



Evaluation of Broadcasting Digital Migration Communication Strategy (Public Awareness Campaign and Consumer Support)

1 - 5 - 25 Report

Prepared for DoC by Pan Africa TMT Group

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Glossary

ABBREVIATIONS	DESCRIPTIONS
ABC	The African Broadcasting Corporation
ASO	Analogue Switch-Off
ATM	Automated Teller Machine
AUC	African Union Commission
BDM	Broadcasting Digital Migration
Bop-TV	Bophuthatswana Television
CDW	Community Development Workers
CEG	Consumer Expert Group
CEO	Chief Executive Officer
CTN	Christian Television Network
DBAB	The Digital Broadcasting Advisory Body
DCMS	Secretary of State for Culture, Media and Sport
DD	Digital Dividend
DDAC	Digital Dzonga Advisory Council
DMCS	Digital Migration Communication Strategy
DoC	The Department of Communications
DPME	The Department of Planning Monitoring and Evaluation
DSO	Digital Switch Over
D2D	Door-To-Door
D-T-D	Door-To-Door
DTH	Direct To Home
DTT	Digital Terrestrial Television
DTV	Deaf TV
DVB-T	Digital Video Broadcasting-Transmission
DVB-T2	Digital Video Broadcasting-Transmission 2
FAQ	Frequently Asked Questions
FET	Further Education and Training
FM	Frequency Modulation
FPB	Film and Publication Board
FS	Free State
FHD	Full High Definition
GCIS	Government Communication and Information System
HD	High Definition
IBA	Independent Broadcasting Authority
ICASA	Independent Communication Authority of South Africa
ICROP	Integrated Community Registration Outreach Programme
ICT	Information and Communication Technology
IEC	Independent Electoral Commission
IMT	International Mobile Telecommunications
IMT-Advanced	International Mobile Telecommunications – Advanced
ITU	International Telecommunications Union
KZN	KwaZulu-Natal

ABBREVIATIONS	DESCRIPTIONS
M&E	Monitoring and Evaluation
MDDA	Media Development and Diversity Agency
MHz	Megahertz
MINALOC	The Ministry of Local Government
MPEG-4	Moving Picture Experts Group
MTSF	Medium-Term Strategic Framework
MYICT	The Ministry of Youth and ICT
NC	Northern Cape
NDP	National Development Plan
NGOs	Non-Government Organisation
NPC	National Planning Commission
ORINFOR	the Rwanda Information Agency
OBV	Outside Broadcasting Van
PMO	Project Management Office
Q&As	Question and Answers
RDB	Rwanda Development Board
RFQ	Request for Quotation
RRC	Regional Radiocommunication Conference
RSA	Republic of South Africa
RURA	Rwanda Utilities Regulatory Authority
SABC	South African Broadcasting Corporation (Public Broadcaster)
SADC	The Southern African Development Community
SAPO	South African Post Office
SAPS	South African Police Services
SARS	South African Revenue Service
SETA	Sector Education and Training Authority
SKA	Square Kilometre Array
SMS	Short message service
STB	Set Top Box
TCRA	The Tanzania Communications Regulatory Authority
TMT	Technology Media and Telecommunication
TOC	Theory of Change
TOR	Terms of Reference
TV	Television
UK	United Kingdom
Ultra-HD	Ultra- High Definition
USAASA	The Universal Service and Access Agency of South Africa
WRC	The World Radio Conference

Main Messages of the Report

- The transition to digital broadcasting is a complex process requiring strategic decisions to be made, on a number of issues; political, social, economic and technological. The period leading up to a successful digital migration process and switchover is of critical importance. A smooth digital broadcasting transition can only be realised through a harmonized and a concerted strategy. Therefore, provision should be made with clear details, informing all the viewers about the entire process and the scheduled switchover dates, with intensified regional awareness campaigns implemented. It is also imperative that consumers must understand what Analogue Switch-Off means, and how they are going to be affected by the process leading up to the switchover date.
- In order to achieve this, a holistic and a comprehensive Broadcasting Digital Migration (BDM) Communication Campaign Strategy, involving a number of stakeholders including broadcasters, regulators, policy makers, community leaders, network operators, manufacturers, retailers and other identified role players in the value chain must be put in place. Engaging all relevant stakeholders is crucial, and also taking into account their concerns and inputs prior and during the formulation of the communications strategy – this approach will yield positive and desired outcomes.
- A detailed and a comprehensive BDM Communication Campaign Strategy, with clearly defined strategic objectives, purposes, action plans and tactics, must be formulated. The lack of an aligned and seamless strategy document, made it difficult to communicate succinctly the strategic purpose and objectives of the awareness campaign. The absence of a singularly focused strategy when rolling out the awareness campaign, which led to, in some instances, inconsistent implementation of the campaign and hence the failure to achieve the desired goals. Fundamental mistakes such as failing to use the primary and locally spoken languages in specific areas could have been avoided, had the strategy been clear in this regard.
- The BDM campaign process had elements to it that seemed to work, however, there are certain components of the campaign activities that need to be improved. For one, the use of locally spoken languages in specific communities can have a positive impact and yield the desired outcomes for the campaign. In addition, the selection of prominent media platforms needs to be done carefully, this is in order to improve the effectiveness of the campaign. Localised and prominent media platforms for specific communities should also be deployed. A careful selection of prominent media platforms within specific and targeted communities, needs to be identified prior to the rolling out the awareness campaigns.
- It is therefore important to note that, different media platforms that were selected achieved varied successes in different communities. It is therefore important that special attention be placed when selecting media platforms and also when communicating key messages. In order to reach the country's diverse audiences, a multi-pronged communications approach that is reflective of the country's demographics, also taking into account the audiences social and economic statuses must be put in place. essential to focus attention is more successful media, and activities in communication the key message.

Executive Summary

The BDM is a process by which broadcasting services offered on analogue networks are transferred to digital based networks over a specific period. The transition from analogue to digital terrestrial television (DTT) broadcasting presents governments, broadcasters, regulators and the general public with immense opportunities and as well as challenges.

1. Introduction and Background

Historically, terrestrial transmission has been the dominant form of delivery for analogue Television (TV) and Radio Broadcasting Services. The main purpose of the digital migration process is to ensure that all analogue services are migrated into digital networks, with the sole aim to switch-off the analogue services at a specific point in time. While the migration process is applicable to both television and radio broadcasting services, this document addresses the main issues concerning digital migration of television broadcasting.

The transition from analogue to digital broadcasting is not only creating opportunities for the provision of Information Communications Technology (ICT) applications and multimedia services but will also contribute to the efficient use of spectrum through the digital dividend and the release of spectrum for other uses such as wireless broadband communications. The migration process offers a unique opportunity to meet the fast-growing demands for wireless communication services, by utilizing the soon to be freed-up spectrum that is going to be redeployed for other important uses such as broadband applications. Some of the freed-up frequencies can be used for advanced commercial mobile services [International Mobile Telecommunications – Advanced (IMT-Advanced)] for consumers and for public safety communications (such as police, fire, and emergency services).

The World Radio Conference (WRC) of the International Telecommunication Union (ITU) took a resolution in 2006 to move away from analogue broadcasting system to Digital Terrestrial Television (DTT) broadcasting system. At the time, the ITU was seeking to promote the transition from analogue to digital transition and to develop frequency plans for digital terrestrial broadcasting for all 3 ITU regions.

The transition costs to digital broadcasting are to be substantial. Most of these costs are incurred at the early stages of the digital switch-over (DSO), particularly during the DTT infrastructure rollout, and during the dual-illumination period. Consumers too will also face significant costs, as the transition to DTT will necessitate that they acquire Set Top Boxes (STBs).

The DTT Migration ecosystems includes key components, namely, policy, regulatory, service provisioning, service launch and consumer awareness. The implementation of the communication strategy and consumer awareness activities is core to the smooth transition from analogue to digital reception of services and the DoC has initiated a nation-wide communication campaign called “Go Digital South Africa”, in order to raise mass consumer and public awareness of the BDM Programme.

2. Overview of the Intervention

The DTT Migration ecosystems includes key components namely, policy, regulatory, service provisioning, service launch and consumer awareness (Revised Action Plan for the Digital Migration in SADC, 2013:01-02). In order for a DTT Migration Project to be successful all of the components of the DTT Migration ecosystem must be carefully considered. Consumer awareness is central to the BDM process and forms a cross functional component amongst other areas. This clearly indicates that the communication plan of the campaign programme should be consistent throughout the roll out of the campaign with key amplifications at certain points, and in accordance to the adopted implementation plan of the communication strategy (6th SADC DTT PMO Forum Report, November 2013: 07).

Over a 2-year period, between 2015 and 2017, the DoC implemented the BDM awareness campaigns in selected communities. The primary aim of the project was to promote the BDM awareness campaign, also to communicate the benefits of digital migration to the communities. Several campaign activations were successfully coordinated and were implemented in various areas across the country. The campaigns were informed by the DoC's BDM awareness strategy and were conducted by applying different tactics, such as Imbizos, rallies, distribution of pamphlets, and door-to-door visits accompanied by promotion and distribution of free government Set Top Boxes (STBs) to the indigent families through the Post Office. The campaigns were spearheaded by the then DoC Minister of Communication, Minister Faith Muthambi, who got personally involved in some of the Imbizos and other campaign activities. The campaigns were well received by the participating communities.

The BDM's Public Awareness and Consumer Support campaign was launched in July 2015, and also in December 2015 by the Minister of Communication. Concurrently, the Minister also hosted the STB Launch event titled, "Zwi khou itea" (It is happening) in the town of Keimoes, in the Kai !Garib Municipality of the Northern Cape. The national campaign involved a wide range of communication, publicity and marketing activities on a countrywide scope using national media platforms.

The analysis that was undertaken of the BDM Public Awareness and Consumer Support Strategy Campaign identified four key themes that were pursued throughout the enquiry, and they were namely: to identify the Objectives, Purposes and Intentions of the Public Awareness and Consumer Support; to identify Communication/Public Awareness Activities; to identify Communication/Public Awareness; and to identify how Communication/Public Awareness Activities were implemented.

3. Brief Background to the Evaluation

The objective of the evaluation was to assess the effectiveness of the implementation of the BDM Public Awareness Campaign and Consumer Support Strategy and also to ascertain how in future it can be enhanced. The primary purpose of this research study was also to assess the impact of the campaigns undertaken, and to assess how the campaign was received by the targeted communities, with the aim to improve the effectiveness of future campaigns. This research study was intended to measure the awareness levels of the BDM process that resulted from the awareness campaigns, and to identify what the most effective activities of the campaigns were, and thus provide recommendations.

The research study seeks to provide in-depth insights into the overall effectiveness of the BDM Public Awareness and Consumer Support Strategy Campaign. The study has also been helpful to assist in

understanding the scale and type of impacts that the various communication strategies that were deployed had on the communities that participated. The study also reviewed a wide range of relevant issues and provided insights into the environmental impacts of the communication campaign and its impact on communities. The impact and effectiveness of these campaign activities differed from community to community. The campaign adopted a communications media mix approach, that was informed by a “communications scientist” theory – which explored new and different communications channels.

The evaluation consists of in-depth analyses undertaken in Northern Cape and Free State, and conducted in 5 district municipalities (2 district municipalities in Northern Cape Province and 3 in Free State Province). The evaluation also includes an analysis of key documents and a nationally representative sample of the DTT databases (telephonically) disaggregated by province. The evaluation exercise employs both quantitative and qualitative research methods. A participatory approach with all key stakeholders - especially the national and provincial departments, as well as implementing agencies was undertaken. The research evaluation included visiting the provinces, municipalities and various agencies.

4. Methodology

The evaluation of the Broadcasting Digital Migration Communication Strategy was conducted using the Dialogical Model of Communication in order to analyse the impact and effectiveness of the communications campaign that was deployed. The methodology adopted displayed a clear and a systematic process of how the project goals were realised, and the steps that were followed towards implementation. The methodology deployed was not a new and infant in developmental stage, but well proven and highly effective, with an exceptionally good track record with past projects implemented. The methodology encapsulated the various stages of the study that were undertaken, including a desktop study primary research (Literature review and International Benchmarking), followed by primary research in specified areas, which includes quantitative and qualitative research.

Below are the various stages of the study that were undertaken:

Inception Report: Is a means of ensuring mutual understanding of the plan of action and the timeline that were put in place when conducting the evaluation. The inception report describes the conceptual framework planned for undertaking the evaluation, the key evaluation questions and methodology, including information on data sources and collection, sampling and key indicators.

Literature and Document Review: Analyses all key relevant documents that were reviewed in order to gain in-depth understanding of the available process and procedures, pertinent and applicable to the legislations and regulations that are important in the implementation processes. The key programme that was reviewed was the National Development Plan (NDP) 2030.

International Benchmarking: Important lessons can be learnt from other countries or regions on how they conducted similar campaigns and assess their impact. Hence, the literature review included a desktop international benchmarking study, in order to ensure that the campaign strategies implemented were attractive and appealing, and able to achieve high impact and thus, the intended objectives.

Primary Research: Questionnaires were carefully designed in order to retrieve yield valid information. Attention was given to ensure that individual questions were relevant, appropriate, intelligible, precise, and unbiased. The primary research comprises of gathering questionnaires and conducting focus group interviews in the selected 5 district municipalities, namely Pixley ka Seme District Municipality and ZF Mgcawu District Municipality in Northern Cape Province; Thabo Mofutsanyane District Municipality, Mangaung Metropolitan Municipality, and Xhariep District Municipality in Free State Province. The 5 district municipalities that were selected by the DoC, were some of the municipalities in which BDM communication campaigns had already been conducted over a 2-year period between 2015 and 2017.

Stakeholders Interviews: The BDM programme is an intense and an involving process that impacts on a number of stakeholders such as consumers, policymakers, regulators, and industry players. The purpose of the stakeholder interviews was to gather first hand, fresh insights into the BDM Awareness and Consumer Support Strategy Campaign from the stakeholders' perspective. In accordance with the Terms of Reference (ToRs), interviews with key stakeholders such as the SABC, SENTECH, USSASSA and SAPO were conducted.

5. Key Evaluation Findings

The BDM awareness campaign has been somewhat successful in creating the requisite awareness levels of the BDM process. It achieved relative success in highlighting why the need and what the benefits of DTT will be for the communities. The findings of the evaluation indicate significant awareness levels in all the areas that were assessed. The campaign had better outcomes in the Northern Cape and mixed outcomes in the Free State especially in the Xhariep District Municipality where the campaign has not been very successful.

Building knowledge around the various elements about the benefits of DTT, hardware requirements and installation, has had differing levels of success across municipalities. The targeted beneficiaries were found to be aware of the government subsidies for STBs, and were generally pleased with the benefits of high quality television signal in comparison with their previous experiences. The overall awareness levels of who qualify for government STBs is good. The majority of the respondents agreed that there was enough talk about digital migration on SABC Television, and just over half agreed that there was enough talk on local radio as well.

SABC TV and radio, door-to-door visits were found to be most effective platforms for creating the much-needed awareness within the communities. The weakest media outreach channels were found to be the "Go Digital" leaflets/pamphlets, the community radio/newspaper and social media. There was little evidence of the use of community radio or other local media platforms. It is also not clear as to whether the BDM communications leaflets and other publicity/promotional materials that were procured and developed were indeed distributed ahead of or during the Imbizos.

Awareness of the ease of installing the STB was found to be low in the Free State. The knowledge of the SAPO providing assistance for the installation of the STB was fair in the Free State (with the exception of the Xhariep Municipality) and good in the Northern Cape.

6. Recommendations

The Recommendations are based on the Dialogical Model which assisted in addressing the shortcomings of the awareness campaign that need to be addressed in relation with the BDM Public Awareness and Consumer Support Strategy Campaign. Seven key recommendations are listed below, and they are:

Recommendation 1: Development of a Comprehensive Communication Strategy: It is recommended that the department develop a comprehensive communication strategy for Digital Migration to enhance and support the objectives and purpose communicating with the entire general public in broad and general terms, but at the same time package specific messages for select communities, stakeholders and interest groups is required.

Recommendation 2: Partnership with the Public Broadcaster (SABC) to be the main platform for communicating key messages for digital migration: This recommendation calls for the department to forge a strategic working partnership with public broadcaster; and that the SABC should be the primary platform to communicate the digital migration messages on a continuous and sustained basis. The SABC as platform, was very successful in reaching the targeted audiences in the areas where the primary research was conducted, furthermore, the SABC has a national footprint which will provide a much wider audience reach.

Recommendation 3: Enhance Door-To-Door Campaigns: Recommendation 3 calls for the improvement and enhancement of the door-to-door campaigns as the secondary medium of the outreach campaign. This intervention will lead to improved interactions with local communities and thus adding value to the BDM public awareness and consumer support. The door to door campaign implementation roadmap to be planned, coordinated and monitored at national level and implemented at local level by identified and trained local representatives including digital cadres, community development workers etc. The door-to-door campaigns can be supplemented by the Ministerial Imbizo activations, as and when applicable and deemed necessary.

Recommendation 4: Call Centre for Digital Migration, to address enquiries and complaints by both STB beneficiaries and installers: This recommendation carries huge financial implications, and a funding model for the BDM Call Centre must be developed.

Recommendation 5: Strengthen Inter-governmental collaborations: Recommendation 5 calls for the strengthening of inter-governmental collaboration across national, provincial and local arms of government, including traditional authorities when rolling-out and implementing digital migration across the country and in all communities..

Recommendation 6: Enhance and Actively Promote Community Involvement: Recommendation 6, calls for Ambassadors from communities, including sport/arts and culture celebrities be identified in order to mobilise the Digital Migration project, to conduct and assist with the roll out of the Public Awareness and Consumer Support Campaigns.

Recommendation 7: On going Monitoring and Evaluation of the progress on the BDM Communications Strategy and Consumer Awareness Implementation: A crucial component of any programme/project – assist to gauge and also to assess impact.

Main Summary Report

1 Introduction

Pan Africa TMT was appointed by the Department of Communications (DoC) to undertake an evaluation of the Broadcasting Digital Migration Communication Strategy Public Awareness Campaign and Consumer Support as part of the Department’s Evaluation Plan of 2017/2018.

2 Background

Following the brief from the DoC, the BDM awareness campaigns were carried out in the communities that were selected. The primary aim of the campaigns was to create and increase the awareness levels and communicate the benefits of digital migration. The campaigns were comprehensive, and were conducted in various ways such as Imbizos, pamphlets, and door-to-door visits, social media and were accompanied by a promotional segment of free government STBs to the indigent families through the Post Office.

The literature suggests that, consumer awareness, backed by a comprehensive communications strategy is vital for the successful implementation when making a transition into the digital age. The BDM programme also forms part of the digitization hype that has revolutionized digital access to the world.

2.1 DTT Migration Ecosystem

The DTT Migration ecosystem involves a number of key stakeholders namely, policy, regulatory, service provisioning, service launch and consumer awareness (Revised Action Plan for the Digital Migration in Southern Africa Development Community (SADC), 2013:01-02). In order for the DTT migration project to be successful, all of the components of the DTT migration ecosystem must be carefully considered and implemented accordingly.

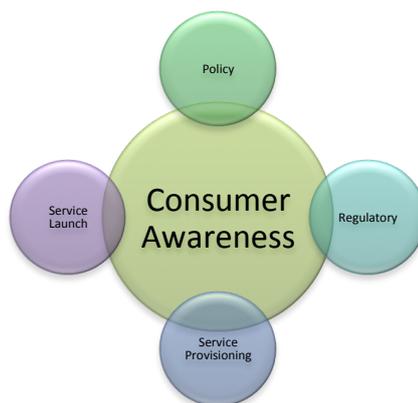


Figure 1: DTT Migration Ecosystem

Source: SADC DTT Inception Report

Consumer awareness is central to the successful implementation of the DM process and forms a cross functional component amongst the other areas. This clearly indicates that consistent and ongoing communication of the DM programme should be carried out throughout the campaign, and must amplified at certain points, in accordance to the adopted implementation plan of the communication strategy (6th SADC DTT Project Management Office (PMO) Forum Report, November 2013: 07). Even though it is one of the most important components of the programme and can dictate the success or failure of the all DTT migration project, of all of the stages of the DTT migration ecosystem, it seems that, consumer awareness is the one that is easily or commonly neglected – pre and during the implementation phase of the process. Therefore, awareness campaigns need to be carefully considered and planned by:

- Developing relevant communication strategy;
- Identifying and co-opting key stakeholders;
- Identifying relevant communications tools and messaging channels/platforms; and
- Continuous evaluation of the communication strategies, implementation and impact of the messaging.

2.2 Purpose of the Evaluation

The ToR succinctly set out the purpose of the evaluation, which is to “determine how effective the BDM communication strategy has been in raising the awareness levels during South Africa’s migration process from analogue to digital broadcasting. The evaluation was therefore intended to guide and improve the public awareness campaign and consumer support, based on a comprehensive assessment of its implementation. The evaluation was guided by the following Key Evaluation Questions (KEQs) as set out in the ToR which informed the evaluation and framed how the evaluation was conducted:

1. *Was the strategy implemented as planned? If not, why?*
2. *What are the best practice models that can be replicated nationally?*
 - 2.1 *What were the most effective campaign activations?*
3. *What challenges were experienced during the implementation phase?*
4. *What evidence is there that indicates that the targeted beneficiaries were reached? If not, why not?*
 - 4.1 *What were the DTT awareness levels that were as a result of the campaign that was conducted?*
5. *How cost effective were the strategy components of the campaign (basic analysis)?*
6. *To what extent did the institutional arrangements support the performance of the strategy, make reference specifically to the coordination, administration and management arrangements?*
7. *How did the South Africa’s Strategy compare to similar strategies of other countries?*
8. *Did the Strategy achieve the intended goals of the National Development Plan (NDP)? If not, how can it be refined in order to achieve the relevant goals of the NDP?”*

2.3 The Scope of the Project

The evaluation covered the implementation of the BDM communication strategy and was seeking to ascertain whether the campaign objectives were achieved. The evaluation consisted of in-depth analysis, which was undertaken in the Northern Cape and Free State, and conducted in 5 district municipalities (2 district municipalities in Northern Cape Province and 3 in Free State Province).

3 Methodology

Research is conducted in order to search for knowledge. The approach adopted in this proposal, was designed and crafted to meet and realise all the required results and deliverables, as clearly stated in the ToRs. The research involved a desk-top literature review, an international benchmarking study and primary research.

3.1 Evaluation Framework – the Dialogical Model of Communication

The evaluation of the BDM Public Awareness and Consumer Support Strategy Campaign was conducted using the Dialogical Model of Communication in order to analyse the impact and effectiveness of the communications plan that was deployed. The Dialogic Model of Communication is a distinct and effective form of communication in contrast to the other forms of communications, such as “debate”, “discussion” or “monologue”. The model provided a useful framework to assess whether the communication efforts were moving towards the expected outcomes. The Dialogical Model of Communication (figure 2) was an effective tool used to explore how effective the campaign was in communicating and thus reaching the public.

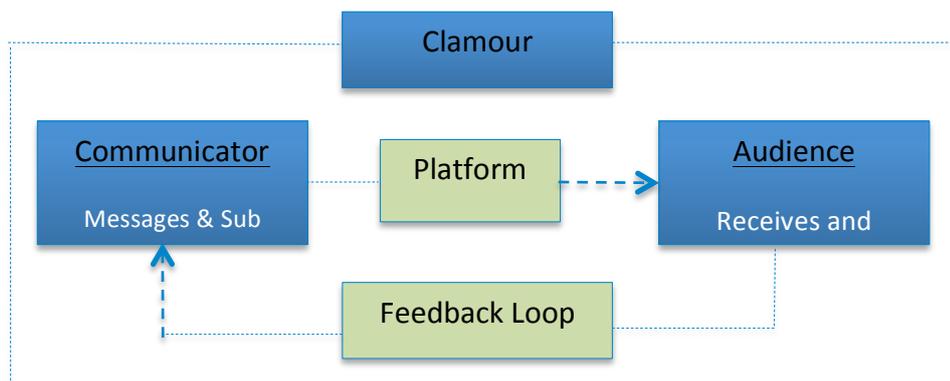


Figure 2: DTT Migration Ecosystem

Source: <http://eprints.qut.edu.au/34323/1/34323.pdf>

The review of the Dialogical Model of Communication reviewed the efforts that were directed on key focus areas, and consisted of the Source of Communication/Communicator, the Message and associated platforms, the target Audience/s

as Receptors of the Message/s and finally the feedback loop which focused on the monitoring and evaluation of the continuous communication, and the impact and the reemphasis of the messages. The study applied the Dialogical Model of Communication in order to determine the extent to which the communication engagement in dialogue with the public, and to ascertain whether the awareness campaign met its strategic objectives.

3.2 Literature Review

The primary objective of the literature review was to explore and also to analyse all the key and relevant documents that informed the rollout and implementation of the BDM Public Awareness and Consumer Support Strategy Campaign. This was in order to gain in-depth understanding of the processes and procedures, pertinent and applicable to the campaigns undertaken. The outcomes of the review will assist in facilitating future advancements of the BDM communications process, by identifying past failures and achievements, and later make proposals on how to improve the implementation of the strategy. The review also assisted to identify areas that required further attention and more focus in order to improve the impact of the overall communication of the awareness campaign.

The review focused on the specific conceptual and foundational documentation of the Ministry and the DoC. The strategic and foundational framework of the BDM project and process were outlined and articulated in the following DoCs' official documents:

- Department of Communications Strategic Plan 2015/16 -2019/20; Annual Performance Plan 2016/17; Annual Report 2016; BDM Project Reports;
- Communications Strategy March 2015; Campaign Toolkit for Communicators, July 2015;
- Production and Distribution of publicity, information and marketing materials including Booklets, Leaflets, Media Notices and Video Clips.

3.3 International Benchmarking

The International benchmarking study was based on selected countries, namely; Rwanda, Tanzania and the United Kingdom, where the BDM project had already been undertaken and completed. In line with the ToRs requirements, the objective was to analyse countries with high-performing communication processes and to identify ways to improve the South African processes based on the findings and the lessons learnt. All the three countries identified, had undergone a varied digital migration processes, that is the initial, middle and completion period, that could prove useful when evaluating the BDM communications strategy.

3.4 Primary Research

The primary research was intended to provide the necessary insights into the impact of the campaigns already conducted by the DoC. The research also provided insights into the extent of the roles that were played by the key and various stakeholders in the public awareness campaigns. In addition, the research further highlighted the extent to which the specific community members in these municipalities were aware and whether they understood the BDM programme and its benefits. The research was further seeking to observe in a systematic manner and to record accurately the community's levels of understanding of BDM programme and the challenges that they experienced during and after the awareness campaigns. The respondents included key grass root personnel who were responsible for the campaigns, Post Office personnel who were responsible for registering and distributing the STBs, the beneficiaries of the free government STBs, and the public in general. The report therefore reflects the sentiments and opinions of the more than 295 respondents who participated in the research.

3.4.1 Research Approach

The study employed both qualitative and quantitative methods of research. The rationale for undertaking qualitative research, was in order to define, and later unearth the range of emergent issues and explore their linkages. Quantitative research was applied in order to evaluate the impact of the campaign and the public understanding of the digital migration process. In order to gain the views and insights, the fieldwork undertaken employed in-depth interviewing approaches and conducted focus group discussions. The respondents were purposefully sampled in order to reflect the range of participants impacted by the campaigns.

3.4.2 Data Collection Instruments

The design of the data collection Instruments (questionnaires) was based on two main objectives, namely: (1) to maximise the proportion of respondents answering the questionnaire—that is, the response rate, and (2) to obtain accurate and relevant information for the study. In order to maximize the response rate, careful consideration was given to how the questionnaires were administered, seeking established rapport and by explaining the purpose of the survey. The questionnaires were carefully designed, with an intent to extract valid information. Attention to detail was given in order to ensure that individual questions were relevant, appropriate, intelligible, precise, and unbiased. The order of the questions were carefully arranged, and the layouts of the questionnaire were clearly done. The lengths of the questionnaires were kept to appropriate scopes, this was in order to ensure that accurate relevant information was obtained. The steering committee was consulted and the committee provided valuable inputs on what questions should be asked, how the questions should be framed, the order in which to ask them, and the general layout of the questionnaire. The questionnaires were first evaluated and approved prior to the actual survey that was conducted.

3.4.3 Data Gathering

Data gathering commenced with desktop research, first by analysing documents, policies, emails and also by conducting telephone interviews. This was followed by primary research in the selected 5 District Municipalities within the 2 provinces as specified in the ToRs.

3.4.3.1 Northern Cape

In-depth interviews were conducted with a number of stakeholders including municipality officials, South African Post Office (SAPO) Managers, as well as focus group interviews with beneficiaries of government-issued STBs and questionnaire responses with members of the public in the ZF Mgcawu and the Pixley ka Seme District Municipalities. The target municipalities were the Kai !Garib and !Kheis local municipalities consisting of Kakamas, Keimoes and Groblershoop towns, and in the Kareeberg municipality, Carnarvon town.

3.4.3.2 Free State

Similar to the Northern Cape Province, the interaction with the relevant stakeholders and focus groups were conducted in the Free State District Municipalities of Botshabelo (Mangaung Metro Council), Xhariep (Trompsburg and Edenburg), Mantsopa (Ladybrand), and Setsoto (Ficksburg). In-depth interviews with Municipal Councillors, Post Office officials, SABC, Government Communication and Information System (GCIS) officials, local media, and beneficiaries of STBs were also conducted.

3.4.4 Data Analysis

During data analysis, the researchers engaged in a process of inspecting, cleaning, transforming, and modelling data, the overall goal was to discover useful information, make recommendations, and provide information that will later assist with the decision-making process. The data obtained, once processed and organized, it was analysed, and the data which was incomplete, contained duplicates, or errors was also identified. Data cleaning was done in order to prevent and correct errors. Thereafter, a process of evaluating data using analytical and logical reasoning to examine each component of the data provided was done.

3.5 Limitations of the Evaluation

All research methodologies have their own intrinsic limitations, impacted by factors related to the resources allocated, including financial and time constraints. The same holds for the research methodologies used in the evaluation of the Digital Migration Public Awareness and Consumer Support campaign. The research is limited to the scope of work as presented in the ToRs.

4 Theory of Change and LogFrame

4.1 Introduction

The evaluation of the BDM Public Awareness and Consumer Support Strategy Campaign will be used to develop a baseline for the BDM Public Awareness and Consumer Strategy, as following the launch and implementation of the awareness campaign in July 2015 no logframe was developed which was to be used as a guide to the median intervention theory of change. The evaluation and outcome will define an explicit Theory of Change and outline the initial target for future baselining. The comprehensive theory of change and logframe are included as part of the report annexures.

4.2 Theory of Change for Digital Migration Communication Strategy (Public Awareness and Consumer Support campaign)

The aim of the communication strategy is to assist in the effective creation of awareness about the Digital Migration process through the delivery of clear and consistent messages.

The communication strategy is based on the following principles:

- Coordinated messages should be pre-agreed at all levels
- Messages given to the public should be consistent regardless of their source
- Messages given should reflect the changing nature of digital migration process and be consistent with the overall/ National plan of the BDM implementation plan

The strategy is intended to create awareness of digital migration processes in preparation for the implementation of its roll-out. It also guides the creative design e.g. branding, state of readiness amongst South Africans about digital migration project and implementation.

The Theory of Change (TOC) describes the relation of how Activities and Outputs result in anticipated Outcomes and Impacts, and the assumptions involved. A TOC helps in identifying what impacts are most likely to be achieved during the timeline of an evaluation; identify resources required (human, financial, agencies) {DPME 2014:7}. In respect of the Digital Migration Communication Strategy (Public Awareness and Consumer Support campaign), the following Theories of Change are discernible:

- TOC 1:** Digital Migration Communication Strategy is necessary in order to inform the South African public, in totality, about the social and economic benefits of the digital migration programme.
- TOC 2:** Digital Migration Communication Strategy is necessary to inform indigent television households of the urgency to register in order to access free government supplied STBs.
- TOC 3:** Digital Migration Communication Strategy is necessary to inform all South Africa about the country's Analogue Switch-Over timelines.

4.3 Problem Tree

A Problem Tree seeks to identify Core Problem, Causes, Effects and Consequences. The Problem Tree for Digital Migration Communication Strategy was as follows: "Analogue Television Technology creates limitations and inefficiencies in the planning and allocation of the radio frequency spectrum. This, in turn, results in limited terrestrial television capacity and channels available for the country, and the excessively high allocation of the radio frequency spectrum for terrestrial television at the expense of broadband." Worse still, the country has little choice in content diversity (information, entertainment and education) as a result of few terrestrial television channels that are available, and as a result, the country's official languages cannot be utilised as media platforms for achieving social cohesion and nation building are limited.

4.3.1 Problem Statement

The Digital Migration Communication Strategy should further seek to create awareness, educate and inform all South Africans about digital migration, including the benefits of the project, its significance for the country and associated implementation plans.

Scale of the problem: To inform all South African (13 million) households with television access about the importance of migrating to a digital television platform.

Overall Objective/Goal: To create awareness, educate and inform South Africans about digital migration, including the benefits of digital migration, and its significance for the country.

Indicator: Percentage of television households connected in preparation for the switch off date: 85% connectivity.

Means of Verifying Indicator: Percentage of STB uptake of the 13 million television households, both subsidized and of STBs purchased off-shelf.

Results to be achieved: what are the main supporting objectives of the DMCS?

4.3.2 Outcome Statement and Log Frame

The changes that will occur if the objectives are reached, will be in the form of Outcome statements (Table 1), and LogFrame (Table 2) respectively.

OUTCOME 1:	All South Africans are Informed and Educated about the importance and benefits of digital migration
Indicator (Means of Verification):	Publication of multi-media and social media messages and marketing materials in all official languages + Braille to reach out to all South Africans across the provinces
Output (Product):	National, Regional and Local/Community Media Relations Stakeholder Engagements & Inter-Governmental Liaison
Activities (What We Do/Verb):	Develop multi-media and social media messages and marketing materials in all official languages + Braille to reach out to all South Africans across the provinces
Tasks (What We Invest):	Draft /Arrange/ Place News & Opinion Articles; Media Interviews; Media Briefings; Media Conferences; Media Notices/Advertisements
OUTCOME 2:	All South Africans are connected to digital terrestrial television, including those subscribed to pay-television
Indicator:	Percentage of households with subsidized and purchased off-shelve terrestrial television STBs
Outputs:	National, Regional and Local/Community Media Relations Stakeholder Engagements (SABC/GCIS/Retail Outlets/Faith & Cultural Groups)
Activities:	Draft /Arrange/ Place News & Opinion Articles; Media Interviews; Media Briefings; Media Conferences; Media Notices/Advertisements Arrange Door-To-Door campaigns and supplementary activations
Tasks:	Distribution of marketing material logistics
RESULT 3 / OUTCOME 3:	5 million indigent households are registered for free STB provided by government
Indicator:	Percentage of indigent households registered for government issued STBs
Outputs:	Registration of 5 million indigent television households at SAPO branches
Activities:	Stakeholder Engagement & Inter-Governmental Liaison (SAPO/SABC/GCIS/Municipalities/Traditional Authorities). Arrange Door-To-Door campaigns and supplementary activations
Tasks:	Distribute marketing material. Provide consumer support by assisting the indigent in filling STB application forms
RESULT 4 / OUTCOME 4:	All South Africans are informed about the Analogue Switch-Over Timelines
Indicator:	Publication of Analogue Switch-Over Timelines
Outputs:	National, Regional and Local/Community Media Relations Stakeholder Engagements & Inter-Governmental Liaison (Parliament/Cabinet/SABC/Sentech/USAASA/ICASA/GCIS/Industry Associations/
Activities:	Develop multi-media, social media messages and marketing materials in all official languages + Braille to reach out to all South Africans across the provinces
Tasks:	Draft /Arrange/ Place News & Opinion Articles; Media Interviews; Media Briefings; Media Conferences; Media Notices/Advertisements

Table 1: Outcome Statements

Long Term Goal	Broadcasting Digital Migration Communication strategy will contribute to enabling the country to achieve social cohesion and nation-building, as well as stimulating much needed economic growth through broadband.			
Project Impact	Inform and educate all South Africans about the importance and benefits of digital migration, encourage and assist indigent television households to register for free STBs and to communicate the analogue switch-over timelines to all			
	Outcome 1	Outcome 2	Outcome 3	Outcome 4
Outcomes/ (change in capacity/ systems/ performance)	All South Africans are Informed and Educated about the importance and benefits of digital migration	All South Africans are connected to digital terrestrial television, including those subscribed to pay-television Public is encouraged to acquire broadcasting reception devices (STBs/antennas) before analogue switch off (ASO).	5 million indigent households are registered for free STB provided by government	All South Africans are informed about the Analogue Switch-Over Timelines
Outputs (What we produce)	Awareness creation on BDM. Go Digital brand campaign launch in the public space National, Regional, Local/Community Media Relations, Stakeholder Engagements & Inter - Governmental Liaison	Media Engagements Advertisement print/radio/TV Face to face interactions National, Regional, Local/Community Media Relations, Stakeholder Engagements & Inter - Governmental Liaison DTT pamphlets and government & promotional events	Media Engagements Advertisement print/radio/TV Face to face interactions National, Regional Local/Community Media Relations Stakeholder Engagements & Inter - Governmental Liaison Government publications DTT pamphlets and government & promotional events	Media Engagements Advertisement print/radio/TV Face to face interactions National, Regional Local/Community Media Relations Stakeholder Engagements & Inter - Governmental Liaison Government publications DTT pamphlets and government & promotional events

Activities	Media Engagements Advertisement print/radio/TV Face to face interactions Develop multi-media and social media messages and marketing materials in all official languages + Braille	Draft /Arrange/ Place News & Opinion Articles; Media Interviews; Media Briefings; Media Conferences; Media Notices/Advertisements Arrange Door-To-Door campaigns and supplementary activations	Stakeholder Engagement & Inter-Governmental Liaison (SAPO/SABC/GCIS/Municipalities/Traditional Authorities) Arrange Door-To-Door campaigns and supplementary activations, Internal government publications, outdoor advertisements, mall activations, Road shows; Community events; St DTT pamphlets and government & promotional events	Develop multi-media and social media messages and marketing materials in all official languages + Braille Media Engagements Advertisement print/radio/TV Face to face interactions
Tasks	Draft /Arrange/ Place News & Opinion Articles; Media Interviews; Media Briefings; Media Conferences; Media Notices/Advertisements	Distribution of marketing material Logistics	Distribute marketing material Provide Consumer Support by assisting the indigent in filling STB application forms	Draft /Arrange/ Place News & Opinion Articles; Media Interviews; Media Briefings; Media Conferences; Media Notices/Advertisements
Indicator	% awareness of BDM Published multi-media and social media messages and marketing materials in all official languages + Braille to reach out to all South Africans across the provinces	Percentage of households with purchased off-shelve terrestrial television STBs	Percentage of indigent households registered for government issued STBs	Publication of Analogue Switch-Over Timelines
Inputs (what we invest in)	Human, financial and other resources used to produce Outputs (Time, Staff, Technology, Equipment, Materials)			

Table 2: LogFrame

5 Literature Review and International Benchmarking Study

The purpose of this section of the report is two folds: 1) to present the literature review, and 2) international benchmark study that was undertaken, in line with the ToRs requirement.

5.1 Literature Review

The analysis of the BDM's Public Awareness and Consumer Support Strategy Campaign was seeking to unpack and explain the planning and implementation of a wide range of communication and marketing activities that the DoC embarked upon during the 2015/16 and 2016/17 financial years. Whilst conducting the analysis, a detailed review of the relevant literature, outlining the objectives and purposes of the awareness campaign, as well as the intentions, plans and the resources allocated to the campaign end as outlined in the DoC's relevant documents, was undertaken.

5.1.1 Background to Digital Migration

The digital migration process is an international phenomenon, affecting all the countries across the globe. As a result, in 2006, the International Telecommunications Union's (ITU) World Radio Conference (WRC) took a resolution to migrate all member-states from an analogue broadcasting system to a digital terrestrial television broadcasting system. To this end, the GE-06 agreement committed signatories that the ITU Regions covering Europe, Africa and parts of the Middle East, to migrate by June 2015 (Association for Progressive Communications 2011: 3). However, this date was later extended in order to accommodate countries that were not able to meet the stipulated switch-off deadline.

5.1.2 Broadcasting Digital Migration in South Africa

The BDM programme was officially launched in South Africa by the Minister of Communications and originally set the country's deadline for digital switchover for December 2011 (Sunday Times BT 11/06/2017:5). The current BDM's Public Awareness and Consumer Support Strategy Campaign was subsequently launched in July 2015. In December 2015, the Minister of Communications hosted the launch of the STBs and the event titled "Zwi khou itea" (It is happening), in the town of Keimoes, in the Kai !Garib Municipality of the Northern Cape. The campaign was launched in two phases, the National Campaign, and was followed by the District Municipality campaign.

5.1.3 Analysis of the BDM Public Awareness and Consumer Support Strategy Campaign

The analysis of the BDM Public Awareness and Consumer Support Strategy Campaign identified four key themes/questions that were pursued throughout the research enquiry. The themes were consistent with, and were in accordance with the research questions as outlined in the ToR.

5.1.4 Strategic Framework

The BDM programme, is located in Outcome 14 of the Government Medium Term Strategic Framework 2015/19 and the National Development Plan 2030 as a project that contributes to “measures aimed at Nation Building and fostering Social Cohesion amongst all South Africans” (MTSF 2014-2019:35; NPC 2011: 65-66). The Strategic Plan 2015/16 -2019/20, describes Broadcasting Digital Migration {Strategic Objective 4 (2)} as a process to “transform the communications sector by providing high resolution/definition television signal quality, media content diversity, as well as a digital dividend to free up significant chunks of the radio frequency spectrum that would be allocated to universal broadband for the country”.

5.1.5 Objective and Purpose of the Public Awareness and Consumer Support

The objective and purpose of the BDM Public Awareness and Consumer Support Strategy Campaign are outlined in numerous communications frameworks such as:

- To create awareness about the digital migration process, articulate the benefits, processes and requirements in preparation for the programme implementation and rollout.
- To educate South Africans about the dual illumination process and the implications thereof and also to encourage South Africans to acquire broadcasting reception devices (STBs/antennas) before the analogue switch off deadline.
- To facilitate the registration process and the distribution of broadcasting reception devices (STB’s/Antennas) before analogue switch off, including Government’s provision for the poor and the unsubsidised communities

5.1.6 BDM Communications Approach

The digital migration communication strategy was championed by the DoC. The official Communicators/Messengers for the BDM’s Public Awareness and Consumer Support Strategy are the following governmental and departmental officials, namely: the Minister, the Deputy Minister, the Ministerial Spokesperson, the Director General, the deputy Directors General, Head of BDM, BDM Project Manager, and BDM Project Officials¹.

5.1.6.1 Key Messages

According to the Communications Strategy of March 2016 – 2018, the BDM’s communication programme was planned to be rolled-out in four phases, with the broad government message being: “Together we move South Africa Forward”. The sub-messages for the campaign were outlined as follows:

- South Africans migrate from the analogue to the digital television;
- Government 100% subsidy of STBs for the indigent television owning households; and
- Job creation through broadcasting digital migration.

¹ Communications Strategy March 2016 – March 2018: Slide 8

5.1.6.2 Media Platforms

The BDM project team used a variety of platforms in various official languages to explain the digital migration process. The BDM project had planned to compile four (4) quarterly reports that outlined consumer access/awareness to digital broadcasting. These reports were separate from the Ministerial Imbizo reports.

5.1.6.3 Audiences

The communication strategy of March 2016 – March 2018 outlines the audiences for the Broadcasting Digital Migration as follows:

- Primary Audience comprising of the 5 million indigent television households.
- Secondary Audiences comprising remaining 8 million television households which includes; Prospective television owners, municipalities, manufacturers, retailers, broadcasting and ICT sector, Organised Labour, media, Houses of traditional leaders, Community Development Workers (CDW) (Communication Strategy March 2015 – November 2018:Slide 17).

5.1.7 Key National Communication Plan Components

National Publicity Awareness and Consumer Support Campaign: The National Campaign involved a wide range of communication, publicity and marketing activities, rolled out countrywide using various national media platforms. The national campaign was launched on a bigger scale, using a big-bang approach, flooding all national media platforms with a barrage of messages outlining the objectives and purposes of the BDM process.

Message/s for the National Public Awareness Campaign: The national campaign adopted a multi-pronged approach when communicating with diverse audiences that constituted the nation in its diversity, consisting of various social and economic interest groups. To this end, the DoC Communications Strategy of March 2015 outlines overarching messages and sub-messages to reach out to the various social and economic groups that make up the South African public.

Media Platforms for the National Public Awareness Campaign: The media platforms used for the national campaign included media events and activities hosted by the Minister, including Media Statements, Media Briefings/Conferences, Media Interviews, Print Media Notices and Radio and Television Advertisements. In addition, the Department produced and distributed a wide range of educational and marketing materials in order to expand the scope of the Public Awareness and Consumer Support campaign.

National Audiences: The BDM Public Awareness and Consumer Support Strategy Campaign segmented its target audience/s into primary and secondary audiences. The primary focus of the national campaign leaned more towards the secondary audiences consisting largely of the 8 million television households that do not need government subsidized STBs, and are probably already subscribed to additional television services.

5.1.8 Key Local Communications Plan Components

Local Public Awareness Campaigns and Consumer Support: The Regional and Local chapters of the BDM Public Awareness and Consumer Support Strategy Campaign were launched in the 2015/16 financial year. The priority areas were identified as the Northern Cape (NC) and the Free State (FS) District Municipalities.

Local Message/s: The **Over-Arching Message** promoted the **STB Registration process** for the 5 million indigent television households that government was seeking to ensure that were not left excluded once the switch-over from analogue to digital platforms were effected.

Local Engagement Platforms: The Regional and district BDM Public Awareness and Consumer Support Strategy Campaign was conducted using several media and community engagement platforms. The government Imbizo framework provided practical guides and resources to help plan, promote, and stage a successful and impactful Izimbizos as well as providing clear guidance on how to go about each stage of the digital migration process. The framework also outlined the ground rules of organizing such events.

Regional and Local Audiences: According to communications framework for the BDM Public Awareness campaign, the Primary Audience consists of the 5 million television indigent households eligible for the STB government subsidies. The purpose of the message was to get the 5 million qualifying television households to register for the government subsidised Set Top Boxes.

5.1.9 Feedback Loop

The literature concentrated mostly on the implementation of the communication messages for specific target audiences, platforms and reporting on the various activations. There was some level of monitoring which concentrated on the technical aspects of the programme and the tracking of registrations undertaken by the Post Office. The feedback sought in this regard, was established and provided from the field interviews, the focus groups which were conducted and the questionnaires that were answered by the beneficiaries and communities.

5.2 Benchmarking Study

The successes achieved by other countries provided guidelines for the critical decision to be made by South Africa when charting its implementation path for the next phase of the campaign. The purpose of the study was to evaluate how South Africa's public awareness campaign fared when compared to the identified public awareness campaigns undertaken internationally. The study further identified the strengths, shortcomings, and lessons that could be drawn from the campaign under review in order to improve the next phase of South Africa's public awareness and communication support campaign in the build-up towards the digital switch-over scheduled for December 2018. The international benchmarking summary below outlines, the regional, continental, and international best practices in select markets of Rwanda, Tanzania, and the United Kingdom.

5.2.1 Tanzania

The Tanzanian Broadcasting digital migration process embarked on a multi-pronged stakeholder initiative, which was led by the country's President and the Minister of Communications, Science and Technology. Apart from a wide range of stakeholders, another champion of the BDM process was the Regulator, the Tanzania Communications Regulatory Authority (TCRA). The assessment Report on Migration from Analogue to Digital Switch Off process in Tanzania, The TCRA Report (2013:11) highlights that 90% of consumers were informed and educated about the digital migration process at the time of the analogue switch-over. The country's BDM timelines were informed by an agreement among East African Communication Association countries to switch to the digital platform on 31 December 2012 in order to "minimize dual illumination costs and to develop enough experience to manage its challenges before the worldwide switch-off deadline" (TCRA 2012:12).

The Communicator/Messenger: The President of the country was the BDM programme's greatest champion. The President launched the Communications Strategy and Logo – the message was that communication is power, utilizing a wide range of audio-visual media products, including jingles, and songs.

The Message and Media Platforms: The key message of the Tanzania Broadcasting Digital Migration public awareness and consumer support was: *"Members of the public to retain their analogue television sets, but purchase STBs to enable reception of digital television signals"*. According to the TCRA Assessment Report (2013:62), the Authority provided education and information to consumers on DTT and ASO for a reasonable time using different media to ensure the intended message reached the public

Regional and Local Audience: Regional and local audiences that made up the total 1,7 million television households in the targeted cities/towns were reached through the use of community, district and regional media. Tanzania identified and segmented the target audiences and profiled them accordingly, this was to ensure that effective outreach campaigns from villages to national level, were tailor-made for various age groups, social spheres and government to private sector.

5.2.2 United Kingdom (UK)

The road towards digital switch-over in the United Kingdom began as far back as 1999, when the then Secretary of State for Culture, Media and Sport (DCMS), Chris Smith, announced that the Government's intention was to achieve switch-over "between 2006 and 2010". However, there were delays, and the switch-over was only completed on 15 September 2005. Tessa Jowell, when addressing the Royal Television Society in Cambridge, announced Mr. Smith's successor at the DCMS, and proclaimed the go-ahead for switchover in the United Kingdom, coupled with support measures, to ensure that no one, particularly the disadvantaged were left behind.

The Communicator/Messenger: Digital UK and the regulator Ofcom led the digital switch-off process in the United Kingdom. Credit was given to the Digital UK communications team for their campaign design, which ensured that no one was left behind. A three-year communications plan with clear messages was also put in place and was outlined as follows:

- Year 3 – Get ready; Year 2 – How to get ready; Year1 – Are you ready;
- 12 Months – Countdown – Switchover is happening; 1 Month countdown: Switchover is here; and Switchover: Switchover to 100% digital

The Message and Media Platforms: The campaign, which spanned across TV, radio, leaflets, outdoor, print, and online advertising, was divided into three main stages. Digital UK published four editions of “Get Set”, the quarterly newsletters for key stakeholders in elected politics, local government, the voluntary sector and the wider business community. Aimed at the interested but general reader, “Get Set” and its electronic counterpart, “Switchover News”, was published monthly, provided a regular update on consumer research, public policy and events on the ground in the regions. One of the strengths of the digital UK communications campaign was attributed to the campaign’s combination of consistent messaging and flexibility where its implementation was concerned. However, the core mix of communications was aligned and consistently delivered high levels of public awareness and clear messages. Another key ingredient to the success of the Digital UK campaign, was the creation of easily recognisable branding, clear, and simple consumer messages that could be shared with partners such as the retailers and the digital TV providers, providing an all-encompassing approach (Digital UK Annual Review 2006/07). The platforms employed included a layered communications model in the form of national advertising, regional communications - driven by local councillors, and local communications in the form of; Website, Consumer support, Trade Support, Community Support, and 1 on 1 Help

Consumer Support [contact centre and website]: The Website, which was made available throughout switch-over period was constructed in such a way to accommodate everyone with or without special needs. Communication was segmented and tailored to specific groupings and or language groups, and thus succeeded to engage with audiences, and also taking into consideration the particular needs and local issues.

Trade Support [retail, installers, and landlords]: In order to magnify the campaign, strong partnerships were forged with retailers via end line. Approval of the use of digital tick certification mark, where it qualified provided the much-needed assurance to consumers.

Regional and Local media platforms: It was noted that pro-active work in the regional and national media, supported Digital UK’s wider communications programme. Many regional radio stations and local newspapers in the first regions to switch-over ran digital TV switch-over Q&As and competitions, as well as placing editorial write-ups on key issues in publications such as housing and property. Assistance was made available for the elderly and disabled by providing basic information like the dates of the awareness campaign and also made sure that they too understood what was needed to be done.

Regional and Local Audience: For many consumers the impact of digital switchover and conversion of TV equipment from analogue to digital was a complex process to understand, and a number of switch-over myths remained amongst the population as a whole.

To this end, the community outreach programme was designed to reach and engage key audiences with messages about the digital TV switch-over. It also became a core element of Digital UK and the Switch-over Help Scheme’s communications campaign in preparation for and during the digital switch-over.

5.2.3 Rwanda

Rwanda's approach to digital migration began in 2009, with the establishment of a National Digital Migration Task Force comprising of a High Level Steering Committee, a National Digital Migration Committee, ran by a National Digital Migration Secretariat. The committee was further divided into Sub-Committees of which one of them was responsible for DTTV Business Development and Public Awareness, this was to ensure the smooth migration from analogue to digital broadcasting. Subsequently this was followed by the adoption of the Broadcasting Policy in 2010 and which further elaborated of the Communications Strategy with Tunga TV 'Go...digital' logo (RURA February 2015 presentation by J.B Mutabazi to the Commonwealth Digital Broadcasting Switchover Forum in Johannesburg).

The Communicator/Messenger: The Government in the form of the Ministry of ICT, Cabinet Affairs, Finance and the Regulator (Rwanda Utilities Regulatory Authority – RURA) were tasked with the responsibility of leading the campaign. A Steering Committee was set up comprised of Minister of ICT who was responsible for policies, regulations and technical standard issues; Minister of Cabinet Affairs responsible for public awareness issues; Minister of Finance who took care of the financial aspects of the campaign; Minister of Justice, who provided oversight on legal agreements and contract issues; Minister of Trade & Industry, oversaw the business value chain; Minister of Youth, Sport & Culture, was responsible for content development; and the Senator, who looked after consumer protection issues; with the Prime Minister taking on capacity building matters. The inclusion of the afore-mentioned ministries was to ensure the smooth running of the campaign.

The Message and Media Platform: Rwanda utilised various media platforms such as the press, radio, TV, and conferences to publicize its awareness campaign. Rwanda used a phased-in approach on all media channels (Radio, TV, and press conferences) to cover 14 sites for digitalization and awareness campaign. On 31 January 2014, a strong awareness campaign preceded the analogue switch-off in Kigali and sub-areas as part of phase 1; phase 2 in North West of the country followed on 31 March 2014; phase 3 in North and North East by end of May 2014; and lastly phase 4 in the South and South West of the country in July 2014, which also marked the end of analogue terrestrial TV in Rwanda. Further information on a digital rollout plan plus switch-over calendar was provided; the list of type approved DVB-T2 STBs plus authorized vendors were made available; and minimum specs of STBs for DTT were uploaded onto the regulator website.

6 Primary Research Study

After a resolution was taken during the World Radio Conference (WRC) of the International Telecommunication Union (ITU) in 2006, South Africa signed a treaty to move analogue broadcasting systems to DTT broadcasting systems. The Department of Communications was mandated to lead the migration process. The government of South Africa is obligated to ensure that all South Africans have access to affordable broadcasting services, irrespective of their economic or social backgrounds.

6.1 Marketing Research Objectives

The broad aim of the research was to investigate the effectiveness of the “Go Digital” campaign in creating awareness and building knowledge about DTT. More specifically, the research was aimed at: understanding the most effective activities of the campaigns; to explore the perceptions of the campaign coverage; investigate if the targeted beneficiaries have been reached; to create awareness levels and improve the recognition levels of the “Go Digital” logo; to explore the levels of awareness of digital migration programme and DTT created by the campaigns; evaluate the levels of migration achieved, that were as a result of the campaigns; and explore the perceptions of community awareness of DTT and digital migration. The research was undertaken with community members in the Northern Cape and the Free State provinces using paper based quantitative questionnaires and face-to-face interviews.

6.2 Analysis of the Quantitative Evaluation Study

The research was conducted by gathering data using questionnaires and conducting focus group interviews in the selected 5 district municipalities. The 5 district municipalities were selected by the DoC, and they were part of some of the municipalities in which the BDM communication campaigns were conducted by the department over a 2-year period, i.e. between 2015 and 2017. Table 3 below shows the sample size of the research undertaken in each province and identified municipalities.

Province	No. Respondents	Municipality	Towns	No. Respondents
Free State	171	Xhariep District Municipality	Edenburg	55
		Thabo Mofutsanyana District Municipality	Ladybrand	57
		Mangaung Metropolitan Municipality	Thabo Nchu, Botshabelo	59
Northern Cape	124	Kareeberg District Municipality	Carnarvon Town	40
		Kheis District Municipality	Groblershoop	31
		Kai Garib District Municipality	Keimoes Town	53
TOTAL	295			295

Table 3: Sample by Provinces and Municipalities

The **Gender demographics** indicates that the majority of the respondents were female (67.7%), with a higher proportion of female participation in the Northern Cape (77, 4%) than the Free State (60,6%).

6.3 Age of respondents

The age of the respondents was spread between the ages of 16 to 75 years, with the smallest age group being 56-75 years (22.8%). The Free State respondents were slightly skewed towards the youngest age group (42.9%) and the Northern Cape had most of its respondents in the 36-55 year age groups. The age of respondents are presented in Figure 3 below.

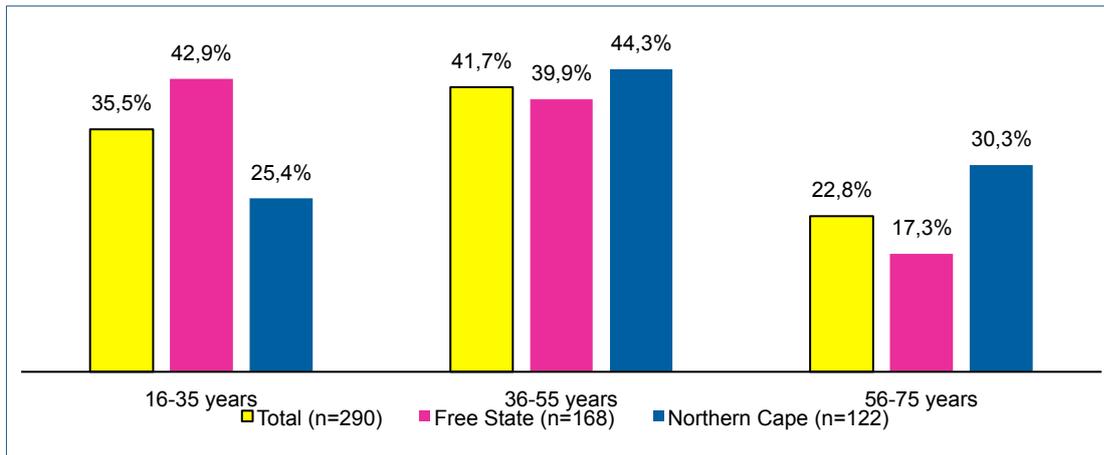


Figure 3: Sample Demographics by Age Groups

6.4 Education Level of Respondents

There were no respondents that had achieved any post-graduate qualifications. A third of the respondents had some high school (31.5%) and another third had achieved a matric (29.1%). Less than 6% of the respondents that participated in the research had post matric qualifications, and less than 1% had completed a university degree as shown in Figure 4 below.

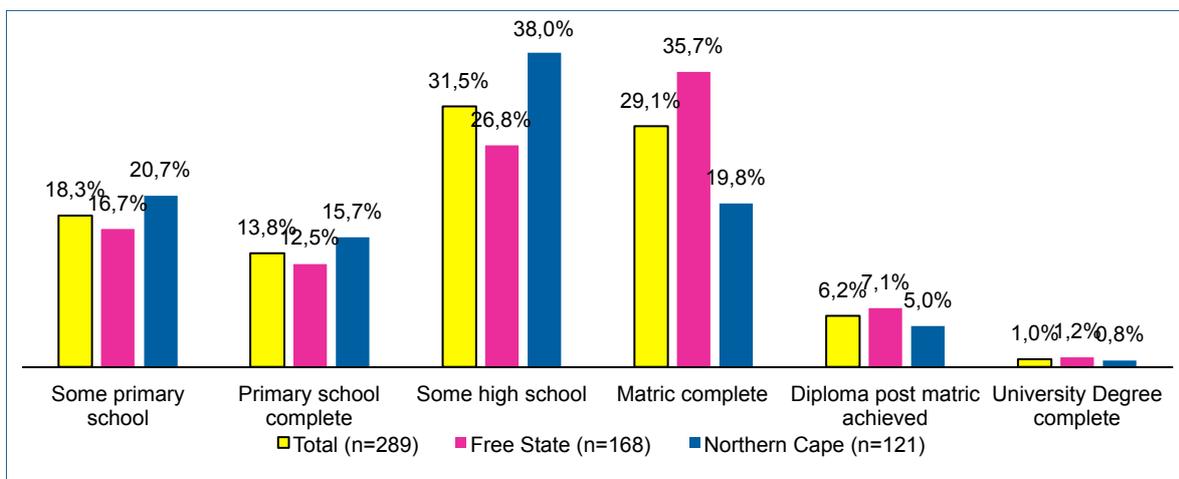


Figure 4: Sample by Education Levels

- Gross Household Monthly Income of Respondents:** Nearly all the respondents had a gross monthly household income of less than R10 001, with the majority having R3 200 or less. Those in the Northern Cape had slightly higher household income levels than those coming from the Free State.
- Disability in Household:** Only 12 respondents reported someone in their household having a disability which represent 3.6% of the total respondents' households. 6,1% of respondents in Northern Cape had someone living with disability in their household, while Free State recorded only 1.8%.

6.5 Quantitative Research

In-depth interviews with municipality officials, SAPO managers as well as focus group interviews with beneficiaries of government-issued STBs were conducted. The collation of questionnaire responses with members of the public was also carried out. Although public awareness was deemed a success by those involved, however, there were concerns raised, such as too little resources were directed at the local radio and community media in order to raise the awareness levels. The other challenges that were identified included the non-availability of flyers and leaflets in the locally spoken languages, as well as the exclusion of the youth as a target audience. The youth is said to be more techno-savvy and therefore more likely to assist in the home in cases where challenges with the TV set occur. The training of the local youth in the technical aspect of STBs installation was also viewed as being critical, since most of the installers that were identified came from outside the local municipalities.

The general indication is that where political oversight had been prominent, some successes were recorded. Posters were distributed across the retail outlets, shops and public amenities such as clinics and community halls. It must however be noted that the Ministerial Imbizos have been seen to generate greater interest and yielded even greater success where the public awareness campaigns were concerned.

Engagements with all of the District Municipalities resulted in high levels of involvement of the local councils providing their support for the public awareness campaigns. The research findings further indicated that the beneficiaries of STBs received their public awareness through door to door campaigns, Imbizos, the SABC, neighbours, posters and leaflets.

6.6 Section Outcome

The findings suggest that the “Go Digital” campaign has been somewhat effective in creating awareness and building knowledge of DTT, with some elements of the campaign being more successful than others. There has however, also been little success from the campaign in the Xhariep Municipality in the Free State. Overall, the campaign has been more successful in the Northern Cape Province than in the Free State Province.

Although very high levels of recognition of the Go Digital logo were found in most Municipalities, the Xhariep Municipality in the Free State had extremely low levels of awareness of the logo. For those who recognised the logo in the Xhariep Municipality, few believed they knew what it represented.

6.6.1 Key Evaluation Findings as per evaluation areas

This section of the report, seeks to outline the findings of the Qualitative and Quantitative field research, in relation to the key Research Questions that were raised at the time of commissioning the Evaluation of the Digital Migration Public Awareness and Consumer Support campaign.

The leading research question of the evaluation exercise, was to determine the effectiveness of the Digital Migration Public Awareness and Consumer Support campaign. The purpose was also to improve

the implementation of future campaigns in other parts of the country, and the build-up to the final Analogue to Digital Switch-Over scheduled for December 2018.

The Research Questions directed and led the Evaluation Study towards determining the effectiveness of the Digital Migration Public Awareness and Consumer Support campaign. The Evaluation Study was structured according to the Classical Triptych Dialogical Model of Communications, as a theoretical framework of analysis, and as was outlined in the constituent components of the Communicator, Message and Medium, and the Audience. Consequently, each component of the Dialogical Model had a series of inherent Research Questions that were related to the Digital Migration Public Awareness and Consumer Support campaign.

The Findings of the Evaluation Study were based on field research comprising of the Literature Review, International bench-marking study, Qualitative Focus Groups, and the Quantitative Surveys by means of Questionnaires.

6.6.1.1 The Communicator

This aspect of the report, relates to the role of the DoC, its portfolio organisations and partner agencies which were a part of the Digital Migration Public Awareness and Consumer Support Campaign. This is also in relation to how the campaign was conceived and its implementation plan was articulated in the various communications plans and strategies that were examined during the literature review stage of the evaluation.

Some of the key Research Questions in this regard included the following:

- How was the Digital Migration Communication Strategy Public Awareness and Consumer Support campaign conceptualised, planned and implemented?
 - How effective was the planning of the campaign and was the campaign implemented as had planned?
- What were the Objectives and Purposes of the Digital Migration Communication Strategy/ Public Awareness and Consumer Support campaign?
- Who championed the digital migration communications strategy?
 - What was the level of coordination between the Department and its portfolio organisations and partner agencies in conceptualising, planning and implementation of the Digital Migration Public Awareness and Consumer Support campaign?
 - Did the portfolio organisations and partner agencies have separate communications strategies in relation to the digital migration? If so, were these communications plans aligned to the main communications strategy driven by the Department?
- To What extent did the institutional arrangements support the performance of strategy, with specific reference to coordination, administration and management arrangements?
- Were the resources allocated for the Public Awareness and Consumer Support campaign adequate?

Responses to these research questions were arranged in accordance with the headings and sub-headings outlined below:

Inadequate Communication Plans

The conceptualisation of the 2015-2017 Digital Migration Communication Strategy / Public Awareness and Consumer Support campaign was articulated in the various Microsoft Power-point Presentations including:

- BDM Digital Migration Public Awareness Campaign: A Communications Strategy March 2015 – November 2018; Digital Migration Campaign Toolkit for Communicators July 2015; and Revised Digital Migration Communication Strategy, August 2015

These communication strategies outlined at a high level, the purpose of the Digital Migration Public Awareness and Consumer Support campaign. All the key role players in the Dialogical Model of Communication were identified, and so were the key message/s to be communicated and the media platforms to be utilized for these ends.

However, the communication plans fell short of providing the necessary details in order to inform the conceptual framework of the campaign. The communication plans were not informed by a fully articulated Theory of Change and a Logical Framework, all captured in the Department's Annual Performance Plan with the attendant risks mitigated, and the costs budgeted for.

In addition, over and above the over-arching Communication campaign (for example the STB registration), there was a need to develop specific marketing and communications campaign that were seeking to address issues emanating from specific areas. Examples of such local communications campaign included the following:

- shortage of DTH Set Top Boxes for border town areas;
- the distribution of DTT and DTH Set Top Boxes to households in the same district/township;
- resilience or non-resilience of housing structures for the mounting of Antennas and Satellite dishes, and the mitigation measures and financial implication thereof; and
- portfolio organisations and partner agencies should have been in a position to develop separate but complementary communication strategies, outlining their mandate and role in Broadcasting Digital Migration, and its alignment with the overall comprehensive Communications Strategy (SAPO; Sentech; USAASA, SABC, and Focus Group Interviews: 01/02/03 August 2017).

Limited Coordination for the Communications Campaign

In many countries, the Digital Migration project is often led by a political principal. In many cases, a government Minister responsible for broadcasting or communications policy, would establish and oversee an Advisory Council or Task Team that draws the participation of key broadcasting stakeholders.

An Advisory Council would then provide the overall strategic leadership of the project, and oversee the conception and implementation of key performance areas, including the implementation of the communication and public awareness campaign of the project.

In South Africa, earlier attempts to establish digital migration coordinating committees were unsuccessful. Previously Advisory Councils or similar, were established for the same purpose, however were dissolved for various reasons, including conflict of interest (DoC AR 2009/10:20).

As a result, when the Digital Migration Public Awareness and Consumer Campaign was launched in 2015, there was no multi-stakeholder forum in place, tasked with overseeing the coordination of the campaign. Seemingly, the public awareness and consumer support campaign was largely driven by the Ministry and DoC.

Although the other aspects of the digital migration project included the involvement of the Department's portfolio organisation and partner agencies such as the SABC, Sentech, USAASA and the SAPO - there was little strategic coordination between the Department and its partners in the conceptualisation and planning of the public awareness and consumer support campaign.

Coordination between the Department, its portfolio organisations and partner agencies, will need to take place across various levels, from strategic levels, to the actual operations - also allowing enough latitude for the relevant structures and stakeholders to be able to anticipate and react promptly to crises that may arise.

Limited Inter-Governmental Relations Framework

The Digital Migration process often draws participation from the varied tiers of government, ranging from the national, provincial and local arms of government, including traditional authorities. This is particularly so because, digital migration entails more than just television broadcasting, digital broadcasting is a platform that can be utilised to deliver other basic services.

Whilst being mindful that the project is being led by the Ministry and the DoC, however, input and participation from other government policy departments is just as important. This inclusive government-wide approach was also implemented in Tanzania and Rwanda, with both the countries sharing similar development challenges as those experienced by South Africa.

In this way, the coordination of the Digital Migration Public Awareness and Consumer Support Campaign would allow for all risks that may arise to be mitigated, even those that were not foreseen or anticipated (SAPO; Sentech; USAASA, SABC and Focus Group Interviews: 01/02/03 August 2017).

Changes in Strategic and Political Leadership

Changes in leadership often entail a review of existing programmes and projects, and the adoption of different approaches and frameworks towards implementation. The downside of frequent changes in leadership is the impact it has on team morale, and the slowing down of the momentum that has been previously gathered.

The BDM project has also been adversely affected by the various court cases pertaining to the encryption or non-encryption of the STBs. These court disputes have further slowed down the momentum of the project, and casting doubt in the public eye about whether the BDM project will ever come to fruition in South Africa in the near future.

Resource Allocation

The key resources required for the Digital Migration Public Awareness and Consumer Support campaign listed as the human and skills resources. These resources will be required for the reconceptualization,

planning, implementation and monitoring of the BDM project and awareness campaign. Financial resources will also be required for procuring a variety of goods and services.

There are a variety of tasks and responsibilities regarding the conception, planning, implementation and monitoring of the Public Awareness and Consumer Support campaign. The findings suggest that the current head count – of one or two departmental officials responsible for these responsibilities falls far too short of meeting the scope and range of activities involved.

6.6.1.2 The Message/s and Audience

The leading research questions in relation to the Digital Migration Public Awareness Message/s included the following:

- What is/are the key Message/s of the BDM Public Awareness and Consumer Support campaign?
 - What were the Sub-Messages of the Public Awareness and Consumer Support campaign?
- What were the key challenges experienced during the implementation of the Public Awareness and Consumer Support campaign?
- What were the most effective and successful aspects of the Public Awareness and Consumer Support campaign?
- What best practices of the Public Awareness and Consumer Support Campaign were identified that can be replicated elsewhere?

In terms of the Communication Strategy March 2015 – November 2018, there seems to be no consistency with other communication plans and strategies. This is in relation to how the key and sub-messages of Digital Migration Public Awareness and Consumer Support Campaign, were outlined:

The Over-Arching **Messages** were Bridging the Digital Divide; Moving from Analogue to Digital; and Ensuring that there is Universal Access

The **Sub Messages** were listed as follows:

- Promoting Local Content; Government prioritizing the poorest of the poor, reprioritizing the allocation of radio frequency spectrum; reallocating the television spectrum; Government reviving and forging renewed partnerships with the industry;
- Avail free multi TV channels (Broadcasting Digital Migration Public Awareness Campaign: Communication Strategy March 2015 – November 2018)

It must however be noted that, none of the above messages, relate to the most pressing pre-occupation of the Digital Migration Public Awareness and Consumer Support campaign, namely:

- Informing and educating the 5 million indigent television households about registering for the free government issued /subsidised Set Top Boxes; and
- Informing and educating the 8 million television households about procuring digital Set Top Boxes from reputable retailers, irrespective of having been subscribed to the MultiChoice's DSTV bouquet

Although many marketing and promotional materials went a long way towards disseminating information about the STB registration, it seems that very little focus has gone towards educating the 8 million

television households that fall outside the government STB subsidy. This omission in the messaging and sub-messages, points to the inadequate planning that went into the communications plans that guided the 2015 – 2018 public awareness campaign.

This concern also applies to the retail sector that sells a wide range of digital television appliances. There is also further need to provide consumer advice and ongoing support, so that they are not left at the hands of unscrupulous retailers. This is particularly true, especially when the country approaches the Analogue Switch-Over phase of the project.

6.6.1.3 Media Platforms

Media Platforms refer to the type of media the Public Awareness and Consumer Support Campaign utilized when communicating messages to audiences. The leading research question/s related to media platforms included the following:

- What were the most successful media platforms that were used for disseminating information about the digital migration project?

It was in the deployment of these media platforms that great attention was devoted to the various Communication Strategies, and where the human and financial resources were directed towards. The Public Awareness and Consumer Support Campaign was not short of media platforms to carry out the set objectives and purposes of the Digital Migration project.

Marketing and promotional materials were produced in all the official languages of the country, and were distributed in various parts of the country during the Ministerial Imbizos and Door-To-Door campaigns.

SABC radio and Television

Both the Focus Group interviews and the Questionnaire singled out the SABC radio and television coverage as being the most important source of information about digital migration. The SABC radio and television services broadcasted Public Service Announcements (PSAs) and commercial advertisements about the digital migration.

Door-to-Door campaigns

The door to door campaigns played an important role in raising the profile of the digital migration project. The involvement of the Minister at local public Awareness and Consumer Support Campaigns also enhanced inter-governmental relations and cooperation between the national, provincial and local arms of government.

Departmental personnel, assisted by the community volunteers also played an important role in engaging with community members, and assisting them with filling out the STB registration forms and explaining the objectives and purposes of the Digital Migration project (In-depth Interviews Trompsburg, Edenburg, Ladybrand, Ficksburg: 04/05/06 July 2017).

In the Northern Cape, the DoC consulted extensively with the provincial government and the various local and district municipalities. The BDM's Public Awareness and Consumer Support campaign was launched

in the ZF Mgcau District Municipality towns of Kakamus, Keimos and Groblershoop and Carnavon town of the Pixley Ka Seme District Municipality.

The primary role played by the Keimos and Carnavon municipality, was to facilitate community access to the BDM project, for purposes of the Public Awareness and Consumer Support Campaign. The BDM publicity and marketing materials were made available to the municipality, and volunteers were organized to distribute materials in the community and also to conduct Door-To-Door campaigns.

Groblershoop did not have national Ministerial attention through an Imbizo and did not enjoy any support or commitment from the local municipality, hence the problems it experienced when trying to discharge the BDM Public Awareness and Consumer Support Campaign. This is mainly attributed to change of administration, following the August 2016 Local Government Elections. The public relations and awareness blitz in Keimos and Carnavon as compared to Groblershoop laid bare the differences that the varying allocation of resources can make to a project, and thus its impact on a local public awareness campaign.

In the Free State intergovernmental coordination for purposes of the BDM, and its Public Awareness and Consumer Support Campaign involved the national Department of Communications, the Free State provincial government, the Mangaung Metropolitan Council as well as the Kopanong, Mantsopa and Setsoto District Municipalities.

There was subtle scepticism among local councillors about community apprehensions in relation to possible repercussions emanating from the STB registration process. Many local community councillors were still reeling from the aftermaths of the August 2016 Local Government Elections, where opposition political parties had made inroads into some of their areas.

In various ways, service delivery issues at national and local levels became inter-twinned, and Councillors tended to empathise with their constituencies, when became sceptical about certain things such as the STB registration process, which community members feared would be used against them for been in arrears for television licence fees (In-depth Interview Thaba Nchu:06 July 2017).

At the end, it appeared that trust was gained and retained between the community and Ward Councillors on the one hand, and the DoC and SAPO, on the other. Furthermore, quarterly community development meetings that were held regularly appeared to have paid dividends for the STB registration process. These community meetings brought all government departments together and thus played an important role as a communication link between national and provincial government and local communities. It is also emerged that the digital migration project and the STB registration processes, later becoming standard agenda items in these quarterly community meetings (In-depth Interviews in Ladybrand, Thaba Nchu and Ficksburg:05/06/07 July 2017).

Promotional Material

The distribution of relevant/language-specific leaflets and posters, revealed that there were inconsistencies with the implementation of the campaign in a number of areas. Some community members don't remember seeing any leaflets or flyers being distributed in their areas. If they did, the marketing material was predominantly in English, as opposed to local languages (Sesotho) spoken in the

district municipality (In-depth Interviews Trompsburg, Edenburg, Ladybrand, Ficksburg: 04/05/06 July 2017).

Community Media Mobilisation and Support

In the Free State community radio stations were used to broadcast live, the coverage of the Ministerial Imbizos. This was complemented and supported by the GCIS purchasing advertisement time-slots from those community radio stations. However, this support seems to have largely been confined to the occasions of the Ministerial Imbizo. It was reported that soon after the event, the hype that was created about the digital migration awareness campaign faded away (In-depth Interview Botshabelo:07 July 2017).

Another shortcoming about the campaign roll out, was the limited use of community media platforms both community print and radio. Booking of advertising spots in support the campaign and also in order to secure editorial coverage, was also said to be limited. Both print media houses in Mangaung and Ladybrand provided very little or no editorial coverage of the digital migration campaign or the Ministerial Imbizos held in their catchment areas (Telephonic Interview Mangaung: 07 July 2017).

6.6.2 Good Practice to be Replicated Elsewhere

The main research question was, “What good practice was identified in the implementation of the Public Awareness and Consumer Support Campaign that can be replicated elsewhere”?

The SAPO branches became an important implementation agency for the BDM public awareness and consumer support campaign. The findings suggest that heads of household that were interviewed, can also bear testimony to this, in support of the following facts:

- Essential training was provided to local Post Office employees and in turn, they provided consumer support to heads of household during the STB registration process;
- SAPO became the conduit between STB/Digital Antenna installation companies and the beneficiary of households, by providing a seamless interface between the parties involved. SAPO facilitated the replacement of damaged STB and digital Antennas, and also made a provision for new street addresses where there were none
- During the BDM project, SAPO further provided an excellent customer and caring service support to the thousands of disadvantaged and poor families (Interviews with Northern Cape Heads of Households: 21 – 22 June 2017).

In the Free State many SAPO employees, including branch managers were involved in the digital migration community outreach, by assisting beneficiaries in filling out the STB application forms. For days on end, they targeted sections of the townships informing the community about digital television, and how the families that qualify for a subsidy could apply for the government issued STBs.

Subsequently, community members voluntarily went to the Post Office to enquire about digital television. Some SAPO officials visited the homes of beneficiaries to make follow ups and also to enquire about the delivery of their STB decoders and antennas (SAPO Interviews: 05/06 July 2017).

6.6.3 Challenges in Implementing the Public Awareness Campaign

Another research question posed was, “what challenges were experienced by officials when implementing the Public Awareness and Consumer Support Campaign”?

6.6.3.1 Late/Slow STB Registrations

The most notable aspects about the Ficksburg Focus Groups was that, the heads of households that were interviewed, only registered to acquire their STBs two or three months after the launch of the Broadcasting Digital Migration Public Awareness and Consumer Support campaign was - also after the fan-fare with the Ministerial Imbizos had taken place.

Interviews with the beneficiaries and heads of television household were arranged by the local Ward Councillors beforehand. The research team was also accompanied by a community development worker/volunteer. However, there was still a feeling of apprehension among the households visited, wondering if they were opening themselves up for arrest and prosecution by agreeing to be interviewed.

The STB registration process has been found to be slow, and the registration levels low, as a result of some unstated, but commonly held views within the communities about the project. Although the community was fully aware about the need to register for STBs, many never got to register for STBs and never got speak about this matter openly, whilst others adopted a “Wait and See Attitude” – by observing the STB registration process from a distance... play their cards close to their chest, and playing it safe.

It also emerged during the interviews that many Ficksburg households purchased flat screen television sets from what they call “some retailers” who did not ask for a valid SABC television licence during the over the counter transaction. It is not however not clear how deeply imbedded these perceptions are in Ficksburg and other border towns, including Ladybrand. These perceptions have impacted on the STB registration processes and were found to be worrisome and hence they deserved scrutiny and attention in terms of:

- the effectiveness of the SABC television licence exemption that was later announced after the start of the campaign;
- the involvement of the retail sector in the whole BDM public awareness and consumer support campaign

6.6.3.2 BDM Call Centre

The focus group interviews with the portfolio organisations and partner agencies pointed out to the challenges and frustrations they have encountered daily in relation with consumer complaints regarding the installation of STBs. Many local consumers had no single point of call to go to in order to register their complaints, with the hope of getting them resolved. Some contacted the SABC, and others reached out to Sentech, and in many instances, the findings suggest that both organisations, provided different responses and advice.

This state of affairs impacted negatively on the BDM project at local levels of the community. One way of addressing this challenge, would be the funding and the establishment of a Call Centre, as had previously been agreed by the Task Team.

6.6.4 Questionnaire Findings

Random Questionnaire surveys were conducted among members of the general public in the Northern Cape (Keimos, Groblershoop and Caranavon) and the Free State (Ladybrand, and were also carried out by the field workers from Botshabelo/Thaba Nchu, Edenburg).

The general findings of the Questionnaire survey in Northern Cape and the Free State were as follows:

- **TV Access:** Nearly four out of 10 respondents (39,2%) had DSTV in their homes. Hence, more than half (53,8%) did not have neither DSTV or Top TV in their homes. Nearly half (46,7%) of the respondents' households in Northern Cape had DSTV, while 33,7% of respondents in Free State had DSTV in their households.
- **Usage of Social Media Platforms:** Although less than half of the respondents (47,7%) made use of social media platforms, more than half (51,7%) of the Northern Cape respondents use social media.

General Awareness of DTT

Awareness of "Go Digital" Logo: Nearly all the respondents from the Northern Cape recognised the "Go Digital" logo. However, for both the Free State and the Northern Cape, only 75.4% of those interviewed recognised the logo, or knew what it represented.

Source of Awareness for Broadcasting Digital Migration (BDM): The main source of awareness of the BDM programme for the Free State respondents was from the SABC radio or TV (69,5%), but for the Northern Cape respondents it was from the door-to-door campaigns (62,9%).

> 60%
50-60%

Source of Awareness of BDM

Campaign Media	Total	Free State				Northern Cape			
		Free State Overall	Municipality			Northern Cape Overall	Municipality		
			Xariep	Thabo Mofutsanyana	Mangaung Metropolitan		Kareeberg	Kheis	Kai Garib
<i>Number of Subjects</i>	288	164	53	53	58	124	40	31	53
SABC Radio & TV	64,6%	69,5%	49,1%	83,0%	76,9%	58,1%	57,5%	67,7%	52,8%
Door-to-door campaign	45,5%	32,3%	-	71,7%	25,9%	62,9%	67,5%	6,5%	92,5%
Imbizo	37,8%	62,2%	49,1%	77,4%	60,3%	5,6%	15,0%	3,2%	-
Go Digital leaflet/pamphlet	30,9%	28,0%	-	69,8%	15,5%	34,7%	70,0%	45,2%	1,9%
Community Radio/Newspaper	15,6%	23,8%	-	3,8%	63,8%	4,8%	2,5%	12,9%	1,9%
Social media	8,3%	13,4%	1,9%	1,9%	34,5%	1,6%	2,5%	3,2%	-
Other (Post Office/Relative)	4,2%	0,6%	-	-	2,0%	8,9%	-	22,6%	7,5%

Strongest campaign media
Weak campaign media
Poor awareness
Good campaign exposure with multiple sources of awareness

Table 4: Source of Awareness of BDM

Awareness about the Requirements for Obtaining and Installing a Set Top Box

The overall awareness levels for qualifying for and installing a STB were good. However, the Xhariep District Municipality was found not to be well informed. The Northern Cape was generally well informed regarding the requirements for obtaining and installing a STB, except with regards to the technical assistance for their TV sets, where there was a perception that the SAPO will provide this assistance. The Free State was less well-informed than the Northern Cape presented a similar trend of perceptions, that SAPO will assist with technical problems pertaining to their TV sets. In addition, the Xhariep Municipality was also found to be not well informed regarding the requirements for obtaining and installing a STB.

> 60%

50-60%

Campaign Media	Total	Free State				Northern Cape			
		Free State Overall	Municipality			Northern Cape Overall	Municipality		
			Xhariep	Thabo Mofutsanyana	Mangaung Metropolitan		Kareeberg	Kheis	Kai Garib
<i>Number of Subjects</i>	295	171	55	57	59	124	40	31	53
STB does not provide free DSTV channels	34,6%	22,2%	0,0%	42,1%	23,7%	51,6%	77,5%	96,8%	5,7%
Free STB for qualifying households	73,2%	62,0%	45,5%	80,7%	59,3%	88,7%	95,0%	96,8%	79,2%
Easy to install a STB	62,7%	37,4%	43,6%	45,6%	23,7%	97,6%	100,0%	100,0%	94,3%
SAPO provides installation assistance	67,1%	60,2%	47,3%	78,9%	54,2%	76,6%	100,0%	51,6%	73,6%
SAPO does not provide technical assistance for TV sets	22,0%	16,4%	3,6%	22,8%	22,0%	29,8%	25,0%	48,4%	22,6%
TV licence not required to qualify for STB	56,6%	45,0%	43,6%	80,7%	11,9%	72,6%	37,5%	71,0%	100,0%

Table 5: Awareness Requirements for Obtaining and Installing a STB

Perceptions of Community Awareness

Perceptions of Community Awareness for STB Applications: The total respondents generally agreed (84,4%) that the community was aware of how to apply for a STB, but again there was a significantly lower portion of the Free State respondents (73,5%) that agreed than the Northern Cape Respondents (99,2%).

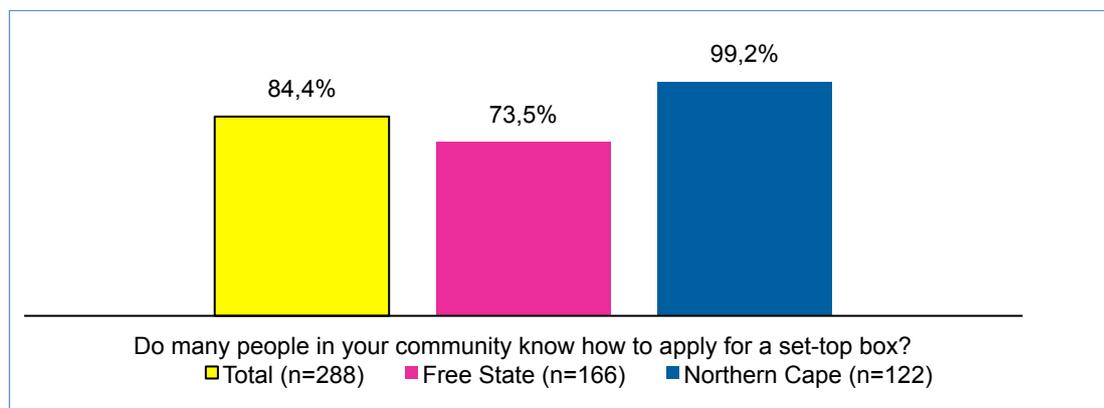


Figure 5: Perceptions of Community Awareness for STB Applications

Perceptions of Exposure to Digital Migration through Different Media Channels

The majority of the respondents agreed that there was enough talk about digital migration on SABC TV, and just over half agreed that there was enough talk on local radio. In the Kai Garib Municipality in the Northern Cape, the perception was that there was enough talk about digital migration across all media channels. In the Thabo Mofutsanyana Municipality in the Free State, the majority of the respondents also agreed that there was enough talk about digital migration on local radio. A significantly higher proportion of respondents from the Northern Cape said that, there was enough talk about digital migration in national and local newspapers, as compared to the Free State respondents.

> 60%

50-60%

Campaign Media	Total	Free State				Northern Cape			
		Free State Overall	Municipality			Northern Cape Overall	Municipality		
			Xariep	Thabo Mofutsanyana	Mangaung Metropolitan		Kareeberg	Kheis	Kai Garib
<i>Number of Subjects</i>	295	171	55	57	59	124	40	31	53
On SABC Television	79,3%	72,5%	60,0%	91,2%	66,1%	88,7%	87,5%	90,3%	88,7%
On local radio	53,6%	59,1%	47,3%	80,7%	49,2%	46,0%	27,5%	32,3%	67,9%
On community radio	32,5%	28,1%	36,4%	14,0%	33,9%	38,7%	15,0%	16,1%	69,8%
In national and local newspapers	35,3%	24,6%	32,7%	15,8%	25,4%	50,0%	55,0%	22,6%	62,3%
In community newspapers	32,5%	24,6%	21,8%	15,8%	35,6%	43,5%	32,5%	22,6%	64,2%
On social media platforms	30,2%	24,6%	40,0%	10,5%	23,7%	37,9%	32,5%	3,2%	62,3%

Table 6: Enough Talk About Digital Migration?

6.6.5 International Bench-marking

With regards to the international bench-marking exercise that was undertaken, the leading research question that was asked was, “How does the South African Public Awareness and Consumer Support Campaign compare with similar strategies undertaken in other countries?”

Some of the notable approaches employed in Rwanda, Tanzania and the United Kingdom, included the following:

- Public Awareness Campaigns in Tanzania and Rwanda received attention from the highest office in the land – the Office of the President – this strategic approach, provided the digital migration project with the much-needed political gravitas and support.

But more importantly, the campaign needs to drive an unambiguous message stating that, digital migration is more than just television broadcasting, but rather a platform that can be used for the delivery of a plethora of basic services to the citizens. Hence the involvement of other key

national policy departments such as Rural Development and Economic Planning in the Digital Migration Advisory Council is important.

- In the United Kingdom, the most notable lessons learnt were:
 - The mobilisation of the BBC Licence Fee as a neutral vehicle for funding Digital Migration Public Awareness, albeit in South Africa an alternative neutral vehicle may have to be identified, because the SABC television licence fee is not a reliable source of revenue;
 - Call Centres for Digital Migration were fully funded, and manned by proficient personnel around the clock. Citizens were promptly attended to by call centre agents instead of being made to hold for a while before their enquiries were attended to;
 - Community volunteers, recruited from social clubs were used to provide consumer support; and were also used for the promotion of alternative and non-conventional media platforms such as library reading cards, ATM machines - to alert consumers about the urgency to procure the necessary digital television equipment.

6.6.6 Other Issues

This section seeks to outline other issues that were unearthed during the focus groups interviews in the Northern Cape and the Free State. This section further addresses in some ways the following leading research question, “Is the BDM Public Awareness and Consumer Support Campaign achieving the relevant goals of the National Development Plan”?

There are a number of other issues related to the BDM project that were picked up during the focus group interviews in the Northern Cape Municipalities of Keimos, Groblershoop and Carnavon. The following issues below were raised as being the most salient:

- Discrepancies in the provision of satellite dishes and digital antennas to the three communities. Many digital antenna beneficiaries complained that they also needed satellite dishes since they have the ability to carry more television channels. This discrepancy, if not addressed, can pose social cohesion challenges between the different sections of the community. According to the current and existing racial spatial location of communities, this assertion could be found to be particularly true, since these areas were previously demarcated during the apartheid dispensation (Interviews with Groblershoop Beneficiaries: 21 June 2017).
- The use of outside companies in the installation of STB and digital antennas, without local communities yielding any benefits, through the transfer of skills and the contracting of local youth and the use of SMMEs in the project, was found to be problematic (Cllr Interview: 20 June 2017). Carnavon was an exception, as many of the youths from the area were trained by the SKA, and subsequently became instrumental in the installation process, and continue to provide after-installation services to the community (Cllr Interview: 22 June 2017).
- That the BDM project, should be linked to the education curricular, especially for high school students, also by inviting students to compete in essay writing about the project (Cllr Interview: 20 June 2017).

6.6.7 Local Youth and the Installation of STBs

One of the glaring shortcomings about the BDM project that was identified in the Free State, was the use of outside companies for the installation of digital decoders. However, it must be noted that the Minister had made an undertaking to ensure that there was involvement of the local youth and companies, in the installation of STBs and antennas during the various Imbizo held in the different district municipalities.

In some metropolitan and district municipalities, groups of youth were trained and empowered with the skills to install digital decoders and antennas, but sadly they were not included in the installation process when the project commenced in their respective areas (Mosala & Mofokeng Interviews 07 July 2017).

6.6.8 Section Outcome

The findings of **Qualitative Focus Groups**, and the **Quantitative Surveys/Questionnaires** complement and support each other in various areas, namely:

- The SABC is the most successful media platform for consumer awareness, and also played an important role in profiling and promoting the local and national public awareness campaigns;
- The Door-To-Door campaigns, especially with the involvement and support of local authorities, have proven to have had a big impact in creating consumer awareness, and thus driving the digital migration message at local level;
- The Ministerial Imbizo's activations were found to be more intense; having received support from the provincial and local government structures and also the implementing entities.
- There was limited use of community and local media outlets, either in terms of editorial coverage or advertising and spot sales;
- Because of the limited distribution or limited usage of local languages, the Go Digital leaflets were affected by this, and as a result also had a limited reach; and
- SAPO played an important consumer support role during the STB registration process, by assisting beneficiaries with their applications.

7 Conclusions

This concluding chapter of the evaluation seeks to link the Recommendations of the study with the triptych Dialogical Model of Communications used in analysing the effectiveness of the Digital Migration Public Awareness and Consumer Support Campaign.

The Public Awareness and Consumer Support Campaign evinced the all the pillars of the Dialogical Model, namely the:

- Communicator's Intentions, Objectives and Purpose of Communication
- Messages encrypted in various forms, and encoded for differing Media Platforms and Audiences
- The identified Primary and Secondary Audiences
- A panoply of Media Platforms, employed and deployed to carry a variety of messages for differing Audiences

7.1 Communicators' Intentions, Objectives and Purposes

7.1.1 BDM Strategic Purposes and Objectives

This Analysis of the BDM Public Awareness and Consumer Support Strategy Campaign identifies four Key themes that were pursued throughout campaign. Although the strategy is not detailed sufficiently, high level strategic purposes and objectives were articulated and campaign activities aligned accordingly.

The lack of depth of the strategy document, however, make is difficult to clearly communicate the strategic purpose and objectives. Hence, the deployment of the strategic tasks was inconsistent, and in some instances not successful in achieving the desired goals. Fundamental mistakes such as failing to use the primary language used in a specific area could be avoided if the strategy was clear on this regards.

7.1.2 Key Messages and Sub-Messages

The campaigns deployed were aligned to the communications imperatives. However, different media achieved varying successes. It is essential to focus attention is more successful media, and activities in communication the key message. The plan deployed outlines overarching messages and sub-messages to reach out to the various social and economic groups that make up the South African public and citizenry.

Whereas the Digital Migration Public Awareness and Consumer Support Campaign has gone to great lengths, and deployed lots of resources in reaching out to millions of people across the country, there is a need to for the campaign to address specific and select communities and stakeholders beginning with the 8 million television households that fall outside the government STB subsidy, and the retail and manufacturing sector that will sell a wide range of digital television equipment to these television households.

There is also a need for the development and funding of local sub-messages for specific geographical areas, as and when a need arises, and the use of minority languages where applicable.

7.1.3 Media Platforms and Target Audiences

Various media platforms were deployed with varying impact in terms of bringing forth digital migration awareness. Whereas the SABC radio and television services have a general geographic footprint to reach various parts of the country, cities, towns and villages alike; community radio and print media have a specific geographic footprint in their respective localities.

In order to enhance the effectiveness of the message in reaching as wide audience as possible, various media platforms need to be deployed. In order to maximise the communication reach, it is essential to apply a multi-pronged approach in communicating to diverse audiences that constituted the nation in its diversity, consisting of various social and economic interest groups.

8 Recommendations

The following recommendations are meant for Department of Communications as the custodian of the Broadcasting Digital Migration project, and the multi-stakeholder Task Team that implements the project. Invariably, all the Recommendations revert to the Dialogical Model in addressing the shortcomings that needs to be addressed in relation with the Digital Migration Public Awareness and Consumer Support Campaign.

Recommendation 1: Development of a Comprehensive Communication Strategy

It is crucial for the department to development of a Comprehensive Communication Strategy for Digital Migration seeks to enhance and support the role of the Department of Communication and its portfolio organisation and partner agencies as the Communicator/s of the Digital Migration project. A comprehensive communication strategy for Digital Migration to enhance and support the objectives and purpose communicating with the entire general public and the nation in broad and general terms, but at the same time package specific messages for select communities, stakeholders and interest groups is required.

Recommendation 2: Partnership with the Public Broadcaster (SABC) to be the main platform for communicating key messages for digital migration

Recommendation 2, calls for the department to forge a strategic working partnership with public broadcaster; and that the SABC should be the primary platform to communicate the digital migration messages on a continuous and sustained basis. The SABC as platform, was very successful in reaching the targeted audiences in the areas where the primary research was conducted, furthermore, the SABC has a national footprint which will provide a much wider audience reach.

The findings indicate that forging partnerships with public broadcasters should be common practice, also forming a seamless thread where communication messages are concerned - this also surfaced in the international benchmark study that was conducted. This particular strategy where adopted, has proven to be successful. All other broadcasting services too, also have a role to play in this regard, this includes terrestrial broadcasters such as e.tv and community television services, as well as satellite broadcasters. The Department, as part of the recommendation 1, should develop the modalities around its partnership strategies, but also take charge, by providing the required leadership - thus ensuring that the set strategic objectives and outcomes are met.

Recommendation 3: Enhance Door-To-Door Campaigns

Recommendation 3 calls for the improvement and enhancement of the door-to-door campaigns as the secondary medium of the outreach campaign. This intervention will lead to improved interactions with local communities and thus adding value to the BDM public awareness and consumer support.

The door to door campaign implementation roadmap to be planned, coordinated and monitored at national level and implemented at local level by identified and trained local representatives including

digital cadres, community development workers etc. The plan should include the key communicators at all identified levels, the activation plan at specific times and the monitoring of the outcomes against the planned targets. The door-to-door campaigns can be supplemented by the Ministerial Imbizo activations, as and when applicable and deemed necessary in order to leverage from the presence of Political principals who are supporting the project.

Recommendation 4: Call Centre for Digital Migration, to address enquiries and complaints by both STB beneficiaries and installers

This recommendation carries huge financial implications, and a national budgetary allocation or budgetary contributions by various stakeholders might be necessary. A funding model for the BDM Call Centre must be developed, and perhaps the National Lottery can be approached for this purpose. After years and once the BDM Call Centre has run its life-span, the facility can be handed over to the consolidated National Emergency Call Centre (to include all emergency services for the whole country), as was suggested by government some years ago, but was never implemented.

Recommendation 5: Strengthen Inter-governmental collaborations

Recommendation 5 calls for the strengthening of inter-governmental collaboration across national, provincial and local arms of government, including traditional authorities when rolling-out and implementing digital migration across the country and in all communities. In order to attain this and to strengthen collaborations, the following interventions were recommended:

- Development of a Memorandum of Understanding governing the role and responsibilities of all the stakeholder member in the BDM Task Team;
- Strengthen BDM project management, also at Local Government (Ward Councillor and Traditional Authority) by linking the digital migration project with local service delivery programmes. For example, the Character Generators incorporated in the Sentech transmitter network can be used for a variety of local community announcements, including emergency services.
- An invitation should be extended to other national government departments, by encouraging them to join the BDM Task Team, where high-level and strategic decisions about the project are taken.

Recommendation 6: Enhance and Actively Promote Community Involvement

Recommendation 6, calls for the consideration of ambassadors from communities, including sport/arts and culture celebrities be identified in order to mobilise the Digital Migration project, to conduct and assist with the roll out of the Public Awareness and Consumer Support Campaigns. That Youth Corps/Digital Cadres from local communities, are mobilized and trained to drive and champion ICT development and access in their respective communities.

Recommendation 7: On going Monitoring and Evaluation of the progress on the BDM Communications Strategy and Consumer Awareness Implementation

A crucial component of any programme/project – assist to gauge and also to assess impact.

9 Attachments

9.1 Evaluation Framework

9.2 Theory of Change

9.3 Reference List