROBE – What else?

No / Nothing (SP).

Help from a friend/family/neighbour

Help from a retailer – HOME SCRIPT ONLY

Further help from the car accessories retailer – CAR SCRIPT ONLY

Help from a garage / mechanic – CAR SCRIPT ONLY

Clearer / simpler instructions

Easier to find information online

A more user-friendly model

A leaflet explaining how to use a typical digital radio (HOME) / DAB car radio / adaptor (CAR)

A leaflet explaining digital radio switchover

An "open day" held in a central place in the local area (e.g. community centre/village hall) where help would be on hand

In-home installation by a member of the Go-Digital team – HOME SCRIPT ONLY

Other (specify)

HOME SCRIPT ONLY

ASK ALL

Now, I would like you to think about the DAB digital radio(s) you were given, and answer the following questions about all of them in general, rather than a specific model.

HOME AND CAR

ASK ALL

SHOWCARD B

Q7 How confident were you with using the new DAB digital radio(s) you were given, at the time you first received it / them (HOME) / DAB car radio or adaptor when it was first installed in your car (CAR)?

SP. ALLOW DK/NULL.

Very confident

Fairly confident

Not very confident

Not at all confident

HOME AND CAR

ASK ALL

SHOWCARD B

Q8 How confident are you with using the new DAB digital radio(s) now (HOME) / DAB car radio / adaptor now (CAR)?

SP. ALLOW DK/NULL.

Very confident

Fairly confident

Not very confident

Not at all confident

HOME AND CAR

ASK ALL

SHOWCARD C

Q9 Are you finding the new DAB digital radio(s) (HOME) / DAB car radio or adaptor (CAR) easier or more difficult to use than you thought you would, when you first received it/ them (HOME) / when it was first installed (CAR)?

SP. ALLOW DK/NULL.

Much easier

A little easier

A little more difficult

Much more difficult

HOME AND CAR

ASK ALL WHO SAY EASIER (CODE 1 OR 2 AT Q9)

Q10 Why do you say you found it easier to use than you thought?

OPEN ENDED RESPONSE.

PROBE FULLY.

HOME AND CAR

ASK ALL WHO SAY MORE DIFFICULT (CODE 3 OR 4 AT Q9)

Q11 Why do you say you found it more difficult than you thought?

OPEN ENDED RESPONSE.

PROBE FULLY.

SECTION 2 – GENERAL REACTIONS TO TRIAL AND DIGITAL RADIO OVERALL

HOME AND CAR

I would now like to ask you about your general experience of the trial and listening to digital radio in general compared to analogue radio.

HOME - Please think about your experience of digital radio overall, rather than specific models.

HOME AND CAR

ASK ALL

Q12 What do you think of the experience of listening to digital radio overall (HOME) / listening to digital radio in your car (CAR)?

OPEN-ENDED.

PROBE FULLY AND CAPTURE AS MUCH DETAIL AS POSSIBLE.

HOME AND CAR

ASK ALL

SHOW CARD D

Q13 Would you say your experience of listening to digital radio in general is better, worse or the same as analogue radio? Is it...

SP. ALLOW DK

A lot better

A little better

The same

A little worse

A lot worse

HOME AND CAR

ASK ALL WHO THINK IT IS BETTER THAN ANALOGUE (C.1-2 AT Q13)

Q14 Why would you say it is better?

MP. ALLOWDK

PROMPT WITH THE LIST ON SCREEN IF NEEDED

PROBE – Anything else?

Easier to use

Better sound quality

Better reception / signal

Can listen to more stations

Showing name of station / song on display

Additional functions (specify)

The look / design of the radio (HOME) / radio or adaptor (CAR)

Other (specify)

HOME AND CAR

ASK ALL WHO THINK IT IS WORSE THAN ANALOGUE (C.4-5 AT Q13)

Q15 Why would you say it is worse?

MP. ALLOW DK

PROMPT WITH THE LIST IF NEEDED

PROBE – Anything else?

More difficult to use

Inferior sound quality

The signal/reception is not as good at times

The signal/reception is not as good for some stations

Can no longer listen to preferred stations

Not as many stations as I was expecting

The look / design of the radio (HOME) / radio or adaptor (CAR)

Other (specify)

HOME AND CAR

IF SAY 'CAN NO LONGER LISTEN TO PREFERRED STATIONS' AT Q15

Q16 You said you can no longer listen to your favourite stations. Can you tell me which one(s) in particular?

MP. ADD LIST OF STATIONS (INCLUDING 'OTHER'SPECIFY).

HOME SCRIPT ONLY

Now you have been listening to your new DAB digital radio set(s) for a few weeks, I would like you to rate it / them on a few aspects.

HOME AND CAR

ASK ALL FOR EACH MODEL MENTIONED AT Q1A

SHOWCARD E

Q17 Thinking about the <RADIO MODEL X>, (HOME) / your DAB car radio / adaptor (CAR) on a scale of 1 to 5, where 5 is very good and 1 is very poor, how would you rate the ...

RANDOMISE

- Reception / signal
- Sound quality
- Choice of stations
- Ease of use
- Screen display

SP. ALLOW DK

5 – Very good

4

3

2

1 – Very poor

SECTION 3 – CHANGE IN LISTENING HABITS

HOME SCRIPT ONLY

I would now like to find out how you think listening to the new DAB digital radio set(s) has affected your listening habits, if at all.

HOME AND CAR**ASK ALL**

Q18 Thinking about radio in general, would you say that you are now listening **to the radio (HOME) / to the radio in your car (CAR)** more or less often than you were before taking part in this trial? By this we mean listening more frequently (*not necessarily listening for longer*).

SP. ALLOW DK

READ OUT

Listen more often

Listen as often as I did before

Listen less often

HOME AND CAR**IF MORE OFTEN (CODE 1 AT Q18)**

Q20a Why do you think you are now listening to **radio (HOME) / to radio in your car (CAR)** more often?

MP. ALLOW DK

DO NOT READ OUT

PROBE – Anything else?

I have more stations to listen to now

I have discovered new things to listen to

The reception is better than on my analogue radio(s) (HOME) / analogue car radio (CAR)

It sounds better than my analogue radio(s) (HOME) / analogue car radio (CAR)

It is easier to use than my previous analogue radio(s) (HOME) / analogue car radio (CAR)

The design/look of the radio is better than that of my analogue radio(s) (HOME) / analogue car radio (CAR)

Because of my participation in the trial

Other reasons (related to digital radio) – SPECIFY

Other reasons (not related to digital radio) - SPECIFY

HOME AND CAR**IF LESS OFTEN (CODE 3 AT Q18)**

Q21a Why do you think you are now listening to **radio (HOME) / radio in your car (CAR)** less often?

MP. ALLOW DK.

DO NOT READ OUT

PROBE – Anything else?

The reception is worse than on my analogue radio(s) (HOME) / analogue car radio (CAR)

It sounds worse than my analogue radio(s) (HOME) / analogue car radio (CAR)

There are too many stations to choose from

It is more difficult to use than my analogue radio(s) (HOME) / analogue car radio (CAR)

I don't understand how to use it
Other reasons (related to digital radio) - SPECIFY
Other reasons (not related to digital radio) – SPECIFY

HOME AND CAR

ASK ALL

Q19 On an average occasion when you listen to radio on the DAB digital radio set(s) (HOME) / in your car (CAR), would you say you now spend more time listening to the radio, less time or the same amount as you were before the trial?

SP. ALLOW DK

READ OUT

More time
The same amount
Less time

IF LONGER (CODE 1 AT Q19)

Q20b Why do you think you are now spending more time listening to **radio (HOME) / to radio in your car (CAR)?**

MP. ALLOW DK

DO NOT READ OUT

PROBE – **Anything else?**

I have more stations to listen to now
I have discovered new things to listen to
The reception is better than on my analogue radio(s) (HOME) / analogue car radio (CAR)
It sounds better than my analogue radio(s) (HOME) / analogue car radio (CAR)
It is easier to use than my previous analogue radio(s) (HOME) / analogue car radio (CAR)
The design/look of the radio is better than that of my analogue radio(s) (HOME) / analogue car radio (CAR)
Because of my participation in the trial
Other reasons (related to digital radio) – SPECIFY
Other reasons (not related to digital radio) - SPECIFY

HOME AND CAR

IF LESS TIME (CODE 3 AT Q19)

Q21b Why do you think you are now spending less time listening to the **radio (HOME) / radio in your car (CAR)?**

MP. ALLOW DK.

DO NOT READ OUT

PROBE – **Anything else?**

The reception is worse than on my analogue radio(s) (HOME) / analogue car radio (CAR)
It sounds worse than my analogue radio(s) (HOME) / analogue car radio (CAR)
There are too many stations to choose from
It is more difficult to use than my analogue radio(s) (HOME) / analogue car radio (CAR)
I don't understand how to use it
Other reasons (related to digital radio) - SPECIFY
Other reasons (not related to digital radio) – SPECIFY

HOME AND CAR

ASK ALL

Q22 Which radio station(s) do you listen to at least once a week nowadays? Please mention as many as apply.

MP. DO NOT ALLOW DK/NULL

DO NOT READ OUT

PROBE: Any others?

ADD LIST OF STATIONS (including O/S).

HOME AND CAR

ASK ALL

Q23 Have you listened to any new radio stations that you were not listening to before you took part in this trial, even if only for a few minutes? If so, which ones?

MP. ALLOW DK/NULL

DO NOT READ OUT. CODE NONE OF NOT LISTENED TO NEW STATIONS

PROBE: Any others?

ADD LIST OF STATIONS (including O/S).

HOME AND CAR

ASK ALL WHO SELECTED ANY PRE-CODED STATIONS AT Q23

Q24 Which of these radio stations were you aware of before you took part in this trial?

MP. ALLOW DK/NULL. FILTER ON STATIONS FROM Q23

SHOW SCREEN

PROBE: Any others?

HOME AND CAR

ASK ALL WHO SELECTED ANY PRE-CODED STATIONS AT Q23

Q25 Which of these radio stations do you think you will continue to listen to regularly, if any?

MP. ALLOW DK/NULL. FILTER ON STATIONS FROM Q23

SHOW SCREEN

PROBE: Any others?

SHOWCARD F

HOME AND CAR

ASK ALL WHO SELECTED ANY PRE-CODED STATIONS AT Q23

Q26 How did you find these new stations? Pick as many answers as apply.

MP. ALLOW DK

I discovered it/them by accident while using the radio(s)

I knew about it/them previously and searched for it/them on the radio(s)

It was/they were recommended to me and I searched for it/them on the radio(s)

I heard/saw advertising for it/them and I searched for it/them on the radio(s)

Other (*specify*)

SHOWCARD G

HOME AND CAR

ASK ALL WHO SELECTED ANY PRE-CODED RADIO STATIONS AT Q23

Q27 How, if at all, would you say listening to new stations on your new DAB digital radio(s) (HOME) / DAB radio / adaptor (CAR) has affected how much you listen to your old favourite stations?

SP. ALLOW DK

I listen to my old favourites more often than I did before the trial

I listen to my old favourites as often as I did before the trial

I listen to my old favourites less often than I did before the trial

I don't listen to my old favourites at all anymore

HOME AND CAR

ASK ALL WHO ANSWERED CODE 3 OR 4 AT Q27.

Q28 Which old favourite stations are you no longer listening to, or do you now listen to less often than before?

MP. DO NOT ALLOW DK/NULL. SHOW LIST OF STATIONS (INCLUDE O/S).

SHOW SCREEN IF NEEDED

PROBE: Any others?

HOME AND CAR

ASK ALL

Q29 Are there any types of stations that you would like to have on digital radio that you think are currently unavailable? This could include stations dedicated to specific types of music, different eras or stations that specialise in things outside of music. If so, please tell us what type of stations you would like to have.

OPEN ENDED

PROBE FULLY.

HOME AND CAR

ASK ALL

SHOWCARD H

Q30 As I mentioned at the start of the trial, you can also listen to digital radio on other devices like your TV, or via the internet on a computer, tablet or smartphone. Did you ever listen to radio stations on any of these platforms before the start of this trial? Please select all that apply.

MP. ALLOW DK

No – I didn't know about this before this trial (SP)

No - I knew about this but only ever listened on a radio set before this trial (SP)

Yes – on TV set

Yes – on a desktop computer – at home

Yes – on a laptop computer – at home

Yes – on a laptop computer – on the move

Yes – on a tablet computer – at home

Yes – on a tablet computer – on the move

Yes – on a smartphone, via an app

Yes – on a smartphone, online

HOME AND CAR

ASK ALL

SHOWCARD I

Q31 Since the digital radio trial began, have you been listening to radio stations on any of these devices, as well as on the new DAB radio set(s) (HOME) / DAB car radio / adaptor (CAR)? Please select all that apply.

MP. ALLOW DK

No - I only listened to radio on the DAB radio set(s) (HOME) / DAB car radio / adaptor (CAR) during the trial (SP)

Yes – on TV set

Yes – on a desktop computer – at home

Yes – on a laptop computer – at home

Yes – on a laptop computer – on the move

Yes – on a tablet computer – at home

Yes – on a tablet computer – on the move

Yes – on a smartphone, via an app

Yes – on a smartphone, online

HOME AND CAR

ASK ALL

Q32 At any point during the trial, have you set your new DAB digital radio(s) (HOME) / DAB car radio / adaptor (CAR) on to the "AM/FM" setting to listen to analogue radio?

SP. ALLOW DK

Yes

No

HOME AND CAR

ASK ALL WHO ANSWER YES AT Q32

Q33 Why have you switched your DAB digital radio set (HOME) / DAB car radio / adaptor (CAR) to AM/FM?

MP. ALLOW DK

DO NOT READ OUT.

PROBE – What else?

To compare digital with analogue radio

I prefer the sound quality on AM/FM

I prefer the reception / signal on AM/FM

To listen to station(s) I could not get on digital radio(s)

Other (specify)

HOME SCRIPT ONLY

ASK ALL

Q34 As part of the trial, we asked participants not to use the analogue radio set(s) we are replacing and use the DAB digital radio set(s) instead. However, we appreciate that sometimes some people will prefer using their old radio set, which is also part of what we are trying to find out with this research.

So, can I please ask if you have used your old analogue radio set(s) since the switch to digital? Please be reassured that your answers will not impact on your participation in the trial.

SP. ALLOW DK

Yes

No

HOME SCRIPT ONLY

IF YES AT Q34

Q35 Why is that?

MP. ALLOW DK

DO NOT READ OUT.

PROBE FULLY – What else?

I missed using it

To compare digital with analogue radio

It is easier to use than my digital radio(s)

I'm more used to using it than my digital radio(s)

It sounds better than my digital radio(s)

It looks nicer than my digital radio(s)

To listen to station(s) I couldn't get on the digital radio(s)

Because it was preset with my favourite stations

I couldn't set up the alarm and needed it

It has other functions that the digital radio(s) do not have

I wanted to have additional radios throughout my home

Other (specify)

No particular reason – SP.

HOME AND CAR

ASK ALL IN 1+ PERSON HOUSEHOLDS FROM RECRUITMENT

SHOW CARD J

Q36 How, if at all, do you think the digital radio trial has affected the radio listening habits of other members of your household?

MP. ALLOW DK.

It hasn't changed anyone else's listening to the radio (SP)

They listen to the radio more often than they used to

They spend more time listening to the radio they used to

They discovered new stations that they are now listening to regularly

They listen to digital radio on other devices more than they used to e.g. on TV, computer or mobile phone

Other (specify)

HOME SCRIPT ONLY

ASK ALL

Q37 Now, how likely, if at all, would you be to recommend digital radio to friends, family, colleagues or people you know?

Please answer on a scale from 1 to 10, where 1 means you are not at all likely to recommend digital radio and 10 means you are certain to.

SP. ALLOW DK

1 to 10 scale

SECTION 4 – VIEWS ON SWITCHOVER
--

HOME AND CAR

The trial has now finished, so I would now like to ask your opinion on a potential digital radio switchover. This would mean all UK national, regional and large local radio stations would move from analogue (FM/AM) to digital radio only (DAB radios, Internet and Digital TV). Only very small local stations and community stations would continue to broadcast via analogue on FM.

HOME AND CAR

ASK ALL

Q38 Do you think that digital radio switchover will be a good thing or a bad thing for the United Kingdom?

SP. ALLOW DK

Good thing

Bad thing

HOME AND CAR

ASK ALL WHO ANSWERED "BAD THING" AT Q38

Q39 Why do you think digital radio switchover will be a bad thing for the UK?

MP. ALLOW DK.

DO NOT READ OUT

PROBE: Any other reasons?

It is being forced on us

It is too complicated to use

It is too expensive

It is an unnecessary expense

There is enough choice on analogue already

It will be difficult to convert the UK's vehicles to digital

It sounds inferior to analogue

I am happy with the stations I had on analogue

All analogue radios will no longer work

I don't trust the Government's reasons for doing it

Other (specify)

HOME AND CAR

ASK ALL

Q40 In your opinion, what are the main benefits that digital radio provides?

MP. ALLOW DK

DO NOT READ OUT

PROBE: Anything else?

Ease of tuning

Additional information display (station names, tracks etc.)

Pause/rewind

Number of stations

Speciality stations

Improved sound quality

Other (specify)

HOME AND CAR

ASK ALL

SHOW CARD K.

Q41 Do you feel more positive or negative about digital radio switchover now, compared to how you were feeling before the start of the trial?

SP. ALLOW DK

I am feeling much more positive about a radio switchover than I was before the trial

I am feeling slightly more positive about a radio switchover than I was before the trial

I feel the same about a radio switchover as I did before the trial

I am feeling slightly more negative about a radio switchover than I was before the trial

I am feeling much more negative about a radio switchover than I was before the trial

HOME AND CAR

ASK ALL

SHOWCARD L

Q42 Here are some concerns that other people have voiced about a possible radio switchover. Which, if any, do you share now?

MP. ALLOW DK

PROBE: Any other?

I don't know enough about it

I may not be able to listen to my favourite radio stations

I won't know how to use it

I don't think it will sound any better

My current radio(s) would not work anymore

I will have to replace my analogue radio set(s) with DAB radio sets

I will have to change or convert my car radio to digital (HOME) / another car radio to digital (CAR)

I won't be able to afford a radio set or convert my car radio (HOME) / another car radio (CAR)

It is an unnecessary expense

I don't think there will be any drawbacks (SP)

Other (specify)

HOME AND CAR

IF Q42 – CODE 'I WILL HAVE TO CHANGE OR CONVERT MY CAR RADIO TO DIGITAL'

Q43 You said that you are concerned that you will have to change or convert your car radio. What particular concerns do you have about this?

MP. ALLOW DK

PROBE: Any other reasons?

DO NOT READ OUT

I don't know enough about it

I don't know how to go about upgrading my car radio to digital

I may not be able to listen to my favourite radio stations

I don't think it will sound any better

I can't be bothered going to a car dealer or car accessories retailer

I can't afford it

It is an unnecessary expense

I won't know how to use it

I don't have time to do it

Other (specify)

HOME AND CAR

ASK ALL

Q44 Do you have any additional comments of any kind about digital radio switchover that you would like to share?

OPEN ENDED – PROBE FULLY.

HOME AND CAR

ASK ALL

Q45 Based on your experience of the trial, if radio switchover happened next week, what would you do with the existing analogue radio sets that you listen to, including car radios? Please assume that you were not given any DAB digital radio set(s) as part of the trial.

MP. ALLOW DK/NULL

SHOWCARD M1

a - First thinking about all your analogue radios you have at home. Please answer as many as apply.

I don't have an analogue radio at home (SP) CAR SCRIPT ONLY

I would use the DAB digital radio set(s) I already own in my house

I would buy new DAB digital radio set(s)

I would listen to the radio on another digital device (either on TV, computer, tablet or mobile phone)

I would stop listening to the radio at home

I would keep it/them to listen to small local and community stations

SHOWCARD M2

b – Now, thinking about the radio(s) in your car(s). Please answer as many as apply.

I don't have a car / car radio (SP) HOME SCRIPT ONLY

I would get my car radio(s) converted to digital

I would wait until I buy a new car(s)

I would listen to the radio in my car(s) through another device like a smartphone or tablet connected to the internet

I would stop listening to the radio in my car(s)

I would keep my car radio(s) to listen to small local and community stations

HOME AND CAR

ASK ALL WHO HAVE NEVER USED OTHER PLATFORMS (FROM Q30/31)

Q46 Would you ever consider listening to digital radio on other devices like your TV, or via the internet on a computer, tablet or smartphone?

SP. ALLOW DK

Yes

No

HOME AND CAR

IF YES AT Q46

SHOWCARD N

Q47 You said you would listen to radio stations on other devices, which ones would you consider?

MP. ALLOW DK

PROBE: Any others?

I would listen on a television set

I would listen on a desktop computer

I would listen on a laptop computer

I would listen on a tablet

I would listen on a smartphone – via an app

I would listen on a smartphone – online
Other (specify)

HOME AND CAR

IF NO AT Q46

SHOWCARD O

Q48 You said you wouldn't consider listening to digital radio on other devices, why do you say that? Please pick as many as apply.

MP. ALLOW DK

PROBE: Any others?

I don't have a TV set

I don't have access to the internet at home

I don't have a smartphone

I wouldn't know how to go about it

I just don't think about listening to the radio when using these devices at home

The TV set(s) or computers are in different room(s) to where I usually listen to the radio

Other people in the house usually watch TV or use the computer(s) at the same time

It's not as convenient as a radio set

Other (specify)

HOME AND CAR

ASK ALL

Q49 Now you've taken part in this trial, how informed do you feel about a possible future digital radio switchover? Please answer using a scale of 1 to 5 where 5 is very well informed and 1 is not at all informed.

SP. ALLOW DK

5 – Very well informed

4

3

2

1 – Not at all informed

HOME AND CAR

ASK ALL

Q50 From your experience, what lessons should the government take from the trial to ensure a successful and easy move from analogue to digital radio for everyone?

MP. ALLOW DK.

DO NOT READ OUT BUT PROBE FULLY

PROBE: Anything else?

Provide more information on the reasons for a radio switchover

Provide more information about the differences between analogue and digital radio

Provide more information on what it means to people

Provide more information on what people have to do to keep listening to the radio

Provide more information about the impact on car radios

Provide more information about how to recycle old analogue radios

Lobby manufacturers to offer digital radios that are easy to use and have simple instructions for older people

Give people enough time to people to change their radio equipment

Run advertisements / features on television, radio, internet, etc

Offer financial support to those who cannot afford to change their equipment

Offer face-to-face assistance to those who are less likely to understand technology

Offer face-to-face assistance to people with disabilities

Other (specify)

Don't do it (SP).

The government is already doing everything it needs to do (SP).

HOME SCRIPT ONLY

ASK ALL

SHOW CARD P

Q51 Now that the trial is ending and you get to keep the DAB radio(s), what do you think you will do with the analogue radio(s) that you put away in order to make room for the digital radio(s) for the trial?

MP. ALLOW DK

I will still use it as it has other functions (CD player, tape recorder, etc)

I will still use it as I prefer it to the digital radio(s)

I will still use it as a radio in my home

I will find another use/location for it in my home

I will give it away / sell it / donate it

I will throw it away / recycle it

I will put it away and not use it anymore

Other (specify)

THANK RESPONDENT FOR PARTICIPATION IN TRIAL. (BEFORE DEMOG QS)

For more information

Ipsos MediaCT
Kings House, Kymberley Road
Harrow HA1 1PT

t: +44 (0)20 8861 8000

f: +44 (0)20 8861 5515

www.ipsos-mori.com/mediact.com

About Ipsos MediaCT

Ipsos MediaCT helps clients make connections in the digital age. We are leaders in providing research solutions for companies in the fast-moving and rapidly converging worlds of media, content, telecoms and technology.