

REVIEW OF THE GRANADA DIGITAL TV SWITCHOVER

1. Executive Summary

The Winter Hill transmitter and its 70 relays, serving 3,041,000 households in the Granada TV Region, successfully switched to digital TV in two stages on 4 November and 2 December 2009.

The Granada Project represented a significant jump in scale for the Digital Switchover Programme, and with a diverse urban region; a transmitter group with 70 relays; a high proportion of flat dwellers and a significant black, Asian and minority ethnic (BAME) population it has been seen as the test of the Switchover Programme to date.

The success of the Granada Project has validated the Digital UK model used to deliver and manage large scale regional switchovers. While each TV region is different and there will be new challenges, it confirms the effectiveness of the switchover plan being rolled out to future regions.

No strategic changes have been identified from this review however there are a number of operational findings from activities that were notably effective and recommendations to further refine Digital UK activity for future regions.

The Granada project has met all four Critical Success Factors:

- (i) The technically successful conversion of the transmitter network;
- (ii) Universal awareness of the switchover;
- (iii) Provision of the Help Scheme to those eligible and requesting help; and
- (iv) Every home choosing to convert to digital TV and all those with digital terrestrial television have successfully re-tuned at or after switchover.

The engineering works carried out by Arqiva were successfully completed within planned timescales, and the mechanisms to report and track status on switchover days proved robust and accurate.

There was 98% digital TV take-up pre-switchover, and two weeks after the second switchover date every home surveyed had converted its main television set to digital and 97% had converted every TV in the home. Re-tuning caused no widespread problems.

The highest rated risk for the Project came from the inevitable overlap of channels from Wales in to the North West. Overall our approach - communicating the likelihood of overlaps to the public in advance - worked well but could not prevent a degree of consumer inconvenience for those who were most affected. There were a number of negative stories in the local press and on television in the days immediately after 2 December. However taken overall, media coverage of the Granada switchover was largely factual and positive.

Consumer and trade support arrangements were successfully scaled up to accommodate the number of households switching. In addition to the Advice Line, there were four roadshows and thirty six advice points located across the region to support viewers. While there were relatively high call volumes (1.3% of households) on 2 December ('DSO2'), these were largely, as expected, re-tuning and manual re-tuning enquiries.

2. Background

At the end of 2009, one-fifth (18%) or 4.8 million UK homes had completed the digital TV switchover.

The Granada Project has always been seen as the landmark project due to the:

- Scale of the engineering programme, a transmitter group with 70 relays;
- Number of households switching on one day, c. three million homes;
- Impact of large urban areas, including the Manchester and Liverpool conurbations;
- Impact of many BAMEs communities (7.8% of the population);
- Impact of a large number of multi-dwelling units (MDUs); and
- Effect of a dense, sophisticated media environment.

The Granada Review has followed the standard lessons learned process paying special attention to the scale and diversity of the region.

The Switchover Programme has continually improved throughout 2009. After each Project switchover completes, a review is conducted, identifying what worked well and areas for improvement. At the end of 2009 in addition to Granada, the West Country and Border TV Regions had fully switched and switchover in Wales was well underway. While each region is different, lessons have been learnt and internal mechanisms are in place to capture, analyse and implement change.

While no strategic changes have been identified in this review exercise, over 2009 we have implemented a number of key changes. For example, the increased prominence of re-tuning for digital terrestrial television (DTT) viewers; overlaps messaging and condensing the consumer contact strategy to start at minus six months for regions switching in 2011 onwards.

2.1 Objective of this Review

The objective of this review was to analyse the success and effectiveness of how Digital UK managed the switchover process in Granada.

This incorporates all elements, from the technical process, to the stakeholder management, trade liaison, consumer communications and support to the project management.

3. Granada Project Outcome

3.1 Local Response

The general feeling from research respondents participating in post-switchover focus groups was that switchover had been successful and well managed. Awareness and understanding of the switchover process built in the run up to 4 November, and was sufficient for people to make the necessary preparations.

“I think generally it’s been handled well, they [Digital UK] got to do what they’ve got to do. I know they can’t not do it, so really they’ve got to deal with people, some people have got lots of money and are dead savvy about it, other people who are hard up and don’t understand so they’ve got to put it out for everyone and I think they’ve done that really. Well done.”¹

The consumer campaign was well received and the multi-media approach endorsed. TV adverts and the 3 month door drop were especially noted as key to building awareness and understanding.

“They [TV] did a picture with this little fella, saying get a digibox, and a number to ring. More so recently, nearly every evening. They are stepping it up.”

“More info. You wouldn’t throw this away. It’s what I’ve been waiting for; a guide to what it means.”²

3.2 Conversion Results

Digital TV take-up in Granada improved significantly in the last three months running up to switchover with 98% of homes ready for the change by September 2009.

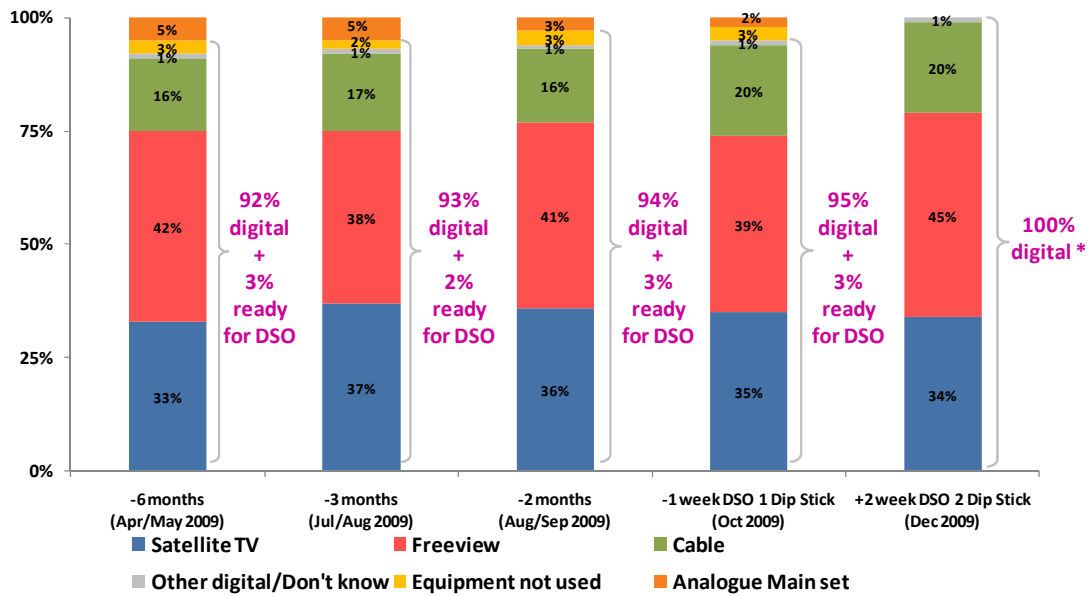
Two weeks after the second switchover date, every home surveyed had converted its main television set to digital and 97% had converted every TV in the home (our highest full household conversion metric to date).

Granada conversion trends match consumer behaviour in other switchover regions.

¹ Source: Granada Focus Groups, Other Lines of Enquiry, December 2009

² Source: Granada Focus Groups, Other Lines of Enquiry, December 2009

Figure 3.2.1 Granada Main set conversion by platform



* Post DSO results showed 1% of homes in Granada that had converted a secondary TV set, but not their main set.

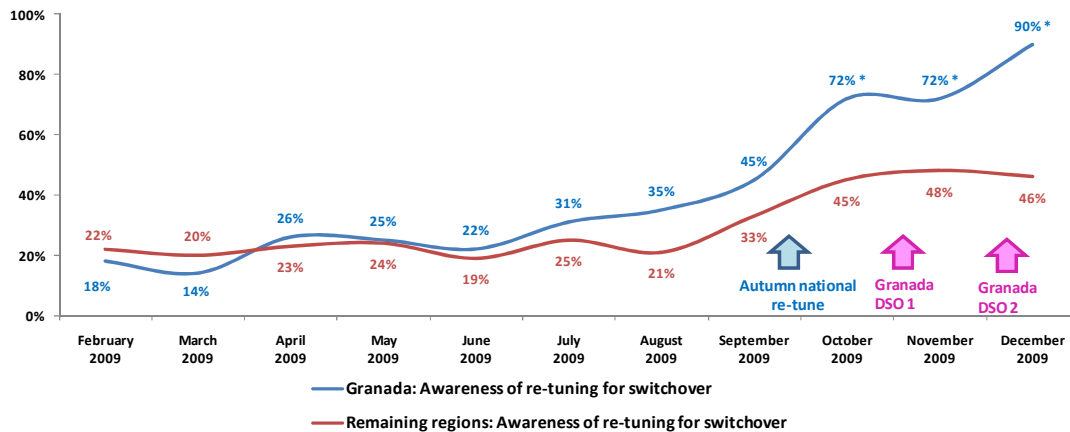
Source: Digital UK Switchover Tracker Survey, Granada sample over 200 respondents per data point

3.3 Re-tuning awareness

When monitoring started in February 2009, Granada re-tuning awareness was lower than the average in the remaining switchover regions (18% vs. 22%), by December 2009 (2 weeks after switchover finished), 90% of Freeview users were aware of the need to re-tune for switchover. There were no reports of viewers going without television from the post switchover dipstick surveys, suggesting all viewers managed to re-tune at switchover.

This fivefold increase in re-tuning awareness was driven by both the regional Digital UK advertising campaign and the National 30 September 2009 campaign.

Figure 3.3.1 Granada Re-tune awareness against remaining regions



* Granada source for Oct to Dec 2009 data are comparable regional Dip Stick surveys

3.4 Project Assessment

The success of the Granada Project is measured against the four Critical Success Factors ('CSFs') used to assess all switchover projects.

Table below shows that the Granada project passed all CSFs and was successful.

Figure 3.2.1 Granada Project Critical Success Factors

CRITICAL SUCCESS FACTORS – GRANADA PROJECT		
Critical Success Factor	Assessment	Status
1. Technical Success: Switch the analogue signal off, and launch the high power digital terrestrial signal at the main transmitter and its relays successfully and on time.	<ul style="list-style-type: none"> ▪ DSO1 (4 November) and DSO2 (2 December) for Winter Hill successfully completed on time. ▪ Arqiva confirmations received and reports issued. 	Passed
2. Universal Awareness: Achieve universal awareness of switchover (95% or higher on the Digital UK Switchover Tracker survey) six months prior to the start of switchover.	<ul style="list-style-type: none"> ▪ 95% or higher from -12 months through to switchover. 	Passed
3. Provision of Help Scheme: Ensure that all those requesting assistance from the Switchover Help Scheme, and providing the necessary information and payment are helped in a timely manner (Switchover Help Scheme to confirm that the Help Scheme is delivering to the required standards as monitored by the Project Board.).	<ul style="list-style-type: none"> ▪ The Help Scheme was delivered to the required standards as monitored by the Project Board. ▪ All those requesting assistance from the Help Scheme, and providing the necessary information and payment were helped in a timely manner. 	Passed
4. Full Conversion & Re-tuning: All those choosing to convert their main television set to digital, and not inhibited by other factors, are able to do so by the second switchover date. All those with digital terrestrial television have successfully re-tuned at or after switchover to continue to receive their full range of channels.	<ul style="list-style-type: none"> ▪ Post-switchover dipstick survey (two weeks after Winter Hill DSO2 226 households interviewed) returned: <ul style="list-style-type: none"> - 100% main set conversion; and - 97% of homes fully converted. - 90% re-tuning awareness - 96% said they retuned their Freeview TV or box on both dates. - No one reported going without television. 	Passed

3.5 Complaints

As at the time of this report, just 52 complaints (0.001% of total households) were received direct from consumers (by letter, email or phone) in the Granada region and 13 letters have been received from MPs relating to individual constituents. Complaints centred on overlaps, re-tuning and equipment issues. Generally the resolution of these required the services of a reputable installer, retailer or manufacturer.

4. Key Findings

Given consideration to the scale and diversity of Granada and having conducted a thorough review of the workstream activity, we have identified findings in the following areas:

- 1) Managing overlaps
- 2) Re-tuning
- 3) DTT Equipment issues
- 4) Digital UK Advice Line and website
- 5) Media & Public Affairs
- 6) Consumer communications
- 7) BAME engagement
- 8) Outreach activity
- 9) Retail
- 10) Housing
- 11) Project Management

4.1 Managing overlaps

- Following the switchover power increases at the Moel y Parc and Storeton Wales transmitters it was known that Welsh DTT signals would overlap into the Granada region. When Granada Freeview viewers re-tuned on 4 November and/or 2 December, an estimated 125,000 (4%) homes would find the Welsh services (BBC One Wales, BBC Two Wales, ITV1 Wales and S4C) at the top of their electronic programme guide (EPG). Of these, 87,000 (3%) homes would experience this on their main TV set.
- While this can generally be resolved by selecting favourites or conducting a manual re-tune to select the Granada frequencies, it was acknowledged that initial reception of Welsh services might prove an irritant for viewers, as well as provide a story for the media. The 'Welsh overlap' was therefore rated as the highest risk as we entered Granada switchover.
- The impact of the overlap was much as we expected. In post-switchover research around 3% of homes mentioned receiving Welsh services, in line with the predicted 4%. At roadshows in overlap areas (including on the Wirral) up to 9 in 10 enquiries were about Welsh services.
- Manual re-tuning calls made up 10% to 15% of calls at each switchover, and despite the complexity of manual re-tuning (procedures for which vary widely from product to product) agents were able to successfully resolve around 70% of those calls on the phone. A further 15% noted the instructions to try later, and 15% could not be resolved and had to be referred on to a local retailer or installer. In the days after switchover, the volumes declined but the proportions with overlap issues increased, and up to 80% of calls related to overlaps.
- In general where viewers experienced the overlap, and saw Welsh TV services at the top of their EPG, they were surprised but only occasionally irritated. The overlap was more readily accepted in areas geographically close to Wales (e.g. the Wirral) than areas a considerable distance away (e.g. Bolton).

- While the pre-briefing of journalists was effective in helping them understand overlaps, it could not be expected to prevent the issue being reported. A small but vocal group of viewers who were confused - and often quite angry – were generating the story which the media were happy to cover. The nature of the story (Welsh services being received in England) also allowed the media to portray it as a ‘cock-up’ and/or conspiracy of some sort. The most significant news stories emerged a week or so after 2 December.
- That said, the overlaps story accounted for only a small proportion of the overall coverage of Granada switchover, and media analysis shows that just 6% of coverage was negative.
- Overall the upfront, gentle pre-briefing strategy worked well. Outbound messaging was generally consistent and accurate, although, as experienced in Granada, pre-briefing was no guarantee against negative media stories running. Nonetheless some lessons were learned, and there will be refinements and additions to the communication programme as summarised below.

Recommendations

- *General messaging on how to resolve receiving the ‘wrong’ regional services has been refined (for example, the removal of references to ‘edit channels’, pulling out aerial cables) and will be applied consistently for all outbound communications from the West region onwards.*
- *Increased prominence of overlaps in the three month leaflet with additional local press advertisements to be run where appropriate.*
- *Earlier notification of overlaps (from three months instead of one month before switchover) and increased prominence in media and stakeholder briefings and materials.*
- *Increase prominence on regional and troubleshooting web pages. A new web ‘widget’ has been created that generates a manual re-tuning leaflet with personalised transmitter frequencies for your postcode (in place for West switchover).*
- *Continue to communicate with manufacturers and retailers about the desirability of including manual re-tune functionality in Freeview equipment.*
- *Refine contact centre reporting on the volume and tone of overlap callers.*

4.2 Re-tuning

- Re-tuning remains the biggest single consumer issue at switchover. Around two-thirds of all calls to the Digital UK Advice Line on 4 November and 2 December were attributed to providing generic re-tuning advice, and likewise the vast majority of enquiries at our switchover roadshows and Advice Points remains re-tuning.

- Over 2009 the prominence of the re-tune messages has been enhanced in switchover communications including a new ten second re-tuning TV ad, a separate re-tuning tab in the three month leaflet, re-tune and manual re-tune factsheets and website enhancements including easy-to-follow product specific re-tuning guides. These activities have proved successful in not only raising awareness and understanding of switchover but also in improving the quality of advice our consumer support functions provide at switchover.
- The National re-tune event on 30 September 2009 meant some viewers thought there were ‘three re-tunes’ for switchover in Granada. While there were benefits in raising awareness and understanding of re-tuning before switchover, it also generated confusion for some viewers and there were reports of viewers being irritated that they had to re-tune three times in quick succession.

Recommendations

- *In regions with high levels of pre-switchover digital TV take-up, continue to increase the profile of the re-tune message targeting the DTT audience.*

4.3 DTT Equipment Issues

- Equipment issues have been a feature of each switchover to date. Known issues (e.g. 2k, split NIT, Vestel T810) still continue to surface, but have turned into ‘business as usual’ matters and Digital UK continues to monitor. Good direct communications with retailers and manufacturers now make it easier for Digital UK to spot, diagnose, and where possible, to work with industry to offer solutions.
- There were a number of reports in Granada from retailers who had purchased non-ticked equipment, about product failures between the first and second switchover stages. This was found to be due to an “extended NIT [network information table]” used at Winter Hill. This came to our attention just after the first stage on 4 November.
- In Granada, Digital UK referred calls to manufacturers in instances where viewers called reporting Welsh services but their equipment did not offer a manual re-tune facility. Manufacturers now have a better understanding of the implications of not offering this functionality.
- The results of Winter Hill switchover testing carried out by Digital Television Group (the DTG is the industry association for digital television in the UK) on behalf of Department for Business Innovation and Skills (BIS) were delivered in the same week as the first switchover date, thus not allowing Digital UK time to assess the implications, or to brief our contact centre.

Recommendations

- *Continue to encourage manufacturers and retailers that they should only buy product with the digital tick and to produce new products that have assisted or intelligent re-tuning.*
- *Inform industry about the changing NIT [network information table] situation for each switchover. Digital Multiplex Operators Limited (DMOL) have now sent out a NIT configuration notice and this will be communicated widely with industry.*
- *It would be desirable for BIS and Freeview to mandate manual re-tune in the tick and trademark licences – Digital UK will respond to the next BIS digital tick consultation appropriately.*
- *Switchover equipment testing milestones to be agreed with BIS and DTG.*

4.4 Digital UK Advice Line and Website

- Consumer support arrangements were successfully scaled up to support three million homes switching on one day. A number of initiatives were delivered in preparation for Granada including:-
 - Securing additional contact centre capacity via three facilities;
 - Use of product specific interactive voice response (IVR) re-tuning instructions (created for the National TV re-tune) at peak call times and out of hours;
 - Website enhancements to the trouble-shooting guide, re-tune video and product-specific, easy-to-follow re-tuning guides; and
 - Describing the contact centre service as the 'advice line' to help manage public and stakeholder expectations.
- The advice line handled higher call volumes on 4 November (22,527 / 0.7%) and 2 December (40,067 / 1.3%) than any other previous switchover.
- The proportion of manual re-tuning enquiries increased due to the Welsh overlap and anecdotal evidence suggests many of the callers were older and average call times increased as a result.
- Automated call routing enabled effective prioritisation of Granada callers during the switchover period and the TV-retune IVR was effective during peak call periods.
- An agent to agent transfer from Digital UK Advice Line to the Switchover Help Scheme's Help Line has proved successful with good conversion rates.

Recommendations

- *Increase awareness with manufacturers of the consumer support requirements at switchover.*

4.5 Media and Public Affairs

- High levels of media interest were managed well, with 94% of Granada coverage being factual or neutral.
- Sustaining good levels of media engagement is becoming more difficult and will be a challenge for the regions switching later in the programme. There will be an increasing need to keep the media story simple, rather than a repository for every switchover message. Where possible, joint events with the Help Scheme should be considered to avoid draining media interest in the run up to switchover.
- Establishing effective partnerships with the main umbrella organisations across community and voluntary groups, BAME organisations and other agencies was critical to the success of stakeholder engagement in the region.
- *Switchover News*, Digital UK's monthly e-newsletter, was an essential part of communicating and successfully engaged a large number of stakeholders. Face-to-face events including roadshows, targeted digital drop in centres in the run up to switchover provided valuable reassurance to local MPs and other stakeholders.
- Clear messaging and briefing from head office around issues, such as the overlap from Wales, and having a dedicated advice line at the Digital UK contact centre were important resources for the regional team to draw on.
- Face-to-face briefings with local media helped educate journalists on the more technical switchover messages for example, overlap.
- Recent research suggests MPs felt well informed and that the project was delivered successfully.

*'They have tried to do everything they could. Jo Waters [Digital UK Regional Manager] I will speak highly of, whatever it took to get a problem solved she stayed with it and did it. I battered Ofcom, I battered everyone, because we couldn't have Christmas without TV in an area that relies heavily on TV and she stayed with it and did it and I speak very highly of her'*³

Recommendations

- *Refinements to stakeholder and consumer messages to further increase the prominence of targeted re-tune messages for DTT viewers and seeding in overlaps messaging earlier (now agreed to be included at minus three months).*

³ Labour Backbencher: Ipsos MORI Winter Survey of MPs February 2010

4.6 Consumer Communication

- The Granada communications approach differed from earlier regions in a number of areas:
 - Greater use of TV, as well as other more urban media;
 - Increased focus on re-tuning awareness;
 - Additional activity targeting multiple dwelling units;
 - Additional activity targeting black, Asian and minority ethnic (BAME) audiences; and
 - Addition of a minus two month burst for the Help Scheme.
- Overall the consumer communication campaign in Granada was extensive, robust and successful. Most notably:
 - The 'Look for the Leaflet' TV advert, which has delivered very high levels of recall (45%) compared to previous campaigns;
 - Re-tune TV adverts, which were used for the first time;
 - Bus wraps and big screens which ran in Manchester and Liverpool had good recall and will be repeated where available;
 - Radio promotion about TV Recorders;
 - The Digital UK 'three month leaflet', with increased prominence of the re-tune and Help Scheme messages;
 - Lamppost banners were up-weighted in areas of high BAME density, and accompanied by the 'All Sets' TV advert running on ethnic TV channels;
 - The Help Scheme 'Helping Hand' strap line was consistently used across all media;
 - Local radio adverts were used to drive footfall to the roadshows; and
 - New overlap and manual re-tuning factsheets were developed.

Recommendations

- *'Look for Leaflet' TV advert to be run for longer in future regions to drive further increases in awareness. Research suggests that readership and retention of the leaflet significantly increases amongst people who have seen the television advert.*
- *Increased space in communication materials and advertising for overlaps messaging e.g. three month leaflet, press adverts.*

4.7 BAME engagement

- Granada was the first TV region where there is a significant proportion (7.8%) of the population that has an ethnic background other than White British. In the lead up to switchover there was evidence that some groups were lagging behind in awareness and understanding, however conversion levels remained high.
- There has been no evidence of minority groups being left behind at switchover and research results suggest that overall the Digital UK approach of using satellite TV advertisements and targeted community

outreach activity worked. Awareness and understanding metrics of switchover among the BAME audience increased significantly between July and October 2009. Date awareness (month) improved by 31 percentage points (38% to 69%) and awareness of re-tuning increased almost three fold from 28% to 76%, up 48pp.

- To target 'at risk' groups additional activity was successfully introduced in the final two months before switchover including:
 - Additional face-to-face events;
 - Additional TV bursts of Digital UK 'All Sets' Help Scheme TV advert on satellite; and
 - Up-weighted lamp poster activity in areas of high ethnic concentration.

Recommendations

- *Help Scheme and Digital UK have jointly agreed a strategy to better engage BAME communities. Targeted advertising will start earlier, and the importance of utilising ethnic minority teams to help make contact with ethnic organisations has been recognised.*
- *Continue to produce a BAME leaflet translated and available in the top ten languages in the region.*
- *Ensure 'leave behind materials'; are distributed widely to community organisations to display and hand out.*

4.8 Outreach Activity

- The outreach activity in Granada was extensive and the effort and commitment shown by local volunteers went beyond expectations.
- Via the grants programme, one-to-one and stakeholder events and the Switchover Advice Points around 75,000 people were offered advice via outreach activity.
- Lead Organisations, third sector bodies appointed to lead the programme of local community activity to raise awareness and understanding of switchover, played a key role post switchover in mopping up issues as viewers got used to their digital TV equipment.
- Successful Granada initiatives were as follows:-
 - Appointment of full time co-ordinators achieved efficiencies in project management and enabled those lead organisations to reach more widely across their sub-region, meeting and surpassing targets;
 - Provision of Advice Points was partly subcontracted to non-lead organisations and this enabled the provision of 36 Advice Points at switchovers, our highest number to date; and
 - Provision of 'Roving Re-tuners' (practical outreach sessions with portable TV and Freeview box) in the six weeks around switchover helped many viewers particularly during the transition period.

Recommendations

- *As in Granada, public facing outreach activity commencing at six months should be the norm. This gives sufficient time to raise awareness and engage volunteers across charity and third sector organisations. This has been built into future joint regional plans and enshrined in a six month readiness review which has key measures around resourcing, mailings, training and the grants programme.*

4.9 Retail

- The Retail support model proved scalable and very effective in Granada with no significant issues reported. Compared to earlier regions there was greater engagement by main electrical multiples and wide availability of stock, especially in the multiples. A number of large chains produced high quality point of sale materials increasing switchover awareness.
- Eighty four percent (881) of retail outlets were signed up to the Digital Logo Scheme at switchover. The team of six Retail Support Executives made c. 4,000 calls or visits to stores, and there were high levels of training take up with c. 3,700 delegates recorded.
- To support the large number of accounts, a field team approach was the only viable way of ensuring a high proportion of outlets were trained and prepared for switchover. A formalised switchover 'battle pack' containing useful reference material (for example re-tuning factsheets) was made available to retailers and provided consistent and quality advice in the lead up to, and at the point of, switchover, as well as reporting on the days of switchover.
- Timely and regular updates to the retail trade increased awareness about the dangers of their buying uncertified products.

Recommendations

- *The reach of overlaps was greater than anticipated for some retailers. In future there will be increased prominence of overlaps and the manual re-tuning solution in training and newsletter updates (materials have been amended and are being used in the West Region).*

4.10 Housing

- Until Granada, the TV regions that had switched were predominately rural with some medium sized population centres. In Granada there are many densely populated areas and the region had the highest level of private and public sector housing and the highest use of communal TV aerials experienced to date. It was critical that property managers responsible for communal TV aerials were reminded that these systems required checking and potentially upgrading at switchover.

- There were no reports of loss of service due to landlord inertia and 100% readiness of public sector housing was achieved in advance of switchover (319 social housing providers, who collectively provide 653,000 housing units, were contacted).
- While the Digital UK model to raise awareness, communicate and prepare the housing sector has been very successful, it has reaffirmed that:
 - Consultation with tenants remains key ;
 - Leaseholders must be treated fairly and may need detailed consultation;
 - Channelised systems and technical issues should be understood by landlords; and
 - Cable TV providers may terminate their services. This is not a matter for Digital UK, but as housing organisations ask for Digital UK's advice we continue to encourage cable providers to communicate in a timely and clear manner.

Recommendations

- *Minor refinements to messaging: in the minus 18 month and reminder housing mailings; face to face presentations; on the property managers' website (digitaluk.co.uk/propertymanagers) and in advertorials and articles for the housing and tourism sectors.*

4.11 Project Management

- Project management - covering monthly reviews of progress, risks and issues; checkpoint reports at one year out, six months and then one month from switchover; technical briefing sessions and the co-ordination and reporting of Switchover Operations Group (SOG) - all worked well. In particular the SOG handbook, containing operational plans and contact details for the days of switchover, was widely used in Granada.
- While our project management practices have proven robust over the last year, we have implemented the following refinements since Granada:
 - A revised and simplified regional integrated plan focusing on fewer key milestones has been developed in conjunction with all workstreams, the Help Scheme and Digital Outreach Limited, and will be rolled out as part of the new project management system shortly;
 - Improved internal communications around change, new information and issues management; and
 - Streamlined SOG processes including exception based template style reporting and an amended SOG handbook which includes the most relevant and useful reference material as informed by 'users'.

5. Next Steps

These findings, and the actions that arise from them, are now being implemented for future switchover regions.