

REVIEW OF THE SCOTTISH BORDERS DIGITAL TV SWITCHOVER

1. Executive Summary

The Selkirk transmitter and its 11 relays, serving 52,000 homes in the Scottish Borders (16,800 of which were eligible for the Help Scheme) successfully switched to digital TV in two stages on 6 and 20 November 2008.

Scottish Borders was the second UK switchover following the Copeland pilot in 2007. A further 66 regional switchovers follow over the next four years to the end of 2012.

The project 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 television.

The Switchover Help Scheme also met to an acceptable level its own success measures.

Two weeks after the second switchover date, every home surveyed had converted its main television set to digital, and 87% had converted every TV in the home.

There was a good response to the Help Scheme, with 70% replying to the mailings, and 17% of Help Scheme eligible individuals took up the offer of help.

The local response was positive, with research reports describing that residents had been 'well prepared for the digital switchover, which they felt has been widely and successfully communicated and publicised'¹.

The communications plan for the Scottish Borders was a reduced version of that used for the Copeland switchover, and designed to be generally replicable for all later switchovers. Despite lighter communications, a greater proportion said that they had received sufficient information and advice (87% in the Scottish Borders compared with 72% in Copeland). This confirms the effectiveness of the switchover plan now being rolled out to other regions.

Nonetheless a number of lessons have been learned, that are being used to further refine Digital UK and Switchover Help Scheme activity. The most significant finding was around re-tuning of DTT (Freeview, BT Vision and Top-Up TV) equipment, which is required on both the first and second switchover dates. While the majority did not have any problems, re-tuning was the biggest single consumer issue for both the general public and Help Scheme customers.

¹ Source: Digital UK / Other Lines of Enquiry Focus Groups

2. The Outcome of the Scottish Borders Switchover

Local residents reported being “well prepared” for the digital switchover, which they felt has been “widely and successfully communicated”. Those interviewed, and the local stakeholders’ group established to support the switchover process, felt that while a few have experienced problems (particularly with re-tuning) the process was straightforward for the vast majority.

“There’s no excuse not to be ready...Couldn’t miss it, and that’s what was needed”

“It was exciting! I got up early on 6th [November] and they’d transferred a few of the digital channels; I wanted to see if this Freeview would work, and it did; and then the balance came on 20th [November]”.²

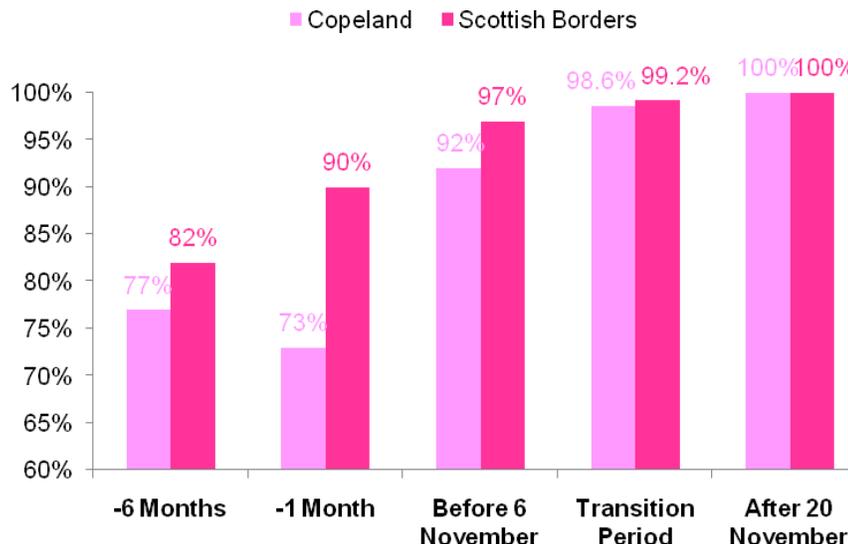
2.1 Conversion to Digital Television

Digital UK’s research showed that 97% of households in the Scottish Borders were ready before the first switchover date on 6 November, and over 99% were ready for the second switchover date on 20 November. All homes interviewed two weeks after switchover had converted at least one set to digital. Because around half of homes could get Digital Terrestrial Television (DTT) before switchover – unlike in Copeland where no homes could – pre-switchover readiness was higher.

FIGURE 1: SCOTTISH BORDERS DIGITAL TV CONVERSION

Note: Includes homes that had bought equipment but not installed it

Source: Digital UK Dipstick Surveys, Scottish Borders: pre-DSO1 n=164; pre-DSO2 n=161; post-DSO2 n=156



Of those homes which were analogue before the switchover, research indicated that 30% chose to convert with Sky and 50% chose Freeview. The remainder did not specify their platform. Half those who converted chose to replace their TV set rather than convert their existing set with a digital box.

² Source: Digital UK / Other Lines of Enquiry Focus Groups

Before switchover only 62% of secondary sets had been converted to digital TV, but many were also prompted by switchover to adapt sets in bedrooms and kitchens. Two weeks after switchover 92% of all secondary sets were digital. It is estimated that 80% of these converted with Freeview, 7% with Sky, and 13% via other platforms.

Very few homes converted their analogue recorders at switchover. Three months prior to 6 November, 25% of homes had a digital recorder, and this only grew to 30% after switchover. Some respondents suggested that they were not fully aware of the impact of switchover on recorders, and said that if they had fully understood, they might have chosen to convert their TV with a recorder rather than a simple set-top box. This finding will be addressed in future communications (see finding 2 below).

2.2 Performance Against Critical Success Factors

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

Figure 2 below shows that the project passed all CSFs and was successful. However, a number of lessons were learned, and these findings are examined in the next section of the report.

FIGURE 2: PROJECT SCOTTISH BORDERS CSF ASSESSMENT

Source: Digital UK Dipstick Surveys

Critical Success Factor		Assessment	
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 confirmed 06/11/08 ▪ DSO2 confirmed 20/11/08 	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% target met early at -15 months ▪ 99% from -9 months 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 by the second switchover date.	<ul style="list-style-type: none"> ▪ Border Help Scheme eligibility period opened on 04/04/08 ▪ Options Pack delivered from 25/06/08 	PASSED
4	Full Conversion: 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 (as indicated by the Digital UK post-switchover survey).	<ul style="list-style-type: none"> ▪ Post-switchover dipstick survey returned 100% main set conversion of the 156 households interviewed. 	PASSED

3. Key Findings

Digital UK and the Switchover Help Scheme have conducted a full review of the strategic approach to switchover, and switchover operations.

The ten key findings are as follows:

1. **Re-tuning of DTT Equipment.** Re-tuning was the biggest single consumer issue for both the general public and Help Scheme customers.

One to 1.5% of homes in the area contacted Digital UK with re-tuning queries (which often presented as simply a loss of channels). One per cent of these contacts were calls to the Digital UK contact centre; the remainder were face-to-face visits at roadshows and Advice Points. Existing DTT users perhaps did not realise they needed to do something on the day of switchover.

A greater proportion of Help Scheme customers did not understand the need to re-tune DTT equipment or struggled doing this. 8% of Help Scheme customers reported re-tuning issues at switchover. Over half of these were resolved over the phone, but the remainder required engineer visits to the home.

There were also two known cases where individuals who had not taken up the offer of help (because they already had DTT equipment), subsequently struggled with re-tuning. Because they did not ask the Help Scheme for support, they lost television for a few days. The Help Scheme can assist those who already have digital television, although those not on income support or pension credit would have to pay the £40 charge for this help (including a new digital box) in the normal way.

Independent retailers reported receiving a high number of enquiries about re-tuning of DTT equipment, and some complaints when customers were charged for re-tuning call-outs on each of the two switchover dates.

Digital UK has reviewed its consumer and trade communications to make the re-tuning message more prominent (particularly for existing DTT users). A new re-tuning leaflet and DVD have been developed for use in future regions. Re-tuning will also be emphasised in retailer training, and the electrical retail sector has been advised that it may wish to offer customers re-tuning packages for the first and second dates.

The Help Scheme is working with its suppliers to ensure that future versions of DTT equipment can deal better with this issue, simplifying the customer action required.

2. **Communications Messages.** The communications plan was effective, but research indicated that some messages (in addition to re-tuning) might benefit from higher prominence. These include:
- Digital recorders, where consumers asked for this message earlier, and as an option for converting their TV set;
 - The explanation of the two-stage process and second date, where there was some lack of prominence in early communications over the second date, and what would happen on it;
 - The extension of DTT services to relay transmitters, which was not always well understood, and may have meant that some consumers did not fully understand their range of digital options at switchover;
 - The fact that relays switch later in the day; and
 - Some of the issues that might be encountered with DTT equipment (see finding 7 below).

Digital UK has reviewed its communications messaging plan in light of this, and will accentuate these points in the leaflet delivered to all homes three months prior to switchover.

It is also important that there is seamless alignment between Digital UK's generic switchover messaging, and the Help Scheme's message to eligible individuals that further support is available. In the Scottish Borders the launch of general communications, 2.5 years before switchover (now discontinued) raised questions about what help would be available well before Help Scheme eligibility opens seven months before switchover. In future switchovers, regional activity will begin at -14 months, and the first local communications campaign will come eight months before switchover, and is immediately followed by the Help Scheme.

3. **Working to Simplify the Help Scheme Offer.** The Switchover Help Scheme learned through customer feedback that the Help Scheme offer in the Scottish Borders, and its presentation in the 'Options Pack', was perhaps too complicated. Research carried out concurrently showed that complexity of the offer increases the risk of people making the wrong choice or opting out of the help altogether, and changes have already been made to the form of assistance provided in the Help Scheme to mitigate this.
4. **Appropriate Take-Up of the Help Scheme.** There was a good response to the Help Scheme, with 70% of eligible individuals who had been mailed the 'Options Packs' replying, and 17% of eligible individuals took up the Help Scheme. While the response rate was higher than in Copeland, take-up was lower (in Copeland 28% of eligible individuals took-up the offer), suggesting that local factors, such as the degree of local community support and pre-existing conversion levels, may partly determine the take-up rate. It is still too early in the whole switchover process to determine what is the underlying demand for the service and hence appropriate take-up.

5. **Outreach to Potentially Vulnerable Consumers.** Digital UK, via Digital Outreach (which has been contracted to mobilise the third sector) established a programme of outreach activity in the Scottish Borders. The lead charity, 'The Bridge', organised mailings to charity partners, training and a system of grants for those charities providing specific switchover activities (for example, a 'Switchover Coffee Morning'). The Switchover Help Scheme deployed networkers in the area to work with Digital Outreach, and jointly presented training sessions with them.

At the point of switchover seven 'Advice Points' were held in community locations across the region, staffed by a mix of Digital Outreach staff, charity volunteers and Help Scheme networkers. While beneficial to the very small number who visited them (approximately 500 people over the 6 days of their operation), there were more Advice Points than were needed, and they were more heavily staffed than was necessary. A lighter approach will be used in future regions.

It is recognised that the Help Scheme's commitment to 'maximising reach' of the Scheme was not fully realised, and that on-the-ground activity should be strengthened. To that end, the Help Scheme is deploying additional management in the regions, and is reviewing the operation of the networking activity.

6. **Digital UK and Help Scheme Co-ordination and Stakeholder Management.** Digital UK and Switchover Help Scheme regional teams formed a 'Local Co-ordination Group', which was found to have been of tremendous benefit in co-ordinating local activity. A local stakeholder group was also convened, and this was effective in garnering community support for switchover. However, the local stakeholders' group would have benefitted from a timetable describing the key milestones on the path to switchover; advance communication of key decisions (such as the selection of Sky as the standard offer for the Help Scheme); sight of communications materials; and a briefing on what happens on the day of switchover. Digital UK and the Help Scheme will work together to achieve this in other regions.
7. **DTT Equipment Issues.** In addition to known DTT equipment issues (including 2k and Split-NIT products) some new issues emerged at the Scottish Borders switchover, including some malfunctioning products; and some equipment that, where there are overlapping signals, did not place the stronger DTT signal at the top of the channels list (EPG). Digital UK has developed an Industry Action Plan to address these issues, and the Digital Television Group has formed a steering group to develop solutions and improve the information available.
8. **3/6 Multiplex.** The Scottish Borders has the highest proportion of homes receiving 3 DTT multiplexes (around 20 channels) of any area in the UK. Forty-seven per cent of homes now receive 3 multiplexes, and the remaining 53% receive 6 multiplexes (more than 40 channels). Digital UK's revised, up-front approach to explaining the differences in channel line-up worked well. There was very little reaction to the channel line-up in areas served by relays

(and receiving around 20 channels), unlike the strong consumer response in Copeland.

9. **The Two-Stage Process and Two-Week Transition Period.** There was an ambivalent response to both the two-stage process and the two-week transition period. As in Copeland, most consumers assumed a two-stage switchover was for our, rather than their, benefit. Views on the transition period were very similar to those seen in Copeland, but when asked directly about the length of the transition period, most (52%) said they thought it was the right length, and only 2% said it was too short. On balance, the evidence suggests that where a transition period exists, two weeks is preferred to four, and still provided sufficient time to resolve issues that arose (e.g. with equipment). However, this must be balanced against the Help Scheme's needs, where a transition period extends the time over which engineers can visit customers requesting further support.

10. **Help Scheme Scalability for Larger and Multiple Regions Switching.** Scalability challenges were identified in the early stages of the Scottish Borders project and the Switchover Help Scheme has since been working on systems and process improvements to prepare for multi-region switchover. Certain operational areas were stretched during the Scottish Borders campaign, and readiness for multiple regions will to be reviewed, especially in the areas of networking (manpower), field operations and contact centre operations (process, systems and knowledge), and local stakeholder activities.

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