

The UK's switch to digital TV

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former Director of the UK's Digital
TV Switchover Programme

*presentation prepared for the CMA's
UKCN Consumer Remedies Workshop*

June 2017

Summary of presentation

Alex Pumfrey is Partner at Midthorn, a firm of advisor-entrepreneurs working where the creative industries meet digital innovation. Previously, between 2008 and 2012, Alex was Programme Director of the UK's Digital TV Switchover at Digital UK.

This presentation was given by Alex at the fourth workshop of the UKCN Consumer Remedies project held at the CMA on 22 June 2017. The first half of this workshop was focussed on marketing, market research and behavioural insights.

Alex led the successful delivery of UK switchover on time, under budget, with minimal consumer disruption. This presentation provided an overview and lessons learnt from UK's switch to digital TV.

About this presentation

- Digital TV switchover was the national change programme which required everyone to get digital TV as the old analogue TV signal was switched off, 2008-2012
- Whilst it was Government policy, enforced via licences by DCMS and Ofcom, delivery was co-ordinated by Digital UK, a single purpose organisation created for the job
- The successful delivery of switchover is presented here as a **case study of consumer action and behaviour change**

My role in the digital TV switchover

Alex Pumfrey



| | |
|-------------|--|
| 2005 - 2008 | Director of Strategy & Policy for Digital UK <i>Responsible for creating the governance framework</i> |
| 2008 - 2012 | Programme Director for Digital UK <i>Responsible for project managing the delivery of UK switchover</i> |
| 2013 – 2015 | COO for Digital UK <i>Responsible for transitioning Digital UK to run Freeview</i> |
| 2016→ | <i>Partner, Maitthorn</i> <i>Advising businesses on digital strategy / incubating start-ups</i> |

- Led the successful delivery of UK switchover: on time, under budget, with minimal consumer disruption
- Worked closely with Government, regulators, broadcasters, equipment manufacturers and others
- Has advised other nations navigating digital switchover: USA, Taiwan, South Korea, South Africa, Japan, France, Finland and Nigeria
- Has spoken on delivery of switchover in professional conferences, and on national and international media

Before and after

Before Switchover 2006

- Freeview coverage c.75% of homes
- 80 transmitters converted
- c.65% adoption of digital TV (all platforms)
- 1000s analogue televisions being sold
- Media pessimism about switchover
- Political anxiety
- 10-15% say they will never convert



End of Switchover November 2012

- Freeview coverage 98.5% of homes
- 1,154 transmitters converted 2008-2012
- 100% adoption of digital TV (all platforms)
- All TV set sales with digital built-in
- Positive media and NAO report
- Political credit
- Everyone converts to digital

Before and after

Before Switchover 2006



*"[The project is] more complex, with more **potential for chaos and consumer revolt** than any other civilian project in our history"*
Industry expert, 2006

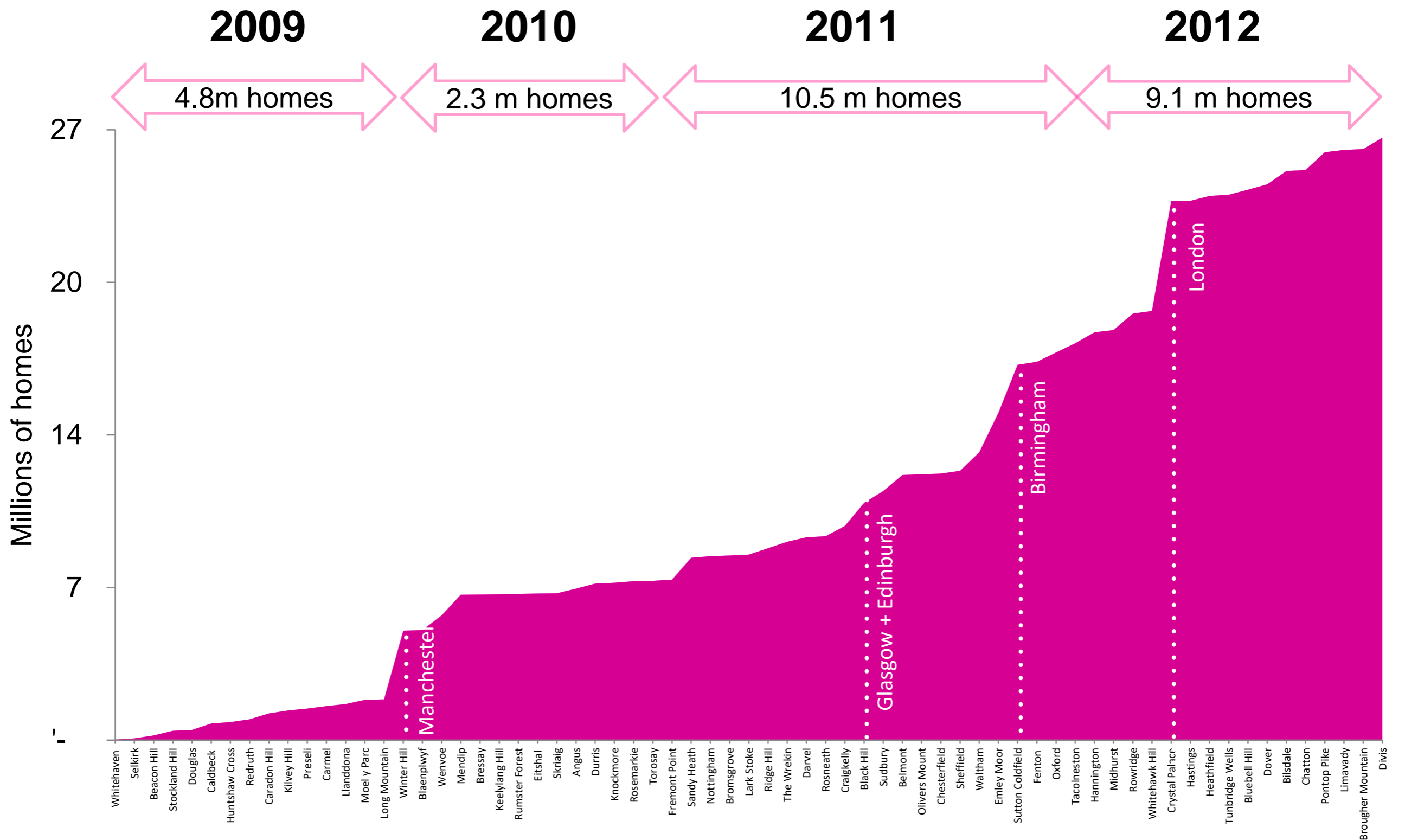
Switchover:
2008-2012

End of Switchover November 2012



*"I am delighted to take this opportunity to congratulate all those who have played a part in the **unqualified success of the digital television switchover.**"*
Ed Vaizey MP, Minister for Culture, Communications and the Creative Industries, 2012

Regional roll-out: 2008-2012



Programme benefits

1

Universal availability of digital terrestrial TV

- Increases affordable choice of TV platforms for consumers
- Increased channel choice
- An end to dual analogue/digital transmission for broadcasters

2

Release of valuable spectrum

- Freed up 14 UHF channels which were sold for mobile use
- 4G roll-out in this spectrum is now covering most of the UK
- Digital TV uses spectrum more efficiently than analogue TV

Government estimated net benefits of £1.1 to 2.2 billion NPV for UK plc

Ofcom spectrum auction raised £2.34 billion for Treasury

Shared objectives

Programme Goal

“The goal of the digital TV switchover programme is to switch television in the UK to digital by the end of 2012, in a way that makes it a simple and positive experience for viewers, and providing assistance to older and vulnerable people”

Critical Success Factors

1. **Re-engineer all 1,154 transmission sites**, switch analogue TV off, and launch the high power digital terrestrial television signal at the main transmitter and its relays successfully and on time
2. **Achieve universal awareness of switchover** (95% or higher) five months prior to the start of switchover
3. Ensure that all those requesting **assistance from the Help Scheme** are helped in a timely manner
4. All those choosing to **convert their main set to digital**...are able to do so by the second switchover date

Programme partners with clearly defined roles

Policy & Regulatory



Overall responsibility for policy delivery



Policy and spectrum management

Implementation



Overall responsibility for programme delivery: on time, on budget and with minimal disruption

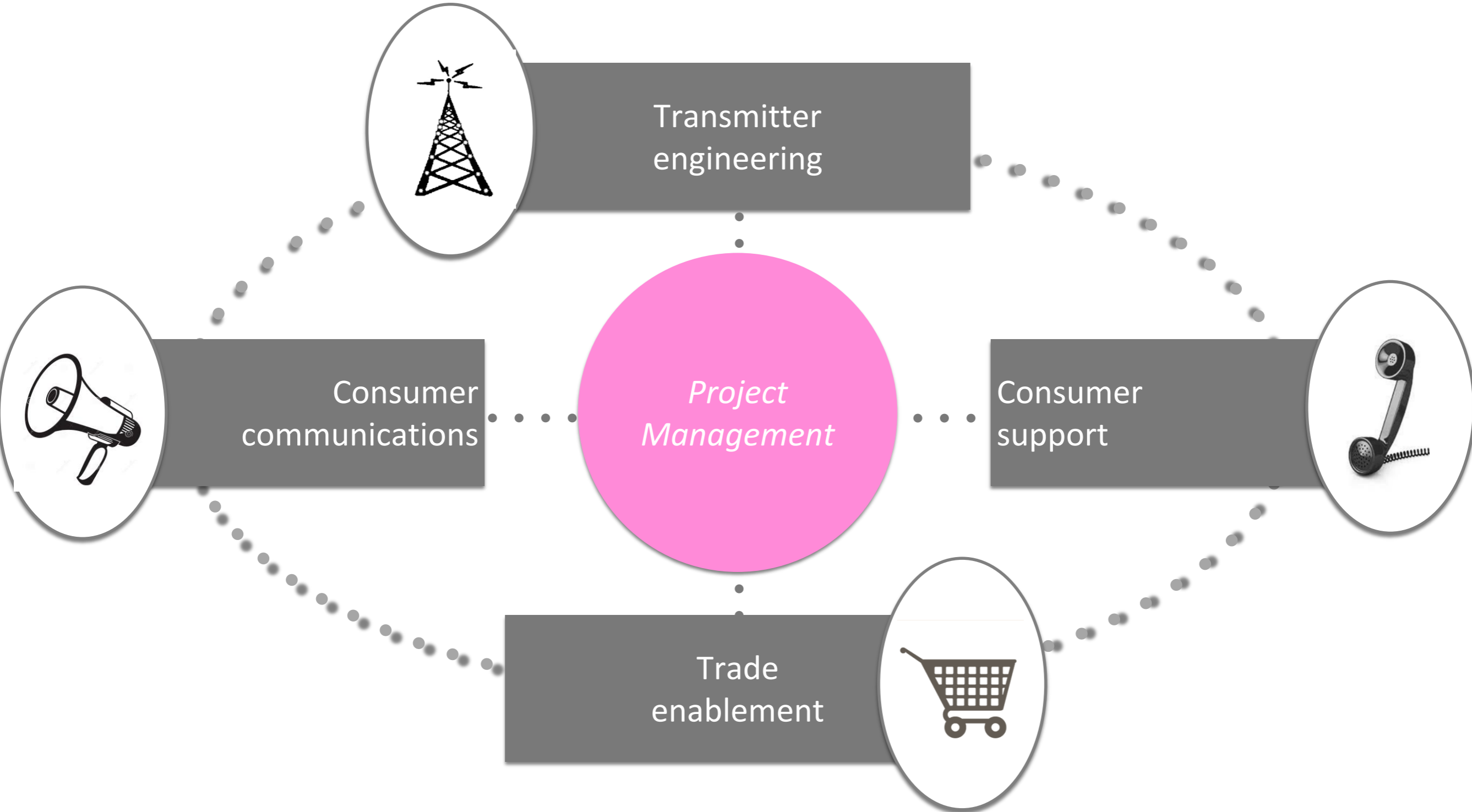


Responsibility for timely delivery of practical assistance to vulnerable people

Ring-fenced budgets

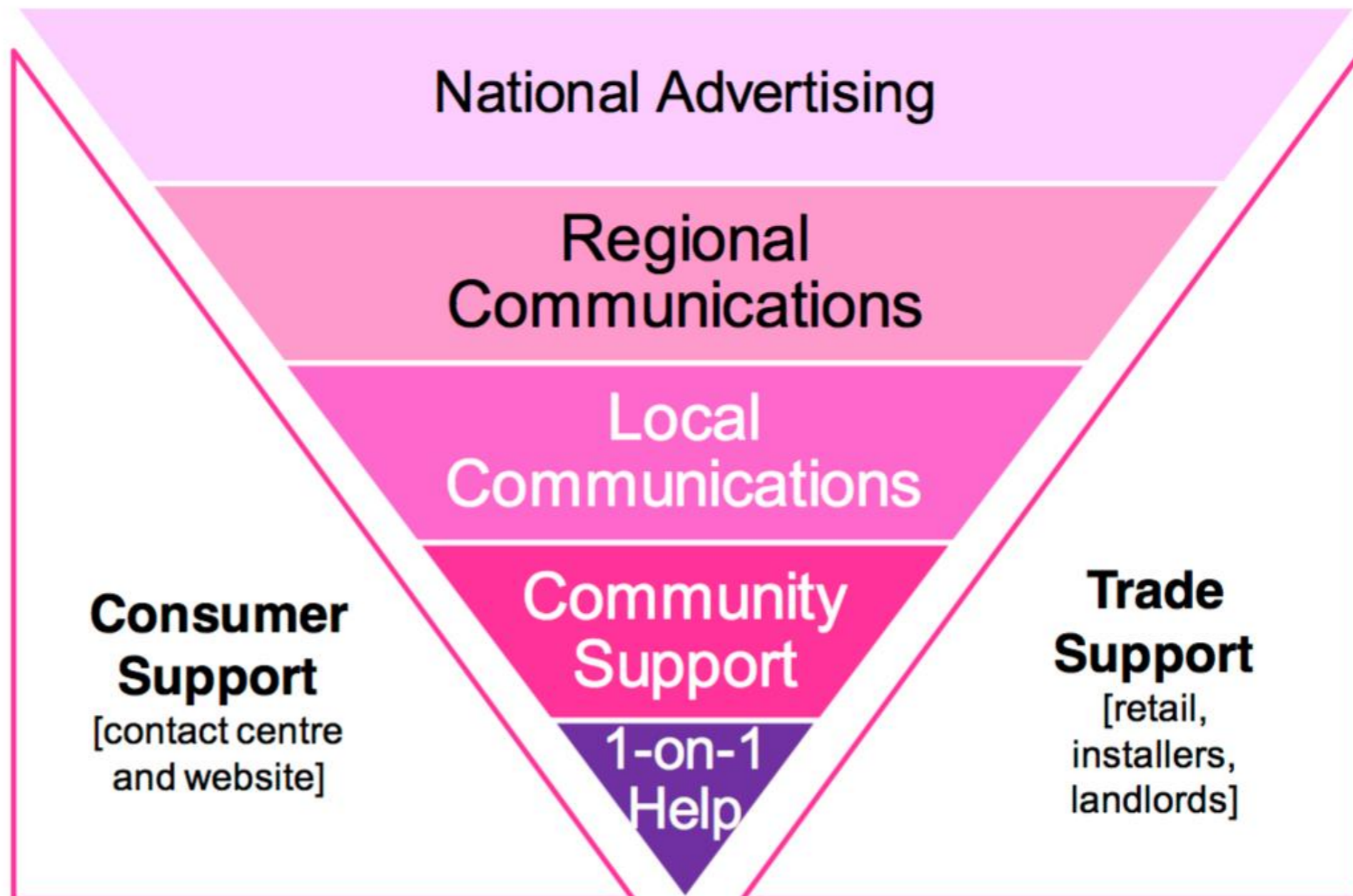
| <i>Item</i> | <i>Source</i> | <i>Budget</i> | <i>Final Expenditure</i> | <i>Savings</i> |
|-------------------------------------|-----------------------------------|---------------|--------------------------|----------------|
| Digital UK Communications | BBC Licence Fee | £200m | £126m | £74m |
| Digital UK Operations | Analogue and digital broadcasters | £30m | £30m | - |
| BBC Switchover Help Scheme | BBC Licence Fee | £600m | £340m | £260m |
| Transmitter Network Upgrades | Analogue and digital broadcasters | £630m | £630m | - |
| TOTAL | | £1,460m | £1,126m | £334m (23%) |

The delivery elements



The communications strategy

A **layered communications strategy** which extended deep into local communities to relay the message of switchover:



The 'moment of compulsion'



-1 year

- 6 months

-1 month

-1 week

-1 day

1st stage
loss of 1
analogue
channel

2nd stage
loss of all
analogue
channels

Communications objective

Raising awareness

Building understanding

Encouraging readiness

Prompting action if not ready

'Be ready'

Target everyone switched

Ensure everyone switched

Main channels used

National advertising

Regional advertising

Direct mail
Press/PR
Events

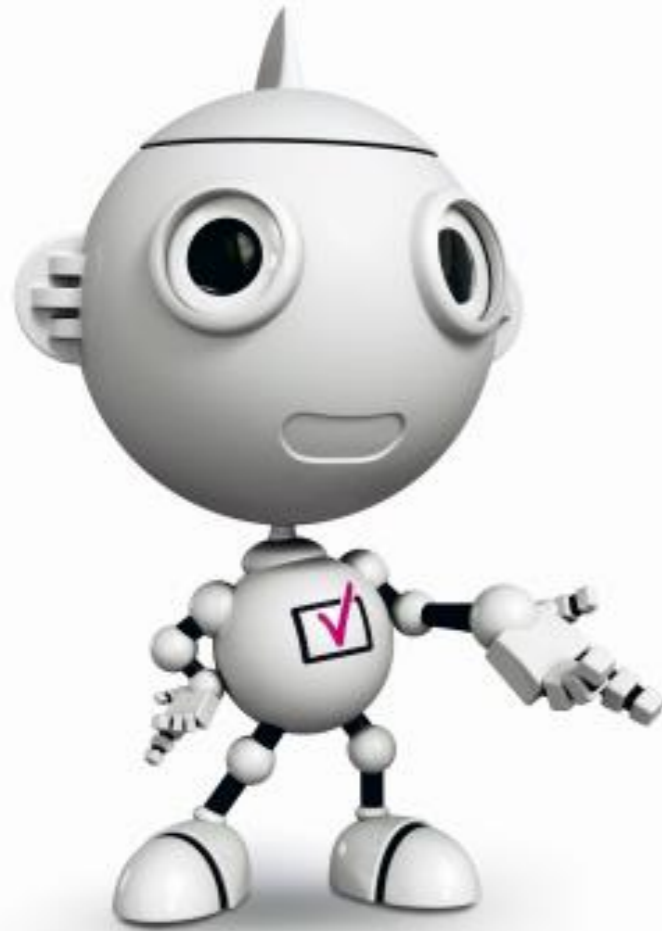
Local advertising

Press/PR

Press/PR
Local advertising

Local advertising

Meet Digit AI!



- Digit AI: 'your friendly guide to switchover'
- Designed by Oscar-winning Aardman Animations
- Appeared consistently through all communications
- Also a costume character for events...
- ...and a toy for children
- Became well recognised and even loved!



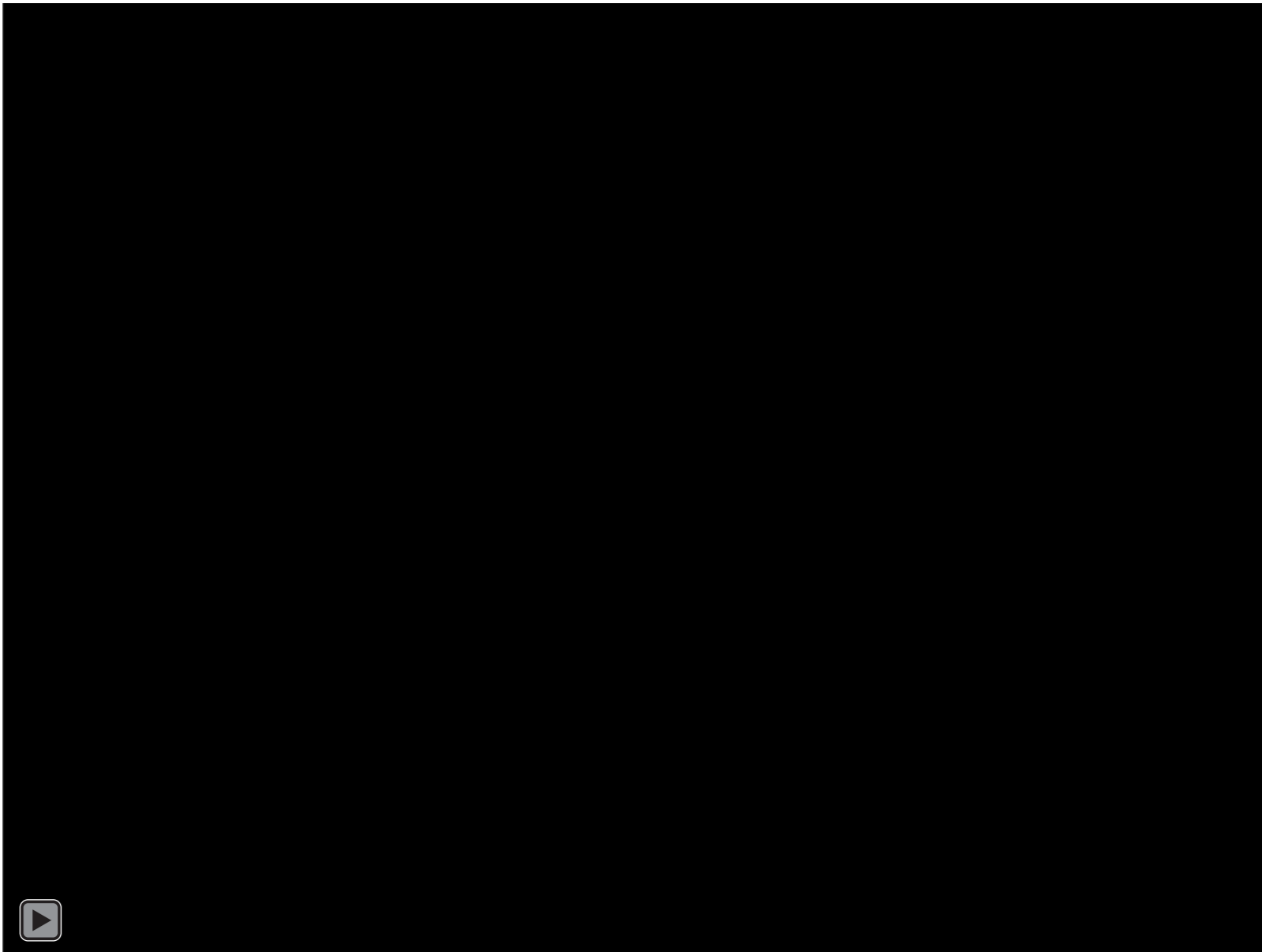
The advertising campaign

- Communications were delivered by a co-ordinated campaign in the 6 months up to switchover:
 - TV, radio, outdoor and press advertising
 - On-screen messages
 - 'Your Guide to Switchover' information booklet delivered to your door
- At peak we delivered more than **200** time sensitive advertisements per week
- In each area there were over **100** opportunities to see our messages



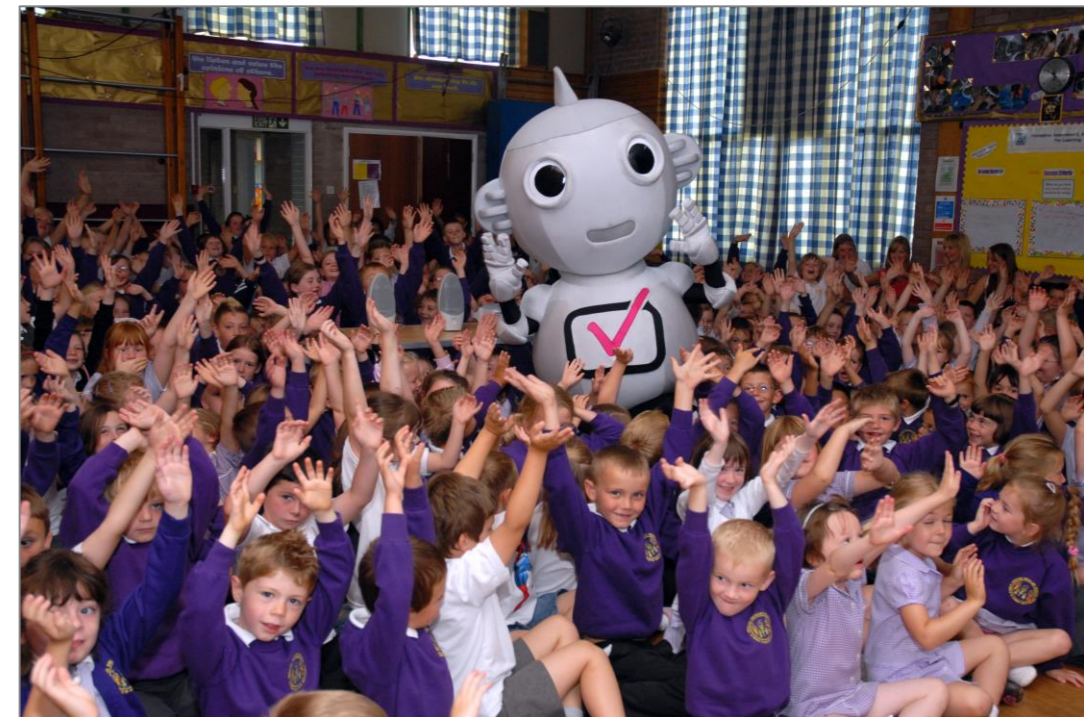
TV advertising

- Advertising on TV was an important part of the mix - and expected for a TV change programme
- We ran a number of different ads, this being our most popular format



Community activity

- More than 2,000 **roadshow events** to advise 480,000 people
- A **Schools' Programme** - educational materials linked to curriculum
- **Regional teams** acted as the face of switchover in each community and co-ordinated activity on the ground, working with partners



Partnership with charities

We helped establish Digital Outreach - a consortium to cascade switchover messaging into the local community.

12,686 charity staff and volunteers provided advice to 580,000 people



- Identified key charities in a region
- Commissioned lead organisations
- Mailed Community Outreach Pack
- Trained volunteers
- Provided grants for community events
- Ran Advice Points at switchover



Phone and web support

- Advice Line: 08456 50 50 50
 - At peak 700 customer service advisers at six call centres
 - Received 2 million calls
-
- Website: www.digitaluk.co.uk
 - 17 million people used the website
 - A 'postcode checker' allowed viewers to find out digital TV options where they live
 - There were 63 million enquiries of the postcode checker



digitaluk

Home Help About Digital UK Press Office Businesses & Organisations Text size A|A|A

What & why When do I switch? How do I switch? Costs & options

Digital UK is the not-for-profit company leading the UK's switchover to digital TV

Latest news
Switchover has been completed in the [Granada TV region](#) and [parts of east and central Wales](#), extending Freeview coverage to virtually all homes.

1 Find out when digital switchover is coming to you
When your home switches to digital will depend on where you live in the UK. All households with a Freeview TV or box will need to re-tune at both stages of switchover and from time to time to keep receiving channels and services

- ▶ Find out when you switch
- ▶ Connections and retuning

2 Find out how to re-tune

3 Find out how to go digital

Help
Still have questions? Go to our help centre

Postcode checker
When is the switchover coming to me?
Postcode
House name or number
Go

Why do you need this?
I am in the aerial installation trade

Who is next to switch?
Wales TV region Not your region? Find out about [your region](#)

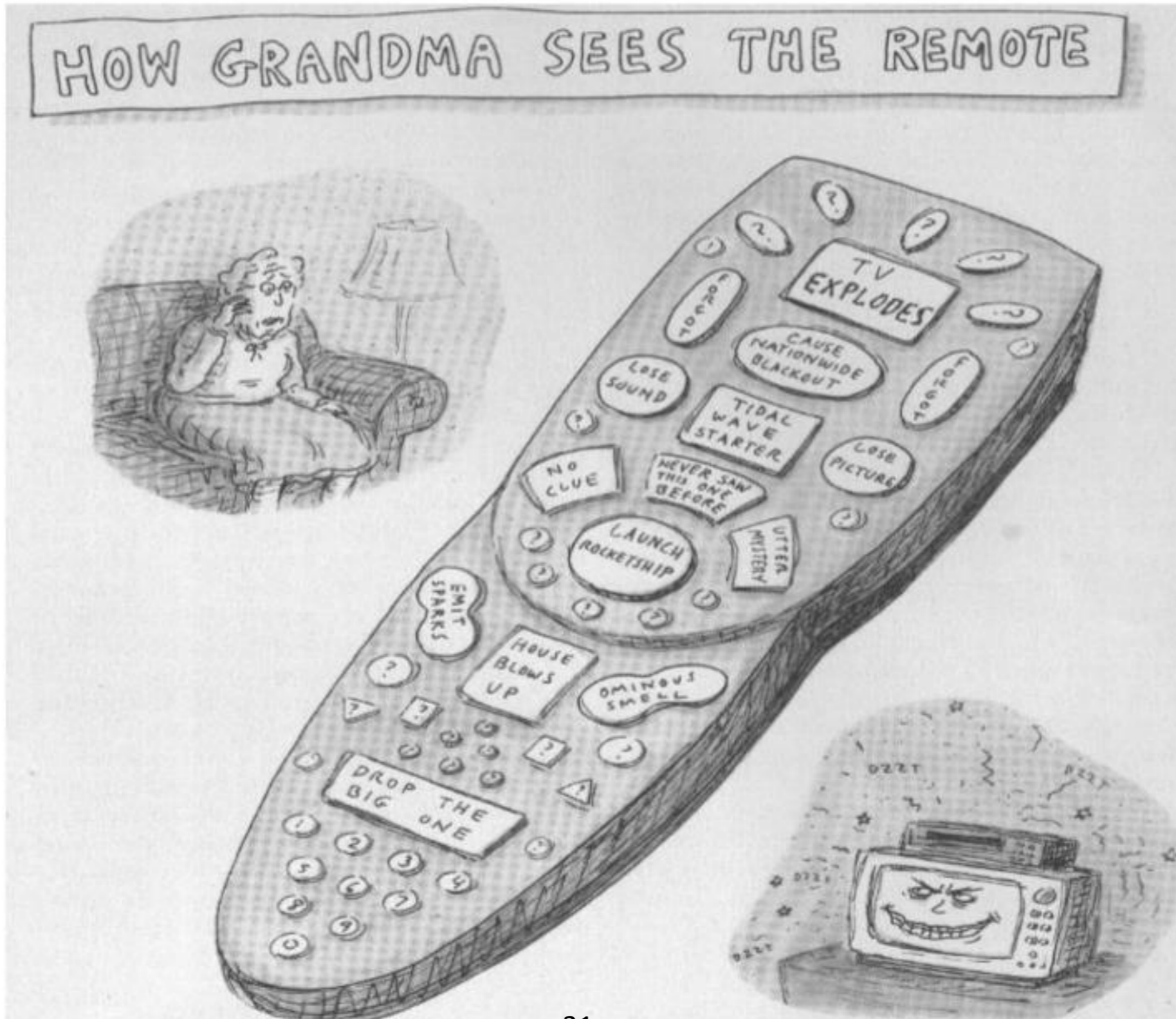
Blaenplwyf, Wenvoe
Next switchover date: 10 February 2010

Am I eligible for extra help?

Top FAQs **Leaflets**

If I don't do anything, will I lose my television?

Some need extra help...




The Switchover Help Scheme

- The BBC-run Help Scheme provided practical assistance to 1.3 million people
- People were eligible if:
 - 75 or over
 - Disabled or blind / partially-sighted
- They were identified from Government records and written to directly
- The service was £40 for most or free if on income support
- It provided:
 - An easy-to-use box
 - Installation service
 - A new aerial if needed
 - Help on how to use digital TV



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Don't lose your TV channels.

If you're 75 and over or eligible disabled you can get help switching to digital TV.

The switch to digital TV is coming, so you need to get ready. The Switchover Help Scheme has helped hundreds of thousands of people switch to digital and can provide everything you need to keep watching your TV.

- Easy-to-use equipment
- An approved installer to supply and install the equipment
- A 12 month aftercare service including a free helpline

This service is available for just £40 all-inclusive or is free if you are on income support. Everyone who is entitled to help will receive an information pack. But if you'd like to apply now, call us free on 0800 40 80 80.

BBC The Switchover Help Scheme is run by the BBC



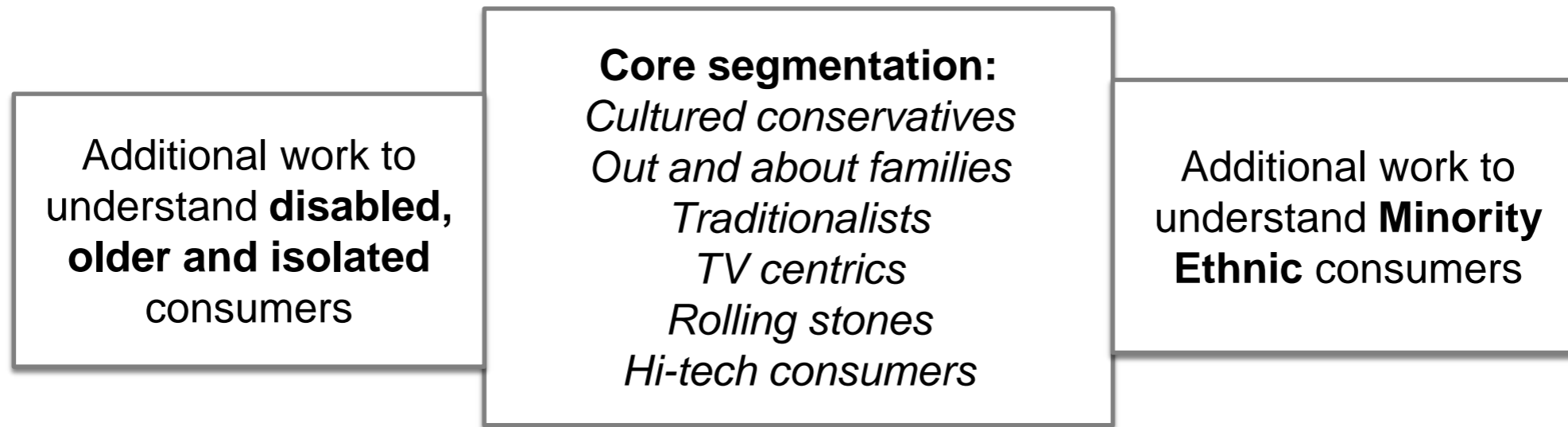
Supporting retailers

- 7,000 stores signed up to the 'Digital Tick Logo' scheme
- They received Digital UK's point of sales materials and were included on Digital UK's online retailer search function
- 46 Retail Support Executives visited every logo licensed store
- They provided in-store training on switchover to 74,000 retail staff who received the 'Ask Digital' qualification



Insight & monitoring

Strategic insight



Quantitative



Qualitative

- **Monthly tracking study**
- 6 years: '06-'12
- GfK NOP / Ipsos MORI
- 1,300 per month
- 65,000 in total
- Face-to-face in-home
- Specific quotas: older, disabled, flats, ME

- **Focus group programme**
- 3 or 4 waves per each of 15 regions
- 3 months, before and after
- Local agencies

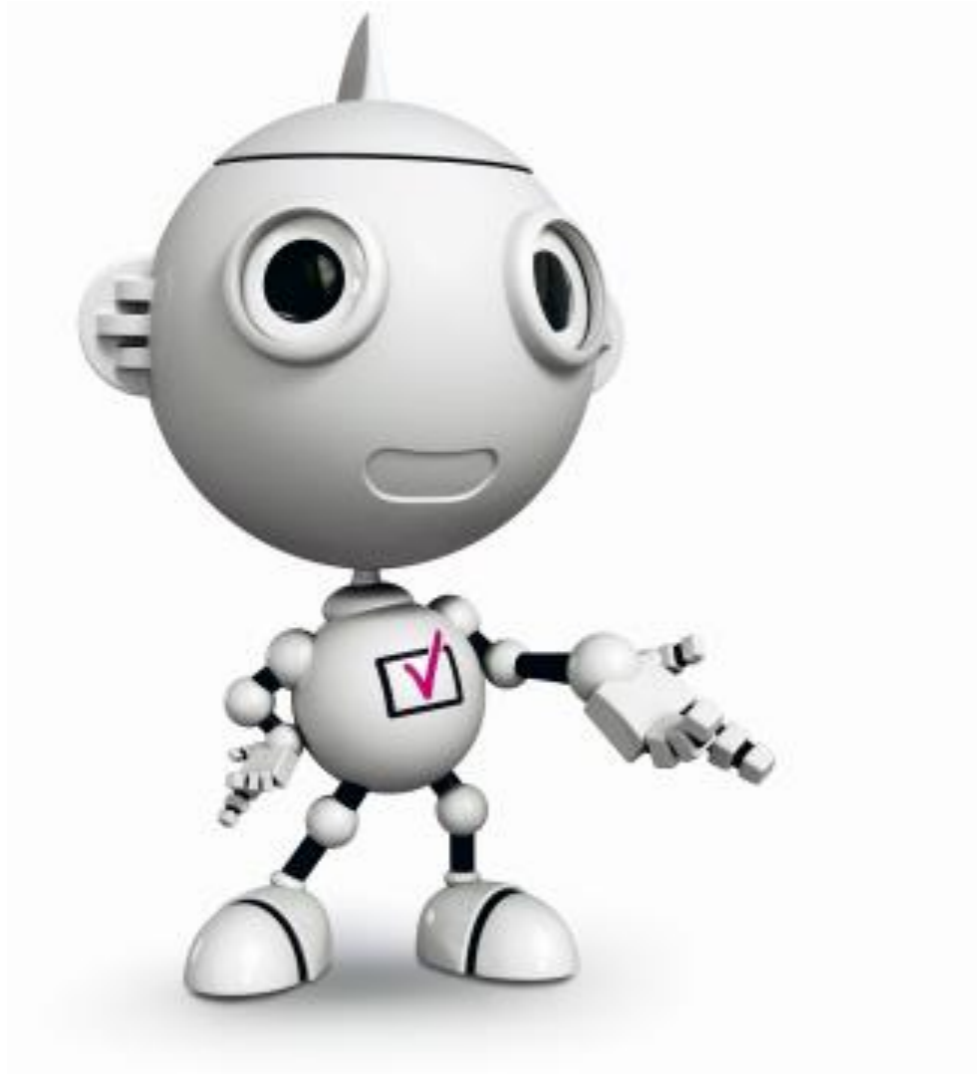
- **Regional reporting**
- Regional teams provide regular report from their on-the-ground experience

| KPI | | Point from Switchover | | | | |
|-----|----------------------|-----------------------|-----------|-----------|---------|----------|
| | | -8 months | -5 months | -2 months | -1 week | +2 weeks |
| | Switchover Awareness | 90% | 95% | 99% | 100% | n/a |
| | Date Understanding | 40%* | 30% | 55% | 75% | n/a |
| | Retune Understanding | n/a | n/a | 30% | 55% | 70% |
| | Main Set Conversion | n/a | n/a | 90% | 95% | 100% |

year awareness
 month awareness

10 insights

1. 'Joining the dots' – creating a seamless consumer experience
2. Awareness > understanding > action
3. Show you're serious
4. Don't overcomplicate it
5. Get press and PR onside - powerful allies
6. Localise activity - can't be a 'top down' imposition
7. Use grassroots networks
8. Offer extra help to those that need it – a little goes a long way
9. Find a moment of compulsion (everyone waits until the last minute)
10. The British public are resilient and pragmatic when given the right advice and support!



Thank you

Alex Pumfrey