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

Final Report

Prepared for DoC by Pan Africa TMT Group

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This report has been independently prepared by Pan Africa TMT Group. The Evaluation Steering Committee comprises the Department of Communications and Department of Performance Monitoring and Evaluation in the Presidency. The Steering Committee oversaw the operation of the evaluation, commented and approved the reports.

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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
COMESA	Common Market for Eastern Southern Africa
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
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

ABBREVIATIONS	DESCRIPTIONS
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
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

ABBREVIATIONS	DESCRIPTIONS
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

Executive Summary

Pan Africa TMT was appointed by the Department of Communications to undertake an evaluation of the Broadcasting Digital Migration Communication Strategy (Public Awareness Campaign and Consumer Support) as part of the Departmental Evaluation Plan of 2017/2018.   Broadcasting Digital Migration (BDM) is a process by which broadcasting services offered on analogue networks are transferred to digital based networks over a specific period. Historically, terrestrial transmission has been the dominant form of delivery for analogue Television (TV) and Radio Broadcasting Services. The BDM revolution is well-underway globally. The transition from analogue to digital terrestrial television broadcasting presents governments, broadcasters, regulators and the general public with immense opportunities and challenges. 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.

1. Introduction and Background

The transition to digital broadcasting is a complex process requiring strategic decisions to be made on a great number of political, social, economic and technological issues. A smooth digital broadcasting transition can only be realised through a harmonized and concerted strategy. Therefore, it is necessary to develop a well-defined roadmap covering national strategies and key decisions. All relevant stakeholders in the terrestrial broadcasting industry have an important and crucial role to play, that will result in a smooth migration to Digital Terrestrial Television (DTT) Broadcasting. Provision of clear and comprehensive information to all viewers about the process and scheduled switchover dates, with more prominent regional awareness campaigns in the period leading up to the switchover is of critical importance to a successful migration process. Consumers need to understand what Analogue Switch-Off (ASO) will mean to them – and what they will need to do before the switch-off.

The migration process offers a unique opportunity to meet the fast-growing demand for wireless communication services by utilizing freed spectrum (referred to as digital dividend) in order to ensure that other important social and economic uses, such as broadband applications have access to this scarce and valuable resource. 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). International Telecommunications Union (ITU) is promoting the transition and has developed frequency plans for digital terrestrial broadcasting for all 3 ITU regions. The Regional Radiocommunication Conference (RRC-06) that was held in 2006 in Geneva developed digital terrestrial broadcasting plan in the frequency bands III (174-230 MHz) and IV/V (470 – 862 MHz) in Region 1 countries.

The costs for the transition to digital broadcasting are substantial. Most of these costs occur at the early stages of digital switch-over (DSO), particularly during Digital Terrestrial Television (DTT) infrastructure rollout and while transmissions are simulcast. Consumers also face significant costs too, as transition to digital requires Set Top Boxes (STBs) to function.

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 very critical to the smooth transition from analogue to digital reception of services. The Department of Communications (DoC) has initiated a nation-wide communication campaign "Go Digital South Africa" to raise a mass consumer and public awareness campaign of the BDM Programme. The purpose of the evaluation is to assess the effectiveness of the implementation of the Broadcasting Digital Migration Public Awareness Campaign and Consumer Support Strategy and how it can be enhanced.

The National Evaluation Policy Framework (NEPF, 2011) describes the Implementation evaluation as a type of evaluation, as an assessment of programme delivery, strategies, procedures and processes. An implementation evaluation can answer questions about what is happening in practice, how it is happening, and why it is happening. Implementation evaluation can happen any time after the programme has been implemented, as a stand-alone evaluation, as part of a series of evaluations, or as one component of an impact or economic evaluation. Implementation evaluation is an essential part of effective programme management.

On-going performance monitoring can provide some information about implementation, but implementation evaluation provides more in-depth and comprehensive information about the quality of service delivery. While an impact evaluation can provide information about whether or not a programme is working, it needs to include an implementation evaluation to provide an understanding of the processes happening in the theory of change. Hence typically implementation evaluations could be undertaken after 1-2 years, and could then be repeated at a similar cycle. The scale of the exercise will depend on the scale of the intervention, and therefore how rigorous these regular reviews need to be.

2. Overview of the Intervention

The BDM in South Africa was launched in 2001. Other related developments on digital migration included the development of the draft Scheme for Ownership Support that conceptualised the government subsidy for the provision of Set Top Boxes to indigent television households.

The Broadcasting Digital Migration's Communication Strategy campaign was launched in July 2015, and in December 2015 by the Minister of Communication. In the process, the Minister hosted the Set Top Box 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 national campaign involved the use of various national media platforms.

This Analysis of the BDM Communication Strategy identifies four Key themes that are pursued throughout this enquiry, namely: to identify the Objectives, Purposes and Intentions of the Public Awareness and Consumer Support; to identify Communication/Public Awareness Activities; to identify impact of Communication/Public Awareness; and to identify how Communication/Public Awareness Activities were implemented.

3. Brief Background to the Evaluation

The objective of the evaluation is to assess the effectiveness of the implementation of the Broadcasting Digital Migration Communication (Public Awareness Campaign and Consumer Support) Strategy and how it can be enhanced. The primary purpose of this evaluation study is to assess whether the communication activities where implemented as planned in the strategy, and establish the impact of the undertaken campaigns to the targeted communities with the aim to improve effectiveness of future campaigns going forward. It is important to have a solid insight into whether the campaigns performed as expected, better than expected, or worse than expected. This evaluation study therefore is intended to measure level of awareness of BDM process as a result of the awareness campaigns, and identify the most effective activities of the campaigns, and provides recommendation on the way forward.

The study provides an in-depth insight into the overall effectiveness of the campaigns and help in understanding the scale and type of impacts various communication systems deployed had on the communities that participated. It is intended to inform on a wide range of relevant issues and provide insight into environmental impacts for communication systems relevant to the communities. The ripple effect is that campaigners function as "communication scientists", conducting various activities by adapting the media mix, trying out different forms of creative, or exploring new communication channels altogether. The impact and effectiveness of these campaign activities differ from community to community.

4. Methodology

The purpose of this implementation evaluation study is to understand how the BDM Communication Strategy is working, and how it can be strengthened. It focuses on the activities undertaken strategy implementation; how these are likely to contribute to the outputs, and establish whether it is likely that the planned outcomes will be achieved. A wide range of methods were used for this process, including quantitative and qualitative data. Some of the tools utilized in the evaluation include:

- Document review, e.g. of plans and monitoring reports, policies etc;
- Review of monitoring data, its availability and quality;
- Desktop international benchmarking study;
- Quantitative survey of extent to which services are being received by users, and quality of the services;
- Interviews/workshops with service users, service managers, other stakeholders;
- Using participatory tools with service users (focus groups and direct observation etc.)

The evaluation questions defined which methodology needs to be used. The methodology needed to look at how implementation is happening, where and for whom, and also which elements of the strategy are working or not working.

The evaluation of the BDM Communication Strategy was conducted using the Dialogical Model of Communication to analyse the impact and effectiveness of the communications deployed. The Dialogical Model of Communication is the theoretical framework that is used to determine what, when, and how communication was observed and acted upon. It is the foundation from which the

interpretations of the findings were made. The review effort is directed on key focus areas of the Dialogical Model of Communication, consisting 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 focuses on the monitoring and evaluation of the continuous communication and the impact and the reemphasis of the messages. The Dialogical Model of Communication framework was also followed with regards to the literature review, international benchmarking, field work data gathering, interviews and meetings with key stakeholders/focus groups.

The methodology adopted, displays a clear and systematic process of how the project goals were realised, and the steps that will be taken to reach them. The methodology deployed is not a new and an infant in developmental stage, but is well proven and highly effective, with an exceptional good track record in projects implementations. It involves various stages of study including desktop study primary research, including quantitative and qualitative analysis.

Literature Review

The literature review consists of a study and analysed all key relevant documents towards the implementation of the BDM Communication Strategy in order to gain in-depth understanding of the available processes and procedures, pertinent to the deployment of the strategy.

International Benchmarking

Important lessons can be learned on how other countries or regions are conducting these important campaigns and thus assess their impact. The literature surveyed covered a desktop international benchmarking study of three selected countries, namely, Rwanda, Tanzania and the United Kingdom. The rationale for adopting this approach, was to learn from other countries' experiences in order to ensure that the campaign strategies implemented are attractive and appealing, and able to achieve high impact.

Primary Research

The primary research was intended to provide the necessary insight into the impact of the campaigns conducted by the DoC. It provided insights into the extent of the role that was played by the key focus groups in the public awareness campaigns. It also assessed the extent to which the specific population in these municipalities were aware and understood the BDM and its benefits. It was further seeking to systematically observe and accurately record the understanding of the BDM and the challenges experienced during and after the campaigns.

The primary research comprises of data gathering using questionnaires and 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 were selected by DoC, and they are some of the municipalities in which the BDM Communication Campaigns were conducted by the DoC over a 2 year period, between 2015 and 2017. Target respondents included key grass root personnel who were responsible for the

campaigns, Post Office personnel who were responsible for registering and distributing the set top boxes (STBs), beneficiaries of the free government STBs, and the public. The report therefore reflects the sentiments and opinions of the more than 295 respondents who participated.

Data Collection Instruments

Data Collection Instruments (questionnaires) design were based on two main objectives and these are: (1) to maximise the proportion of respondents answering the questionnaire—that is, the response rate, and (2) to obtain accurate relevant information for the study. To maximise the response rate, careful consideration had to be given on how the questionnaires were administered, established rapport, explained the purpose of the survey, and reminded those who have not responded. Questionnaires were carefully designed to yield the required information. Meticulous attention was given to ensure that individual questions were relevant, appropriate, intelligible, precise, and unbiased.

The data gathering process commenced by undertaking a desktop research, by analyzing documents, policies, emails and conducting telephone interviews. This was followed by primary research in the selected 5 District Municipalities within the two identified provinces. The following data gathering techniques were used:

- **Questionnaires and Surveys:** Selected targeted stakeholders and audience were interviewed in order to identify their BDM awareness levels;
- **Focus Groups:** Focus group data gathering was conducted during the visits; and
- **Documents and Records:** Relevant documentations and records on the BDM Communication Strategy were acquired, studied and analysed.

Data Analysis

During data analyses process, researchers engaged in a process of inspecting, cleaning, transforming, and modelling data with the goal of discovering useful information, suggesting conclusions, and supporting decision-making. 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.

Stakeholders Interviews

The BDM project is an involving process that has an impact on various stakeholders including consumers, policymakers, regulators, and industry players. The purpose of undertaking stakeholder interviews was to gather fresh insights into the BDM Communications Campaign from the stakeholders' perspective. In accordance with the Terms of Reference (ToR), interviews with key stakeholders such as the South Africa Broadcasting Corporation (SABC), SENTECH, Universal Service and Access Agency of South Africa (USAASA) and the South African Post Office (SAPO) were conducted.

Ethical Considerations

The highest ethical standards were upheld when collecting data. To this end, Pan Africa TMT committed itself to be guided by and was seeking to comply with the Human and Scientific Research Council's Code of Research Ethics in gathering, processing and disseminating information in relation with this evaluation research project. The Pan Africa TMT exercised due care when it interacted with participants and interviewees, and conducted this research in accordance with the Values Statement as well as principles of Respect and Protection, Transparency, Scientific and Academic Professionalism and Accountability in relation with the Participants of the research project.

The Evaluation of the BDM Communication Strategy and Consumer Support falls under the Human Subject Research category in that it involves research that obtains:

- Data through human intervention or interaction with the individual
- Identifiable private information

Secondly, the research study constitutes minimal or no risk at all for the intended participants. The sole objective was to outline their personal experience of the usefulness of the BDM Communication Strategy, Public Awareness and Consumer Support campaign in their areas.

Limitation of the Evaluation

All research methodologies have their own intrinsic limitations, impacted upon 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 BDM Communication Strategy campaign. The research was limited to the scope of work as presented in the Terms of Reference.

5. Key Evaluation Findings

The process of the implementation evaluation was very important, as it built understanding amongst stakeholders on why a problem was occurring and committed to changes towards the intervention in order to maximise the likelihood of the impact. At the end of the evaluation some decisions are needed. These are:

- Does the intervention look like it is on course towards achieving its outcomes – if not what needs to be done?
- How should implementation be strengthened?

Literature Review

The main shortcomings of the BDM Communication Strategy were that, it was informed by various Communication Plans that were articulated at a high level, through PowerPoint presentations, and therefore, did not provide detailed outlines of their requirements. As a result, the strategy lacked depth and details on what, how and when the tasks needed to be undertaken. In addition, in all the

various communication plans, the key messages are not explicitly spelled out. Many of the bulleted key messages explained the process of what needed to happen, as opposed to outlining the key messages themselves.

The Communications Plans are not informed by a Logical Framework that already outlined the Strategic Objectives, Outcomes, Outputs, Activities and Resources. Neither are there messages that speak to job creation. It therefore became apparent, that the various communication plans needed to be consolidated into a comprehensive Communication Strategy, informed by a Theory of Change and LogFrame and that they should all be aligned to the Annual Performance Plan for the BDM project.

In spite of the shortcomings, there is a lot that the fragmented communication plans have been able to achieve, in terms of implementing the Public Awareness and Consumer Support Campaign. The data suggests that there was great effort and planning that went into the Ministerial Imbizos and the Door-To-Door campaigns. And there has been a significant impact of these campaigns, through personal and community engagements also across the various provinces and across the country.

International Benchmark

Seemingly, Tanzania seems to have followed a multi-stakeholder public awareness campaign approach that was championed at the highest level – by the President, also with the use of catchy jingles and songs (both audio and visual). This provided the highest level of exposure, thereby ensuring buy-in and support by other Government administrative organs, in both central and local governments. Participation of all stakeholders from planning to implementation was also found to be critical. Also, just as important, and was identified in all the other countries, there was a concerted / aggressive public awareness campaigning during the individual phases of each rollout.

In the United Kingdom, Digital UK brought on board a myriad of relevant stakeholders to ensure that 'no one was left behind'. There were also learnings drawn, that in certain areas, there were vast differences between the levels of awareness and understanding in terms of the dates of switchover and what was expected of the viewers during the migration process. One of the common threads between the United Kingdom and Tanzania was the constant engagement with their respective consumer bodies. The United Kingdom's consultation with Consumer Expert Group (CEG) on communication plans ensured that the messages were clear and accessible, and that alternative formats were available were appropriate. In Tanzania, the Consumer Consultative Council also engaged and provided support for active participation and feedback mobilization.

Rwanda explicitly defined clear roles and responsibilities for the varied government stakeholders, namely STB vendors, broadcasters and the public. The intention was to create effective educational awareness campaigns. Rwanda also adopted an identification process where audiences were profiled according to categories, this approach was adopted in order to ensure that the outreach campaign was effective. Lessons were also learnt from the initial failure to switch off in 2013, owing to the prohibitive cost of Set Top Boxes (STBs), lack of customer support as there were not enough trained technicians, and there was also a lack of adequate content.

Quantitative Research Findings

The literature suggests that the BDM Communication Strategy has been relatively successful in creating awareness of the Broadcasting Digital Migration Process and the evaluation findings clearly show meaningful awareness levels in areas assessed.

The literature further suggests that SACB radio and television platforms were the most successful in creating the campaign awareness and was followed by the Door-To-Door campaigns and the Ministerial Imbizos. The study also found that there was a limited use of community and local media platforms. There is however, a need to mobilise local and community media, and for the GCIS to commit some ad-spend to local media houses during the BDM Communication Strategy and public awareness projects. In addition, there was a limited reach of Go Digital leaflets, either through limited distribution or limited usage of local languages. The research revealed that there was limited use of Afrikaans as a language, also bearing in mind that Afrikaans is a dominant language used across the Northern Cape. Seemingly, the leaflets and posters that were distributed to the communities were also not translated into Afrikaans.

It was also found out that SAPO played an important role in providing consumer support during the STB registration process, by rendering application assistance to beneficiaries. It was also found that the SABC played a crucial role in supporting the Ministerial Imbizos, by providing sizeable resources operationally and content wise.

Focus Group Interviews – Qualitative Research Findings

Leadership instability within the DoC has been identified as one of the critical handicaps towards the successful implementation of the BDM project. Changes in leadership often entail a review of existing programmes and projects, the adoption of different approaches and frameworks. The downside of these frequent changes in leadership, is the impact they have had on team morale and also the slowdown of the momentum of the project roll out.

In addition, the BDM project has been negatively affected by the various court cases pertaining to the encryption or non-encryption of STBs. These court disputes have dampened and have slowed down the momentum of the project rollout, thus casting doubt in the eyes of South Africans of the BDM project ever reaching its completion.

The BDM Task Team that was established, drew its membership from both portfolio organisation of the DoC, namely, the SABC and the Independent Communications Authority of South Africa (ICASA) and portfolio organisations of the Department of Telecommunications and Postal Services (DTPS), namely Sentech, SAPO and USAASA. It also need to be affected at the operational level, the Director General of the Department of Communications and the Chief Executive Officers of the all the entities need to meet more frequently than their principals in order to implement the decisions taken at the strategic level by the Minister and the entity's Chairpersons.

Findings Against the Key Evaluation Questions

The evaluation was guided by the Key Evaluation Questions (KEQs) set out in the ToR which informed the evaluation and outlined how the evaluation was conducted.

1. **Is the Strategy implemented as planned? If not, why?**

   Implementation of strategy varies from area to area. In some areas such as Keimoes in Northern Cape, implementation was done very well, and was able to reach high awareness levels. However, in other areas, the implementation needed more planning and improvements.

2. **What are the best practice models that can be replicated nationally?**

   Various lessons learned from international benchmarking study, were identified. These can be applied to South Africa's environment in order to improve the impact of communications/awareness.

   2.1 **What are the most effective activities of the campaigns?**

   Campaigns which are well coordinated, involving multi-stakeholders and community leadership were found to be most effective.

3. **What are the challenges experienced during implementation?**

   Various challenges were identified during the evaluation of the study, some of which are:
   - The strategy document lacked depth and detail, hence, it proved difficult to implement;
   - Lack of consistent implementation of the strategy; and
   - Lack of language sensitivity in some areas was observed.

4. **Is there evidence that the targeted beneficiaries were reached? If not, why?**

   Yes; awareness level in most areas were satisfactory, however, in some areas, there was still a room for improvement.

   4.1 **What are the level of awareness of DTT resulting from the campaigns conducted?**

   Mixed awareness levels were observed. In some of the areas the awareness levels were high, but in some area the awareness levels were low. This shows inconsistencies of how the strategy was implemented.

5. **How cost effective were the components of the strategy (basic analysis)?**

   SABC radio and television have been identified as being the most cost-effective media platforms with the highest reach. The Door to Door campaigns and Ministerial Imbizos also had a good reach, but are deemed not as cost effective as the use of SABC radio and television platforms.

6. **To what extent do the institutional arrangements support the performance of the strategy, with specific reference to coordination, administration and management arrangements?**

   The study found institutional arrangements to be the most critical part of the campaign, which determines the success of the strategy implementation.

7. **How does the South African Strategy compare with similar strategies of other countries?**

   The current BDM Communication Strategy lacks depth and hence it is difficult to implement consistently and under different environments and circumstances. A

strategy and a campaign review is necessary in order to develop a revised and a detailed comprehensive and coherent BDM Communication Strategy with a measurable implementation plan.

8. **Is the Strategy achieving the relevant goals of the National Development Plan (NDP)? If not, how can it be refined to achieve the relevant goals of the NDP?"**

   YES, it has generally achieved significant levels of Broadcasting Digital Migration awareness, however, there is a room for improvement.

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 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 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.

1 Introduction

In May of 2017 Pan Africa TMT was appointed by the Department of Communications to undertake an evaluation of the Broadcasting Digital Migration Communication Strategy (Public Awareness Campaign and Consumer Support) as part of the Departmental Evaluation Plan of 2017/2018. This evaluation was planned and commissioned by the Department of Communication as an Implementation Evaluation of the BDM Communication Strategy (Public Awareness Campaign and Consumer Support).

2 Background

The Broadcasting Digital Migration revolution is well-underway globally. The transition from analogue to digital terrestrial television broadcasting presents governments, broadcasters, regulators and the general public with immense opportunities and challenges. Digital terrestrial broadcasting provides possibilities for adding new programmes and interactive multimedia services. 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 is also contributing to the efficient use of spectrum through the digital dividend and the release of spectrum for other uses such as wireless broadband communications.

Terrestrial transmission has been the dominant form of delivery for analogue Television (TV) and Radio Broadcasting Services. Broadcasting Digital Migration (BDM) is a process by which broadcasting services offered on analogue networks are transferred to digital based networks over a specific period. The main purpose of the migration process is to ensure that all analogue services will be replicated on the digital networks with the 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.

International Telecommunications Union (ITU) is promoting the transition and has developed frequency plans for digital terrestrial broadcasting for all 3 ITU regions. The Regional Radiocommunication Conference (RRC-06) that was held in 2006 in Geneva developed digital terrestrial broadcasting plan in the frequency bands III (174-230 MHz) and IV/V (470 – 862 MHz) in Region 1 countries being Europe, Africa, Middle East and the Islamic Republic of Iran[1]. 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[2]. Hence, in line with the International Treaty, the Department of Communications is leading South Africa's Broadcasting Digital Migration Process.

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[1] http://www.itu.int/en/ITU-R/terrestrial/fmd/Pages/frequency-plans.aspx
[2] In 2006, the ITU's Regional Radiocommunication Conference (RRC-06) comprising 120 Administrations in Region 1 (except Mongolia) and Iran from Region 3, adopted a treaty Agreement (GE06 Agreement) that includes a frequency Plan for the digital sound and television broadcasting service

The transition to digital broadcasting is a complex process requiring strategic decisions to be made on a great number of political, social, economic and technological issues. A smooth digital broadcasting transition can only be realised through a harmonized and concerted strategy. Therefore, it is necessary to develop a well-defined roadmap covering national strategies and key decisions. All relevant stakeholders in the terrestrial broadcasting industry have an important and crucial role to play that will result in a smooth migration to Digital Terrestrial Television (DTT) Broadcasting. Provision of clear and comprehensive information to all viewers about the process and scheduled switchover dates, with more prominent regional awareness campaigns in the period leading up to the switchover is of critical importance in order to ensure a successful migration process. Consumers need to understand what Analogue Switch-Off (ASO) will mean to them – and what they will need to do before the switch-off. A comprehensive publicity campaign must involve broadcasters, network operators, governments, manufacturers and retailers.

To this end, the Department of Communications (DoC) undertook Broadcasting Digital Migration (BDM) awareness campaigns in selected communities over a period of about 2 years between 2015 and 2017. The primary aim of the campaigns was to promote awareness and benefits of digital migration to the communities. Several campaign activities were successfully coordinated and deployed in various areas around the country. The campaigns were comprehensive, and conducted in different ways, such as Imbizos, rallies, 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. Minister Faith Muthambi, the then Minister of Communication, spearheaded the campaigns, and was personally involved in some Imbizos and other campaign activities. The campaigns were well received by the communities that participated.

Digitalization is the integration or adoption of digital technologies into everyday life by the digitisation of data or process that can be digitised. It is first and foremost a social and business phenomenon that is underpinned by the increasing adoption and use of digital technology for everyday processes and communication. Digitalization is therefore a large-scale social/lifestyle trend that currently permeates society and is not often discussed as a business technology trend. This is the paradox of Digitalization – it is not primarily about technology. At the core of Digitalization is the mass adoption of connected digital technologies and applications by consumers, followed by the adoption from enterprises and governments. Hence, consumer awareness backed by a comprehensive communication strategy is vital for the successful transition into the digital age. The rapid digital adoption also becomes a driver for change, as increased accessibility to connected devices creates a more empowered and a digital savvy population. The BDM is part of the digitisation hype that is seeking to revolutionize digital technologies and to access world. BDM, involves digitisation and transmission of broadcasting signals.

2.1 DTT Migration Ecosystem

The DTT Migration ecosystems includes following 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 need to be carefully considered.

Consumer awareness is central to the BDM process and forms a cross functional component amongst the other areas, clearly indicating that communication of the programme should be consistent throughout the project life cycle, 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).

Of all of the stages on the DTT Migration ecosystem, consumer awareness is the one that is easily or commonly neglected in the beginning of the process, even though it is one of the most important and can dictate the success or failure of the DTT Migration Project.

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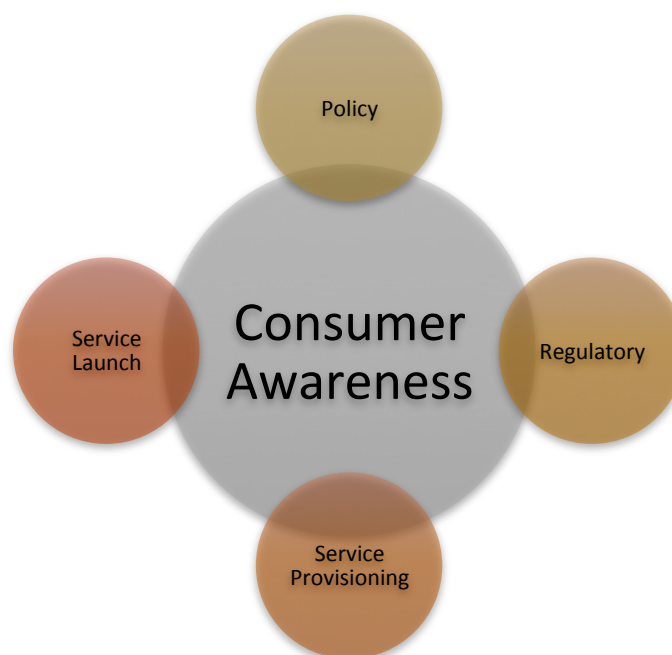
Figure 1: DTT Migration Ecosystem

Source: SADC DTT Inception Report

Therefore, awareness campaigns need to be carefully considered and planned by:

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

2.2 SADC Recommendation to the Republic of South Africa on Consumer Awareness and Campaign Strategy

Consumer Awareness and Campaigns: According to the SADC PMO Mission Report on RSA of 2013, the National DTT PMO team was recommended to draft a comprehensive consumer awareness and campaign strategy. The brief outlined that the strategy should be inclusive of all stakeholders, that the rollout of the strategy should include broadcasters, retailers and other identified key role players. It further recommended that, intensive awareness programme and campaign activation be initiated as soon as possible[3].

2.3 Awareness Campaigns

The digital switch-over is an involving process that impacts on consumers, policymakers, regulators, and industry players. The policymaker and the regulator pursue the switch-over process for various reasons, such as improving the quality and diversity of broadcasting services; promoting the convergence of ICTs and therefore promoting information society; and also deploying efficient technology and consequently attain optimal usage of radio frequency spectrum. Whilst the industry players are looking for new business opportunities, the consumers are looking forward to improved television viewer experience through enhanced, varied and quality programmes. It is critical that the strategy should not only identify tangible outcomes but should also focus on engendering long-term relationships among stakeholders, in order to ensure that effective and efficient migration to digital broadcasting does become a reality.

The DoC has initiated a nation-wide communication campaign called "Go Digital South Africa", to raise mass consumer and public awareness through the campaign of the BDM Programme over a period of three-years, from March 2015 – March 2018.

The Minister of Communications officially launched the public awareness campaign on the 13th of July 2015. The DoC started with the implementation of the Digital Terrestrial Television (DTT) migration awareness campaigns in selected communities over a period of time. The primary aim of the campaigns was to promote awareness and also highlight the benefits of digital migration to the communities. To this end, several activities were successfully coordinated and deployed in various areas around the country.

2.4 Basic Principles of the Communications Strategy and the Implementation of the Consumer Awareness Campaign

Clarity and Simplicity: - to ensure widespread understanding of the stages of the digital migration process and on the actions that each of citizen should form part of the Digital Switch Over (DSO).

Transparency: - to ensure that there is visibility and discussion about all the activities, generate commitment of all the actors, as well as ensuring that messages between the various agents are aligned.

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[3] SADC PMO Mission Report RSA 2013

Multiple Communications Methods: - to ensure that the messages conveyed are appropriate to the intended targets audiences, and ensure accessibility for all; irrespective of their levels of e-literacy, education, age, language etc.

Differentiation: - to ensure that communication actions are taken favouring the use of free and accessible media.

2.5 Purpose of the Evaluation

The Terms of Reference (ToR) succinctly set out the purpose of the evaluation, in order to "determine how effective the BDM Communication strategy has been in raising awareness on South Africa's migration to digital broadcasting. The evaluation was intended to inform the improvements to be undertaken with regards to the public awareness campaign and consumer support based on a comprehensive assessment of its implementation. The evaluation was guided by the Key Evaluation Questions (KEQs) as set out in the ToR, which informed the evaluation and framed how the evaluation was to be conducted:

1. Is the Strategy implemented as planned? If not, why?
2. What are the best practice models that can be replicated nationally?

2.1   What are the most effective activities of the campaigns?

3. What are the challenges experienced during implementation?
4. Is there evidence that the targeted beneficiaries are reached? If not why?

4.1   What is the level of awareness of DTT as a result of the campaigns conducted?

5. How cost effective are the strategy components (basic analysis)?
6. To what extent do the institutional arrangements support the performance of the strategy, with specific reference to coordination, administration and management arrangements?
7. How does the South African Strategy compare with similar strategies of other countries?
8. Is the Strategy achieving the relevant goals of the National Development Plan (NDP)? If not, how can it be refined to achieve the relevant goals of the NDP?"

The objective of the evaluation was to assess the effectiveness of the implementation of the BDM Public Awareness Campaign and Consumer Support Strategy and to explore how it can be enhanced. One of the campaign challenges was the ability to identify the true impact and effectiveness of a given campaign in achieving its set objectives. Different campaigns have different impacts in different communities, and thus may have different levels of successes. Hence, the primary purpose of this research study was to assess the impact of the campaign that had already been undertaken within the various targeted communities, with the aim to improve the effectiveness of future campaigns. It is therefore important to have credible insights in order to understand whether the campaigns performed as expected, better than expected, or worse than expected.

This research study was therefore intended to measure the levels of awareness of the BDM process resulting from the awareness campaigns that have been carried out. To identify the most effective

activities of the campaigns, and later provide recommendation on the way forward. This Research study thus provides in-depth insights into the overall effectiveness of the campaign. It further assists with the understanding of the scale and type of the impact of the various communication systems that have been deployed and the impact they had on the communities that participated. The study is further intended to inform on a wide range of relevant issues and provide insights into environmental impacts and communication systems relevant to the affected communitiesand also, to be aware that the impact and effectiveness of these campaign activities will differ from community to community.

The implementation of the communication strategy and consumer awareness activities is crucial to the smooth transition from analogue to digital reception of services. The issue of consumer awareness has been highlighted as the most critical by various the institutions including ITU, African Union Commission (AUC) and the Southern African Development Community (SADC), as it involves universal access to information by the public. Hence before any switch off of services, the implementing agencies have to ensure that the public will not be negatively affected by the migration (Report on the assessment of the status of AU Member States towards the Digital Terrestrial Television Broadcasting October, 2013:68-70).

2.6 The Scope of the Project

The evaluation of the study covers the implementation of the BDM Communication Strategy and the achievement of its outcomes over a period of 2 years, from April 2015 to March 2017. The evaluation consisted of in-depth analysis undertaken in Northern Cape and Free State, which was conducted across five (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 employed a mixed method by undertaking 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 also carried out. The evaluation therefore included various visits to the provinces, municipalities and agencies.

3   Methodology

Research in common parlance refers to a search for knowledge. The approach adopted in this proposal was designed and crafted to meet and realise all required results and deliverables as clearly stated in the ToR. The research involved both desk-top literature review, followed by an international benchmarking exercise and also primary research.

3.1 Evaluation Framework – the Dialogical Model of Communication

The evaluation of the BDM Communication Strategy was conducted using the Dialogical Model of Communication to analyse the impact and effectiveness of the communications deployed. Dialogic

Communication is a distinct and effective form of communication in contrast with other forms of communications such as "debate", "discussion" or "monologue". The Model provides a useful framework to assess whether the communication efforts are moving towards the expected outcomes. The Dialogical Model of Communication[4] is an effective tool of exploring how effective organizations communicate and interact with the public.
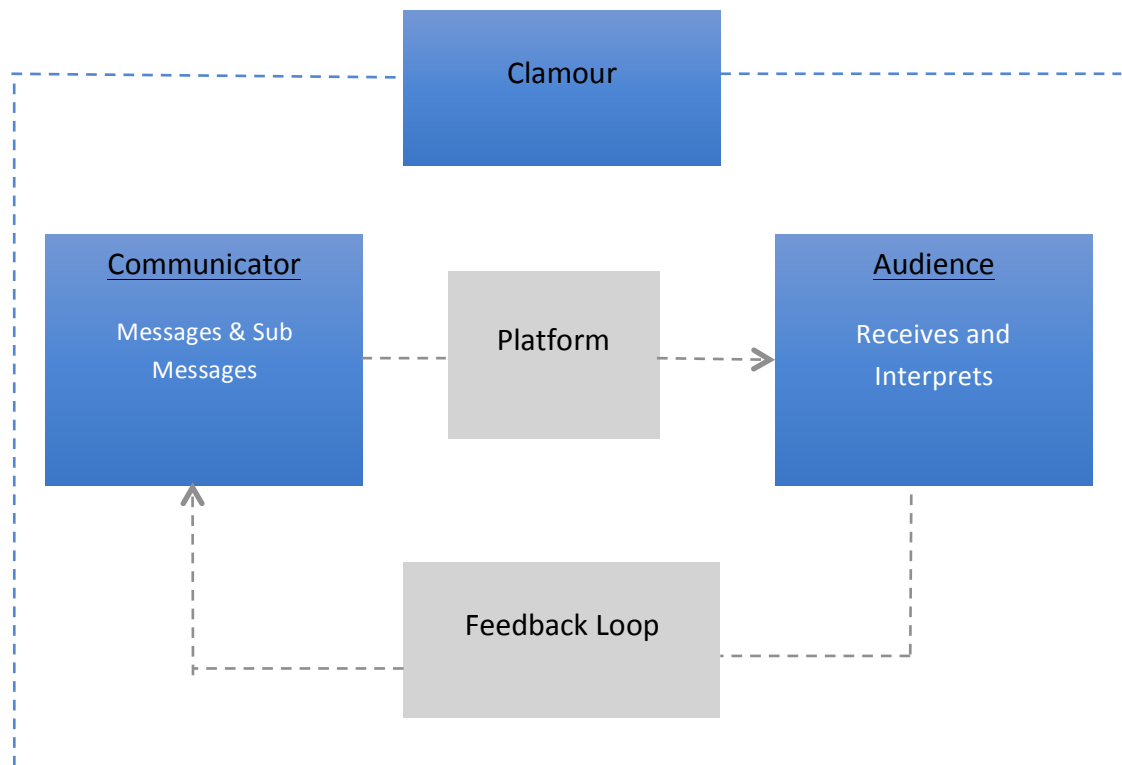
Figure 2: Dialogical Communication Model

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

The review effort was directed on key focus areas of the Dialogical Model of Communication, consisting 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 focuses on the monitoring and evaluation of the continuous communication and the impact and the reemphasis of the messages. The Dialogical Model of Communication was applied in order to determine to what extent the communication engagement dialogues with the public met the strategic expectations and objectives. When applying the Dialogical Communications Model to both the Broadcasting Digital Migration communication reports and the public awareness campaigns, it provided some unique insights into gaps that still exist in the communications campaigns and other activities.

The Dialogical Model of Communication framework was also applied when undertaking the literature review, conducting the international benchmarking study, field work data gathering, interviews and meetings with key stakeholders/focus groups. These stakeholders included the SABC, SAPO, USAASA, and the signal distributor for the South African broadcasting sector, Sentech, as well as STBs beneficiary families and focus groups surveys, including local government officials in the

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[4] http://eprints.qut.edu.au/34323/1/34323.pdf

provinces of Free State (Mangaung, Xhariep and Thabo Mofutsanyane District Municipalities) and Northern Cape (ZF Mgcawu and Pixley ka Seme District Municipalities).

The Dialogical Model of Communication is the theoretical framework guiding the research, and it is therefore used to determine what, when, and how the research was observed and acted upon, since it is the foundation from which the interpretation of the findings was made. Both qualitative and quantitative methods were used in the form of face to face interviews, as well as questionnaires. This approach was adopted in order to allow individuals' views and experiences to be explored in detail.

3.2 Literature Review

The primary objective of conducting the literature review was to understand and also analyse all the key and relevant documents involved in the rollout and implementation of the BDM Communication Strategy. This was done in order to gain in-depth understanding of the available processes and procedures, pertinent and applicable to the campaigns. The review was also intended to identify and analyse the impact of the strategic actions that were undertaken in the past.

The review was also used to establish a theoretical framework for the research, to ascertain key fundamentals and to provide a context for the evaluation of the BDM communication strategy. It was also carried out to in order identify and analyse the strategic actions of the campaign that were conducted in the past and their respective outcomes. The review will also assist in facilitating future advancements in the BDM communications processes, by identifying past failures and achievements, and make proposals on improved ways of implementing the strategy. It will also assist to identify areas which require further attention and focus, in order to improve the impact of the overall communication of the programme

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 are outlined and articulated as follows in the DoCs' official documents:

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

These documents formed a central component of the review. The analyses were done based on the Dialogical Communication Model, assessing how well all aspects of the communication were implemented.

3.3 International Benchmarking

The international benchmarking approach was adopted based on the countries that were selected and that have completed the BDM process. The objective was to analyse countries with high-performing communication processes. And also, to identify ways to improve the South African processes based on the findings and lessons learnt from other nations and lastly, to provide guidance for the critical and informed decisions to be made, when mapping the way forward.

The basic idea behind benchmarking study was to:

- Find countries that have successfully implemented the digital migration process and utilizing effective communication strategies;
- Study how such results were achieved;
- Identify plans for improving the BDM communications performance; and
- Implement the plans, and thereafter monitor and evaluate the results.

The purpose for reviewing South Africa's BDM communication strategy, was to evaluate how the implementation fared comparatively with other identified communication's strategies internationally. Although the findings were relevant and clear, it might be more complex and challenging to put them into practice.

Best practices also have to be evaluated and adjusted to the needs of the country, and only relevant activities, be recommended and adapted to the specific environment.

Three countries were identified for the purpose of this international benchmarking exercise. All three of these countries have undergone their varied and respective digital migration processes (initial, middle and completion period), that could prove helpful when evaluating South Africa's BDM communications strategy. The review focused on the following identified countries.

- Tanzania
- Rwanda
- United Kingdom

When selecting the countries, different variables were considered, which included economic development, literacy, access to traditional and modern media platforms, television penetration and the geographic dispersion amongst other factors. The criteria was informed by amongst others, the use of various SADC reports, focusing on digital migration awareness and other International Telecommunications Union (ITU) literature on digital migration statuses.

3.4 Primary Research

The primary research was intended to provide the necessary insights into the impact of the campaigns that were conducted by the DoC, and the role that was played by the key stakeholder groups. Also, to ascertain the levels of awareness and understanding of the BDM and its benefits, by the specific population in these municipalities. The research was further seeking to systematically

observe and accurately record the understanding of BDM and challenges experienced during and after the campaigns. Target respondents included key grass root personnel who were responsible for the campaigns, Post Office personnel who were responsible for registering and distributing the STBs, beneficiaries of the free government STBs, and the general public. 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 research methods. The aim of qualitative research is to define and describe the range of emerging issues and explore their linkages, rather than to measure their extent. Quantitative research was applied by evaluating the impact of the campaign and the public's understanding of the process. In order to gain the views and insights, the research used in-depth interviewing techniques and conducted focus group discussions. The respondents were purposefully sampled to reflect the wide range of participants that took part the campaigns.

3.4.2 Data Collection Instruments

Data Collection Instruments (questionnaires) design was based on two main objectives, and these are: (1) to maximise the proportion of respondents answering the questionnaire—that is, the response rate, and (2) to obtain accurate relevant information for the study. In order to maximise the response rate, careful consideration was given on how the questionnaires were administered, established rapport, explained the purpose of the survey, and served as a reminder to those who had not responded. The questionnaires were carefully designed in order to produce valid information. Meticulous attention was given to ensure that individual questions were relevant, appropriate, intelligible, precise, and unbiased. The order of the questions was carefully arranged, and the layouts of the questionnaire were clearly done. Questionnaires were first evaluated, prior to the actual survey being conducted. The lengths of the questionnaires were kept at appropriate lengths, in order to obtain accurate and relevant information from the respondents. The steering committee was consulted and also provided valuable inputs on what questions should be asked, how they should be asked, the order in which for them to be asked, and the general layout of the questionnaire.

A pilot study was further conducted in order to assess the effectiveness of the questions that were going to be asked and also tried to identify any possible ambiguities. The results of the pilot study were used to try and improve the questions that had already been designed. The final questionnaires were later submitted for review and approval by the Steering Committee.

3.4.3 Data Gathering

The data gathering process that was undertaken, commenced with the desktop research, by reviewing documents, policies, emails and transcripts of the telephone interviews. This was followed by primary research in the selected 5 District Municipalities within the two identified provinces. The following data gathering techniques were used on this project:

- **Questionnaires and Surveys:** Selected targeted stakeholders and audiences were interviewed in order to identify/understand their awareness levels of BDM processes;
- **Documents and Records:** Relevant documentations and records on BDM awareness campaign were acquired, studied and analysed;
- **Focus Groups:** During the visit, a focus group data gathering was conducted; and

The Focus Group Surveys covered the following:

- In-Depth Recorded Interviews with Municipal Councillor/Manager/Mayor, explaining the involvement of the Municipality in the BDM Public Awareness and Consumer campaign;
- In-Depth Recorded Interviews with SAPO Branch Managers to explain the Post Office involvement in the BDM Public Awareness and Consumer Support (STB Registration) campaign; and
- In-Depth Recorded Interviews with beneficiaries, to gather insights about their levels of understanding about BDM Public Awareness and Consumer Support (STB Registration Assistance).

3.4.3 Data Analysis

During the analysis of the data, the researchers engaged in a process of inspecting, cleaning, transforming, and modelling data. The end goal was to unearth useful information, suggested conclusions, and supporting decision-making. The data obtained was then processed or organized for analysis. Once processed and organized, the data which was incomplete, contained duplicates, or errors was identified. The data cleaning process then ensued 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 also 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. There were several limitations to the evaluation, one of which was on the benchmarking exercise that was undertaken. The international benchmarking study concentrated solely on the public awareness campaign and support, as no similar literature was provided nor available in the South African literature reviewed.

Both Qualitative and Quantitative research methods were employed for the study, namely:

- Literature Review;
- Recorded Focus Group Interviews;
- In-depth interviews with STB beneficiaries; and
- Structured Questionnaire

3.5.1 Literature Review

The Literature Review for the Digital Migration Public Awareness and Consumer Support campaign comprised of the following documents reviewed and were categorized as follows:

- Department of Communications MTSF 2015/16 – 2019/20;
- Department of Communications Annual Performance Plan 2016/17 & 2017/18;
- Communication Strategy frameworks;
- DoC Annual Reports;
- Marketing material such as Booklets, Leaflets and flyers;
- Website for Digital Migration;
- Website for South Africa Online; and
- Digital Migration Imbizo Reports

For purposes of the literature review, the DoC made available the majority of these documents. And as such these documents were adequate enough for outlining the Purpose and Objectives of the Digital Migration Public Awareness and Consumer campaign; messages that were communicated to audiences and the media platforms used to reach specific audiences.

However, the project's communication strategy frameworks were lacking in detail. The majority of the documents provided were presented in Microsoft PowerPoint presentations, only outlining high-level Communication and Media Plans to guide the Public Awareness and Consumer campaign – and as a result, the rationale and in-depth of details were not adequately reflected.

In addition, the Communication Strategy frameworks were not informed by a Theory of Change or Logical Framework, stipulating the Outcomes, Outputs, Activities and Inputs with the requisite Indicators for each; to enable a concise measurement of the implementation of these frameworks as well as the evaluation thereof.

3.5.2 Recorded Focus Group Interviews

Recorded and structured interviews were conducted with the representatives of various portfolio organisations and partner agencies of the DoC that were working on the BDM project. These included the SABC, SAPO, Sentech and USAASA.

The focus group interviews conducted were segmented as follows:

- Strategic level with Head Office officials to determined their role and input in the development of the overall and joint Public Awareness and Consumer campaign; and to establish if these portfolio organisations developed their own separate public awareness campaigns. Four Focus group interviews were conducted with the SAPO team of three; the Sentech team of three, the SABC team of seven and the USAASA Chief Executive Officer;
- Nine In-depth interviews were conducted at Operational level, with regional officials to determine the role and input of portfolio organisations in the implementation of the public awareness and consumer campaign during the Ministerial Imbizos and the Door-To-Door

campaigns. Two interviews were conducted in the Free State, one with the SABC Regional Communications manager, and the other with the GCIS Provincial Liaison Manager

Other in-depth interviews were conducted with three SAPO branch managers in the Northern Cape and four SAPO branch managers in the Free State;

- Three interviews were conducted with representatives of community radio stations and newspapers in the Free State (Mangaung and Botshabelo); and
- A total of 10 Recorded and Structured in-depth interviews were conducted with Ward Councillors in Northern Cape and the Free State, to establish the involvement of the local municipalities in the BDM Public Awareness and Consumer Support campaign. Interviews were also conducted with Keimoes (Ward Councillor), Groblershoop (Executive Mayor), and Carnarvon (Corporate Affairs Executive and Ward Councillor).

Structured questions were used for this purpose, and the responses are attached as an annexure 2. Field trips to the Northern Cape were carried out over four days, and those to the Free State, over five days.

A random selection of Wards and Councillors for the in-depth interviews was carried out. These were also based on the availability of the Councillors on the day the interviews. Because these Ward and Councillors were directly involved with the campaigns, their views and opinions can reasonably be assumed to be those of the representatives in the given municipalities - regarding the success of the Digital Migration Public Awareness and Consumer Support Campaign.

3.5.3 In-depth interviews with STB Beneficiaries

A total 31 in-depth interviews were further conducted with the beneficiaries of the STBs in the Northern Cape (17) in Keimoes; Groblershoop and Carnarvon) and the Free State (14) in Edenburg, Ficksburg, and Ladybrand as per the specifications of the Evaluation of the Broadcasting Digital Migration Public Awareness and Consumer Campaign's ToR.

The STB beneficiaries were selected randomly from a 2 kilometre radius in a neighbourhood. The councillors delegated development workers and volunteers, to accompany and introduce the research team to these television households. The population sampled is therefore not representative of the individual neighbourhood's perceptions and opinions pertaining to the success of the Digital Migration Public Awareness and Consumer Support Campaign, - but rather a dip-stick approach, to determine whether sufficient financial resources were made available and that adequate time was allocated, in order to ensure that the research team was not presented with resource constrains.

The duration of these interviews varied from 30 – 45 minutes. The purpose of in-depth interviews with STB beneficiaries was meant to establish the following:

- The media platforms which informed them about the digital migration project and the STB registration process;

- The impact of the STBs on their television viewing experience;
- The most effective media platform for disseminating information about digital migration and the STB Registration process; and
- Reasons for delays in registering for STBs

3.5.4 Structured Questionnaire/Survey

The third research methodology used for the BDM Digital Migration Public Awareness and Consumer Support was the Structured Questionnaire/Survey. A marketing company was outsourced and briefed to develop a list of questions for the Questionnaire, in order to establish general public awareness about digital migration in the selected Wards of Keimoes, Groblershoop and Carnarvon in the Northern Cape, and in Botshabelo and Thaba Nchu in the Free State.

The municipal Councillors who provided community development workers and volunteers, who were required to assist with the in-depth interviews with STB beneficiaries, were also requested to provide two field workers to conduct Questionnaire interviews in their respective neighbourhoods.

The Questionnaire consisted of 37 Questions that related to the following, the:

- Demographic profile of respondent;
- Educational level of respondents;
- Source of news and information;
- General Awareness;
- Specific Awareness about Digital Migration;
- Perceptions of community awareness about digital migration; and
- National, Regional or Local Media coverage about digital migration

The field workers were first work-shopped by the research team, by taking them through all the questions that were asked in the Questionnaire. These field workers were selected from a group of volunteer youths who were a part of the Door-To-Door campaigns that were conducted in their respective areas at the time of the Ministerial Imbizos.

On the realisation that the list of questions on the Questionnaire were rather long, the research team chose and advised the field workers to conduct the interviews in select television households as opposed to conducting these outside shopping malls and other public amenities. The 30-minutes that was required to answer the Questionnaire, became rather too long to engage potential respondents who were coming out of shops or other public amenities. Some interviews were conducted in clinics with respondents – who were able to do so – who were seated in queues whilst waiting for medical attention. A total of 320 Questionnaires were completed, with the remaining 30 as spoilt papers or not filled at all.

The Questionnaire is attached as an annexure 2, the findings and analysis of the responses from the select areas of the sample have also been captured.

The number of Questionnaire was limited per sampled area of 50 – 100 Questionnaires per municipality. The responses provided were only indicative of the sample size, as opposed to the level of awareness by representatives about digital migration in those neighbourhoods.

3.6 Overall Methodology Approach

A carefully crafted and designed project methodology, that was cost-effective, that would not compromise the quality of the results and that was able to achieve the project objectives as described in the ToR was adopted. The methodology employed, displayed a clear and systematic process of how the project goals would be realised, and the suggested steps that will be taken in order to reach them.

4 Theory of Change and LogFrame

4.1 Introduction

A theory of change can be a helpful tool for developing solutions to complex social problems. At its most basic, a theory of change explains how a group of early and intermediate accomplishments sets the stage for producing long-range results. A more complete theory of change articulates the assumptions about the process through which change will occur, and specifies the ways in which all of the required early and intermediate outcomes related to achieving the desired long-term change will be brought about and documented as they occur. Theory of change requires stakeholders to be precise about the type of changes they want to achieve. It is essentially an explanation of how a group of stakeholders expects to reach a commonly understood long-term goal. A Theory of Change helps avoid implementing a mistake (A. Anderson,

The Core Elements of a Theory of Change:

- How long will it take to reach my long-term goal?
- Do we have the resources we need to implement this intervention?
- Are these really the only required outcomes to reach the long-term goal?
- Is the planned intervention enough to achieve the goal?
- Are there conditions outside our control that will impact our ability to produce these preconditions?
- Can we get real community-level change toward this outcome?

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. In line with the International Treaty the Department of Communications is coordinating South Africa's migration from analogue to digital broadcasting services. Digital Broadcasting Migration is a process by which broadcasting services offered on analogue networks are transferred to digital based networks over a specific period. The main purpose of the migration process is to ensure that all analogue services will be replicated on the digital networks with the aim to switch-off the analogue services at a specific point in time.

The Public Awareness and consumer education is a fundamental component of the Broadcasting Digital Migration (BDM) programme. This component is sought to inform the general public and educate them about the programme, implementation process and its benefits. The Department of Communications has initiated a nation-wide communication campaign "Go Digital South Africa" to raise mass consumer and public awareness campaign of the Broadcasting Digital Migration (BDM) Programme. The purpose of this communication strategy is to provide a broad macro-strategy to guide the Broadcasting Digital Migration Programme's public awareness campaign over a period of three-years from March 2015 – March 2018.

4.2 Key communications methods

4.2.1   Key messages

The messages given need to reflect the changing nature of migration from analogue to digital. Broad messages have therefore been developed for each of the stages of migration. The concept of communication can be defined as a process enabling the provision and exchange of information and instruction in order to enable the organisation to function effectively.

Best practice suggests that communication is clear and concise, is a two way process, is regular and systematic, is relevant and timely and mostly chains should be kept as short as possible

Broad messages have been identified as: Broad Government Message "Together we move South Africa forward"

Overarching Messages:

- South Africans migrate from the analogue to digital television.
- Government 100 % subsidy of STBs for the poor television owning households.
- Job creation through broadcasting digital migration
- Bridging the digital divide and Universal access

Sub Messages

- Promoting local content
- Government prioritizing the poorest of the poor
- Transforming the television spectrum
- Government Industry Partnership
- Creating young entrepreneurs to be creative and find innovative solution
- Free multi TV channels

4.2.2   Messengers

4.2.2.1 Primary Messengers:
- Minister, Deputy Minister and the Executive
- Digital Migration Programme Manager
- Project Team Stream Leads (Communication, Technical, Policy etc)
- Staff

4.2.2.2 Secondary Messengers:
- Partner Entities (SOC's)
- Relevant National, Provincial and Local Government Entities
- Broadcasters
- Retail Stores
- Volunteers
- And other relevant stakeholders

4.2.3 Target Audiences

Communication is a key component in the successful delivery of BDM, services, and the information shared should be timely, appropriate and received by the intended audience.

13 million TV owning households; TV owners in sectors (business; education; hospitality industry, schools, tertiary institutions, hospitals); prospective TV owners; Municipalities; manufacturers; retailers; broadcasting and ICT sector; organised labour; NGOs; civil society organisations; media; co-operatives; churches; stockvels & other community groups; Houses of traditional leaders, SCOs & CDWs

4.2.4 Platforms

- Advertisements (Electronic, Radio/Print/Television)
- Community Media (Electronic Radio/Print/Television)
- Social Media Networks (Instagram, Facebook and Twitter Page #DTT)
- Government publications
- Outdoor advertisements
- Outreach Programmes
- Digital Migration SA Website (www.digitalmigrationsa.co.za)

4.3 Theory of Change for BDM

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 causal relation of how Activities and Outputs will result in anticipated Outcomes and Impacts, and the assumptions involved. There can be multiple TOCs that describe a programme, how the intervention works in different contexts or at different stages of the intervention or even for different intended impacts.

A TOC can help identify which impacts are likely to be achieved during the timeline of an evaluation; identify resources required (human, financial, agencies) {DPME 2014:7}.

4.3.1   Key Identified Theory of Change Items

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 to inform the South African public, in totality, about the social and economic benefits of digital migration through:

- Increased choice in information and entertainment provide by multiple terrestrial television channels thereby strengthening social cohesion and nation building
- Digital Dividend – the release of much needed radio frequency spectrum that can be allocated for the provision of broadband to boost the country's economic growth

TOC 2: Digital Migration Communication Strategy is necessary to inform indigent television households of the urgency to register for the provision of free government supplied Set Top Boxes, in relation to:

- The required procedures and documentation for the application of 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 to ensure:

- Readiness of all South Africans, institutions, organisations, business entities, corporations, non-governmental organisation, community organisations on the specific date that affects them
- Seamless transition, and migration of the country from analogue to a digital platform

4.3.2   Problem Tree

A Problem Tree seek to identify Core Problem, Causes, Effects and Consequences. The Problem Tree for Digital Migration Communication Strategy is 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, and the country's official languages cannot be utilised as media platforms for achieving social cohesion and nation building.

Effects: Limited Choice in Terrestrial Television
Limited Use of Official Languages for Television
Limited Content Diversity (Information/Education/Entertainment) in Television
Limited Radio Frequency Spectrum Allocated for Broadband

Core Problem: Limited Terrestrial Television Capacity/Channels
Inefficient Radio Spectrum Allocation & Usage

Causes: Allocated Radio Frequency Spectrum for Analogue Television
Inefficient and Antique Analogue Television Technology

Assumptions for the implementation of the BDM Communication Plan

- The communication activities are based on the following assumptions:
- There is a pre-agreed way in which the indigent households can register.
- There are connections between the agencies coordinating BDM implementation.
- There are good relationships between government/agencies and the media.
- Management tools (resources) have been developed as part of the project to assist agencies

4.4 Logframe Process Flow

4.4.1 Problem Statement

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

4.4.2 Scale of the problem

To inform all South Africans households about the importance of migrating to a digital television platform that will:

- Provide information diversity and choice through multiple digital television channels;
- Enhance social cohesion and nation building by promoting the use of all official languages through the multiple digital television channels; and
- Promote economic development through the release of the much needed radio frequency spectrum to be used for broadband (Digital Dividend)
- Inform the 5 million indigent television households to register for free Set Top Boxes that will enable them to access multiple digital television channels

Is this understanding applicable to digital migration communication issues across all provinces?

The Digital Migration Communications plan's problem statement covers all pertinent issues related to the social and economic benefits of digital migration, and the consumer support to be provided to all television households. This understanding applies across all provinces.

4.5 Overall Goal

All South African are educated and informed about digital migration; including it's the benefits and of digital migration, its significance to the country.

To create awareness, educate and inform South Africans about digital migration; including its benefits and significance to the country.

The objectives of the BDM Communication Strategy

- To create awareness, educate and inform South Africans about digital migration.
- To inform South Africans about the benefits of digital migration.
- To educate South Africans about the dual illumination process (performance period) and the implications thereof.
- To encourage South Africans to acquire broadcasting reception devices (STBs/antennas) before analogue switch off (ASO).

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 5 million indigent television households, and of STBs purchased off-shelf. Consensus understanding of the impact of the Digital Migration Strategy:

Digital Migration Communication Strategy prepares all South Africans, and all television households that by December 2018:

- the 5 million indigent television households are connected to multiple terrestrial television channels through the allocated free STBs
- the remaining 8 million television households are connected to multiple terrestrial television channels, even if they have other options such as pay-television
- the country is ready for Analogue Switch-Over, into a digital terrestrial television platform, and the requisite RF spectrum is released for broadband

Purpose of the Digital Migration Communication Strategy:

To inform and educate all South Africans about the importance of digital migration and benefits to the country and its economy, analogue switch-over and for the 5 million indigent households to register and receive free Set To Boxes.

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

- Inform and persuade all South Africans to embrace digital terrestrial television by purchasing the necessary digital decoders and Set Top Boxes
- Inform and assist indigent television households in applying and registering for free government-supplied STBs
- Inform all South Africans about the Analogue Switch-Over timelines

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

4.6 Outcome Statement

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 supplementaty 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 Statement

4.7 Log Frame

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	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

			events	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

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5 Literature Review and International Benchmarking Study

5.1 Introduction

The purpose of this section of the report is two folds: 1) to present the literature review which analysed relevant documents and policies, by highlighting successes and gaps, asking questions that need to be answered for the improvement of the implementation of the BDM communication strategy. And 2) to present the findings of the international benchmark study and to coordinate international comparative analysis. The analysis of the BDM's Public Awareness and Consumer Support, seeks to explain the planning and implementation of a wide range of communication and marketing activities that the DoC has embarked on between the periods of 2015/16 and 2016/17 financial years.

The analysis of the BDM Public Awareness and Consumer Support campaign commenced with a detailed review of the relevant literature, outlining the Objectives and Purposes of the campaign, as well as the Intentions, Plans and the Resources allocated, as outlined in the official documentation generated by the DoC.

5.1.1 History of Broadcasting in South Africa

As a prelude to the Broadcasting Digital Migration Public Awareness and Consumer Support campaign, it is imperative that a historical background to South Africa's broadcasting and television industry be presented, and also the digital migration project. Broadcasting services in South Africa can be traced back to the first broadcast that was first transmitted on the evening of July 01 1924 to a Johannesburg - based radio station. The first of these regular broadcasts was a culmination of a series of endless experiments, two decades before, first in the Eastern Cape and later on in Cape Town and Durban (Rosenthal 1974:9).

However, financial sustainability of the three radio stations prompted an entertainment entrepreneur, Schlesinger, to take over the three radio stations and consolidate them into a single radio station – the African Broadcasting Corporation (ABC). The new ABC was to serve the metropolitan centres of the three provinces, and "broadcasting was national and could follow a uniform policy".

It was not long before the ABC broadcasting corporation encountered financial problems as well, and there was a strong public sentiment for government to take over the radio station. In 1934, the Hertzog-government invited British Broadcasting Corporation Director-General, John Reith, to investigate the matter, and recommend a new broadcasting system for the country. Reith recommended a public broadcasting service along the side of the BBC, funded by a receiver licence fee. Parliament, then, enacted the Broadcasting Act of 1936 which established the South African Broadcasting Corporation (Rosenthal 1974:116 - 159).

From those early days, the SABC expanded services first in English, and later Afrikaans before introducing African language service in isiZulu, isiXhosa and Northern Sotho in 1940. In 1950, the SABC launched its first commercial service, Radio Springbok. The SABC continued to operate as a monopoly,

and expanded its new radio services with the introduction of FM broadcasting technologies. In January 1976, the country's first television service 'took to air'.

The 1970s saw the breaking-up of the SABC monopoly with the licensing of Bantustan radio stations, including Radio 702 and Capital Radio 604. In 1983, Bophuthatswana homeland launched a television channel, Bop-TV. The country licensed its first subscription television channel, M-Net, owned by the country's press media groups. In 1988 Bop-TV began leasing satellite transponders, followed by M-Net three years later to reach out to viewers and subscribers across the country.

By 1990, the SABC boasted a bouquet of more than 20 radio stations and three terrestrial television channels and its dominance of the South African broadcasting landscape was well entrenched despite the entry of new players onto the scene (Task Group Report 1991: 3 – 6). With the dawn of a new democratic constitutional dispensation in the early 1990's, the South African broadcasting market was subjected to a liberalisation process, and the establishment of a new regulatory framework following the enactment of the Independent Broadcasting Authority Act of 1993. It was around this time that M-Net was expanded into a satellite subscription service - DSTV -with a variety of film, documentary, children and sport channels broadcasting beyond the country's national borders.

The new regulatory agency, the IBA recommended that the SABC sell a number of its commercial radio stations to private investors so as to expand and diversify broadcasting ownership patterns, while it licensed new 'green field' radio stations. The IBA also recommended that the SABC hive-off its signal distribution function to a separate entity, and later formed as a state-owned entity - Sentech – to provide a non-partisan service to an array of new broadcasting services (IBA 1995: 4 – 57). In 1998, the IBA licensed e.tv as a national free-to-air commercial terrestrial television service, preceded by a few years, by the licensing of a regional terrestrial television channel, Trinity.

In 2007, the new converged regulatory agency for broadcasting, telecommunications and postal services, Independent Communications Authority of South Africa (ICASA), attempted to introduce competition in the subscription television market by launching four subscription services, and later a mobile television service. However, only one took to air, TopTV, but it later folded after failing to gain a foothold in the market.

South Africa's three broadcasting tier system, namely, public, community and commercial, brought about the broadcast media ownership diversity, - in private radio and community broadcasting. By 2013, South Africa boasted 24 regional private/commercial radio stations, 218 community radio stations and five terrestrial community television services. According to the recent market research, access to the broadcasting media in South Africa is now approaching universal service with television

viewership up from 90.8% to 91.7%, between June 2011 and June 2012 (GCIS Media Landscape 2012:147-148). However, it is the pay television satellite television – DSTV – that now carries in its bouquet a greater portion of the South African broadcasting market, including all SABC terrestrial radio and television services (as imposed by ICASs must-carry-rules) and its twenty-four-hour satellite news service, and many of the private radio stations and community television stations. Moreover, DSTV has a footprint across the African continent.

5.1.2 Background to Digital Migration

Radio and television broadcasting, from inception at the turn of the twentieth century have been transmitted using an analogue technology – "sound and television pictures were transmitted as a continuously varying signal. With the advent of digital technology, sound and television pictures were first encoded into a series of binary digits (zeroes and ones). This meant that digital broadcasts could be 'compressed' by computer processing, so that they used less space in the spectrum than an equivalent analogue broadcast" (House of Lords 2010:9).

As a result, a single Multiplex can carry up to eighteen digital television channels, as well as radio and text-based services can be carried in the space occupied by one analogue television channel. More so, digital television signals can be broadcasts across various platforms, namely terrestrial, satellite or via cable. This makes digital broadcasting the most revolutionary technological development to happen in the history of broadcasting since the advent of colour television in the late 1950s. In addition, digital television provides high definition channels, digital radio, tele-text and a new generation of on-demand services to viewers (improved recording, on-screen programme guides, sub-titles, audio descriptors for the visually impaired, digital radio stations and interactive services (DUK FR: 7-8). Digital migration also yields what is commonly referred to as the Digital Dividend - the release of excess radio frequencies that can be allocated to mobile broadband.

Digital migration is an international phenomenon affecting all countries. As a result, the International Telecommunications Union's World Radio Conference (WRC) took a resolution in 2006 to migrate all member-states from an analogue broadcasting system to a digital terrestrial television broadcasting system (DTT). To this end, the GE-06 agreement committed signatories that ITU the Region covering Europe, Africa and parts of the Middle East, to migrate by June 2015 (Association for Progressive Communications 2011: 3). This meant that, post-June 2015 the ITU will not be in a position to protect the affected member-states from radio frequency spectrum interference resulting from other countries that have migrated to a digital broadcasting system. As result ITU member-states launched digital switch-over programmes in their respective national jurisdictions to overseer the migration from analogue to digital broadcasting. As a result, a number of countries committed to differing deadlines to switch-over to the digital platform, including South Africa (2018), Brazil (2018) and India (2023).

5.1.3 Broadcasting Digital Migration in South Africa

Broadcasting Digital Migration in South Africa was launched by the late Minister of Communications, Dr. Matsepe-Casaburri in 2001, and set the country's deadline for switchover for December 2011 (Sunday Times BT 11/06/2017:5). To coincide with the launch of the country's digital migration project, M-Net began its digital terrestrial trials using Sentech's network.

In 2001, the Digital Broadcasting Advisory Body (DBAB) was established in order to coordinate the entire project for the country. In 2002, the DBAB published a report that fed into the Digital Broadcasting Discussion Paper published by the Department of Communications in 2004. Out of the Discussion Paper, the Digital Migration Working Group was established to replace the DBAB, and set the path towards the development of the country's Broadcasting Digital Migration policy in 2008 (ICASA 2004: 49-50). When ICASA published its first draft of the digital migration regulations, M-Net conducted trials on the earlier digital technological standard, Digital Video Broadcasting-Transmission (DVB-T) (M-Net 2012: 7).

With technological developments unfolding, second generation DVB-T2 came to replace DVB-T as it promised to double the capacity available on the Multiplexes than what the latter provided. DVB-T2 as an improved technology, runs side by side with Moving Picture Experts Group (MPEG-4) compression standard.

In July 2009 government, through the DoC, established the Digital Dzonga Advisory Council (DDAC), to replace Digital Broadcasting Advisory Body, which at the time had ceased to operate. "The focus of the Digital Dzonga was to guarantee that the country had a smooth migration transition to the digital broadcasting era" (DoC AR 2009/10:8).

The mandate of the government-funded Digital Dzonga was to:

• Provide a forum for all stakeholders for discussions and decisions related to digital migration, and to provide strategic guidance to the Minister and the Department;
• Develop an implementation and monitoring plan for South Africa's terrestrial television services; and
• Communicate with the public on digital migration (www.godigitalsa.co.za/digitaldzonga).

In relation to the development and implementation of a Digital Migration Communications Strategy – e-Awareness Strategy - the Department developed a Public Awareness campaign. By the end of the 2009/10 financial year, the Public Awareness Campaign was put on hold in order to review progress and the effectiveness of the campaign (DoC AR 2009/10:23).

The Digital Dzonga Advisory Council met ten times, producing three Digital Terrestrial Television State of Readiness Reports. However, in November 2009, the Minister decided to dissolve Digital Dzonga "due to potential conflict of interest within the Council (DoC AR 2009/10:20).

Other related developments that surrounded the digital migration process, included the development of the draft Scheme for Ownership Support that informed the government subsidy, for the provision of STBs to indigent television households. These multi-stakeholder consultations – STB Manufacturing Summit - that produced the Set Top Box Manufacturing Strategy, and embraced the involvement of small and emerging entrepreneurs in the manufacturing and installation of STBs, including the establishment of a STB Installers' School to train technicians (DoC AR 2009/10:7-55).

As a result of these technological developments, government published the amended 2008 Digital Migration Policy with a view to assess the implications of this increased allocation of capacity in the multiplexes to the terrestrial television broadcasting services. In view of these developments, Cabinet decided to extend the switch-over date from December 2011 to December 2013 (Government Gazette No.34538:19 August 2011). In turn, the Regulator published an explanatory note to its digital terrestrial television regulations to reflect amendments to the national policy, and by allocating multiplexes on which the country's terrestrial television services would provide digital broadcasting services (Government Gazette No. 34642:9-13).

Following the passing away of Minister Matsepe-Casaburri, the succeeding leadership that was responsible for the country's communication policy and the digital migration process, changed several times. The late Minister was succeeded by a number of Ministers, this follows a number of Cabinet reshuffles. On the technology front, a standards contestation ensued in the courts, pertaining to the debacle of whether to encrypt or not-encrypt STBs, - a development that pushed the switch-over date to the December 2018 date.

In January 2015, a Presidential decree separated the once unified and converged DoC into two separate Ministries, the new Department of Communications and the Department of Telecommunications and Postal Services (DTPS). The new DoC was assigned with the task of being the caretaker of the media and content policy aspects, and had to establish a new department from the ground up. These changes resulted in the Digital Migration Project Management office being relocated to the new DoC.

It is against this background that the recent Broadcasting Digital Migration's Public Awareness and Consumer campaign was launched in July 2015, and hence, it is the subject of this evaluation study. All the developments outlined above, and the deferment of the switch-over date a number of times, has but generated negative media publicity and resentment from the broadcasting, telecommunications and ICT sectors alike, and mobile telephone operators, who are eyeing the digital dividend frequency spectrum for their own use with mobile broadband. For broadcasters and signal distributors, delays in migrating the country to a digital technology platform implies extra costs for providing simulcast/dual illumination broadcasts, i.e., broadcasting in both analogue and digital.

For mobile telephone operators, delays in migrating the country to a digital platform implies that, continuous adjustments must be made to their allocated frequencies, since they have to continue to accommodate new technologies whilst waiting for the release of additional spectrum that comes with the switch-over (Sunday Times BT 11/06/2017:5).

The recently undertaken Broadcasting Digital Migration's Public Awareness and Consumer Support campaign was launched in July 2015, and in December 2015 the Minister hosted the Set Top Box Launch event titled "Zwi khou itea" (It is happening) in the town of Keimoes, in the Kai !Garib Municipality of the Northern Cape. The Public Awareness and Consumer Support campaign was launched in two phases, the National Campaign, and the District Municipality campaign (Local).

In July 2017, the newly appointed Minister Ayanda Dlodlo undertook to revive the multi-stakeholder relations that once existed and the coordination structures that were once responsible for the digital migration process. A process that has witnessed, on the one hand, the policy maker and e.tv, a free-to-air commercial television service lock horns in court, regarding the encryption or non-encryption of STBs, also with the SABC (a public broadcaster) and MultiChoice (a pay-television service), on the other hand (ITWeb 07 July 2017). According to a government statement released about the multi-stakeholder meeting that was held, "the meeting is a step closer to ensuring that the Broadcasting Digital Migration process is finally implemented".

5.1.4 Alignment of the BDM to the National Development (NDP)

Broadcasting Digital Migration 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 the digital dividend to free up significant chunks of the radio frequency spectrum that would be allocated to universal broadband for the country".

The Minister reports in her foreword of the Annual Report 2015/16, that "the previous financial year witnessed the launch of the Broadcasting Digital Migration process, which was followed by a public awareness and support campaign, through a series of Digital Migration Izimbizo campaigns that I led across the country".

"We noticed a slow registration take-up by citizens due to the TV-licence requirement and insufficient funding to conduct public and consumer awareness campaigns – said the report. Pamphlets and leaflets were also designed and translated in local languages for the promotion of the DTT awareness campaigns" (Annual Report 2015/16: 6-7).

According to the Accounting Officer, a total of R22 million was allocated for the Public Awareness and Consumer Support – including the funds that were transferred from the DTPS.

5.1.5 Objective and Purpose of the Public Awareness and Consumer Support

The National Campaign kicked off countrywide in the 2015/16 financial year, and involved a wide range of communication, publicity and marketing activities using national media platforms. The Objective and Purpose of the BDM Public Awareness and Consumer Support campaign were captured and outlined in the numerous communications frameworks, and were described as follows:

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

The Department is supported by a number of supporting agencies and institutions with specific responsibilities in the BDM project, and the Public Awareness and Consumer Support. The identified supporting agencies and institutions are:

- **South African Broadcasting Corporation –** the national public broadcasting service with the largest radio and television geographic footprint, and the main source of information, education and entertainment for the majority of South Africans;
- **Sentech** – the broadcasting signal distributor;
- **Universal Service and Access Agency of South Africa** – the champion of universal access and service to electronic communications, broadcasting, information and communication technologies as well as postal services. For purpose of the BDM project, USAASA's role was to procure and distribute STB to five (5) million indigent television households, and to enable them to receive converted digital broadcasts on their analogue television sets;
- **South African Post Office** – the postal service provider with the largest geographic footprint in the country, to serve as a retail outlet, but importantly, as a registration and distribution point for the government-subsidised STBs earmarked for the five million indigent television households to be registered;
- **ICASA** – the Authority is responsible for regulating the telecommunications and broadcasting sectors.
- **e.tv** - the private free-to-air television service and several **Community Television Stations** provided alternative terrestrial television services in the metropolitan regions of the country.
- **Northern Cape and Free State provincial governments** lead and implement the Public Awareness Campaign and Consumer Support at the provincial level to meet the local conditions such as the national cross-border considerations.
- **District Municipalities (Northern Cape & Free State)** - led and implemented the Public Awareness Campaign and Consumer Support at the district municipality level.

The BDM's Public Awareness and Consumer Support campaign was launched in July 2015, and in December 2015 respectively, with the Minister in the lead by hosting the STB launch event.

The Public Awareness and Consumer Support campaign was launched in two phases, the National Campaign, and the District Municipality campaign (Local).

Common Communication Leaders (National and Local)

The Ministry and the DoC championed the digital migration communication strategy, and the sources of Communication/Messenger for the BDM's Public Awareness and Consumer Support were the following Government and Department Officials:

- the Minister;
- the Deputy Minister;
- the Ministerial Spokesperson;
- the Director General;
- the deputy Directors General;
- Head of BDM;
- BDM Project Manager; and
- BDM Project Officials[5].

5.1.5.1 Key Messages

According to the Communications Strategy March 2016 – 2018, the BDM's communication programme was planned to be rolled-out in four phases. The broad government message was depicted as: "Together we move South Africa Forward".

The sub-messages for the campaign were outlined as follows:

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

Key Messages for Phase 1 comprised of the following:

- Educational Messages on why Digital Migration is necessary;
- How poor households will benefit from the STB;
- Explaining amendments of the BDM;
- Benefits to the South African electronic manufacturing industry;
- Performance period resumes;
- Prioritisation of borderline and SKA areas; and
- Possible interruption of signal/broadcasting services

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[5] Communications Strategy March 2016 – March 2018: Slide 8

Key Messages for Phase 2 & 3 comprised of the following:

- Message should update on the process of production of the STB;
- Message should explain the distribution mechanism of STBs and their installation;
- Marketing with different products and adverts should continue;
- Marketing of the BDM as part of government's commitment to improve Information and Communication Technology;
- Prioritisation of borderline and SKA areas; and
- Possible interruption of signal/broadcasting services

Key Messages for Phase 4 comprised of the following:

- Minister announces the plan for government to switch off Analogue signal;
- Persuasion of people to act;
- Information on acquisition of STBs; and
- Roll out of STBs (Communication Strategy March 2016 – March 2018: Slides 11-12)

5.1.5.2 Media Platforms

The BMD project team used a variety of platforms, in various official languages to explain the digital migration process. A total investment of R2 767 672 was made available for the mainstream media in December 2015:

- SABC radio and Television   47%   (R1 299 992)
- Alive Advertising   18%   (R513 000)
- Media Mark (CTN & KZN)   10%   (R274 680)
- Times Media (Soweto TV)   5%   (R128 500)
- Zallywood (Tshwane TV)   5%   (R128 500)
- Community Radio   15%   (R423 000)

The mainstream media advertising campaign was supported by extensive marketing and publicity materials, packaged in various official languages:

- BDM website;
- SA NewsOnline;
- Booklets, FactSheets and Leaflets;
- Billboards & Digital Screens (various provinces); and
- Posters (Analogue Switch-Over)

The third category of the media platform that was used for the BDM project, entailed the Ministerial Imbizos and Door-To-Door campaigns. In terms of the Operational Plan 2016/17, ten digital migration awareness campaigns were planned for the year. A budget allocation of R598 000, was increased to

R1 117 000 for the activation and roll out of ten additional awareness campaigns for the same financial year (Department of Communications Operation Plan 2016/17: 68-81; Operational Plan 2016/17: 56-61).

The BDM project team, had planned to compile four (4) quarterly reports that outlined consumer access/awareness to digital broadcasting. However, no budget was allocation was provided for this item and these reports were separate from the Ministerial Imbizo reports.

5.1.5.3 Audiences

Communication Strategy March 2016 – March 2018 outlines the audiences for the BDM as follows:

- Primary Audience comprising of the 5 million indigent television households;
- Secondary Audiences comprising of;
    o Broader television owning households, television owners in sectors such as business, education, hospitality, etc. (e.g. hotels, businesses, schools, tertiary institutions, hospitals).
    o Prospective television owners, Municipalities, manufacturers, retailers, broadcasting and ICT sector, Organised Labour, Non-Government Organisations (NGOs), civil society organisations, media, co- operatives, churches, stockvels & other community groups, Houses of traditional leaders, Community Development Workers (CDW) (Communication Strategy March 2015 – November 2018:Slide 17).

5.1.6 Key National Communications Plan Components

5.1.6.1 National Publicity Awareness and Consumer Support Campaign

The National Campaign kicked off in the 2015/16 financial year and involved a wide range of communication, publicity and marketing activities on a countrywide scope using national media platforms. The national campaign was launched on a bigger scale, using a big-bang approach by flooding all national media platforms with a barrage of messages outlining the objectives and purposes of the BDM process.

The target audiences for the national campaign was the general South African public and citizenry as whole, to inform them about the project and a process that would completely change the face and format of broadcasting. The national campaign was also targeted at segmented national audiences that included the business manufacturing and retail sectors, for example, those that produce and sell a wide range of television consumer equipment to the public or the broadcasting production sector that provides and sells content to television channels.

As it were, the promise of a digital broadcasting platform was revolutionary –ushering the availability of a multiple free-to-air television BDM channels on the one end, and providing television viewers with hitherto high-definition television picture quality, unprecedented in the history of broadcasting.

5.1.6.2 Message/s for the National Public Awareness Campaign

The national campaign used a multi-pronged approach by accommodating and communicating to diverse audiences that reflect the nation in its diversity, consisting of various social and economic interest groups.

To this end, the DoC's Communications Strategy 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 and citizenry.

Overarching Messages sought to communicate the following messages:

- Multiple television channels with high definition picture quality;
- Universal access and service of television channels, to give expression to the country's diverse cultural, linguistic, geographic and lifestyles components;
- Bridging the digital divide by bringing information, education and entertainment to millions of South Africans through broadcasting services and Broadband services delivered through the information and communications technologies; and
- Compliance with international standards and conventions that govern the radio frequency spectrum

Sub Messages of the national campaign sought to communicate the following messages as:

- Promoting Television Local Content, from both the production and distribution perspectives, as multiple television channels would require increased television production capacity, providing the local production industry with new opportunities.

    o Local Content would also enhance the country's cultural and linguistic heritage.

- Supporting the local manufacturing industry, by commissioning the production of STBs to small and emerging entrepreneurs, and the use of local artisans and technicians in the installation of the STBs and other related television reception equipment.

5.1.6.3 Media Platforms for the National Public Awareness Campaign

The media platforms used for national campaign included media events and activities hosted or issued by the Minister including Media Statements, Media Briefings/Conferences, Media Interviews, Print Media Notices and Radio and Television Advertisements on:

- Mainstream print media houses with a national and regional footprint;
- SABC Public and Commercial Radio stations;
- SABC Television Channels;

- e.tv;
- Private Radio Stations across the country; and
- Coverage of BDM activities by the mainstream media and the South African Government Online News Agency

In addition, the Department produced and distributed a wide range of educational and marketing materials to expand the scope of the Public Awareness and Consumer Support campaign, including:

- Bill Boards;
- National Freeway Electronic Sign Boards;
- BDM Booklet (Frequently asked questions (FAQ)) in several official languages;
- BDM Leaflet in several official languages;
- Ministerial Speeches and Presentations;
- BDM Website;
- BDM Fact-Sheet;
- BDM Booklet (Translated in several official languages);
- BDM Leaflets (Translated in several official languages);
- Set Top Box Registration Leaflets;
- Radio broadcasting advertisements/notices;
- Television broadcasting advertisements/notices;
- Print media advertisements/notices;
- Media Statements;
- BDM Media Articles on South African Government News Agency;
- BDM Call Centre for handling enquiries;
- BDM Project Video clips;
- BDM Project Photos;
- BDM Facebook Account; and
- BDM Twitter Account

Details and additional information was needed regarding the following:

- Media monitoring report on television and radio coverage;
- List of mainstream national and regional newspapers used for the BDM Public Awareness campaign; the quantity of the advertisements/notices; and the text/copy of the advertisement/notice;
- Quantities and Distribution of Booklets and Leaflets produced for the BDM Public Awareness campaign; and
- Statistical information about the consumer enquiries received by the Call Centre and the Social media sites of Facebook, Twitter and others

5.1.6.4 National Audiences

The BDM Public Awareness campaign grouped its target audience/s into Primary and Secondary Audiences. The focus of the national campaign was on the **Secondary Audiences** consisting largely of the 8 million television households that do not need government subsidized STBs, and were probably subscribed to additional television services.

The national campaign was also focused on a range of other social and economic interest groups consisting of:

- The broadcasting industry consisting of the licensed television and radio broadcasting channels; television and radio production houses (established and small and emerging); marketers who purchase advertising time of television channels;
- The information and communications sector, including manufacturers and retailers of a wide range of computing and gaming equipment that need to interface with television and other receiver equipment for compatibility purposes;
- business sectors including the manufacturing and retail sectors who produce and sell a wide range of receiver equipment;
- business consumers of television services such as hotels and restaurants;
- non-governmental and community-based organisations, including educational and academic institutions;
- media houses consisting of the national and regional media houses and publications both print, online and electronic; and
- government institutions, including Parliament and provincial legislatures; the executive and local arms of government as well as schools, hospitals and other public amenities

5.1.7 Key Local Communications Plan Components

5.1.7.1 Local Public Awareness Campaigns and Consumer Support

The Regional and Local chapters of the Broadcasting Digital Migration Public Awareness and Consumer Support campaign were launched in the 2015/16 financial year. The priority areas were the Northern Cape (NC) and the Free State (FS) District Municipalities. The five District Municipalities were selected on the basis of their location as national border districts that were prone to cross – border interference from the neighbouring countries, namely:

- ZF Mgcawu District Municipality (NC);
- Pixley Ka Seme District Municipality (NC);
- Thabo Mofutsanyane (FS);
- Mangaung Metro (FS); and
- Xhariep District Municipality (FS)

5.1.7.2 Local Message/s

The Regional and Local Messages for the District Local municipalities in the various provinces, as outlined in various Communication frameworks/strategies, were as follows:

The **Over-Arching Message** is the **Set Top Registration process** for the 5 million indigent television households that government seeks to ensure that are not excluded once the Switch-over from Analogue to Digital platforms is implemented.

Sub-Messages of the regional and local campaign include:

- Step-by-Step Instructions for registering for an STB, and the attendant documentation required;
- Government cares for, and prioritises the needs of indigent families that fall under a specific income threshold;
- Local Economic and Job creation opportunities for local technicians to be contracted for the installation of STB and related receiver equipment for the 5 million indigent television households; and
- Local communities have an opportunity to establish community television services in order to serve their linguistic and cultural needs as well as their local developmental needs

5.1.7.3 Local Engagement Platforms

The Regional and District BDM Public Awareness and Consumer Support campaign was conducted using several media and community engagement platforms namely:

- Community Engagement Meeting – Imbizos;
- Door-To-Door Road shows;
- Distribution of localised;
    o BDM Booklets
    o Leaflets
    o STB registration Leaflets
- Community Media (radio/newspaper);
- Traditional Authorities;
- Provincial Government;
- District Municipality / Councillors; and
- Community Organisations

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 guidelines on how to go about each stage of the process. The framework also outlined the ground rules of organizing such events.

Additional information was required to ascertain the following:

- Quantities and the Language medium spread of booklets and STB registration Leaflets distributed in each District Municipality;
- Copies of Ministerial Speeches distributed at District Municipality Imbizos; and
- Community media in various District Municipalities and the copies of notices used for advertisements/announcements or notices

5.1.7.4 Regional and Local Audiences

According to the communications framework for the BDM Public Awareness campaign, the Primary Audience consisted of the 5 million television owning poor households eligible for the STB government subsidy. The purpose of the message was to get the 5 million television households to register for the government subsidised STBs. Other important role players/ambassadors for the regional and local campaign of the public awareness campaign included:

- Local Municipal Councillors;
- Traditional Authorities' Councillors;
- Community organisations, Change Agents, and
- Church organisations and the elders

5.1.8 Feedback Loop

The literature concentrated mostly on the implementation of the communication messages, looking at specific target audiences, platforms used and reported on various activations. There was also some level of monitoring which concentrated on technical aspects of the BDM process and the other that racked the registrations that were made at the Post Office.

It is this aspect of the BDM Public Awareness campaign that the DOCs RFQ 083 2016/2017, specifically focused on. The rationale that was provided for undertaking the impact study, was in order to complete the feedback loop and thus guide the communications team on the resources that must be allocated towards adapting and improving all identified communication deficiencies, for future public awareness and consumer support campaigns.

The feedback that was sought out in this regard, would have been established and retrieved from the field interviews, focus groups and questionnaires conducted with the beneficiary individuals and communities.

5.2 Benchmarking Study

As part of the literature review, research on the BDM communication systems of Tanzania, Rwanda and United Kingdom was undertaken. Benchmarking refers to analysing high-performing systems and identifying ways to improve our own systems based on the findings. A benchmarking exercise seeks

to identify and implement best practice models. The successes of some nations, can provide potential guidelines for critical decision making and the way forward by other nations.

The purpose of the benchmarking study was to evaluate how South Africa's public awareness campaign fared, as compared with the identified international public awareness campaigns. However, the study went further and also to identified the strengths, shortcomings, and lessons that could be drawn from other countries and later adapted for the improvement of South Africa's public awareness and communication support campaign - in the build up towards the Digital Switchover scheduled for the end 2018.

The International benchmarking summary below outlines, Regional, Continental, and International best practices in select markets of Tanzania, the United Kingdom and Rwanda.

The BDM programme is a worldwide regulatory process, and is being implemented according to the guidelines that have been set out by the ITU. As a result, all member-states were required to embark upon and implement the BDM in their respective countries – and the processes were supported by public awareness campaigns.

The draft updated ITU Guidelines **(February 2012:101)** for informing the transition from analogue to Digital Broadcasting - including the Asia-Pacific Region, provided information and recommendations on some of the key areas to pay attention to, particularly with regards to communication and public awareness. These guidelines also highlighted the tools used in national communication campaigns, and should include, amongst others:

- Websites;
- Advertisements in national (printed) media;
- Direct mail 223 and;
- Call or contact centres. Websites with information on digital switchover have been set up in virtually all 'ASO' countries

The guidelines further emphasized the fact that, in order to limit the risks of distorting the messages or confusing the market, regulators or legislators should only communicate about services and activities that directly fall within their scope of responsibilities.

They also make mention of the fact that in terms of national and regional communication, tailored information might be required in the face of the different types of audiences to be targeted. They further highlighted that "special communication care", might be needed, in order to provide examples to landlords, who are managing multiple dwelling units or shared aerials, since they can be responsible for a large share of the affected viewers (Draft updated ITU Guidelines **February 2012:130).**

For the purposes of this exercise, three countries were identified and used as international benchmarking countries. It needs to be noted that, owing to time constraints the desktop research that was conducted focused only on consumer awareness and public support, and that not much literature was readily available, that could be used to make comparisons. What made using these

three countries for the benchmarking exercise to be of particular interest, was the varied processes that were undertaken whilst gearing for their digital migration switchover, in their initial-middle-and-completion periods, which could have proven helpful in the South African context.

The countries were considered by looking at different variables which included economic development, literacy, access to traditional and modern media platforms, television penetration and the geographic dispersion amongst other factors. The criteria used was informed by amongst others, the use of various SADC reports and other ITU literature, that focused on the digital migration awareness campaigns.

Two countries within the continent were selected, **Tanzania** located within the SADC region, **,** and **Rwanda**, located within the Common Market for Eastern and Southern Africa (COMESA) region. Besides being recognised for being amongst the first African countries to successfully undergo digital migration, Tanzania became the key focal point as a country, since the success of its digital migration exercise was attributed to its effective awareness campaign that was conducted and also drawing parallels to how the implemented the programme. The choice of Rwanda was informed by its fast uptake to new and prevailing ICT developments, and its campaign being championed by the country's President.

The **United Kingdom (UK)** became the third country to be selected for the international benchmarking exercise, for amongst others, for its advanced economic development; for having completed the digital migration process, and for being one of the first countries in the world undertake and complete the programme; with extensive television penetration levels; diverse and established media multiple television channels industry and for being a member of the Commonwealth, positioned the country for being a good reference point.

Of further interest to this study was the country's layered communications model that was adopted, using the Dialogical Model of Communication, with a special focus on communicator/messenger, message and audience/recipient. Below are the findings pertaining to the three countries benchmarked:

5.2.1 Tanzania

The Tanzanian Broadcasting Digital Migration process was a multi-stakeholder initiative led by the President and 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).

Tanzania's Cabinet approved the BDM policy and the Migration Roadmap in 2008. And thereafter, a National Technical Committee on Digital Migration was established, in order to coordinate all the planning and implementation of the Digital Migration Roadmap.

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 analogue switchover.

Tanzania has a population of 43 million, and only 26 percent live in urban areas, and the remaining 76% in rural areas. The country's television industry dates back to 1994, and the 1.7 million television households are served by four television channels, namely ITV, CTN, DTV, and Abood. Some of the television channels provided both terrestrial and subscription television services, thus providing Tanzania with a multichannel television industry (TCRA Assessment Report 2013:12).

The country's Broadcasting Digital Migration 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).

Phase 1 of the Analogue Switchover involved the main cities and towns of Dar Es Salaam, Tanga, Mwanza, Dodoma, Mbeya, Arusha and Moshi. To kick-start the BDM stakeholder consultations, TCRA published two Public Consultations Documents outlining the rationale for the country to migrate from analogue to the digital broadcasting platform. These were followed by the Annual Broadcasting Conferences which brought together a wide range of stakeholders to deliberate on the planning and implementation of the broadcasting digital migration process.

The Regulator also arranged bilateral meetings with television services/content service providers and the Multiplex Operators to iron out their differences regarding signal distribution costs during simulcast periods, infrastructure sharing and service level agreements. Multiplex Operators were licensed to distribute and transmit all broadcasts at a fee (TCRA 2012:17).

In 2010 the Regulator developed a Communication Strategy for the BDM process which was approved by the Government before its implementation, which used a variety of media platforms, including print media, radio, television, websites, roadshows, talk shows, meetings, and seminars to inform and educate the public, industry and consumers.

The BDM publicity awareness and consumer campaign, and the campaign logo were launched by the President on August 2011. Throughout the BDM process, the Regulator was also in constant liaison with the Consumer Consultative Council. As part of the consumer support, the Regulator also "demanded that the set-top-box distributors provide appropriate customer care and technical support; and advocated for active consumer feedback mobilization system" (TCRA 2012:20).

The Communicator/Messenger

The Tanzania Broadcasting Digital Migration public awareness and consumer support campaign was both a National and Regional/Local campaign. The national campaign targeted the 1.7 million television households spread in the seven cities and towns of Dar Es Salaam, Tanga, Mwanza, Dodoma, Mbeya, Arusha and Moshi. "Different public education programmes were carried out by various means, including print and electronic media for quite some time with a view to sensitize the public on the migration to digital terrestrial broadcasting in Tanzania" (Hon. Prof. Makame M. Mbarawa (MP), Minister for Communication, Science and Technology, Analogue Switchover Speech, December 30, 2012).

At regional and local levels, publicity awareness and consumer support was directed more at contractual issues between consumers and the television channels.

The TCRA was the champion of the Digital Broadcasting Migration process by:

- Developing the Communications Strategy and framework; and
- Developing messages and choosing media platforms to be used

However, the President of the country was the programmes' 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 that:

- Members of the public can retain their analogue television sets, however purchase STBs to enable the reception of digital television signals (Mbarawa (MP), Minister for Communication, Science and Technology, Analogue Switchover Speech, December 30, 2012).

Media Platforms

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. Some of the media platforms included:

- TCRA publications, brochures, FAQs;
- TCRA website;
- TCRA call centre;
- General Seminars done in zonal areas, including engaging Local Government Leaders on a quarterly basis;
- Focused Seminars on DTT to Government Administrative organs i.e. Parliament, Cabinet, Inter-Ministerial Meetings of Permanent Secretaries;
- Focused Seminars and public adverts to analogue service areas during the actual ASO Switch Off date;
- Use of National, Regional, District and Community Media;
-
- Engage and use of Artists, Performers, Roadshows, Leaflets, and Posters (TCRA Presentation by Eng. Jasson Ndanguzi to the 8th SADC DTT Migration Forum, Mangochi, Malawi, November 2014)

According to a July 2013 article in BIZTECH Africa, official estimates put the number of TV sets in Tanzania at 6.4 million, out of a total of 10.3 million households. Furthermore, a survey undertaken in 2010 suggested that 41% of Tanzania's population of 46 million watch TV on a weekly basis, and this is in consideration of urban and rural populations split. This urban/rural divide is noted as not surprising given that analogue TV signals only reach an estimated 24% of the population, owing to challenging terrain and unreliable power hindering coverage in rural areas. Radio remains the most reliable mass medium, reaching around 85% of people in both urban and rural areas. To this end, the generation of public awareness was found to have been; TV (91%), Radio (66%), Newspapers (36%), word of mouth (22%), and websites (6%).

Regional and Local Media Platforms

The Regulator, TCRA used the following media platforms to reach regional and local audiences:

- Regional, District and Community media
- Posters and Leaflets
- Word of Mouth is also reported to have played an important public awareness role in broadcasting digital migration (TCRA Presentation by Eng. Jasson Ndanguzi to the 8th SADC DTT Migration Forum, Mangochi, Malawi, November 2014)

Regional and Local Audience

Regional and Local Audiences that make up the total 1,7 million television households in the targeted cities/towns were reached through community, district and regional media. Tanzania identified and categorized the audience and used profiling for effective outreach in villages to national level, tailor-made for various age groups, social spheres and government to private sector.

5.2.2 United Kingdom

The switch to digital television in the United Kingdom was lauded by former UK Prime Minister, David Cameron as being the biggest single change to broadcasting for a generation, in that it has delivered more choice for millions of viewers and paved the way for exciting new services, securing United Kingdom's role as a global player in broadcasting and creative industries. "The fact that this complex and challenging programme of change was delivered on time and under budget is a testament to the skill and dedication of all involved", (UK Prime Minister David Cameron's message in the Digital UK Annual Review 2006/07).

The road towards digital switchover in the UK 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 switchover "between 2006 and 2010". A Digital Action Plan, a body working across industry, government and consumer groups, was set up in order to provide advice on the best way to meet the switchover target date. However there were delays and it was only in 2005 on 15 September, addressing the Royal Television Society in Cambridge, that Smith's successor at the DCMS, Tessa Jowell, announced the go-ahead for switchover in the UK, coupled with support measures to ensure that no one, particularly the disadvantaged were left behind.

Subsequently, an independent not-for-profit company, Digital UK, set up by the broadcasters and the commercial Multiplex operators, was established to co-ordinate the switchover process and to ensure that the public is kept informed about the process. During the rollout, the Government gave Ofcom and Digital UK a joint task of discontinuing analogue television broadcasting.

According to the Digital UK Annual Review report 2006/07, the switchover process in the UK started in 2007 in the Copeland area, including the town of Whitehaven, in Cumbria. The first analogue signal was replaced with digital services on October 17, 2007, with the remainder, being switched four weeks later.

The Communicator/Messenger

Digital UK and the Regulator Ofcom led the process of digital switch-off in the UK. The Digital UK Chairman, Barry Cox indicated that when the programme was started, one of their main communications tasks was to get people to buy digital TV equipment in good time, particularly among older viewers, many of whom were wary of new technology. Great credit was given to the campaigns designed by the Digital UK communications team, which ensured that no one was left behind. The successful delivery of the Help Scheme, which supported more than a million households, was also decisive in silencing critics about the overall policy. Barry Cox, Digital UK Chairman Digital UK Annual Review Chairman's report 2006/07.

A three-year communications plan with clear messages was put in place and was detailed 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

Switchover: Switchover to 100% digital

Furthermore, a layered communications model that reached deep into communities, provided practical support for the most vulnerable, and mobilizing existing support networks was implemented.

The following and segmented groups were target namely, the older people, people who were socially isolated, people with sensory, mobility, dexterity, people with mental health conditions, people who speak English as a second language, people with learning difficulties. For these people, a Community Outreach Programme (COP) run by Digital UK in partnership with other NGOs assisted with the Digital Switchover Help Scheme. The scheme was thought to have assisted in altering negative attitudes; increased the level of positive attitudes; increased level of understanding and reassurance; and was informative, and thereby empowering the community through the scheme.

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 newsletter 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", published monthly, provided a regular update on consumer research, public policy and events on the ground in Copeland and the regions. Digital UK also created an information pack providing details about the switchover for all MPs and members of the devolved legislatures, written jointly by Ofcom and DCMS.

One of the strengths of the Digital UK communications campaign was attributed to its combination of consistency and flexibility. For example, at the start of the programme, local communications were phased in over a two-year period. As the switchover gathered momentum and viewer comfort with the process increased, the campaign was gradually reduced to a shorter, sharper six-month campaign model, which saved money and was more in tune with how viewers wanted to receive information. However, the core of the communications mix was kept constant, delivering consistently high levels of public awareness and understanding. Another key to the United

Kingdom's success, was the creation of easily recognisable branding and clear, simple consumer messages that could be shared with partners such as retailers and the digital TV providers, providing an all-encompassing approach (Digital UK Annual Review 2006/07).

The messaging was firstly designed to raise awareness about the switch-over. The second was aimed at making sure existing Freeview viewers realised they would be affected (and would need to retune their TVs). The final step was to drive action, reinforcing the date and retuning messages. Targeted advertising to promote the BBC-run Switchover Help Scheme was implemented (Digital UK Annual Review 2006/07).

The Minister for Culture, Communications and the Creative Industries, Hon. Ed Vaizey (MP), highlighted that the benefits of the switch-over to the United Kingdom's economy, industry and viewers would be widespread and could not be underestimated with its better choice, picture quality and sound, now being available to almost all UK homes, but also of the valuable spectrum that has been freed up for exciting new services such as mobile broadband (Digital UK Annual Review 2006/07).

The platforms used 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 available throughout the switch-over period, was constructed in such a way that it could accommodate everyone with or without special needs. Communication was tailored to specific groupings and or language groups, engaging the audience, and taking into consideration the particular needs and local issues.

According to the Digital UK article, Digital TV switchover: serving and supporting viewers online, the website served and supported an average of 300,000 visitors each month, making it a key communication channel for television viewers throughout the digital switchover programme. London for example, is reported to have seen web traffic peak at 700,000 visitors - 114,000 at the first stage alone, as it underwent switchover in April 2012. In total 17 million people used the website (Digital TV Switchover report 2008 – 2012:23).

Trade Support [retail, installers, and landlords]

Strong partnerships were forged with retailers to magnify the campaign via end line. Approval of the use of digital tick certification mark, where it qualified and provided assurance to consumers.

At some point during the digital migration process, it was realised that there were around 6 million flats in the UK, and yet 97% of tenants had never spoken to their landlords about digital TV.

In 2006/07, Digital UK increased its resource in this area and spent much time visiting regional Housing Associations, social housing providers, and tenants' associations, as well as liaising with key trade bodies such as the National Landlords Association, British Property Federation, National House builders' Federation, and logging progress.

- Intelligence gathering and research; writing to all social housing providers in lead regions; writing to hotels and B&Bs, schools, lettings agents; managing research into Care Homes on behalf of DCMS, tracking progress amongst flat dwellers (who rent from a social landlord, private landlord, or own the leasehold);
- **Property managers' communications**: in April 2007, Digital UK arranged a supplement about the digital switchover to appear alongside the key housing trade magazine, Inside Housing, and plans to launch a comprehensive online guide for property managers in Summer 2007, at digitaluk.co.uk/property managers.
- **Tenants' communications:** Digital UK produced specific leaflets for tenants, and ran advertising campaigns in the lead regions to raise awareness and understanding amongst tenants (**Digital UK Annual Review 2006/07: 35 - 36)**

Regional and Local media platforms

- Community Outreach;
- Public roadshows; and
- Face to face meetings; visits to homes and care homes

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 have run digital TV switchover Q&As and competitions as well as editorial information around key issues like housing and property, assistance for the elderly and disabled and basics like date awareness and understanding what to do.

Regional and Local Audiences

On 13 June 2007 Ofcom's Advisory Committee on Older and Disabled People and Digital UK jointly published research highlighting the potential impact of digital switchover on the disabled, older, isolated and low-income consumers. To this end, the research highlighted the need for a targeted communications campaign to educate informal, formal, and voluntary support networks (such as family members, social service departments and voluntary agencies) about the importance of them

reaching those most in need of help with switchover. It was found that older, disabled, isolated and low-income consumers relied heavily on television, with most in need of support shown to have financial hardship and low levels of existing support. 'Without support, these consumers will experience difficulty in preparing for an all-digital television environment' (Ofcom media release, 13 June 2007).

For many consumers, the impact of the digital switchover and conversion of TV equipment from analogue to digital was a complex process to understand, and a number of switchover myths amongst the population as a whole prevailed. It was found that, vulnerable audiences needed face to face support from trusted sources. To this end, the community outreach programme was designed to reach and engage key audiences with messages about the digital TV switchover. It became a core element of Digital UK and the Switchover Help Scheme's communications campaign for the digital switchover.

Importantly, it was integrated into the wider communications campaign, meaning that it included TV, radio and press advertising, information leaflets sent to every home and roadshows across the country providing face-to-face advice as well as a website providing online help and support (Francis, Tessa:01). Many respondents reportedly felt empowered by this model, and others recognised its potential to empower others so much so that most people who had been involved in the programme became a source of motivation, and acted to disseminate information to friends, peers, family or more widely into their communities (Digital TV Switchover 2008 - 12 Report**).**

The help scheme outreach team worked in partnership with existing charity networks like Age UK and other statutory bodies such as local authorities. The role of the help scheme was to provide emphatic reassurance that it was there for the interests of those eligible.

The end result was that more than 12,000 charity staff and volunteers organised 14,000 events and provided switchover advice to 700,000 viewers. Practical face-to-face advice was offered by the roadshow. The field team was reported to have been very knowledgeable in helping visitors improve their understanding about switchover, with 58% of visitors rating their knowledge of switchover either 'Excellent' or 'Good' after the visit, compared with 42% before their visit. Visitors rated staff either helpful or very helpful and said that they understood 99% of the information the team gave them. It is estimated that over a wide range of some 440,000 leaflets, including the regional leaflet (in case they missed it through their door), retune leaflet, aerial leaflet, recorder leaflet, Help Scheme leaflet, and where appropriate, leaflets in foreign languages were distributed (Tessa Francis, 2012: 4 -5).

Evaluation of BDM Communication Strategy

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Pan Africa

5.2.3 Rwanda

Rwanda's approach to digital migration began with the establishment of a National Digital Migration Task Force in 2009 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 to ensure the smooth migration from analogue to digital broadcasting. Subsequently this was followed by the adoption of the Broadcasting Policy in 2010 and articulations about 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 Tunga TV digital migration initiative, the brain child of the Ministry of Youth and ICT (MYICT), supported by the Ministry of Local Government (MINALOC), the Rwanda Information Agency (ORINFOR), Rwanda Development Board (RDB), together with the private sector broadcasters and other multimedia companies, was launched by the Minister for Youth and ICT (MYICT), Jean Philbert Nsengimana in Gisagara District in Southern Province with the aim to drive Rwanda go digital (the migration from analogue to digital), facilitate the public to acquire affordable TV sets, STB's and other devices promoting access to information services.

In a press conference, Minister Nsengimana encouraged Rwandans to embrace technology, and further said that, "we have a partnership with the private sector, especially TV sets dealers and banks, we want to see how they can help Rwandans to get TV sets, by making a provision for an instalment payment method, this will increase the number of TV owners," (Broadcast report April 2013: issue no. 154).

The Minister stressed that the initiative was aimed to give every Rwandan access to television and noted that, "Knowledge is power, knowledge is wealth. That every Rwandan has to watch TV, even if they don't own one at home," (BizTech Africa, March 22, 2013). Despite this initiative, a mini survey by The Independent showed that at the time, the target audience remained in the dark as to how the shift will benefit them. This therefore necessitated more public information and education about the programme (Ntangura, Godfrey - The Independent, May 2013). Something which Cedric Pierre-Louis of the Tele10 Rwanda concurred with, and indicated that more effort was needed to go into radio public pronouncements and billboard advertising on pertinent issues or questions about digital migration. On the same note, he went on to commend the government for adopting the public-private-partnership approach for implementing the digital migration programme.

In an article titled, Rwanda leapfrogs into digital broadcasting digital migration: challenges and opportunities (Cedric Pierre-Louis of the Tele10 Group in Rwanda, 2014: 232 – 241), and the book Impacts of Knowledge Society on Economic and Social Growth in Africa, mentioned that on account of remarkable commitment by government, efficient planning process, dynamic working relationship between private and public sectors, Rwanda is considered one of the most advanced countries regarding digital switchover.

Tele10 Group's Pierre-Louis further elaborated on this by suggesting that, at the end of every month, the Government must organise 1 or 2 days roadshows in different provinces wherein between 10,000 to 20,000 people would be targeted. This, he termed popular gatherings, with a view of hearing from a shared platform of telecom operators, popular artists and top public officials highlighting Information Communications Technologies. Subsequently, the ICT awareness campaigns were merged with Tunga TV. In light of the dearth of information with regards to any other media platforms and emphasis on roadshows and Tunga TV, it was assumed that the afore-mentioned played a critical role in the public awareness programme.

The Communicator/Messenger

The Government in the form of the Ministries of ICT, Cabinet Affairs, Finance and the Regulator (Rwanda Utilities Regulatory Authority – RURA) had 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; the Minister of Cabinet Affairs, responsible for public awareness issues; Minister of Finance, who took the responsibility of foregrounding what the financial implications of the programme were going to be; Minister of Justice, who looked after legal agreements and contract issues; Minister of Trade & Industry, who overlooked the business value chain; Minister of Youth, Sport & Culture, for content development; and the Senator, dealt with consumer protection issues; with the Prime Minister taking on capacity building matters. The inclusion of the afore-mentioned ministries, ensured the smooth running of the campaign and thus the implementation of the digital migration programme.

Roles for the government, STB vendors, broadcasters and the public were explicitly defined, and were intended to create effective educational campaigns. In particular, announcements on STBs and the digital migration were carried out through media such as traditional newspapers, television broadcasters and through the STB vendors were also instructed to provide consumers with detailed information about their products.

The Message and Media Platform

Core approaches: public & awareness – "Each has a role for general public awareness.' Tunga TV - *Go…Digital.*

The target audience was the +- 200,000 TV watching households.

Rwanda, similar to other countries that undertook the digital migration process, utilised various media platforms such as the press, radio, TV, and conferences to publicize its awareness campaign. The Committee's approach was also both at a national and regional level with the key awareness role led by the Digital Migration National Secretariat.

Rwanda used a phased approach on all media channels (Radio, TV, and press conferences) to cover 14 sites for digitalization and awareness campaign. This was confirmed by the RURA Director of ICT Standards and Quality of Service Unit, Protais Kanyankore who stated that the "The real date to start the switch over from analogue to digital broadcasting and digital terrestrial television will be implemented in phases. We will start district by district in different phases to avoid a countrywide backlash," (KABONA ESIARA Rwanda Today, Sept 2012).

A strong awareness campaign which preceded the analogue switch-off in Kigali and sub-areas on 31 January 2014 as part of phase 1; phase 2 in North West of the country on 31 March 2014; phase 3 in North and North East by end of May 2014; and 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 (RURA's presentation by the Advisor to the Director – General, Lamin JABBI Esq. on Implementation of Public Awareness Campaign on Digital Migration – Rwanda Experience). Further information on a digital rollout plan, plus the switchover calendar; the list of type approved DVB-T2 STBs plus authorized vendors; and minimum specs for STBs for DTT was provided in the regulator's website.

With regards to further developments, Digitising Africa reported that the Rwandan government, in an effort to further improve access to digital broadcasting and information in the country worked with the Chinese firm StarTimes. Press reports from Kigali indicated that a USD 92 million initiative was launched, that will saw up to 400,000 households in rural Rwanda provided with digital TV sets and equipment. It was understood that StarTimes would provide the digital TV sets and other customer premises equipment, with the recipients expected to pay for the items in instalment over a period of six years. Clarity had not been provided as to whether StarTimes was receiving any government financial guarantees for the project (April 2017).

In July 2013 Rwanda failed to start with the country's switching off process, owing to what the government highlighted as, the non-availability of STBs in the market. However, as Rwanda Today journalist, Kabona Esiara reported in the article titled "Is Rwanda ready as digital migration deadline looms?" The switch from analogue to digital broadcasting was delayed, as a consequent of bureaucracy in the procurement process, and delays in the provision of information to the public about the advantages of digital broadcasting. The government was at the time also trying to identify suppliers of STBs. Furthermore, the Ministry of Local Government, which was charged with rolling out the programme, had not come up with a list of sectors that would pioneer digital broadcasting. This delay resulted in 800 STBs, that were supposed to enable the digital migration, lying idle in the Orinfor stores (Rwanda Today, 21 September 2012).

6 Analysis of the Quantitative Evaluation Study

This section of the report outlines the findings based on a triangulated analysis, derived from the various literature, documents, primary and secondary data collected for the evaluation. The findings are presented in response to, and in an order of the overarching questions and the sub-questions, which served as an assessment framework for the analysis.

The primary research followed a data gathering methodology which utilized questionnaires and conducted focus group interviews in the selected five (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 were selected by the DoC, and they are some of the municipalities in which the BDM Communication Campaigns were conducted by the DoC over a period of two (2) years, between 2015 and 2017.

Primary research was conducted in the Northern Cape from the 20th to 22nd June 2017. During this period, a vast geographical area within the 2 district municipalities was covered, thus reaching the 3 local municipalities, namely; Kai!Garib,! Kheis, and Kareeberg, involving 4 towns, namely Kakamas, Keimoes, Groblershoop and Carnarvon. During the week beginning 02 July ending on 08 July 2017, the Pan Africa TMT team undertook a field study in the Free State Province. The research was conducted in the District Municipalities of Mangaung, Xhariep and Thabo Mofutsanyana comprising of the following local municipalities: Bloemfontein, Botshabelo, Thaba Nchu, Letsemeng, Kopanong, Mantsopa, and Setsoto. The primary objective of the primary research was to systematically observe and accurately record the understanding of BDM and challenges experienced during and after the campaigns. **Table 3** below shows a sample of the provinces and municipalities that were researched.

Province	No. Respondents per province	Municipality	Towns	No. Respondents per town
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 Town	31
		Kai Garib District Municipality	Keimoes Town	53
TOTAL	**295**			**295**

Table 3: Sample by Provinces and Municipalities

6.1 Demographics of Respondents

6.1.1 Gender of Respondents

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%).
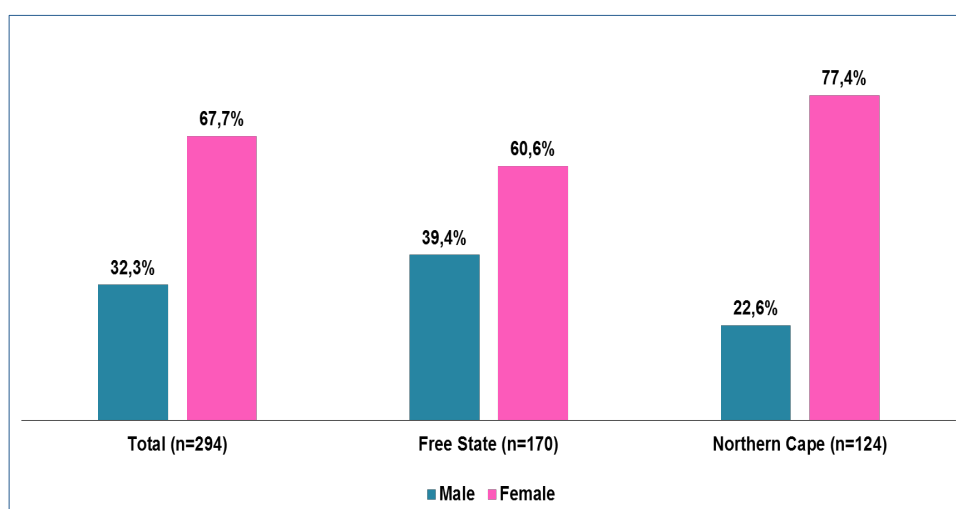
Figure 3 shows a graphical presentation of the respondents by gender.
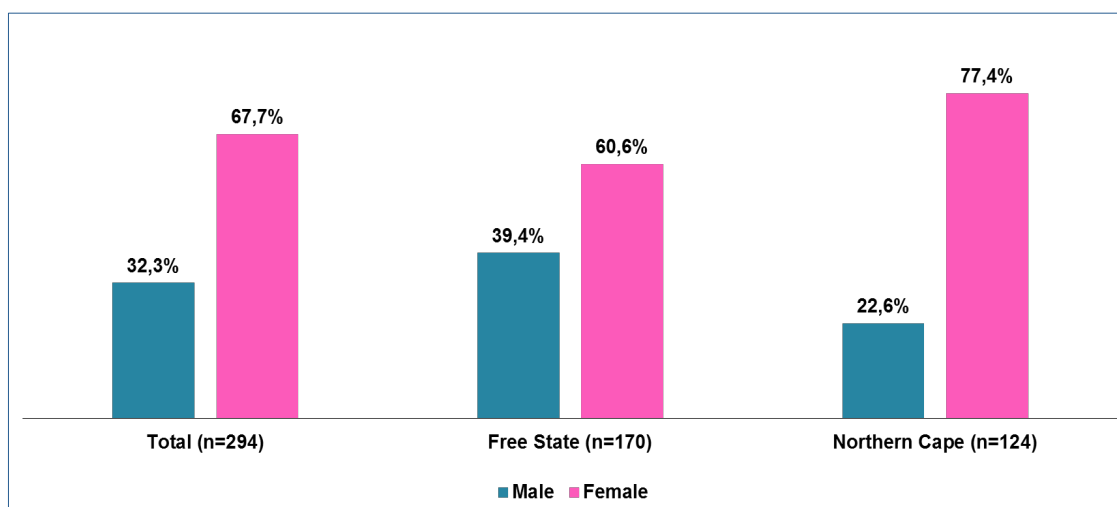
Figure 3: Sample Demographics by Gender

6.1.2 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 4** below.
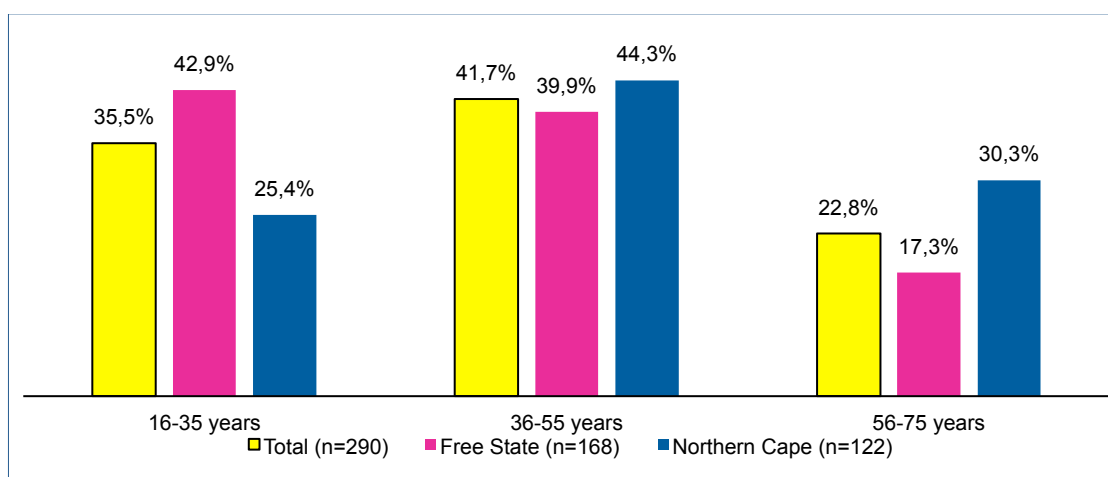
Figure 4: Sample Demographics by Age Groups

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6.1.3 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 5** below.
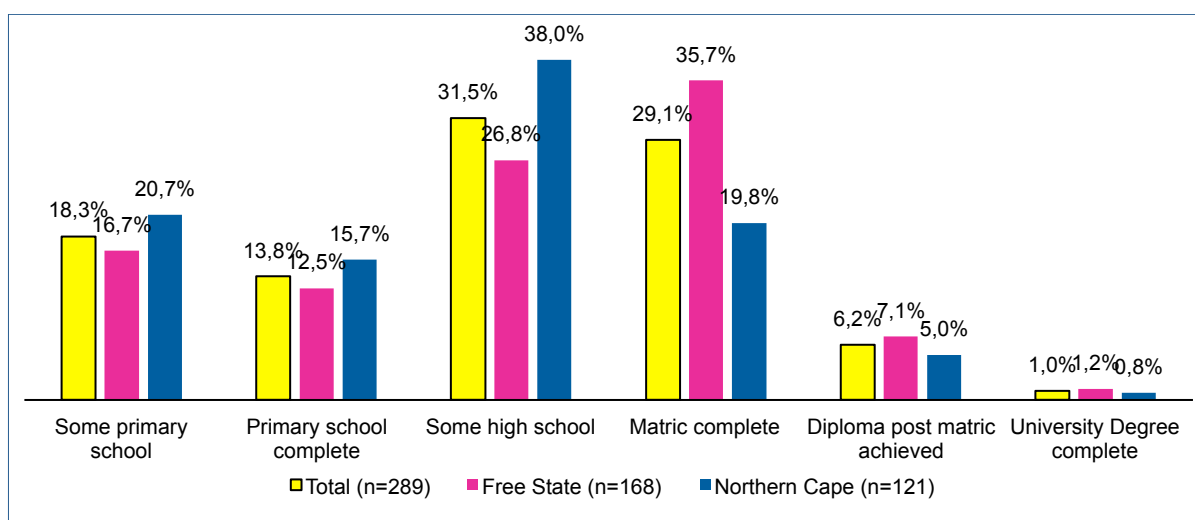
Figure 5: Sample by Education Levels

6.1.4 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 the Free State.
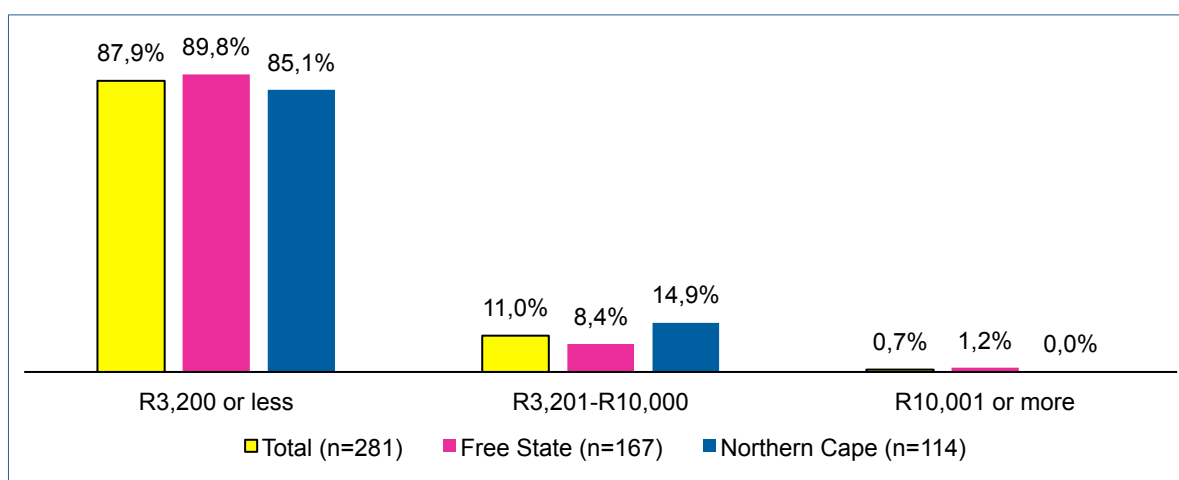
Figure 6: Gross Household Monthly Income of Respondents

6.1.5 Disability within Households

Only 12 respondents reported to having someone within their household to having a disability, thus representing 3.6% of the total respondents' households surveyed. As shown in Figure 7, 6,1% of respondents in the Northern Cape have someone living with a disability in their household, while Free State recorded only 1.8%. **Table 3**, shows the types of disabilities as reported by the respondents.
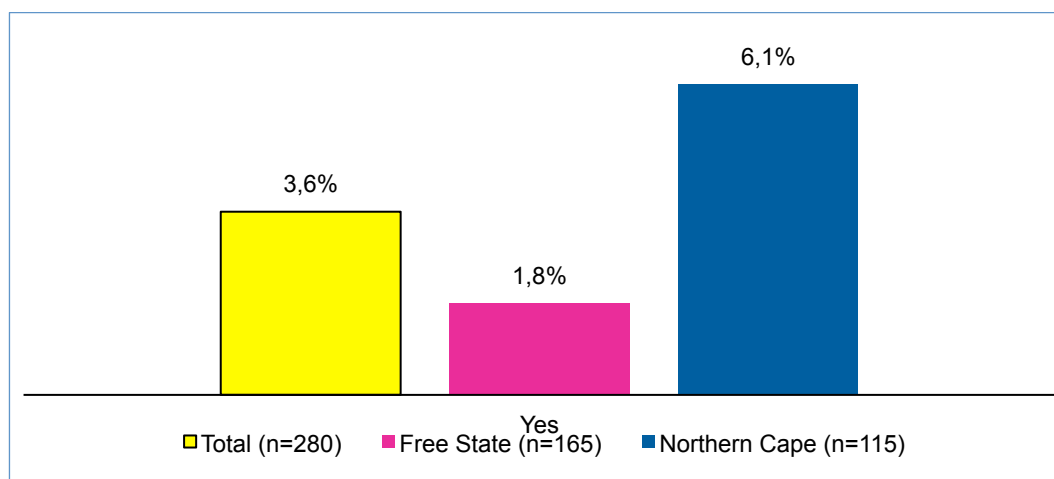
Figure 7: Disability within Households

Disability	No. Respondents
Wheelchair bound	2
Leg or foot disability	3
Hand disability	2
Speech disability	2
Physical disability (not specified)	1
Hearing disability	1
Chronic blood pressure	1

Table 4: Disability within Households

6.2 Findings

6.2.1 TV Access and Media Usage

6.2.1.1 TV Access

Nearly four (4) out of ten (10) respondents interviewed (39,2%) had DSTV in their homes, but more than half (53,8%) did not have either 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.
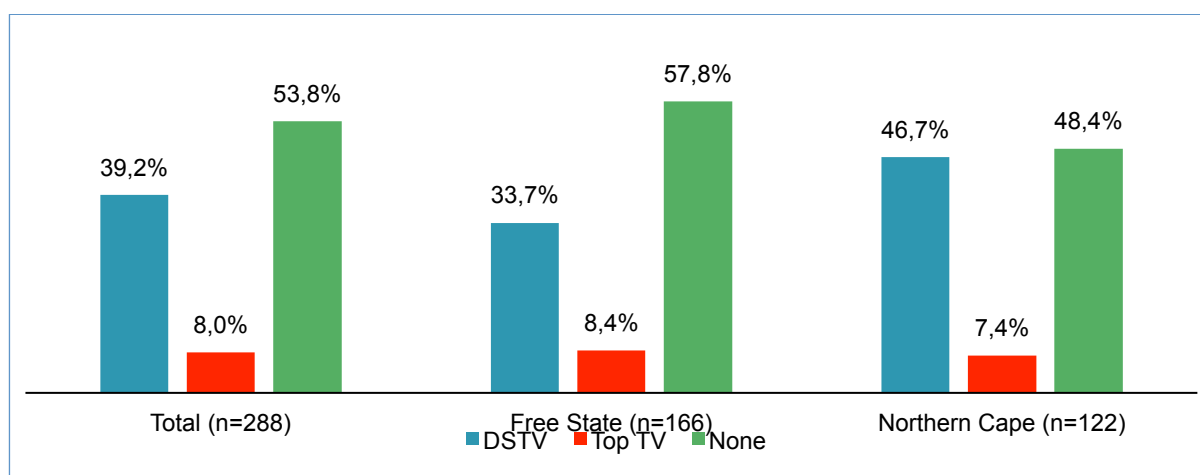
Figure 8: Media Access per Household

6.2.1.2 Usage of Social Media Platforms

Although less than half the respondents (47,7%) made use of social media platforms, more than half (51,7%) of the Northern Cape respondents used social media.
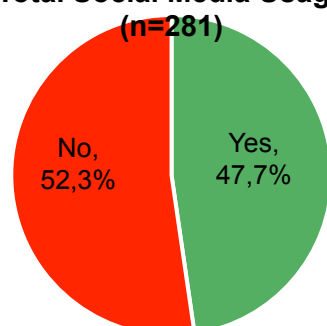
Figure 9: Usage of Social Media Platforms

6.2.2 General Awareness of DTT

6.2.2.1 Awareness of "Go Digital" Logo

All respondents were required to know what the logo represented, or at least be aware of the BDM programme.   The findings suggest that, 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 that recognised the logo, also knew what it represented.
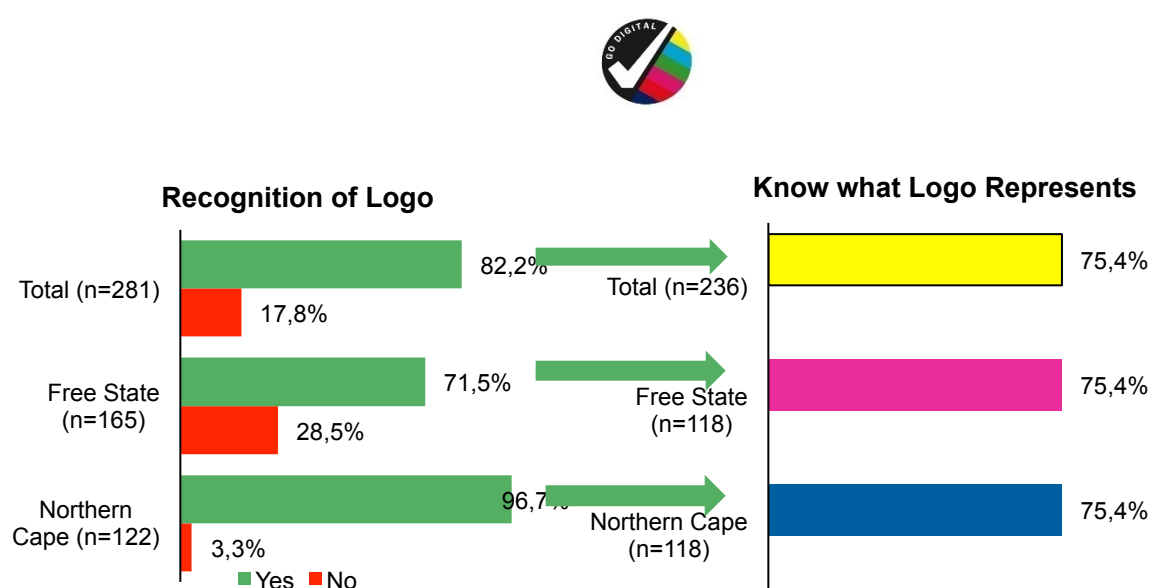
Figure 10: Awareness of "Go Digital" Logo

6.2.2.2 Source of Awareness for Broadcasting Digital Migration (BDM)

The main source of awareness of BDM 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 campaign (62,9%). The differential was very small, 62 vs 58 for NC D2D vs SABC. Also taking from what was mentioned in the SADC focus group meeting, the SABC placed a lot of effort by including in their radio programming talks about the project, in support of the upcoming mistrial Imbizo.   Furthermore, the analysis of the survey indicated that the Imbizos might not be sustainable in terms of costs and logistics, but had a wider audience reach among the respondents.
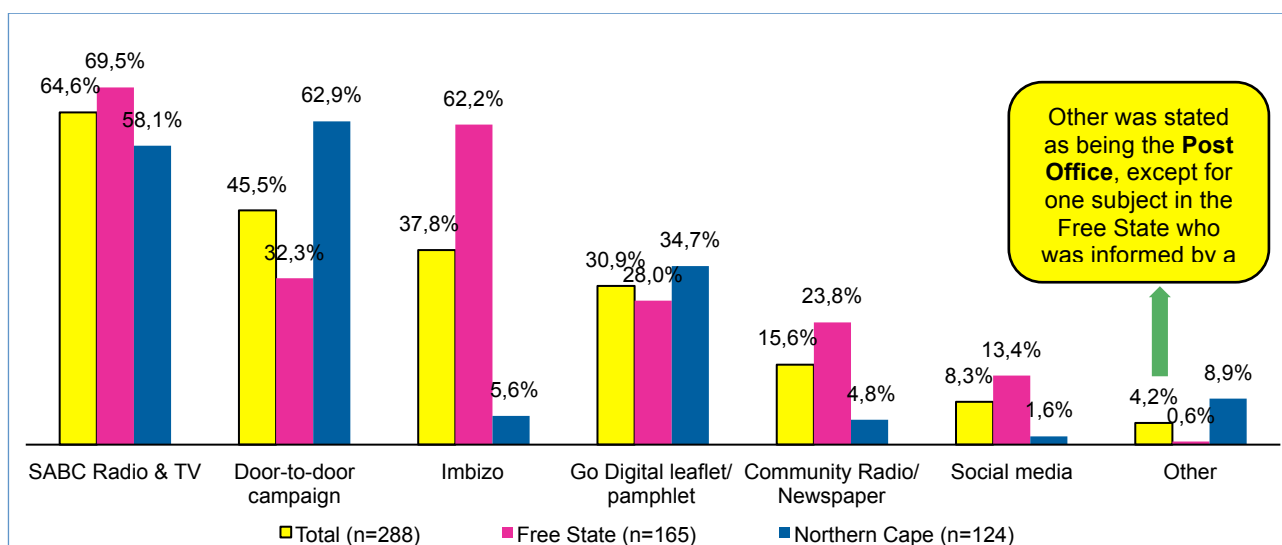
Figure 11: Source of Awareness of BDM

6.2.2.3 Effect of Awareness on Migration to Digital Television

Awareness of DTT has resulted in 67.9% of the respondents switching to digital television. The switching behaviour of those in the Northern Cape (94,1%) however, was significantly higher than the Free State (47,7%).
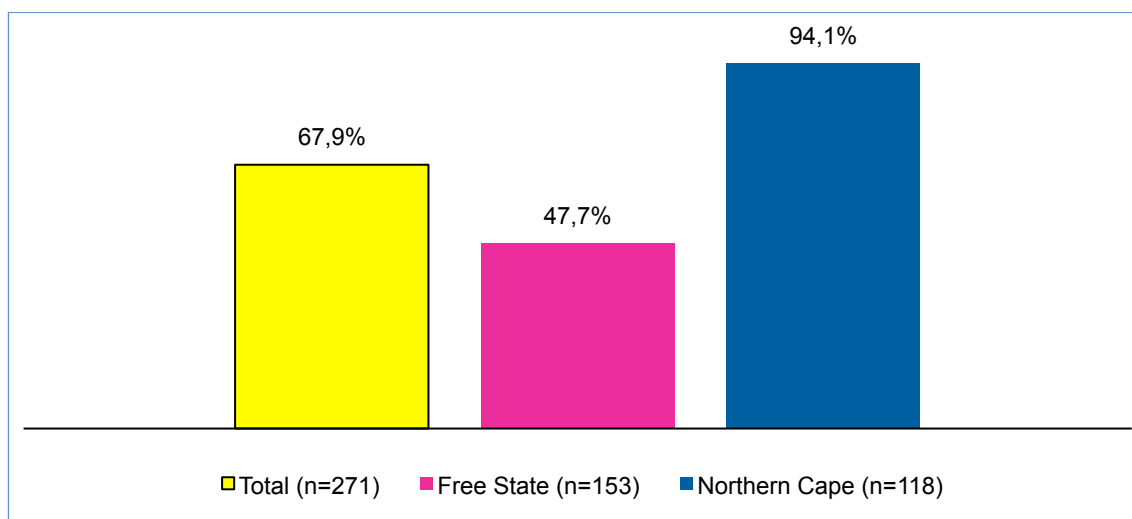
Figure 12: Effect of Awareness on Migration

Specific Awareness of DTT

True/False

In order to understand the awareness of specific factors of the BDM and DTT, the respondents were presented with a list of statements regarding the following:

- The benefits of BDM or DTT;
- The hardware requirements to receive DTT; and
- The requirements for obtaining and installing a set-top box

The respondents were required to state whether they believed the statements were true or false, or if they didn't know. The majority of statements were actually true..

6.2.3 Awareness of Benefits of DTT

6.2.3.1 You Need a New TV to Receive Digital Broadcasts?

However, some confusion remains about the need for a new TV set in order to receive digital broadcasts with 21,7% still believing that a new TV is required and 18,0% still unsure. Although 65,3% of the Northern Cape respondents knew the statement was false, there was a significantly large proportion (33,9%) who believed that they needed a new TV set.
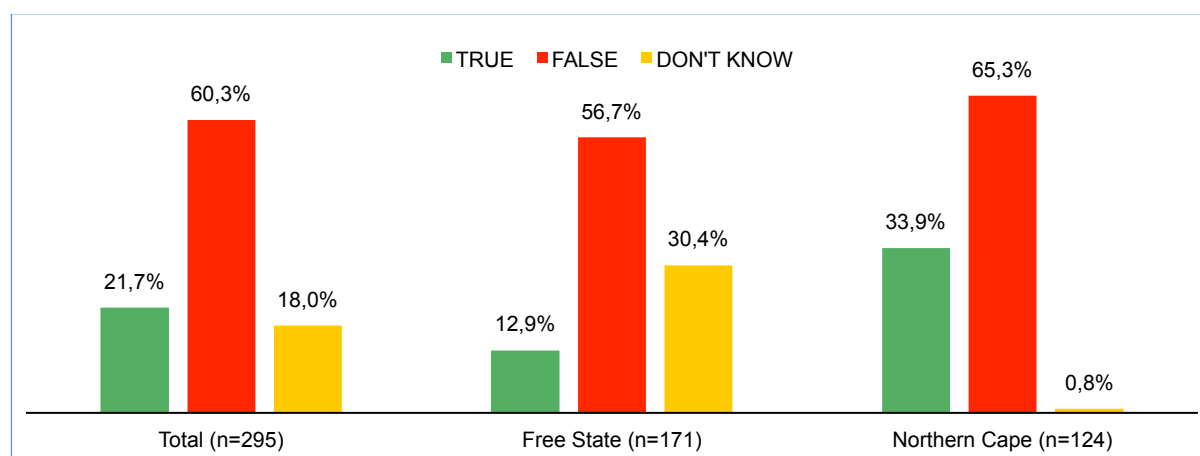
Figure 13: You Need a New TV to Receive Digital Broadcasts?

6.2.3.2 You May Need a New TV Aerial to Receive Digital Broadcasts?

Only 20,3% of the respondents interviewed, were able to correctly identify that they may need a new TV aerial in order to receive digital broadcasts. More than half the Free State respondents (50,9%) were unsure, but 69,4% of the respondents in the Northern Cape were incorrect in believing that they definitely would not need a new TV aerial to receive digital broadcasts.
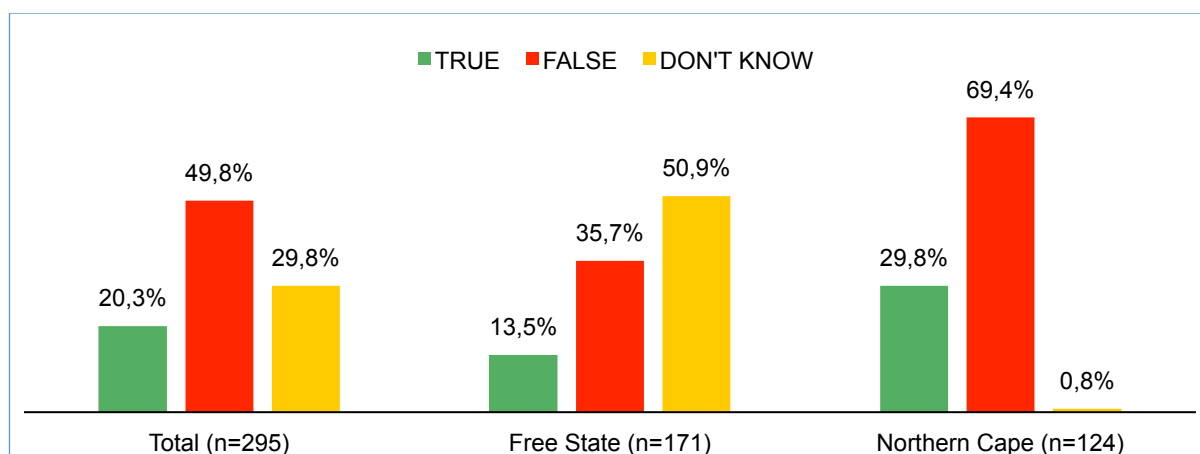
Figure 14: You May Need a New TV Aerial to Receive Digital Broadcasts?

6.2.3.3 Old Analogue Television Sets Need a STB to Receive Digital Broadcasts?

Although 56,9% of the respondents agreed that old analogue television sets will need a STB in order to receive digital broadcasts, however, there were still a quarter of the respondents (25,4%) who were unsure. In the Free State, 39,2% were unsure, and in the Norther Cape 29,8% were incorrect in thinking that a STB was not required.
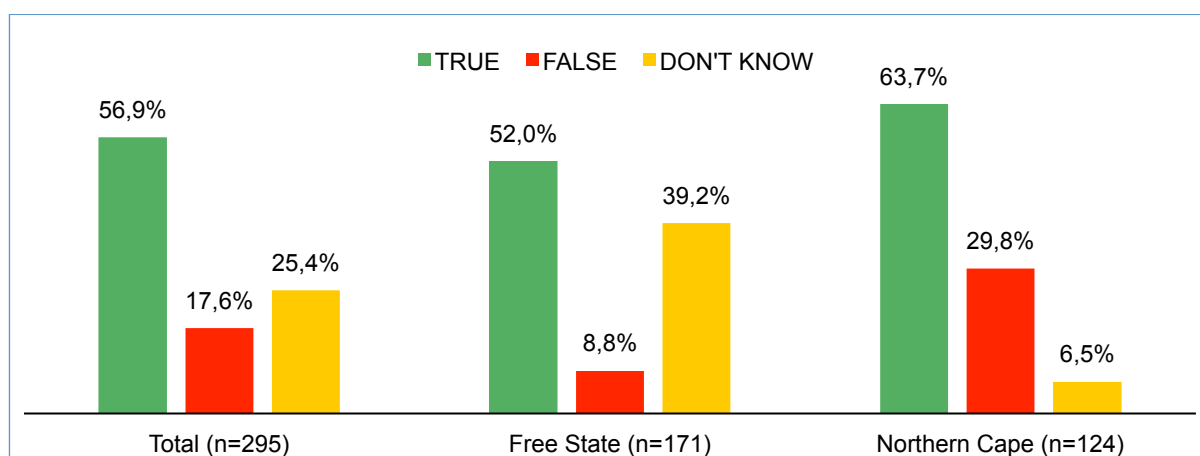
Figure 15: Old Analogue Television Sets Need a STB (Set-Top Box) to Receive Digital Broadcasts?

6.2.4 Awareness of the Requirements for Obtaining and Installing a Set-Top Box

6.2.4.1 A Set-Top Box Helps to get Free DSTV Channels?

There were mixed responses pertaining to the statement, "a STB helps to get free DSTV channels". Only 22,2% of Free State respondents and (51,6%) of Northern Cape respondents understood that this statement was false. Significantly, large proportions (44,4%) of the Northern Cape respondents were incorrect in believing the statement was true.
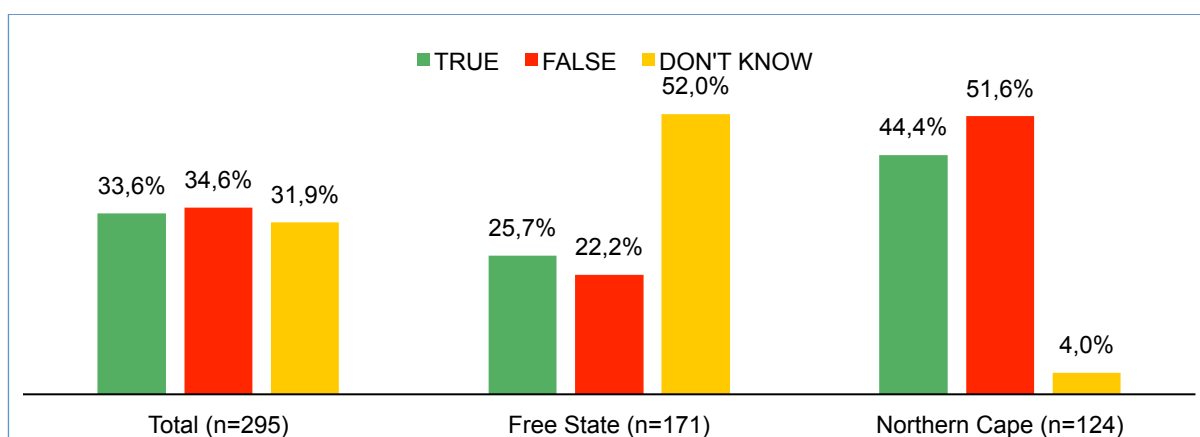
Figure 16: A Set-Top Box Helps to get Free DSTV Channels?

6.2.4.2 Government Provides Set-top Boxes for Free for Qualifying Households?

Although the majority (73,2%) of respondents agreed that the government provides STBs for free to qualifying households, there were still a large proportion of the Free State respondents (31,6%) who were unsure.
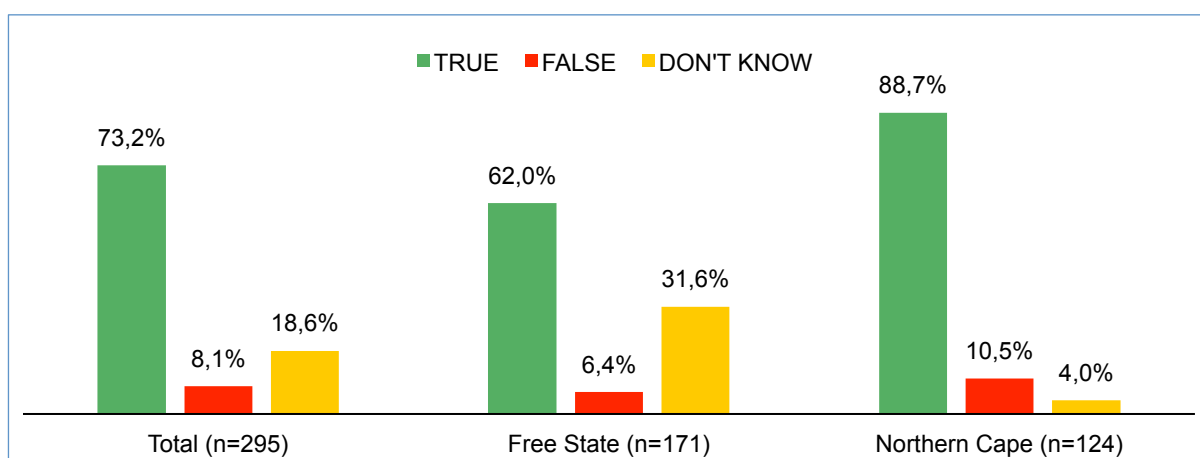
Figure 17: Government Provides Set Top Boxes for Free for Qualifying Households?

6.2.4.3 It is Easy to Install a Set-top Box?

The Northern Cape respondents were well informed in understanding that, it is easy to install a STB, with 97.6% agreeing with the statement. The majority of the Free State respondents (50,3%) were unsure.
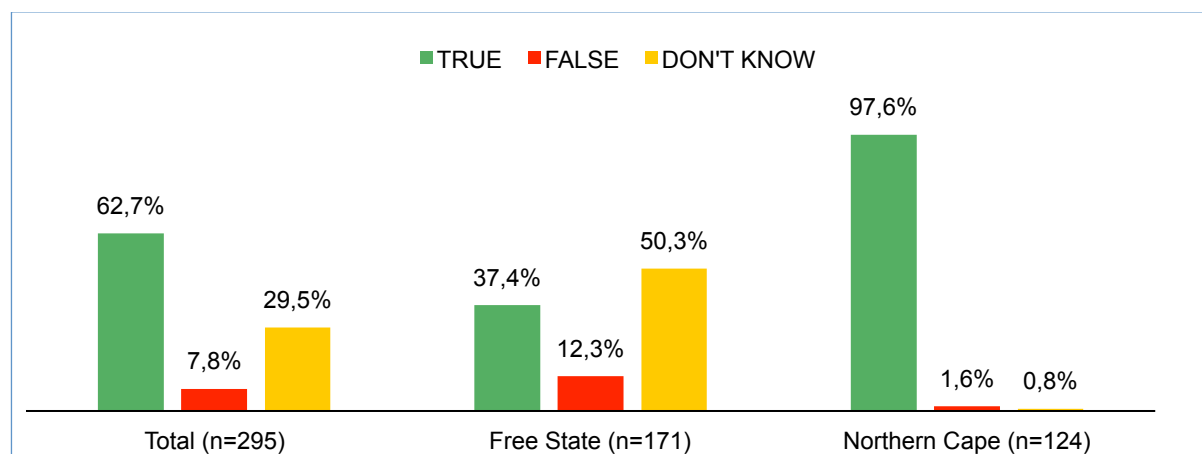
Figure 18: It is Easy to Install a Set-top Box?

6.2.4.4 You can get Assistance to Install Your Set-top Box from the South Africa Post Office?

Although two-thirds of the total number of respondents (67,1%) agreed that, assistance can be sought from SAPO for the installation of STBs, there was still 35,1% of the Free State respondents who remained unsure about this fact.
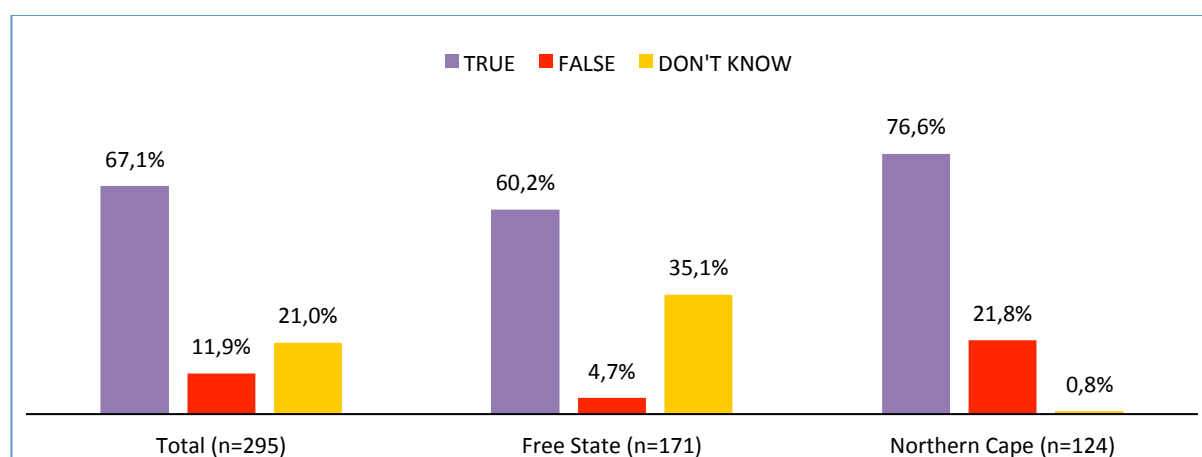
Figure 19: You can get Assistance to Install Your Set-top Box from the South Africa Post Office?

6.2.5 You can get Assistance from the SAPO when you are Having Technical Problems with your TV?

This statement was a tricky one to answer, as the SAPO will not necessarily assist with problems related with the Television, unless, these problems were with regards to not receiving the STB signal. It was expected that the responses to this statement would be diverse, but what was surprising was that, the large proportion (69,4%) of the Northern Cape respondents who believed the statement to be true.
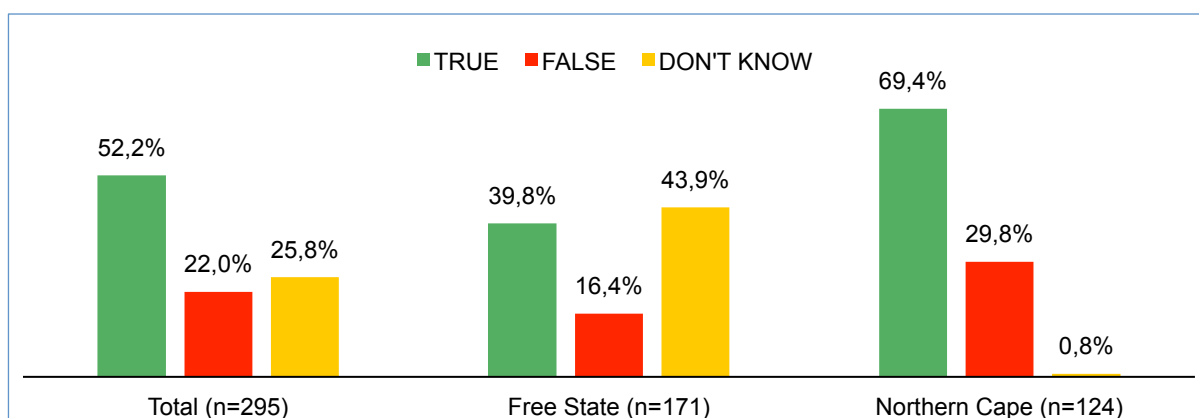
Figure 20: You can get Technical Assistance from the South Africa Post?

6.2.6 You do Not Need a TV License to Qualify for a Government Issued STB?

This was another tricky statement as the campaign print material indicates a need for a TV license but information provided was that a TV license is not required. If the respondents were verbally informed that no TV license was required, then the 45,0% of respondents in the Free State and the 72.6% of respondents in the Northern Cape, were correct to agree with this statement.
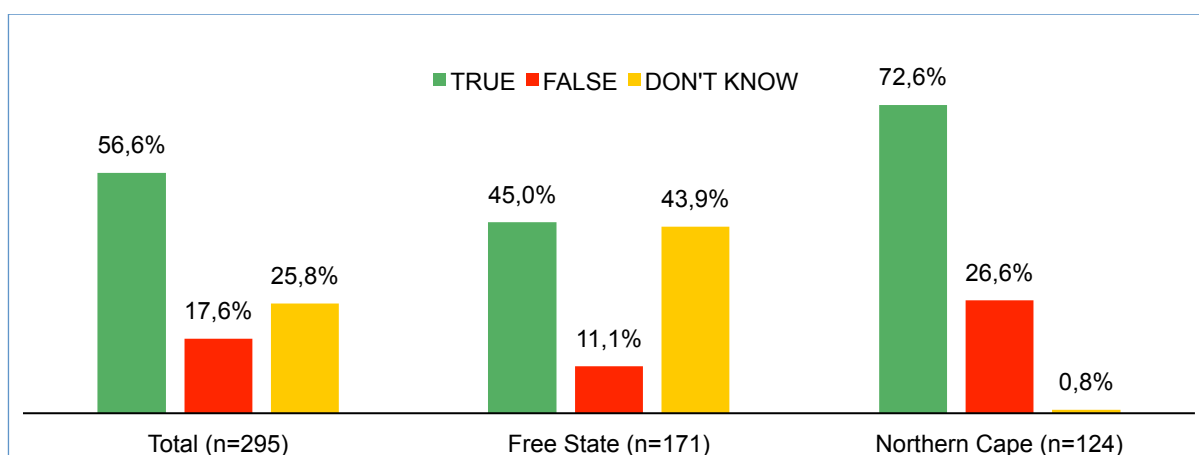
Figure 21: You do Not Need a Television License to Qualify for a Government Issued Set Top Box?

6.2.7 Perceptions of Community Awareness

6.2.7.1 Perceptions of Community Awareness Regarding BDM

More than eight (8) out of ten (10) respondents (81,2%) believed that the community was aware of BDM. The positive perceptions were however, much lower in the Free State (68,1% agreeing) than the ones in the Northern Cape (98,4% agreeing).
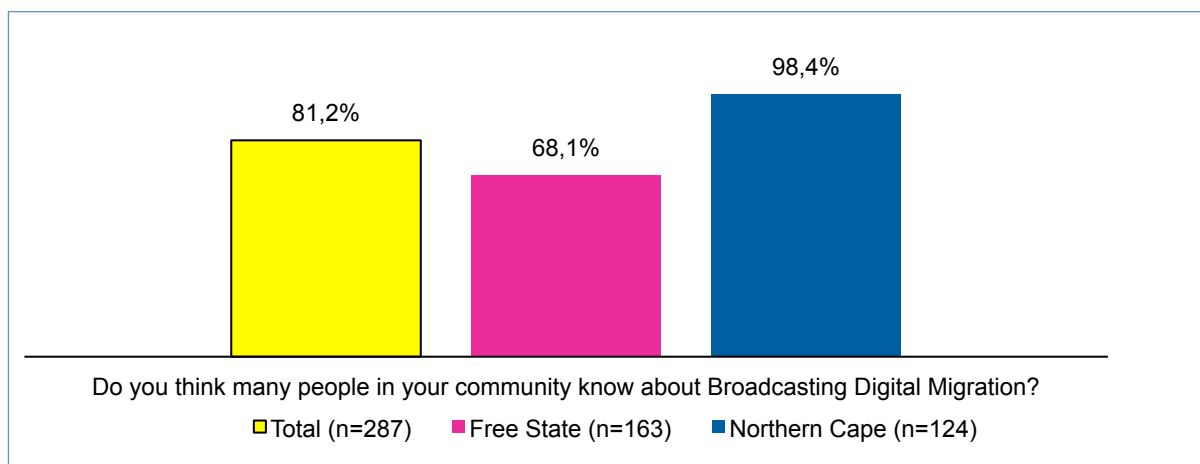
Figure 22: Perceptions of Community Awareness Regarding BDM

6.2.7.2 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 then again, there was a significantly lower portion of Free State respondents (73,5%) that agreed as opposed to the Northern Cape Respondents (99,2%).
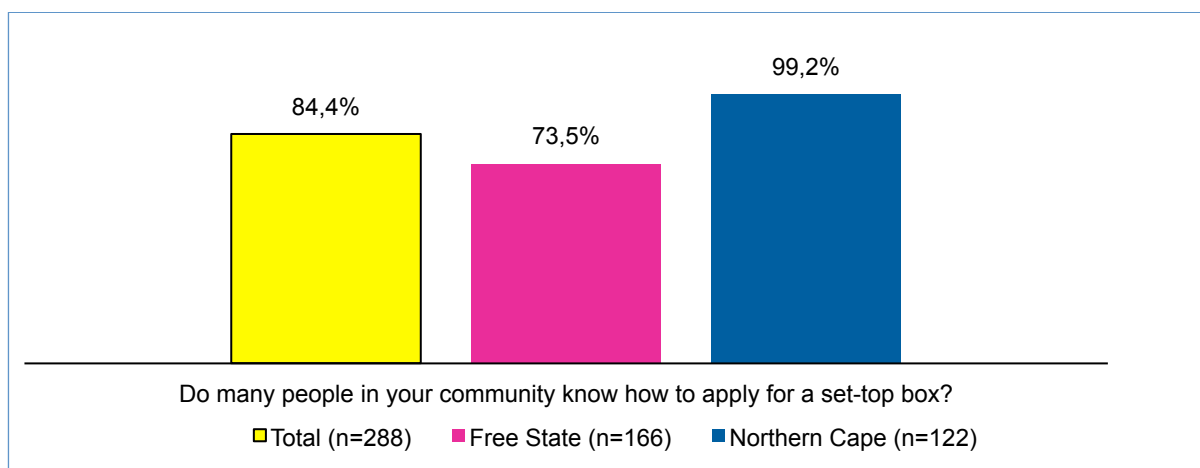
Figure 23: Perceptions of Community Awareness for STB Applications

6.2.8 Perceptions of Exposure to Digital Migration through Different Media Channels

6.2.8.1 Enough Talk about Digital Migration on SABC Television?

The overall perceptions about digital migration information appearing on SABC Television, were that there was enough talk of it (79,3%). However, there was less agreement from the Free State respondents, with only 72,5% agreeing that there was enough talk and 18,1% being unsure.
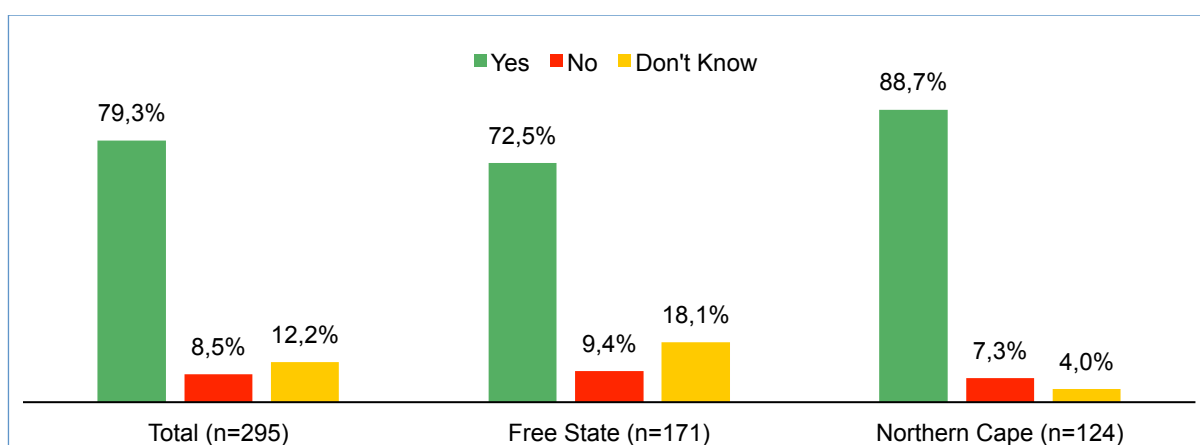
Figure 24: Enough Talk about Digital Migration on SABC Television?

6.2.8.2 Enough Talk about Digital Migration on Local Radio?

Just over half (53,6%) of the respondents agreed that there was enough talk about digital migration on local radio. However, in the Northern Cape, a large 38,7% of respondents were not in agreement and in the Free State, 32,2% were unsure.
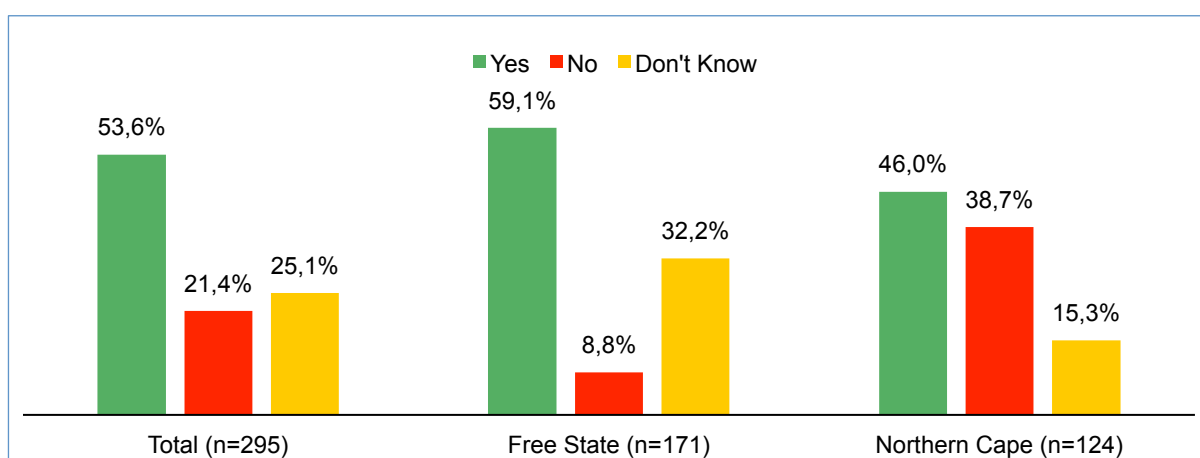
Figure 25: Enough Talk about Digital Migration on Local Radio?

6.2.8.3 Enough Talk about Digital Migration on Community Radio?

Only a third (32,5%) of the respondents agreed that there is enough talk of digital migration on community radio, and 43,1% were unsure. 40,3% of the Northern Cape respondents did not think there was enough talk on community radio and 59,1% of Free State respondents were unsure.
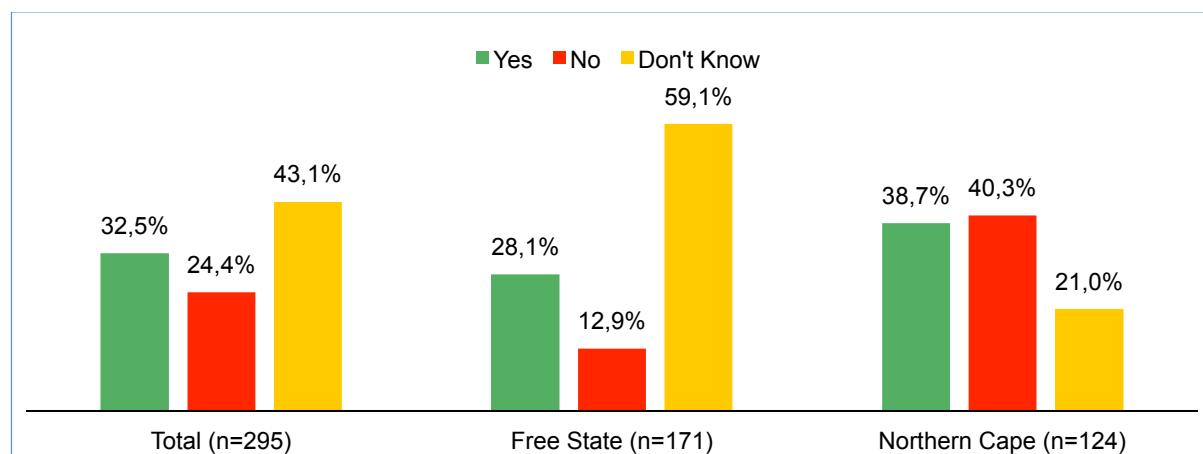
Figure 26: Enough Talk about Digital Migration on Community Radio?

6.2.8.4 Enough Talk about Digital Migration in National/Local Newspapers?

Significantly, fewer Free State respondents (24,6%) agreed that there was enough talk about digital migration in national and local newspapers than Northern Cape respondents (50,0%). There was also a very large proportion of Free State respondents (60,2%) who were unsure.
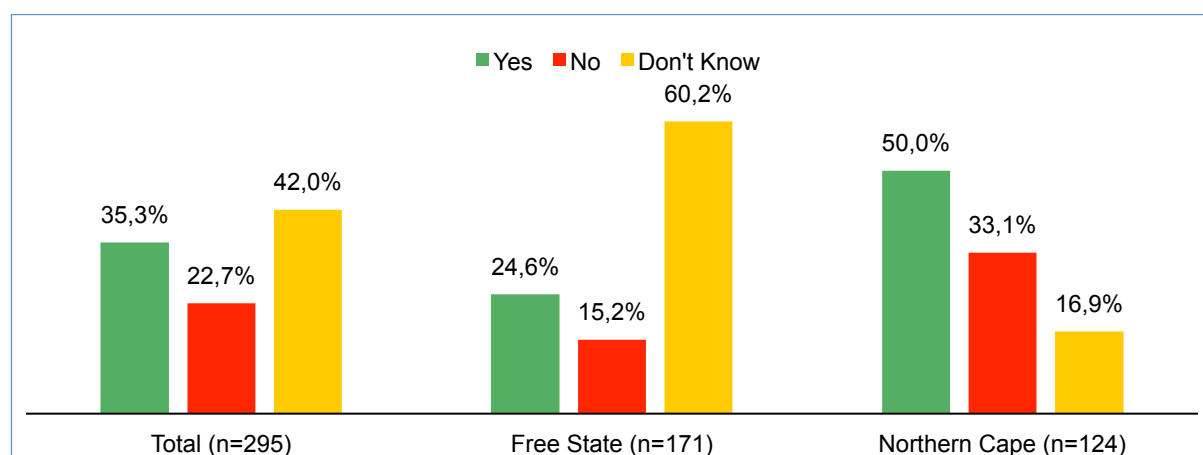
Figure 27: Enough Talk about Digital Migration in National/Local Newspapers?

6.2.8.5 Enough Talk about Digital Migration in Community Newspapers?

Again, there was a large proportion of respondents (45,1%) who didn't know if there was enough talk about digital migration in community newspapers. Only 24,6% of Free State respondents, and 43,5% of Northern Cape respondents believed that there was enough talk about digital migration in community newspapers.
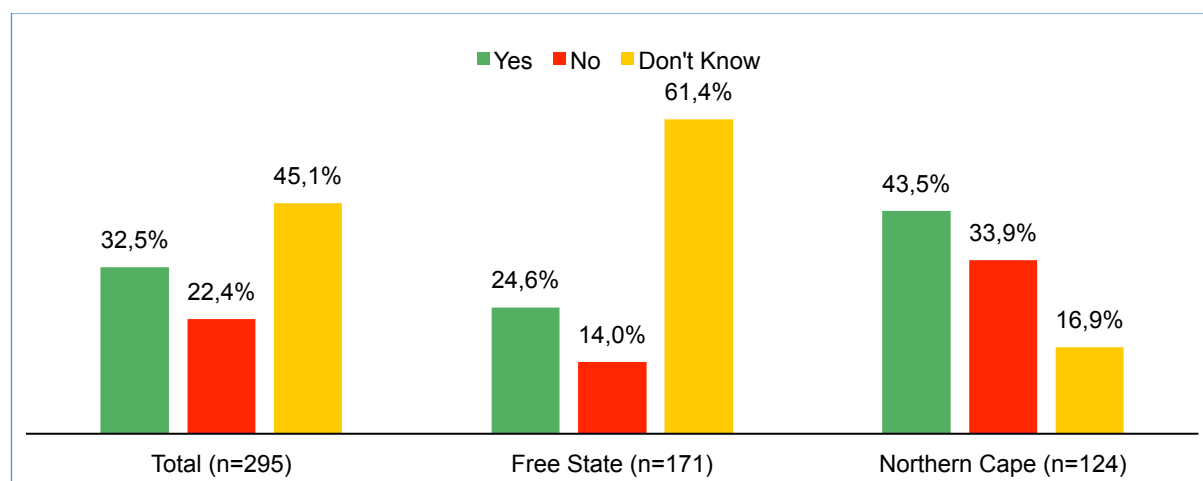
Figure 28: Enough Talk about Digital Migration in Community Newspapers?

6.2.8.6 Enough Talk about Digital Migration on Social Media Platforms?

The majority of Free State respondents (61,4%) didn't know if there was enough talk about digital migration on social media platforms.
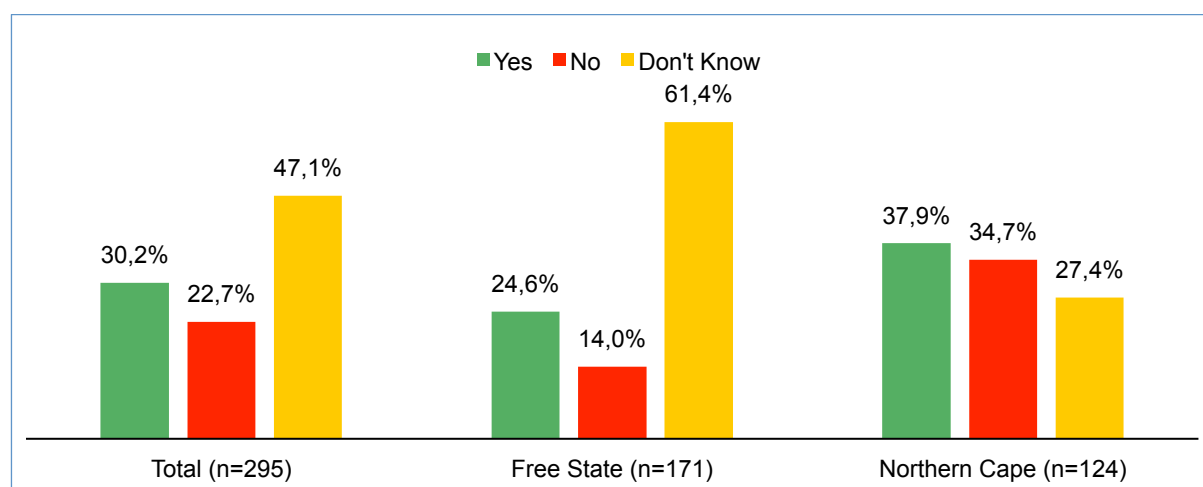
Figure 29: Enough Talk about Digital Migration on Social Media Platforms?

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6.3 Municipality Analysis

6.3.1 Northern Cape

A total of 124 respondents were sampled in the Northern Cape Province, with Kareeberg District Municipality, Carnarvon Town accounting for 40 respondents; Kheis District Municipality, Groblershoop Town, 31 respondents; and Kai Garib District Municipality, Keimoes Town, accounting for 53 respondents.

The majority of respondents were female (77,4%) with the age cohorts spread between 16 to 75 years, with the smallest age group being 56 to 75. In terms of the respondents' levels of educational, none of the respondents interviewed had achieved any post-graduate qualifications. A third of the respondents had some high school education (31.5%) and another third had achieved a matric (29.1%). 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 the Free State.

A set of questions used in the questionnaire, sought to gain insights into their levels of DTT awareness, and were presented to the respondents as follows:

TV Access?

A large proportion of respondents from Kai Garib District Municipality (67,9%) had DSTV in their homes. The majority of respondents from Kareeberg District Municipality (64,1%) and Kheis District Municipality (63,3%) had neither DSTV nor Top TV in their homes.

Source of news/information?

The majority of the respondents in all three Northern Cape Municipalities, got their news and information from SABC radio or TV (90.3% overall). Regional/National newspapers were also used as sources of news/information by some respondents (19,4%) in the Kheis District Municipality. None of the respondents in the other Municipalities gained their news/information from some of these sources.

Use of social media platforms

The findings purport that, slightly more than half (51,7%) of the Northern Cape respondents used social media platforms. Respondents from the Kheis District Municipality were the biggest users (60%) of social media platforms between the Northern Cape Municipalities.

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Awareness of Go Digital Logo

There were high levels of awareness of the "Go Digital" logo from all Northern Cape Municipality respondents. The understanding of what the logo represented was fair for Kai Garib (62,7%) and Kheis District Municipality respondents (65,5%), but 100% of Kareeberg District Municipality respondents believed that they knew what the logo represented.

Source of Awareness for BDM

The main source of awareness of BDM for the Northern Cape respondents was from the door-to-door campaign (62,9%), but the SABC radio and TV (58,1%) was found to be the main source of the awareness. The door-to-door campaign was extremely effective in the Kai Garib District Municipality and the "Go Digital" leaflet/pamphlet was very effective in the Kareeberg District Municipality, with 92,5% and 70,0% of the respondents in each Municipality respectively, having gained their knowledge through these media channels.

Effect of awareness on migration to digital television

Migration to digital television in the Northern Cape has already taken place, with 100% of respondents from Kai Garib District Municipality, 93.5% of respondents from Kheis District Municipality and 86.5% of respondents from Kareeberg District Municipality had already migrated.

BDM is about getting a high-quality television picture?

Although 83,1% of the Northern Cape respondents correctly agreed that BDM will give them a high-quality television picture, there was still 16.9% who disagreed or didn't know. The Kareeberg District Municipality had the highest proportion of respondents that didn't believe the statement to be true (22,5%) and 10,0% , stated that they didn't know.

DTT will provide more channels and programmes?

83,1% majority of the Northern Cape respondents believed that DTT would give them more channels and programmes. However, the Kheis District Municipality had a significantly lower proportion of respondents that believed this, with as many as half (51,6%) stating that this was false.

DTT provides an on-screen electronic programme guide with programme synopsis?

The majority (90,3%) of respondents sampled, agreed that DDT will provide an on-screen electronic programming guide, with programme synopses. Nearly all (98,1%) of the Kai Garib respondents affirmed this statement, which was not surprising considering that 100% of them had already migrated to DTT.

DTT provides for parental guidance and control of programmes?

Again, the majority (92,7%) of the Northern Cape respondents believed that DTT made provision for parental guidance and control of programmes. However, 15% of the Kareeberg District Municipality respondents still required information regarding this fact, since 7.5% stated that it was false, and a further 7.5% were unsure.

DTT will provide disability services for the hard of hearing and visually impaired persons (Subtitles and large Scripts)?

The Kareeberg District Municipality again had the highest proportion of respondents who stated "False" (7,5%) or "Don't Know" (10,0%) to the statement that, DTT will provide disability services for the hard of hearing and visually impaired viewers. Overall however, the majority of the Northern Cape respondents (92,7%) were aware that this statement was true.

You need a new TV to receive digital broadcasts?

It must however be noted that, there is some confusion whether there is a need for a new TV set in order to receive digital broadcasts, with 33,9% of the Northern Cape respondents still believing that a new TV set is required. The respondents from the Kai Garib District Municipality were the least well informed of the Municipalities, with 45,3% of the respondents believing that a new TV set was required. This was surprising given the fact that all these respondents had already migrated to digital television.

You may need a new TV aerial to receive digital broadcasts?

Only 29,8% of the Northern Cape respondents were able to correctly identify that they may need a new TV aerial in order to receive digital broadcasts. The respondents from the Kai Garib District Municipality were the most well informed with 39,6% of them agreeing that a new TV aerial may be needed.

Old analogue TV sets need a set top box to receive digital broadcasts?

Although 63,7% of the Northern Cape respondents agreed that old analogue TV sets need a STB to receive digital broadcasts, there were still 29,8% of them who didn't think a STB was required. The majority of respondents from the Kheis District Municipality (67,7%) were incorrect to believe that a STB will not be required for analogue television sets.

A set top box helps to receive free DSTV channels?

A large majority of the respondents from the Kai Garib District Municipality indicated that, they believed that a STB will help them to get free DSTV channels. Based on the knowledge that all these respondents had already migrated to digital television, it can be assumed that there is a misperception in the community about what channels they are receiving, believing that they are DSTV channels.

Government provides free STBs for qualifying households?

Although the majority (88,7%) of Northern Cape respondents agreed that the government provides STB for free to qualifying households, there was still a large proportion of respondents from the Kai Garib District Municipality (20,8%) who believed this was false.

It is easy to install a set top box?

The Northern Cape respondents were well informed that it was easy to install a STB, with 97.6% agreeing with the statement. Those who disagreed or who were unsure were all from the Kai Garib District Municipality.

You can get assistance to install your STB from the South African Post Office?

76,6% of the Northern Cape respondents agreed that assistance can be sought out from the SAPO for installation of the STBs. Those respondents that didn't agree or who were unsure came from the Kheis District Municipality, with 45,2% disagreeing and the Kai Garib District Municipality, with 24,5% disagreeing.

You can get assistance from SAPO when having technical problems with your television?

This statement was intended to provoke mixed reactions, as the SAPO will provide assistance with the STB signal, but not necessarily with problems related to the actual TV set. It was expected that the responses to this statement would be diverse, but what was surprising, was that there was a large proportion (69,4%) of Northern Cape respondents who believed the statement to be true.

You do not need a television license to qualify for a Government issued STB?

This was another tricky statement, since the campaign print material indicated that there was a need for a TV license, but the additional information that was provided suggested that a TV license was not required. If the respondents were verbally informed that a TV license was not required, then the respondents in the Kai Garib District Municipality would have been well informed with 100% of them agreeing that a TV license was not required.

Perceptions of community awareness regarding BDM

Nearly all the Northern Cape respondents (98,4%) believed that the community was aware of BDM. In the Kareeberg District Municipality however, 5% of the respondents did not feel that the people in the community knew about BDM.

Perceptions of community awareness for STB applications

The majority of the Northern Cape respondents agreed (99,2%) that the community was aware of how to apply for a STB. But again, there was a small portion of the Kareeberg respondents (2,6%) who didn't think many people in their community knew how to apply for a STB.

Enough talk about digital migration on SABC Television?

The respondents from all the Northern Cape Municipalities agreed that there was enough talk about digital migration on SABC television, with 88.7% of all Northern Cape respondents agreeing to this.

Enough talk about digital migration on local Radio?

Only 46,0% of the respondents in this province agreed that there was enough talk about digital migration on local radio. However, a significantly higher proportion of respondents from the Kai Garib District Municipality agreed (67,9%), unlike the other respondents from Northern Cape Municipalities (27,5%) from Kareeberg and (32,3%) for Kheis District Municipalities. The majority of respondents from the Kheis District Municipality disagreed that there was enough talk about digital migration on local radio.

Enough talk about digital migration on community radio?

40,3% of the Northern Cape respondents did not think that there was enough talk on community radio, with differing opinions across all the municipalities. Whereas the majority of respondents from the Kai Garib District Municipality (69,8%) agreed that there was enough talk about digital migration on community radio. The majority of respondents from the Kheis District Municipality (71,0%) disagreed with half of the respondents (50%) from the Kareeberg District Municipality being unsure.

Enough talk about digital migration in National and local newspapers?

Only half (50%) of the Northern Cape respondents agreed that there was enough talk about digital migration in national and local newspapers. However, there was disagreement from the Kheis District Municipality respondents with 67,7% of them disagreeing.

Enough talk about digital migration in community newspapers?

Less than half (43,5%) of the Northern Cape respondents agreed that there was enough talk about digital migration in community newspapers. However, again the perception across the municipalities varied greatly, with the majority (55,0%) of Kareeberg respondents being unsure, 64,5% of Kheis respondents disagreeing, and 64,2% of Kai Garib respondents agreeing that there was enough talk about digital migration in community newspapers.

Enough talk about digital migration on social media platforms?

The findings suggest that the responses from the respondents about there being enough talk of digital migration on social media platforms, was very mixed with 37,9% agreeing, 34,7% disagreeing and 27,4% being unsure. The majority of Kheis respondents (71,0%) disagreed, the majority of Kai Garib respondents (62,3%) agreed and more than half (55,0%) of the Kareeberg respondents were not sure whether there was enough talk about digital migration on social media platforms or not.

6.3.2 Free State

A sample of 171 respondents that was engaged in the Free State with Xhariep District Municipality, town of Edenburg comprised of 55 respondents; Thabo Mofutsanyana District Municipality, Ladybrand, 57 respondents; and Mangaung District Municipality, towns of Thaba Nchu and Botshabelo comprising of 59 respondents.

The results of their responses were as follows below:

TV Access?

The majority of the respondents (57,8%) in the Free State do not have DSTV or TopTV. Thabo Mofutsanyana had the highest proportion of people (80,4%) without DSTV or TopTV. Xhariep municipality and Mangaung Metropolitan municipality has a large proportion of DSTV viewers at 39,6% and 43,9% respectively.

Source of news/information?

Nearly all the respondents in Xhariep District Municipality (96,4%) got their news/information from SABC radio or TV. Both Thabo Mofutsanyana District Municipality (87,7%) and Mangaung District Municipality (76,3%) also had large proportions of people using SABC radio or TV as their source of news/information. The Mangaung District Municipality residents however, also used the community radio/newspaper widely, with 74,6% of the respondents getting their news/information from this source.

Use of social media platforms

Social media usage in the Free State differed greatly among the different municipalities, with usage of 75% in Mangaung Metropolitan, 44.9% in Xhariep and only 14.3% in Thabo Mofutsanyana.

Awareness of Go Digital Logo

Thabo Mofutsanyana District Municipality respondents both had very high awareness levels (91,1%) of the logo, and a high level of perceived knowledge of what the logo represents (90,2%). This could be attributed to the fact that the majority of the respondents in this municipality do not have DSTV or TopTV, thereby exposing them to more SABC TV where the campaign was being rolled out.

Source of Awareness for BDM

The main source of awareness for the Free State respondents was from the SABC radio or TV (69,5%). A high proportion of Thabo Mofutsanyana respondents gained their awareness from multiple sources, including SABC radio and TV (83,0%), the Imbizos (77,4%), the door-to-door campaigns (71,7%) and then Go Digital leaflet/pamphlet (69,8%). However, Xhariep respondents reported no awareness from the door-to-door campaign, the Go Digital leaflet/pamphlet, or the community radio/newspaper.

Effect of awareness on migration to digital television

The high levels of awareness of DTT was apparent among the Mangaung Metropolitan respondents, and this has translated into a significantly high migration to digital television, with 88.2% of the respondents in this municipality having already migrated. Unfortunately, the high awareness levels for the Thabo Mofutsanyana respondents, has not resulted in a high level of migration yet. Only 30.0% of these respondents have migrated to digital television.

BDM is about getting a high-quality television picture?

Overall for the Free State, 76,6% of the respondents agreed that BDM will give them a high-quality television picture experience. However, there was still a large proportion (22,8%) of Free State respondents who didn't know whether this statement was true. These uncertainties came mostly from the Xhariep District Municipality where more than half (56,4%) of the respondents didn't know.

DTT will provide more channels and programmes?

A large proportion (39,2%) of the Free State respondents didn't know if DTT was going to provide more channels and programmes. The respondents from the Thabo Mofutsanyana District Municipality were the most well informed about this fact, with 70.2% of them stating that it was true.

DTT provides an on-screen electronic programme guide with programme synopsis?

54,4% of the respondents in this province were unsure about getting an on-screen electronic programming guide with programme synopsis when using DTT, with all the municipalities interviewed providing a high level of don't know responses.

DTT provides for parental guidance and control of programmes?

Only 38,6% of the Free State respondents believed that DTT made a provision for parental guidance and control of programmes. More than half (50,9%) of them were unsure, with all municipalities having a large proportion of the respondents stating that they didn't know.

DTT will provide disability services for the hard of hearing and visually impaired individuals (Subtitles and large Scripts)?

Only a third (32,7%) of the province's respondents agreed that DTT will provide disability services for the hard of hearing and visually impaired viewers. The majority (57,3%) of Free State respondents were unsure about the statement, with the Xhariep District Municipality respondents indicating extremely high levels of don't know responses.

You need a new TV to receive digital broadcasts?

Although only 12.9% of the Free State respondents thought that they would need a new TV set in order to receive digital broadcasts, there was still almost a third (30,4%) of the Free State respondents that didn't know. The most well-informed municipality was the Thabo Mofutsanyana District Municipality, where 84,2% understood that there was no need for a new TV set to receive a digital broadcast.

You may need a new TV aerial to receive digital broadcasts?

Only 13,5% of the Free State respondents answered correctly that they may need a new TV aerial to receive digital broadcasts. A large proportion of respondents in all the three municipalities indicated that they didn't know if a new TV aerial may be required.

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Old analogue TV sets need a set top box to receive digital broadcasts?

52,0% of the Free State respondents agreed that old analogue television sets need a STB to receive digital broadcasts. However, 39,2% were unsure. The respondents in the Mangaung Metropolitan Municipality were the most informed, with 67,8% of them agreeing that a STB was required, with only 23.7% being unsure.

A set top box helps to receive free DSTV channels?

Only 22,2% of Free State respondents understood that the statement, "a STB helps to get free DSTV channels", was false. About half the respondents in all the municipalities stated that they didn't know if the statement was correct. More than four (4) out of ten (10) respondents in the Xhariep District Municipality incorrectly thought the statement to be true.

Government provides free STBs for qualifying households?

There was an awareness that the Government provides STBs for free to qualifying households. This response was most prevalent in the Thabo Mofutsanyana District Municipality (80,7%). More than half of the respondents (52,7%) in the Xhariep District Municipality stated that they didn't know.

It is easy to install a set top box?

The awareness about the ease of installing a STB was relatively low, with only 37,4% of the respondents stating that this was true. All the municipalities had high levels of 'don't know' responses, with more than half (50,3%) of the respondents in the Free State being unsure.

You can get assistance to install your STB from the South African Post Office?

The majority of the respondents from the Thabo Mofutsanyana District Municipality (78,9%), were aware that help for installing the STB can be received from theSAPO. The responses from the Xhariep District Municipality were mixed with 47,3% of respondents being aware of this fact, but 52,7% indicating that they didn't know.

You can get assistance from SAPO when having technical problems with your television?

Similar to the Northern Cape, this statement was intended to provoke mixed reactions, that SAPO will assist with the STB signal, but not necessarily with problems associated with the actual TV set. It is therefore not surprising to see a large proportion of 'don't know' responses across all the Free State municipalities. Surprisingly though, there was 39,8% of the Free State respondents who said that the statement was true.

You do not need a television license to qualify for a Government issued STB?

45,0% of respondents in the Free State, were correct to agree with this statement. Communication has done well in the Thabo Mofutsanyana District Municipality, with 80,7% agreeing, but not very well in the Mangaung Metropolitan Municipality, where only 11,9% agreed.

Perceptions of community awareness regarding BDM

The overall perceptions of the community in the Free State Province being aware of BDM were brought down by the poor perceptions in the Xhariep District Municipality, where only 26,4% of respondents in this municipality believing that the community was aware of BDM.

Perceptions of community awareness for STB applications

73,5% of the respondents agreed that the community was aware of how to go about applying for a STB. But again, their overall awareness was negatively influenced by the high proportion of respondents in the Xhariep District Municipality who disagreed (66,7%) that the community was aware of how to apply for a STB.

Enough talk about digital migration on SABC Television?

The overall perceptions from the Free State respondents were that, there was enough talk of digital migration on SABC Television (72,5%). The Municipality with the highest proportion of respondents agreeing was the Thabo Mofutsanyana District Municipality, where 91,2% of the respondents agreed that there was enough talk on SABC TV.

Enough talk about digital migration on local radio?

Although 59,1% of the Free State respondents agreed that there was enough talk about digital migration on local radio, almost a third (32,2%) was unsure. There was however a large proportion of respondents from the Thabo Mofutsanyana District Municipality (80,7%) who believed that there was enough talk about digital migration on local radio.

Enough talk about digital migration on community radio?

Agreement that there is enough talk about digital migration on community radio, was low for all the municipalities in the Free State. The Mangaung Metropolitan Municipality respondents displayed the most disagreement with 32,2% of them believing that there was not enough talk of digital migration on community radio.

Enough talk about digital migration in national and local newspapers?

A very large proportion of the Free State respondents (60,2%) were unsure that there was enough talk about digital migration in national and local newspapers. Only 32,7% of respondents from the Xhariep District Municipality, 15,8% from the Thabo Mofutsanyana District Municipality, and 25,4% from the Mangaung Metropolitan Municipality, were in agreement that there was enough talk about digital migration in national or local newspapers.

Enough talk about digital migration in community newspapers?

Again, there was a large proportion of respondents (61,4%) from the province who didn't know whether there was enough talk about digital migration in community newspapers. Only 15,8% of respondents from Thabo Mofutsanyana District Municipality, 21,8% of respondents from Xhariep District Municipality, and 35,6% of respondents from Mangaung Metropolitan Municipality believed that there was enough talk of digital migration in community newspapers.

Enough talk about digital migration on social media platforms?

The majority of the Free State respondents (61,4%) didn't know if there was enough talk of digital migration on social media platforms. This was likely because many of them (55,3%) did not make use of social media platforms. The respondents from Xhariep District Municipality were the most positive, with 40,0% of them agreeing that there was enough talk about digital migration on social media platforms.

6.4 Summary

6.4.1 Source of Awareness of BDM

The study shows that BDM Communication Campaigns were not very effective in the Xhariep District Municipality, and across all the media platforms. The awareness levels of the campaign across all the media was poor. However, Thabo Mofutsanyana recorded a good reach through SABC radio, Door-To-Door campaigns, Imbizos and Go Digital leaflets.

Source of Awareness of BDM

> 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
Number of Subjects	*288*	*164*	*53*	*53*	*58*	*124*	*40*	*31*	*53*
SABC Radio & TV	64,6%	69,5%	49,1%	83,0%	75,9%	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 5: Source of Awareness of BDM

6.4.2 Effects of BDM Awareness on Migration to DTT

The recognition of the Go Digital logo was high across the majority of the municipalities. The exception was the Xhariep Municipality in the Free State, where less than a third of the respondents were able to recognise the logo. There was however a high proportion of respondents who recognised the Go Digital logo and who thought that they knew what the logo represented. The findings suggest that migration to DTT was high across all the municipalities in the Northern Cape and the Manguang Metropolitan Municipality in the Free State. Despite the high levels of recognition of the Go Digital logo in the Thabo Mofutsanyana Municipality in the Free State, this has not translated to high levels of migration.

Effect of BDM Awareness on Migration to DTT

> 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
Recognise Go Digital Logo	82,2%	71,5%	29,6%	91,1%	92,7%	96,7%	97,4%	96,7%	96,2%
Know what Logo Represents *(% of those who recognise logo)*	75,4%	75,4%	37,5%	90,2%	72,5%	75,4%	100,0%	65,5%	62,7%
Migrated to digital Television	67,9%	47,7%	25,0%	30,0%	88,2%	94,1%	86,5%	93,5%	100,0%

Table 6: Effects of BDM Awareness on Migration to DTT

6.4.3 Awareness Requirements for Obtaining and Installing a STB

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		
			Xariep	Thabo Mofutsanyana	Mangaung Metropolitan		Kareeberg	Kheis	Kai Garib
Number of Subjects	*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 7: Awareness Requirements for Obtaining and Installing a STB

6.4.4 Enough Talk About Digital Migration?

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
Number of Subjects	*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 8: Enough Talk About Digital Migration?

6.4.5 Section Outcome

The recognition of the Go Digital logo was high across the majority of municipalities. The exception was the Xhariep Municipality in the Free State, with less than a third of the respondents who were able to recognise the logo. For those who recognised the Go Digital logo, there was a high proportion of respondents who perceived that they knew what the logo represented. Awareness about the migration to DTT was high across all municipalities in the Northern Cape, and also the Manguang Metropolitan Municipality in the Free State. Despite the high levels of recognition of the Go Digital logo in the Thabo Mofutsanyana Municipality in the Free State, this did not translate to high levels of migration. The Northern Cape was generally well informed about the benefits of DTT. However, in Kheis District Municipality, there were low awareness levels that suggested that DTT does provide more channels and programmes. This was likely to be a perception from those viewing digital television rather than an outcome from the campaign, since 93,5% of the Kheis respondents had already migrated to DTT.

The findings further suggest that the Free State was less informed than the Northern Cape, however the awareness levels of DTT providing a high-quality television picture, has reached the majority of the respondents in Thabo Mofutsanyana and Mangaung Metropolitan Municipalities. The Xhariep municipality was found not to be well informed. The research further revealed that there were very low awareness levels across all municipalities in the Free State and the Northern Cape about the possibility of needing a new TV aerial in order to receive DTT. The Northern Cape was generally well informed about the other hardware requirements for receiving DTT, i.e. there was no need for a new TV set and that a STB could still work with old analogue TV sets. However, there were fair levels of awareness in Kai Garib indicating that respondents understood that a new TV set was not required. The Free State respondents were found to be less well-informed as compared to their Northern Cape counterparts, with the respondents in the Xhariep Municipality being reported as being not well informed about any of the hardware requirements for DTT.

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

The majority of the respondents agreed that there was enough talk of digital migration on SABC TV, and just over half of the respondents 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 the respondents from Northern Cape said that there was enough talk of digital migration in national and local newspapers, as compared to the Free State respondents.

6.5 Analysis of the Quantitative evaluation

6.5.1 Northern Cape

In-depth interviews were carried out with municipality officials, SAPO Managers, focus group interviews were conducted with beneficiaries of government-issued STBs and questionnaire responses were also gathered from members of the public in the ZF Mgcawu and the Pixley ka Seme District Municipalities of the Northern Cape Province.

In the ZF Mgcawu District Municipality the targeted municipalities were the Kai!Garib local municipality consisting of the (Kakamas, Keimoes and Groblershoop towns, and in the Kareeberg District Municipality the target local municipality was Carnarvon).

The Focus Group Surveys covered the following:

- In-Depth Recorded Interviews with Municipal Councillor/Manager/Mayor, to explain the involvement of the Municipality in the BDM Public Awareness and Consumer campaign;
- In-Depth Recorded Interviews with SAPO Branch Managers, to explain the Post Office involvement in the BDM Public Awareness and Consumer Support (STB Registration) campaign; and
- In-Depth Recorded Interviews with STB beneficiaries about BDM Public Awareness and Consumer Support (STB Registration Assistance)

The Kai! Garib municipality in the ZF Mgcawu District Municipality being one of the first municipalities to undergo digital broadcasting migration, had high levels of involvement, hence the provinces' migration success rate. To this end, all available resources were made available for the public awareness campaign. In conjunction with the GCIS, Municipalities, the SAPO, the Committee, ensured that all stakeholders and the members of community came on board. Door to door campaigns by between 250 to 300 volunteers were conducted, with posters and leaflets used to spread the message. The messages were targeted at low income households encouraging them to register by applying at their local post office. According to the local authorities, the campaign was found to be success.

Although public awareness campaign was deemed to be a success by those involved, there were however concerns that were raised suggesting that too little resources were directed towards local radio and media in order to raise awareness. There was a general view that suggested that the local media would have been best placed to undertake the media awareness function since it understood the community better, and as such, more resources should have been made available locally. The findings indicate that, local media could have succeeded in communicating direct and consistent messages to the local communities that they serve. This strategy would have assisted with the messaging a couple of weeks prior to the switchover. The other challenges identified included the non-availability of flyers and leaflets in the local languages, as well as the exclusion of the youth as a target audience. The findings purport that the youth was found to be more techno-savvy and was most likely to assist in the home had challenges pertaining to the TV sets and STBs arose. Moreover, the training of the local youth in the technical aspect of STBs installation was found to be critical. There was however concern, citing that most of the installers that were appointed, came from outside the affected municipalities.

The findings indicate that, where political oversight was found to be prominent, some success regarding the public awareness campaigns was realised. The Kareeberg District Municipality was said to have demonstrated good inter-governmental relations between national, provincial and local arms of government. The municipality ensured that posters were distributed in retail outlets, shops and public amenities such as clinics and community halls. In the infancy of the project, the research suggests that, a number of youths were said to have been trained as artisans and that they were instrumental with the installation of digital television equipment. This was in contrast to Kheis Municipality, where a new Council comprising of a different party was inaugurated, following the

local government elections, and hence the municipality was found to have had minimal involvement in the public awareness campaigns. The post office was found to be the only entity that was most committed to driving the project on the ground. Most importantly, it must be noted that the Ministerial Imbizos, as compared to the other ordinary imbizo's that had taken place, were found to have generated greater interest and yielded successful public awareness campaigns.

6.5.2 Free State

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

Concerning the public awareness campaigns for digital migration, engagements in all the District Municipalities indicated a high level of involvement of the local councils, more so the Provincial government, particularly when Ministerial Imbizos were held.

Following the directive from Head Office, saw the SABCs provincial offices, alongside the GCIS coming on board and playing a significant part in promoting the digital migration process – this partnership was initiated during former Minister Dina Pule's tenure. A variety of promotional and publicity materials, including radio interviews, phone in programmes, advertisements and talk shows were used to promote the digital migration awareness campaign. This approach was later amplified with the Ministerial Imbizos, wherein taxi ranks and shopping centres were targeted. Live broadcasts, through Outside Broadcasting Vans (OBVs) were conducted, and Offices of the Premier and district mayors also got involved. The beneficiaries of STBs received their public awareness information through Door to Door campaigns, Imbizos, through SABC's Lesedi FM, neighbours, posters and leaflets.

The key message that was communicated at the time was, "Don't change your television set. All you need is a set top box to get digital television". The secondary message was seeking to explain the process / procedures and documentation required when applying for a STB. De-linking the television license from the digital migration process led to an increase in registrations.

The role that was played by the local SAPO was critical to the digital migration public awareness and support campaign. Local postal offices were overstretched, to a point of overreaching in some post offices. Although training was provided to SAPO staff, most staff members were expected not only to register beneficiaries of STBs, but also to undertake Door to Door campaigns, redeem vouchers recovered from installations. Also in the absence of a call centre, SAPO staff members were further expected to act as a go between the installers and the general public who were encountering challenges with the installations of their STBs.

Public awareness of the digital migration in the Free State was deemed to be a success in some areas, such as the Manguang metro municipality. However, experience in some areas such as Edenburg in the Xhariep District Municipalities and Setsoto District Municipality was varied, as highlighted by all stakeholders, including beneficiaries of STBs, who were impressed with the new equipment, a clear picture quality and more channels. There were however other beneficiaries who endured frustrations with the STB registration, and also the long time it has taken to have them delivered and installed.

The main challenge that was identified has been the non-consistent and fading public awareness campaigns, leaving some consumers exposed to unscrupulous retailers. MultiChoice included has been reported as taking advantage of this loophole, by advising members of the community that alternative decoders were available in the event that the Post Office did not have stock. The slow adaptation to new technology by some people as cited in Ficksburg for example, required what one of the GCIS officials termed a "big bang approach" to public awareness. This was because in some instances such as in Edenburg, some people did not have an idea what the difference between analogue and digital was. Although local radio and media were provided with editorial coverage and advertisement support, this was not sufficient, however only became more pronounced during the Ministerial Imbizos. Lack of training of local youth as artisans remained a sore point in areas such as Edenburg and Ficksburg, thus presenting inconstancies where provincial training was concerned.

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.

Migration to DTT was high across all municipalities in the Northern Cape. However, in the Free State, high levels of migration were found only within the Manguang Metropolitan Municipality districts.

Media channel effectiveness:

SABC TV and Radio was the most effective media channel and succeeded in providing sufficient information to the community about digital migration. The weakest media channels were found to be the Go Digital leaflet/pamphlet, the community radio/newspaper and social media.

The door-to-door campaign was found to be most effective in the Thabo Mofutsanyana Municipality in the Free State, and the Kareeberg and Kai Garib Municipalities in the Northern Cape. The Imbizos were generally most effective in the Free State and particularly in the Thabo Mofutsanyana and Mangaung Metropolitan Municipalities. The Go Digital leaflet/pamphlet was also most effective in the Thabo Mofutsanyana Municipality in the Free State and the Kareeberg Municipality in the Northern Cape.

The community radio/newspaper outlets were most effective in informing the people of the Mangaung Metropolitan Municipality in the Free State. Social media, the SAPO and word of mouth played very small roles in creating the much-required awareness levels.

Levels of awareness of digital migration and DTT, created by the campaigns

The campaigns that were implemented succeeded in creating high levels of awareness about the benefits of DTT in The Northern Cape. In the Free State, good levels of awareness were found to exist around the high-quality television picture, and a fair level of awareness was also found regarding the additional channels and programmes. However, awareness of other DTT benefits were found to be very low. The campaign managed to create fair to good levels of awareness around the need for STBs for old analogue television sets, and that a new TV set was not required, but failed to adequately inform the communities that a new aerial may be required to receive DTT.

The campaign has had little success in creating awareness about the hardware requirements for DTT in the Xhariep Municipality in the Free State. High levels of awareness were found to be in the Northern Cape with regards to the requirements for applying for DTT. The knowledge of subsidies available for qualifying households was fairly good across most municipalities, with the exception of the Xhariep Municipality in the Free State.

Awareness of the ease of installing the STB was found to be low in the Free State. However knowledge that SAPO was 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.

Except for respondents from the Xhariep Municipality in the Free State, perceptions of community awareness of DTT and digital migration were very high. The Go Digital campaign was seen to be successful in creating awareness about the existence of DTT, but had differing levels of success in communicating the key messages to the communities. A number of the benefits presented by DTT were not known by the majority of the Free State respondents. There were low levels of awareness across all municipalities, that accessing DTT may require a new TV aerial. There were also some misperceptions that a STB would give viewers access to free DSTV channels, e.g. a large majority of respondents from the Kai Garib District Municipality indicated that they believed a STB would help them to get free DSTV channels. It can therefore be assumed that there was a misperception within the community about the type of channels they were going to be receiving, believing that they were DSTV channels. These assertions were found to be worrisome, considering the fact that the respondents concerned had already migrated to digital television.

There were low levels of awareness in the Free State about the ease of installing STBs, with the Go Digital campaign having not been very successful in the Xhariep District Municipality in the Free State. This therefore calls for further investigations in order to understand the root cause of this District Municipality's campaign for not being as successful as in other municipalities. Overall, the campaign was found to be more successful in the Northern Cape Province than in the Free State. Understanding what created the different levels of understanding of the campaign, will assist with future campaign planning. SABC TV and radio, door-to-door and Imbizo were also found to be the main sources of creating awareness. The costs of using other channels for campaigning should be investigated, as they may prove to be unviable in achieving the desired results. This is particularly true for the social media platforms, as only about half of the targeted beneficiaries actually make use of, or have access to social media.

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?
  - 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:

i. 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 Pubic 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).

ii. 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.

However, at operational level, and during the implementation of the campaign, there was cooperation between the Department and its portfolio organisations, especially during the Ministerial Imbizos and Door-To-Door engagements with communities across the various provinces.

Recently, Minister Dlodlo made articulations stating that the Department will initiative a process of reviving the Broadcasting Digital Migration Advisory Council/Task Team, this in preparation for the country's switch-over to digital scheduled for December 2018.

In addition to the coordination across a range of issues regarding digital migration, coordination where the communication campaign is concerned, will hopefully receive attention.

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.

At the highest strategic level is the Minister and the Board Chairpersons of all the relevant entities where strategic matters relating to the mandate, role and commitment of each entity is outlined and agreed upon.

With regard to the implementation of the strategic decisions taken at Ministerial and Board entity level, there ought to be engagements between the Department's Director General and the Chief Executive Officers of the all the entities involved. Regular meetings at this level are important in order to maintain momentum during the implementation of the Digital Migration Public Awareness and Consumer Support Campaign.

Further down the operational chain is cooperation between the various specific divisions from each party, such as the Technical or Marketing and Communication teams, who need to liaise with each other from time to time. These structures will also need to provide the tools to assist them to respond promptly to issues and implement decision that are related to aspects of their operations (SAPO; Sentech; USAASA, SABC and Focus Group Interviews: 01/02/03 August 2017).

iii. 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 form 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.

For example, District Municipalities and Ward Councillors need to be aware that digital broadcasting infrastructure will also be helpful, in order to ensure that there is a seamless and instant communication in place to be deployed to their communities should there be emergencies.

As a result, an intergovernmental relations framework and a coordination function needs to be put in place and must permeate across the varied levels of the project, in order to ensure the successful implementation of the Digital Migration Public Awareness and Consumer Support Campaign.

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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).

iv. Changes in Strategic and Political Leadership

One of the serious handicaps that confronted the implementation of the Broadcasting Digital Migration, has been the leadership instability that arose from the changes in Cabinet, leading to the appointment of several Ministers to the Ministry of Communications over the past years.

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.

These frequent leadership changes have in turn, affected the roll out of the BDM project more than any other government programme. The impact has been found to be largely negative, thus debilitating a project that was subject to tight delivery timelines (SAPO; Sentech; USAASA, SABC and Focus Group Interviews: 01/02/03 August 2017).

Secondly, the BDM project has 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.

There is also a great need for the DoC seize, reposition the BDM project and provide a clear direction for the industry on a decisive way forward. This strategy will ensure that a final march towards digital switch-over as scheduled for December 2017 is swiftly implemented (SAPO; Sentech; USAASA, SABC and Focus Group Interviews: 01/02/03 August 2017).

v. 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.

It is important to note that, the scope of the Evaluation Study was not only focused on the human resources aspect. Save to say that this is a national campaign which will be conducted and implemented over a two-year period, and will therefore require the allocation of sufficient human resources and expertise.

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?
  - o 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 listed as follows:

- 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;
- From the technical aspect, protecting STBs so that they don't work outside RSA;
- Promoting young entrepreneurs, also by encouraging them to provide innovative and creative solutions;
- 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.

The focus on the indigent television households is understandable, in the light of the socio-economic life conditions of the majority of South Africans. This further demonstrate that, there are efforts and commitments from government of ensuring that this particular group is not left behind during the digital migration process.

However, in so doing, the Department must not leave out communicating with the rest of the 8 million television households that fall outside the threshold of the STB subsidy or support framework (In-depth Interviews Trompsburg, Edenburg, Ladybrand, Ficksburg: 04/05/06 July 2017).

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.

i. 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.

ii.   Door-to-Door campaigns and Ministerial Imbizo

The door to door campaigns played an important role in raising the profile of the digital migration project. Departmental personnel, assisted by the community volunteers 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 Mgcawu District Municipality towns of Kakamus, Keimos and Groblershoop and Carnavon town of the Pixley Ka Seme District Municipality.

A series of meetings were held ahead of the roll out of digital switch-over campaign. The Northern Cape switch-over was to be the first for the country, "and seemingly the stakes were very high", in order to ensure that the digital switch-over was an absolute success (In-Depth Interviews 20 June 2017; 22 June 2017).

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.

Ministerial Imbizos were held in both Keimos and Carnavon municipalities, and drew attendance of officials from the Presidency, as well as from the DoC (Department of Communications 2016: Draft Project Plan ASO Event 28 October 2016). And as a result, Keimos and the Carnavon were placed into a public relation "frenzy" – with financial, human and public awareness resources being pulled together from national, provincial and local government levels. Government officials and volunteers mobilised the two communities by utilizing loud-hailers, flyers, exhibition stands and a host of other marketing paraphernalia (In-Depth Interviews 20 June 2017; 22 June 2017).

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.

The Free State focus groups interviews that were carried out, showed that high levels of consultation and cooperation between the national, provincial and local arms of government in relation with the BDM Public Awareness and Consumer Support campaign, can go a long way.

However, there was subtle sceptism 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 certai 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).

iii. 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).

In some district municipalities, the SABC and SAPO also distributed some marketing materials produced from their regional offices, but this was not done in all the other areas. The quantities distributed appeared also appeared to have been low, as some of the respondents remembered the promotional materials that was distributed by both state-owned entities.

iv. 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.

Once the applications forms were filled in, and applicant data was captured on the system, only then was the Head Office is in a position to access the applications and to refer successful application to the companies appointed for the installations.

SAPO employees also joined the DTT team from the DoC when the Department conducted community outreach campaigns, including the Door-To-Door campaigns. Flyers and leaflets were distributed within communities, and the Post Office mounted some of the posters in and outside their offices, which explained the digital migration project and the STB registration process.

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. But still, some of the respondents were apprehensive upon the arrival of the Pan Africa TMT team to conduct the interviews.

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.

One of the household respondents quipped by saying, (In-Depth Interview Meqeleng, Ficksburg: 06 July 2017): "Cllr Maveliso came around to inform me about the research team that will be coming around to conduct interviews about STB. I have been expecting you, but when the car stopped and the team got out and walked towards my house, I had doubts as to whether you were SABC licence inspectors on an investigation mission. But having agreed to the Councillors request, I thought to myself let me open for you, and respond as honestly to your questions".

Based on the above observations, it could be said that, many respondents did not indicate or divulge to the research team their initial apprehension to register for STB's or avail themselves to be interviewed – even after having the knowledge that the research project was commissioned by government. The research team observed that, it took a lot of courage and trust from some respondents to be honest, to open up and to divulge the real reasons behind their slow response in registering for the STBs.

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 "Chinese retailers" who did not ask for a valid SABC television licence during the over the counter transaction. Ficksburg is a border town with neighbouring Lesotho, hence there is reason to believe that these television sets are "grey" products and goods, that many border towns are susceptible to.

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 impact of "grey" and "dumped" television sets on the South African retail market using the border towns as the entry points; and
- 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). These field workers were briefed about the project and about the issues related to the Digital Migration Public Awareness and Consumer Support Campaign.

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

- The Digital Migration Public Awareness and Consumer Support campaign has been successful;
- Public knowledge about DTT was more successful in the Northern Cape as compared to the Free State;
- Public awareness and consumer campaigns were said to be instrumental in promoting STB registration and migration to DTT platform; and

- The identified successful media platforms of the Public Awareness and Consumer Support Campaign were said to be the following:
    - SABC Radio and Television broadcasting services;
    - Door-To-Door campaigns; and
    - Ministerial Imbizos
- The campaign with the lowest public awareness levels was said to be in the Xhariep district municipality of the Free State

The specifically summarised and categorised findings of the Questionnaire Survey in Northern Cape and the Free State were outlined as follows:

- Gender: 67,7% polled were females
- Age Group:
    - 77,2% polled fell under the 16 – 55 group
    - 22,8% polled fell under 56 – 75 group
- Education:
    - 31% polled with some primary school education;
    - 31.5% polled with high school education;
    - 29,1% with Matric qualification;
    - 6,2% with Diploma/FET qualification; and
    - 1,2% with University degree
- Gross Income
    - 87,9% earned less than R3 200 per month
    - 11% earned between R3 200 – R10 000
    - 0,7% earned above R10 000
- Television Channel Access:
    - 39.2 with DSTV Subscription
- Source of information:
    - SABC 90.3%;
    - Community Radio 22.6%; and
    - Regional Newspapers 5,6%
- Social Media Access: 52%
- Recognition of Go Digital Logo: 82.2%
- Knowledge about what the Logo stands for: 75.4% (equal split between NCape & FS)
- Sources of digital Migration information:
    - SABC   64,6%
    - Door-to-Door   45%
    - Ministerial Imbizo   37,8%
    - Go Digital Leaflets   30,9%
    - Comm Radio/Newspaper   15,6%
    - Social Media   8,3%
    - Other   4,2%

- Consumer Migration to DTT as a result of Public Awareness campaign   67,9%

- Benefits of Digital migration:
  - Better TV picture quality: 79,3%
  - Access to Multiple Channels: 66,4%
  - Electronic Programme Guide: 61,7%
  - Parental & Programme Guide: 61,4%
  - Assistance to Visually Impaired/Hard of Hearing individuals 58%
- Awareness about the purpose of Set Top Box: 56%
- Government free STBs to qualifying households: 73,2%
- SAPO assistance in applying for STB: 67,1%
- SABC Television licence required for STB application: 56,6%
- General community awareness about digital migration: 81,2%
- General community awareness about STBs: 84,4%

(Source: Qualitative Quarter Research: July 2017. Report – Broadcasting Digital Migration Communication Strategy).

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;

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o 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.

Apart from the international lessons learnt from the bench-marking exercise, what stood out from many countries across Africa and around the world, was that South Africa is one of the few countries, if not the only country, that provides free Set Top Boxes subsidies to indigent television households.

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 Sacco 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 Hoorn Interview: 22 June 2017).

- The BDM project was instrumental in creating career awareness among the youth, exposing them to the various career options open to them within the ICT and electronic communication space. Further opportunities were identified within the public policy development and consumer protection space within the DoC, ICASA and USAASA. University graduates and university of technology students with electrical engineering qualifications, could later end up working for companies such as the SABC and Sentech; as well as provide support functions in government and state-owned companies such as human resources, information technology and finance.

- 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 Sacco 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 Summary

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

- The SABC became the most successful media platform for creating 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;
- During the activation period, the Ministerial Imbizo's were found to be more intense; having received support from the provincial and local government structures and also the

- implementing entities. These Imbizos also succeeded in galvanising the support for the consumer awareness campaign in the specific and targeted areas;
- 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

As per the ToR, this evaluation was set out to determine the effectiveness of the implementation of the Broadcasting Digital Migration Public Awareness Campaign and Consumer Support Strategy, and also to ascertain how the project can be enhanced in future. The evaluation started out by first describing and clarifying the BDM's Theory of Change. The evaluation also validated that the primary purpose of the campaign was to inform and educate all South Africans about the importance of digital migration and its benefits to the country and the economy at large. And also, about the support to be given to the 5 million indigent households who registered for free STBs. Applying a theory-driven approach, the evaluation appraised the relevance, effectiveness, efficiency and sustainability of the BDM strategy – this was in accordance to an assessment framework adopted, and derived from the Key Evaluation Section (KEQs) in the ToR and their associated sub-questions.

The evaluation concluded by indicating that the current implementation approach of the BDM strategy was imperfect, however succeeded in presenting clear messages on the digital migration processes as embedded within BDM ecosystem. Although there is evidence that the department has been implementing the strategy, the various gaps and challenges were identified.

This concluding chapter of the evaluation was seeking to link the Recommendations of the study with the Dialogical Model of Communications that was used when analysing the effectiveness of the Digital Migration Pubic Awareness and Consumer Support Campaign.

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

- The communication's Intentions, Objectives and Purpose of the campaign;
- That messages were encrypted, and encoded for the use in the differing media platforms and audiences;
- The identified primary and secondary audiences; and
- A display of media platforms, was employed and deployed, in order to carry out a variety of messages targeted at different 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 Campaign identified four key themes that were employed throughout the campaign. Although the strategy was not sufficiently detailed, however, high level strategic objectives were articulated during the campaign activities and were aligned accordingly. The strategic framework of the BDM project and the processes outlined, were detailed in the various DoCs' official documents. In addition, and for the purposes of operational planning and implementation, the DoC further generated a set of documentation that gave expression to the BDM Public Awareness and Consumer Support Campaign.

The lack of the strategy documents made is difficult to communicate clearly, the Department's intended and strategic objectives of the campaign. Hence, the deployment of the strategic tasks, were found to be inconsistent, and in some instances not successful in achieving the desired goals. Had the strategy been clear, fundamental mistakes such as failing to utilise the primary languages spoken in specific areas could be avoided.

7.1.2 Key Messages and Sub-Messages

The key messages as detailed in the BDM Communication strategy were clearly defined. The findings suggest that the campaigns that were implemented, were found to be aligned to the strategic communications imperatives. However, in spite of the intended outcomes, the different media employed achieved varying successes. It is however essential to focus attention on the media that was found to be more successful in communication the key messages. The communications strategy that was deployed, outlined the overarching messages and sub-messages, that were used in order 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 went to great lengths in deploying a number of resources in trying to reach out to specific communities across the country. There was also a need for the campaign to address specific and select communities and other stakeholders including the 8 million television households that fell outside the government STB subsidy – and also the retail and manufacturing sectors, that will be responsible for selling a wide range of digital television equipment to these television households.

There was also a need for developing local sub-messages targeted at specific geographical areas, to be used as and when a need arose, and also the use of minority languages where applicable.

7.1.3 Media Platforms and Target Audiences

Various media platforms were deployed and yielded varying results in terms of impact and raising digital migration awareness levels. The SABC radio and television services succeeded because they have a wide range geographic footprint, reaching various parts of the country, cities, towns and villages alike. Community radio and print media, if adequately used, would have had a greater impact because of the specific geographic footprint they cover in their respective localities.

The findings indicate that, various media platforms needed to be deployed in order to enhance the effectiveness of the messages by reaching as wider audience as possible. Also, and in order to maximise the communication reach, it would have worked out best, had a multi-pronged communications approach could have been applied – reaching diverse audiences across the provinces, regardless of their differing social and economic standing.

The findings of the analysis that was evaluated were informed by the OECD-DAC criteria (OECD, 1992)

7.2 Relevance

The study was undertaken to assist the DoC to gauge the impact of the campaign, identify its successes if any, and to reflect on the lessons learnt - emanating from the challenges that resulted from the communications activities undertaken and also pertaining to the project. To assist the process, a number of communications documents were made available to the research team, and they included PowerPoint presentations, activation reports and other relevant documents such as the communications tools and the medium strategic framework of the department.

7.3 Effectiveness

The study highlighted that there were some key communications activities that were effective in supporting the consumer awareness campaign. The study further identified key activities, concerns and inputs that were provided by the Departments stakeholders and implementing agencies.

However, the findings suggest that, it is essential that some components of activities undertaken be improved. The use of languages has both emotional and political nuances that can cloud or enhance the messages presented. In addition, the selection of prominent media platforms needed to be done carefully. The research indicates that different media platforms had varying reach and impact from area to area. In future, a careful assessment of most effective media within a specific area must be conducted prior to deploying activities, this is in order to improve the effectiveness of the campaigns.

7.4 Efficiency

The use of the varied activities across different media platforms had varying effects. The findings of the study indicate that, the campaign would have been more beneficial had community leaders been involved from the planning stages – this would have ensured that there was immediate buy in from community members and thus enhanced the community's participation. In addition, and going forward, the campaign would have further benefitted, had a multi-stakeholder approach led by Ministers and senior government officials and other strategic stakeholders would have been adopted.

Successful campaigns, as identified by the international benchmark study that was undertaken, tended to adopt a multi-stakeholder approach and participation. However, this was not the case in some geographical areas, such as Groblershoop.

7.5 Sustainability

Furthermore, whilst trying to ascertain which relevant mediums to use when trying to reach a particular target audience, the study found out that Imbizos and door-to-door campaigns, though effective, they might not be sustainable. This is in relation to logistics, costs and furthermore the ability to reach a wider audience. It was however noted that the mediums used did have some level of impact even though they were localised and were specifically targeted towards the indigent members of the community.

When considering the importance of the consumer awareness of the campaign in the digital migration ecosystem, a bigger impact was attained when other platforms were utilized, thus having a better audience reach. The findings indicate that Imbizos can be activated as an additional supplement to the campaign, as and when applicable – this is to ensure that a more targeted political presence and support is attained for the project.

7.6 Impact

The study found that the implementation of the BDM Communication plan had a significant impact in communities, this was as a result of the digital migration awareness campaign – and the benefits thereof were relatively high. However, the study also found that, different activities and the use of different media platforms had varying successes in different communities and areas. Hence, in order to improve the campaign and attain the desired impact, it is essential to review issues such as, effective media platform to be used in order to reach particular communities, the use of suitable languages for particular communities, early engagement with community leadership, and identifying suitable tactics to be deployed when implementing the campaign.

8 Recommendations

This chapter contains a list of recommendations emanating from the evaluation of the Digital Migration Communications Strategy and Consumer Support.

Invariably, all the recommendations are informed by the Dialogical Model when trying to address the shortcomings of the awareness campaign that need to be addressed – with regards to the Digital Migration Public Awareness and Consumer Support Campaign. Equally important, is to note the existing components of the campaign that have proven to be successful in communicating the digital migration project to a wide range of communities across the provinces where the campaign was rolled out.

The following recommendations are meant for the Ministry and the Department of Communications as the custodian of the Broadcasting Digital Migration project, and also the multi-stakeholder Task Team that was responsible for implementing the project. Invariably, all the Recommendations revert back to the Dialogical Model in trying to address the shortcomings of the awareness campaign that needs to be corrected in relation to the Digital Migration Public Awareness and Consumer Support Campaign.

Recommendation 1: Development of a Comprehensive Communication Strategy

It is important that the Department develops a Comprehensive Communication Strategy for Digital Migration project in order to enhance the campaign and support the role played by of the Department of Communications, its portfolio organisation and partner agencies for the Communicator/s of the Digital Migration project. A comprehensive communication strategy for Digital Migration project is required in order to enhance and support the objectives of the campaign, in communicating the campaign messages to the general public and the nation as a whole. But of greater importance would be the packaging of specific and targeted messages for select communities, stakeholders and interest groups is required.

The road-map to communicating to the general public, to select communities and stakeholders, must to be guided by a Theory of Change and a Logical Framework that would assist to signpost the following key components for effective implementation, monitoring and evaluation of the project:

• Set clear and measurable timelines for Tasks, Activities, Inputs, Outputs and Outcomes;
• Avail adequate resources – financial, human and technological – required for implementation;
• Identification of potential risks, and provide measures for mitigation; and
• Early warning systems for timeous interventions

All the above-mentioned components are applicable to the supplementary Media and Communications Plans that have been outlined as the actionable sub-items to Recommendation 1, namely:

- Positioning Broadcasting Digital Migration as a sub-stratum of various government programmes, in order to deliver basic services to all; and leveraging existing government programmes by including primary and high school learners in promoting digital migration in their homesteads.
- Align the Communication Strategy with supplementary Strategies and Media Plans, that emanate from portfolio organisations and partner agencies.
- Plan, position and implement the Digital Migration Communication Strategy as a sustainable campaign conducted in a seamless manner and uninterrupted over considerable period of time towards digital switch-over.

The Communications Strategy for Broadcasting Digital Migration should include the following components:

A. Targeted communication messages to the 8 million television households (that fall outside the government STB subsidy), the retail and manufacturing sectors that will be selling a wide range of digital television equipment to television households. Special focus should be placed in providing information to consumers and thus protecting them against unscrupulous retailers who sell digital television equipment and related "grey" products and equipment;

B. Position Digital Migration as a basic service that will leverage the delivery of education, health, and other government services to communities;

C. Align the overall Communication Strategy with the marketing and public awareness strategies of the portfolio organisations and partner agencies. Partner and stakeholder messages must not deviate from the DoCs key messages. For example, the SABC television licence fee campaign – sends out a single and an unambiguous message;

D. Develop specific local communications and consumer support campaigns that will address specific issues, as and when they arise, in different local communities. For example, the distribution of DTH vs DTT Set Top Boxes or Crisis Management Communication at local community levels;

E. Increase and enhance the use of all official languages, including minority languages for migrant communities, in all marketing material intended for local communities;

F. Enhance the use of local and community broadcasting and print media platforms when communicating with local communities, through the use of editorial content and advertisement support. Character Generators by SAPO and transmitted by Sentech, can play an increasing local communication role;

G. Enhance and retain the use of SABC services because of their proven success during the digital migration public awareness campaign, including the use of the public broadcaster's Public Service Announcements (PSAs). Other terrestrial broadcasting services also have a role to play in this regard, such as e.tv and community television services (Soweto TV and Tshwane TV, for example)

H. As part of the awareness campaign, leverage the BDM project by weaving it into Basic Education (primary and high school) by promoting essay writing, public speaking and career development aspects of the curricular. Youth are an already available techno-savvy audience, that can be roped in to the drive digital migration awareness campaign into millions of television households, at no cost at all;

I. Explore the use of non-conventional media as part of the BDM public awareness campaign, by including the involvement of:

- 3rd party licence disc covers;
- Taxi Ranks/Railway Station Multimedia Monitors;
- Clinic/Hospital/SARS/Airport Multimedia Monitors;
- Community Centres and Libraries;
- ATM screens;
- Super-market bags and slips; and
- School exercise book covers

J. Plan the BDM Public Awareness and Consumer Support as a sustainable and an ongoing campaign, that is implemented in a seamless manner and on a continuous basis, over a period of time.

One of the common elements that were observed with regards to the implementing agencies was that, the said entities only got active when the Ministerial Imbizos were in action. In the absence of these Imbizos, the entities seem not to have had a clear direction about their roles, as it seems that these were not clearly outlined nor communicated by the Department. Hence the is an expectation for the DoC to provide strategic leadership where the BDM project is concerned.

At the same time, it must be noted that a revised strategy alone, cannot and should not be expected to solve all the challenges that have been identified by this evaluation. The findings suggest that, the assumptions of the Theory of Change have not all proven to hold and implementation fidelity was broken down in practice. Nevertheless, there have been positive gains that were yielded by the awareness campaign, and these were as a result of the quality campaigns and communication approaches adopted. However, these gains have been threatened by the lack of a comprehensive strategy, with roles and responsibilities clearly defined, the identification of more impactful platforms to be utilized and adequate funding for the BDM project being made available.

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 (Table 5, etc). 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 for implementation at local level by identified local representatives including Community Development Workers, Volunteers and other locally trained personnel. The road map 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 expected to support 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 the role of the BDM Task Team at all levels, from the strategic decision-making levels, as well as the operational levels;
- 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.
- Engaging with local political leadership and getting their buy in is important. Local Councillors and traditional authorities can also be brought on board, to manage the seamless implementation of the country's digital switch-over. This can be viewed from the context of addressing local and national service delivery issues in the build-up to the 2019 General Elections. It will be important for the BDM project to be mindful of the upcoming elections, in order to prepare itself and to navigate its way cautiously, in anticipation of the unfolding and what is suspected to be a highly charged political environment; and
- 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. This includes the National Treasury, Social Development, South African Revenue Services, Local and Cooperative Government, Departments of Health, including Basic and Higher Education departments.

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.

Annexure 1: References

1.   **Balancing Act, Broadcast report issue no. 154** - Tunga TV Digital migration initiative launched in Rwanda, 19 April 2013
2.   **BizTech Africa** – Minister urges citizens to embrace digital Tv, March 2013
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Annexure 2: Evaluation Instruments

BDM Public Awareness Questionnaire

The Questionnaire seeks to complement other data collection methodologies for evaluating the BDM Public Awareness campaign.

The Questionnaire seeks to conduct a survey either through:

- Random Sampling of residents in the 5 District Municipalities at a public amenity such as Shopping Centres, Community Libraries, Clinics, Community Centres, or through
- Community Meeting convened with the assistance of the local Municipal Councillor whereby Questionnaires are distributed to attendants, guided by or assisted by Volunteers and the Research Team.

The target of the Questionnaire population of 60 - 100 residents per municipality, to give a total sampled population of 300 - 500 respondents.

Demographic Questions

Q1   :   Age Group   16 – 35 36 – 55 56 – 75

Q2   :   Gender   Male   Female

Q3   :   DSTV Connection @ home

Q4   :   Education Level   Below Matric   Matric   Tertiary

Q5   :   Source of General News & Information   (Tick One or more)

SABC Radio & TV   Comm Radio/Newspaper

Regional/National Newspaper

TECHNICAL QUESTIONS

Q6:   Recognise this Logo & What is represents?

Q7: Broadcasting Digital Migration is about getting high quality television picture?

Yes   No

Q8: How did you get to know about BDM? (Tick One or more)

Go Digital Leaflet/Pamphlet   SABC Radio & TV   Imbizo

Door-To-Door campaign   Community Radio/Newspaper

Other & Specify

Q9: Old analogue television sets need STB to receive digital broadcasts?

Yes   No

Q10: Set Top Box helps to get free DSTV channels?   Yes   No

Q11: Government provides STB for free?   Yes   No

Q12: Attended BDM Imbizo in your area?   Yes   No

Q13: Was your Home part of BDM Door-To-Door Campaign? Yes   No

Q14: Do Many people in your community know about Broadcasting Digital Migration About?

Yes   No

Q15: Do Many people in your community know how to apply for a Set Top Box?

Yes   No

Q16: Do you think there is enough talk about digital migration in the media
Such as the SABC television and radio, and in your community/local media?
Yes   No

Q17: Is there enough coverage of Broadcasting Digital migration national and local newspapers and magazines?

Yes   No

Q18: Do you use social media platforms?

Yes   No

Q19: Is there coverage or discussion about broadcasting Digital Migration on social media platforms?

Yes   No

Questionnaire and Structured Questions for Interviews and Focus Groups

The List of Structured Questions below are for the Recorded Interviews to be conducted with the following Stakeholders and/or their Representatives:

- 2 x Provincial Liaison Officer (Northern Cape and Free State provincial government official for the BDM project)

- 5 x District Municipality officials responsible for liaising with BDM project

- 5 x Municipal Councillor – facilitated Imbizos in their respective Wards for BDM process

Provincial Liaison Officer And District Municipality Liaison Officer for BDM

Question1:   Kindly explain your Involvement in the Broadcasting Migration process? Were you involved in the public awareness campaign as well, How?

Question 2:   Which information materials were provided to you and your area for BDM public awareness campaign? Did you rely solely on DoC info materials or did your office generate some info materials for this purpose?

Question3:   How helpful were these information materials in spreading information about Broadcasting Digital migration to the community/ies, and Why?

Question 4:   What are your impressions of the Imbizo's and the door-to-Door campaigns conducted in your area? How effective were these methods for the BDM public awareness campaign?

Question 5:   If you are to reflect on the BDM public awareness campaign in your area, Are there Aspects of the campaign which you think could have been conducted better or differently for an improved public awareness campaign?

Question 6:   Did you provide any feedback about the success or shortcoming of the BDM public awareness to the BDM Project Team? If so, outline your input in this regard.

SAPO STB Registration Officials

A separate and specific list of Structured Questions for the 5 SAPO Officials (for the 5 SAPO Branches/Outlets in the 5 District Municipalities) responsible for the STB registration process:

Question 1:   Kindly explain How you got Involved in the STB registration process for the Broadcasting Digital Migration project?

Question 2:   Did SAPO generate any information material or conduct any public awareness campaign about the STB registration project?

Question 3:   Was specific training provided or workshops conducted to prepare and equip you with the STB registration process? Was this training/workshops adequate?

Question 4:   What is your experience of the STB registration process? Are there specific problems/challenges you encountered during the registration? Were beneficiaries aware of the requirements for registration?

Question 5:   Which aspects of the STB registration process worked well, and which aspects were problematic or difficult to manage?

Question 6:   Did you provide the BDM Team with any feedback about your STB registration process? If not, What input would you make to the BDM project team?

Group Interviews With STB Beneficiaries

These entails group interviews and discussions with Heads of Households or their representatives who benefited from the government subsidised STB.

Question 1: Has the use of STB changed your television viewing experience?
If so, How? Are the STBs reliable? How often do you experience downtime?

Question 2: How did you first learn about the STB registration process? How did you find the STB registration process? What problems did you encounter?

Question 3: Which media (Leaflet/Radio advertisement, for example) was more informative about the STB registration process?

Question 4: Did you attend the Imbizo in your area? What did you find Informative about the Imbizo?

Question 5: Do you have additional television sets in your household? If so, did you purchase additional STB's for those set/s?

Question 6: Are you subscribed to DSTV? Do you intend to so in future?

Annexure 3: Evaluation Framework

The Evaluation Research Study uses the Dialogical Model of Communication for analysing the Public Awareness and Consumer Support campaigns in South Africa, the United Kingdom and Tanzania.

The classical dialogical model of communication is based on the so-called triptych of communication consisting of the Communicator, Message and Recipient. All communication begins with the Communicator who initiates interaction with a Recipient or Audience by virtue of his/her intentions.

Occupying the central position in the communication triptych is the Message – that which is being shared between the Communicator and the Recipient. The communicator's thoughts and intentions are encoded in a message through the use of signals including speech, printed material such as books or leaflets, in audio and visual recordings (Van Schoor 1979:- 7 -33).

The various transportation mechanisms that carry the signal are referred to as the Medium. In the case of communicating to the public or larger groups of people, the mass media are for this purpose including newspapers and magazines, radio and television broadcasts, and recently with the aid of online media such as websites and social media sites.

The communications process becomes meaningful when the message is received, interpreted and understood by the Recipient/Audience. In instances where the Recipient can respond to the Communication, Feedback is provided thereby allowing for a continual engagement between the two or more parties.

This interaction was characterise by Greek Philosophers Socrates and Plato as Dialogue. For Plato, Dialogue was the ideal means of achieving mutual understanding. Communication was viewed accordingly as a mode of existence (Van Schoor 1979:- 7 -33).

Ever since the days of the Greek philosophers, communications has been a subject of study from various approaches including Kierkegaard's Existentialism, Semiological Structuralism, Hermeneutics, Marxism which later approached the subject various angles, including the structure of power relations in society.

But none of these philosophical approaches have challenged the classical Triptych Dialogical Model of Communications that outlines the role players, the engagement between them and the media utilised to reach out to each other.

However, it was Jose Ortega y Gasset who captured the dynamic nature of communication: "Every utterance is deficient; and every utterance is exuberant". In terms of the first law, we cannot never quite succeed in communicating absolutely everything we wish to say. No material form can suffice for the range and depths of man's spirit and lifeworld. On the other hand, an utterance expresses far more than it says at face value (Van Schoor 1979:19).

To this end, the classical Triptych Dialogical Model is used in this Evaluation Research study to analyse the successful or unsuccessful implementation of the Digital Switchover public awareness and consumer support campaign through Literature Review of official and relevant documentation for South Africa, United Kingdom, Rwanda and Tanzania.