

Digital Television (DTV) Transition Campaign Update

DTVAnswers.com

An initiative of the National Association of Broadcasters

DTV Transition

DTV Transition:

February 17, 2009

- All full-power television stations must complete transition to digital broadcasting by Feb. 17, 2009 at 11:59pm.
- Mandated by Deficit Reduction Act of 2005

DTV Transition

Who's Affected?

- 19.6 Million OTA-only Households (17.8%)
- 14.6 million HH's with some OTA (16.1%)
- Total OTA HH's: 34.2 million
- Total OTA Sets: 69 million

Source of estimates: NAB Research analysis of Spring 2006 Knowledge Networks/SRI Home Technology Monitor survey; 2005-2006 Nielsen U.S. TV Household estimates.

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Who's Affected?

- Disproportionately Affected Groups
 - Seniors
 - Minorities
 - Economically Disadvantaged
 - Rural Areas

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Three ways consumers can switch:

1. Purchase a Converter Box
 - Government providing \$40 coupons for boxes.
2. Purchase a new TV set with a built-in digital tuner
3. Subscribe to Pay TV service—i.e. cable or satellite

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Congress' Role

- \$1.5 billion appropriated to fund digital-to analog converter box coupon program
- U.S. Dept. of Commerce's NTIA managing program
 - IBM awarded contract to distribute coupons

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Coupon Program

“Starting Jan. 1, 2008, all U.S. households will be eligible to request up to two \$40 coupons to be used toward the purchase of up to two digital-to-analog converter boxes...” *(NTIA press release, 3/12/07)*

Broadcasters Leading DTV Awareness Efforts

TV Stations nationwide participating in DTV Consumer Education Campaign

- DTV Action Spots
- Crawls, snipes and news tickers
- 30-minute television programs
- 100-day “Countdown Clock”
- Public Relations
- Grassroots initiatives



Television as we know it is about to change.

By law, television stations nationwide will switch from the old method of transmitting TV signals known as analog to digital television (DTV) on February 17, 2009. DTV is an innovative new type of broadcasting technology that enables television stations to offer movie-quality pictures and sound, more channels and even over-the-air high definition television (HDTV) to consumers with HD television sets.

The transition to DTV will also free up the airwaves and give America's first responders more ways to communicate with each other during emergencies. But while the benefits of DTV are remarkable, millions of households risk losing television reception after the switch to DTV unless they take easy steps to upgrade. We're here to help you learn more about the DTV transition and [what you can do](#) to prepare for it.

 [Get Ready for DTV](#)



 [Switchover Options](#)



 [News & Events](#)



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Outreach: TV program

30-minute educational TV program

- Focus: A-Z of DTV transition, with special focus on converter boxes
- Shot and distributed in HD, SD
- Produced in English, Spanish
- Includes interviews with FCC Chairman Kevin Martin; U.S. Secretary of Commerce Carlos Gutierrez

Outreach: Speakers Bureau

DTV Speakers Bureau

- Purpose: Utilize industry's grassroots and personnel resources as a “ground campaign” to complement “air campaign” of spots and news coverage
- Goal: 8,000 speaking engagements
 - Audiences: Rotary clubs, Kiwanis clubs, retirement centers, manufacturing plants, schools, etc.

Outreach: DTV Road Show

600
Events
Nationwide



DTV Trekker stop at Randolph Air Show in San Antonio, TX

DTV Transition

NAB's DTV Campaign

Components

- Research
- Media
- DTV Transition Coalition

DTV Transition

- DTV Campaign Timeline
 - Phase I (Jan. 2007 – Feb. 2008)
 - Phase II (Feb. 2008 – Nov. 2008)
 - Phase III (Nov. 2008 – February 2009)

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Research

- Focus Groups
- Survey Research/Polling
- Tracking

DTV Transition

- State and Local Gov't Outreach

DTV Toolkits sent to:

- All 535 members of Congress
- Governors, Lt. Governors
- State Legislators: Majority, Minority leaders
- State Legislators: Minority caucuses
- State aging agency directors
- State municipal association executive directors
- State county association executive directors

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Toolkits

- All 7,200 legislators
- All Secretaries of State
- Mayors of 500 largest cities

DTV TRANSITION

- WHAT IS THE DTV TRANSITION COALITION ?
 - Group of public and private organizations working together to assure a successful transition to digital television.

DTV Transition

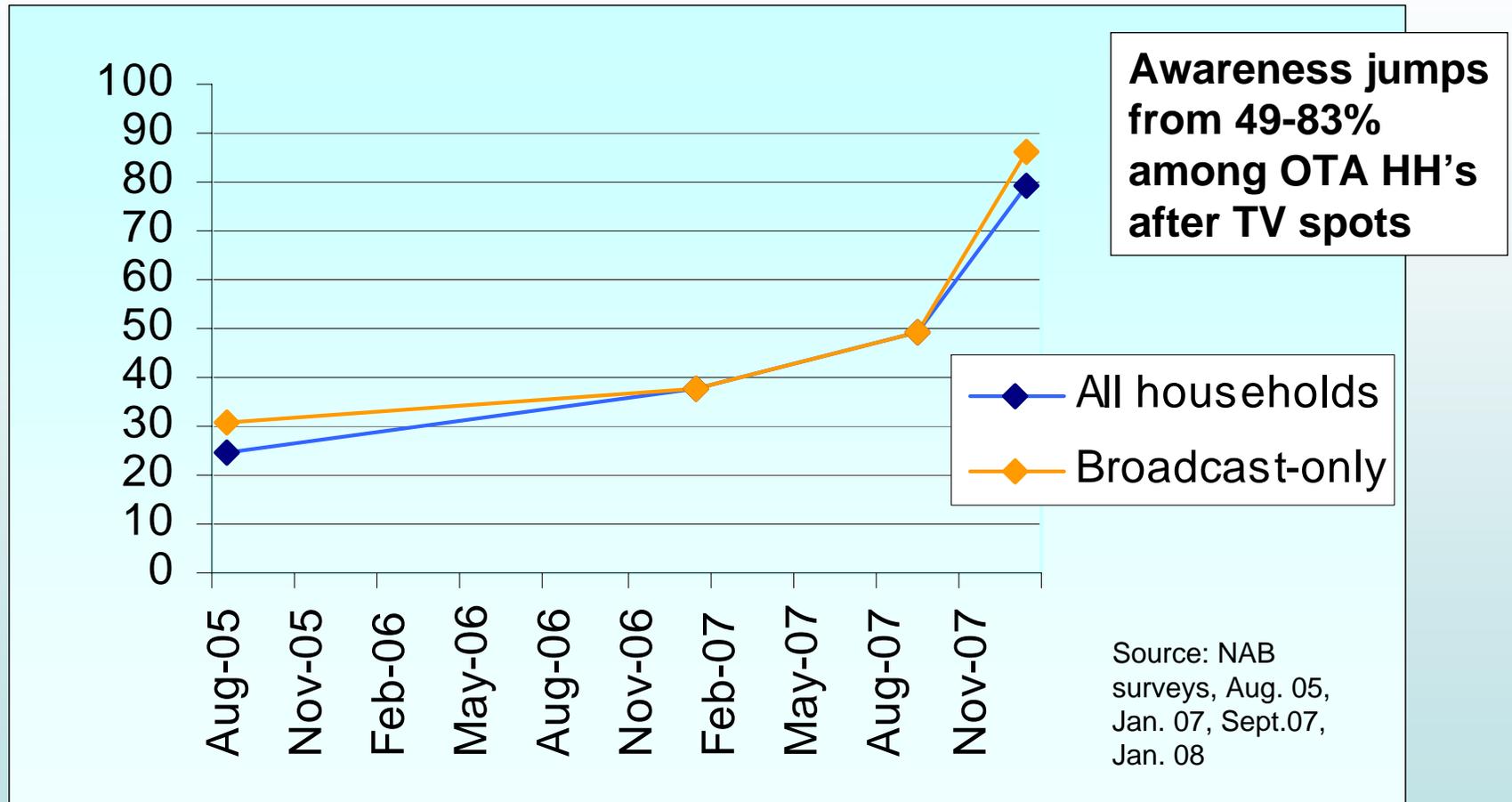
DTV Transition Coalition

Goal: To ensure no consumer is left without broadcast television due to a lack of information about the transition.

- February 28, 2007: 8 organizations
- November, 2007: 180 organizations
- May, 2008: 229 organizations

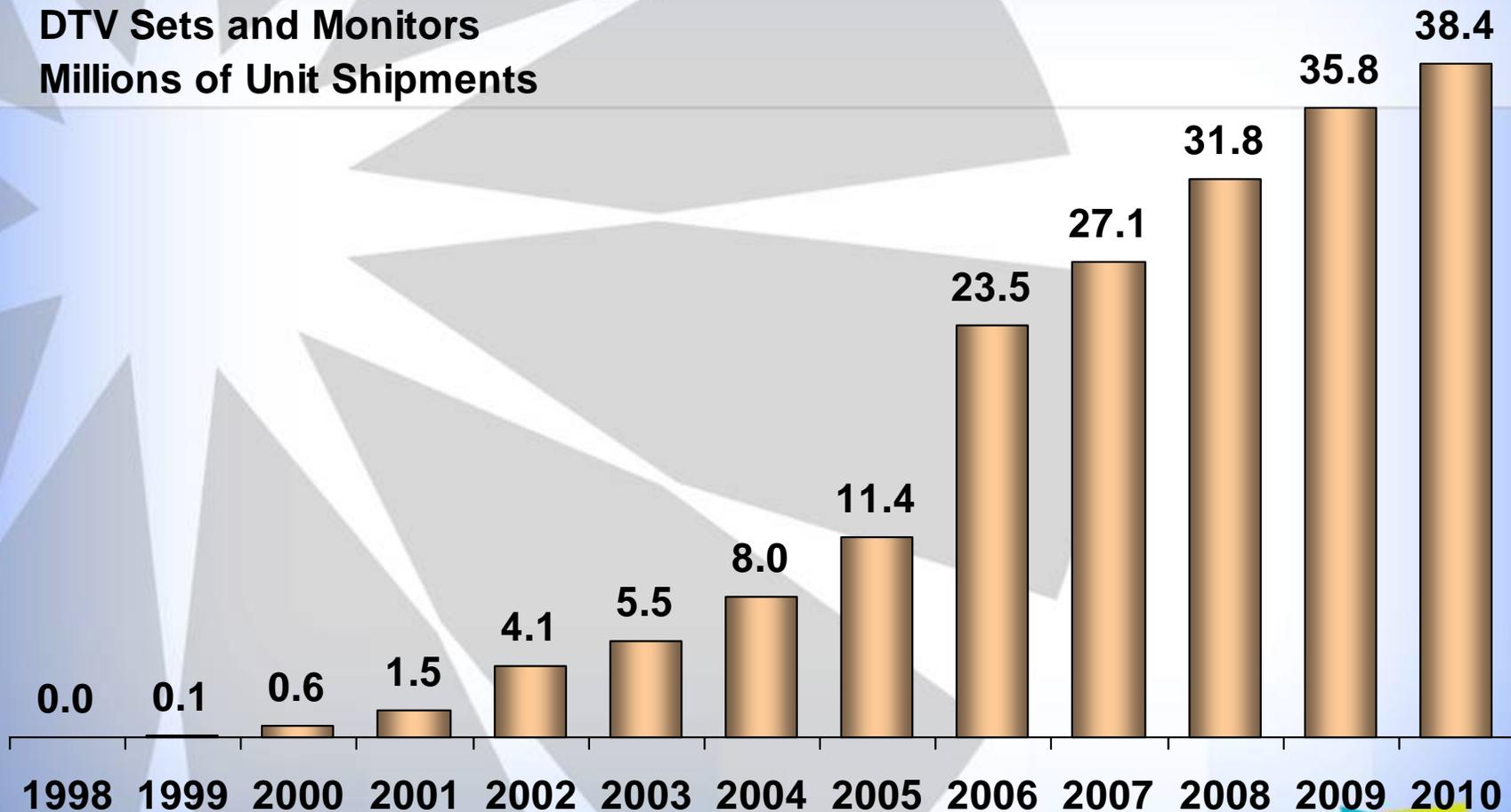


DTV Awareness



Historic DTV Sales

DTV Sets and Monitors
Millions of Unit Shipments



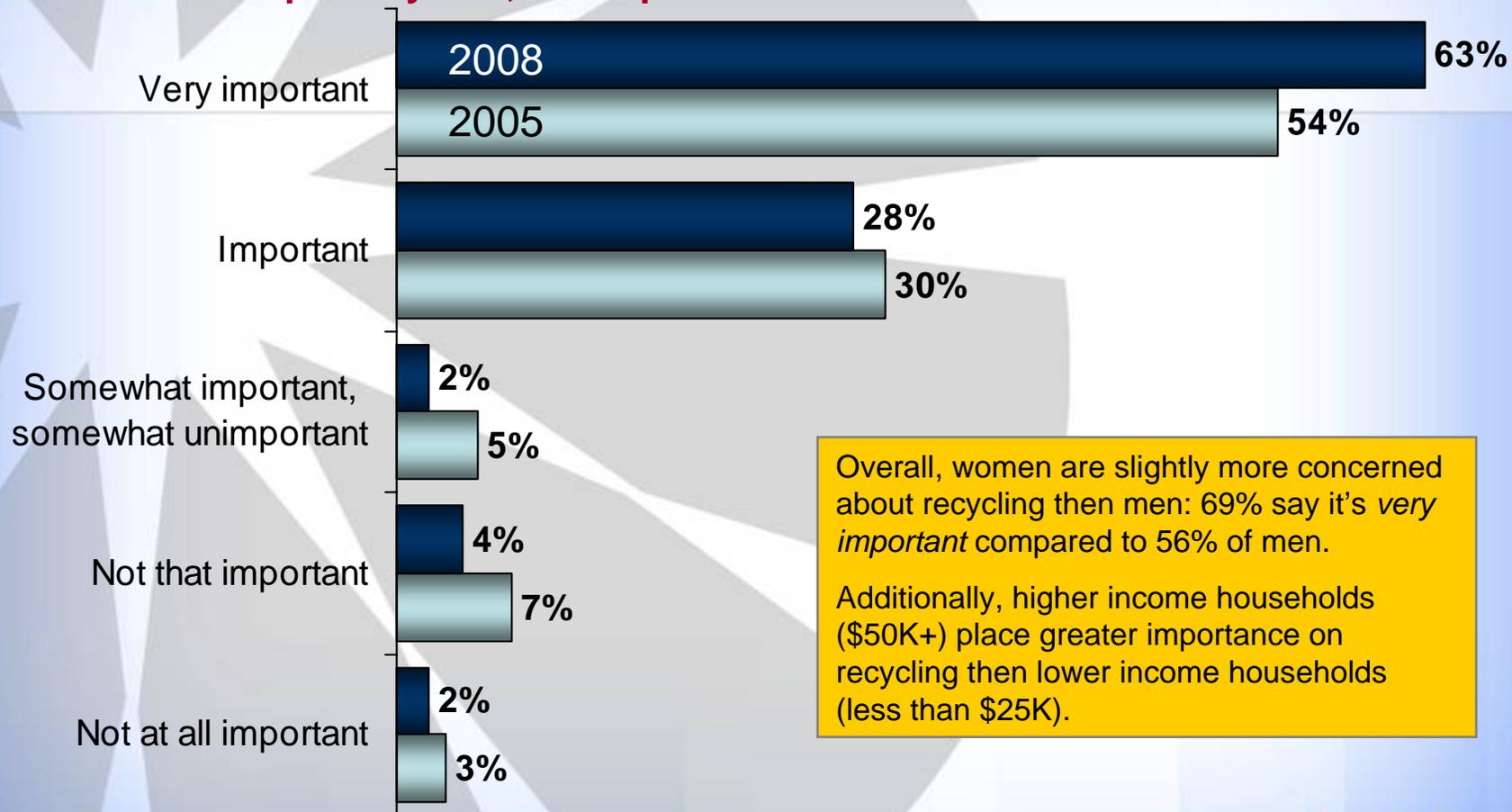
www.CE.org

Producer of



Importance of Recycling on the Rise

Over the past 3 years, net importance increased from 84% to 91%



Overall, women are slightly more concerned about recycling than men: 69% say it's *very important* compared to 56% of men. Additionally, higher income households (\$50K+) place greater importance on recycling than lower income households (less than \$25K).



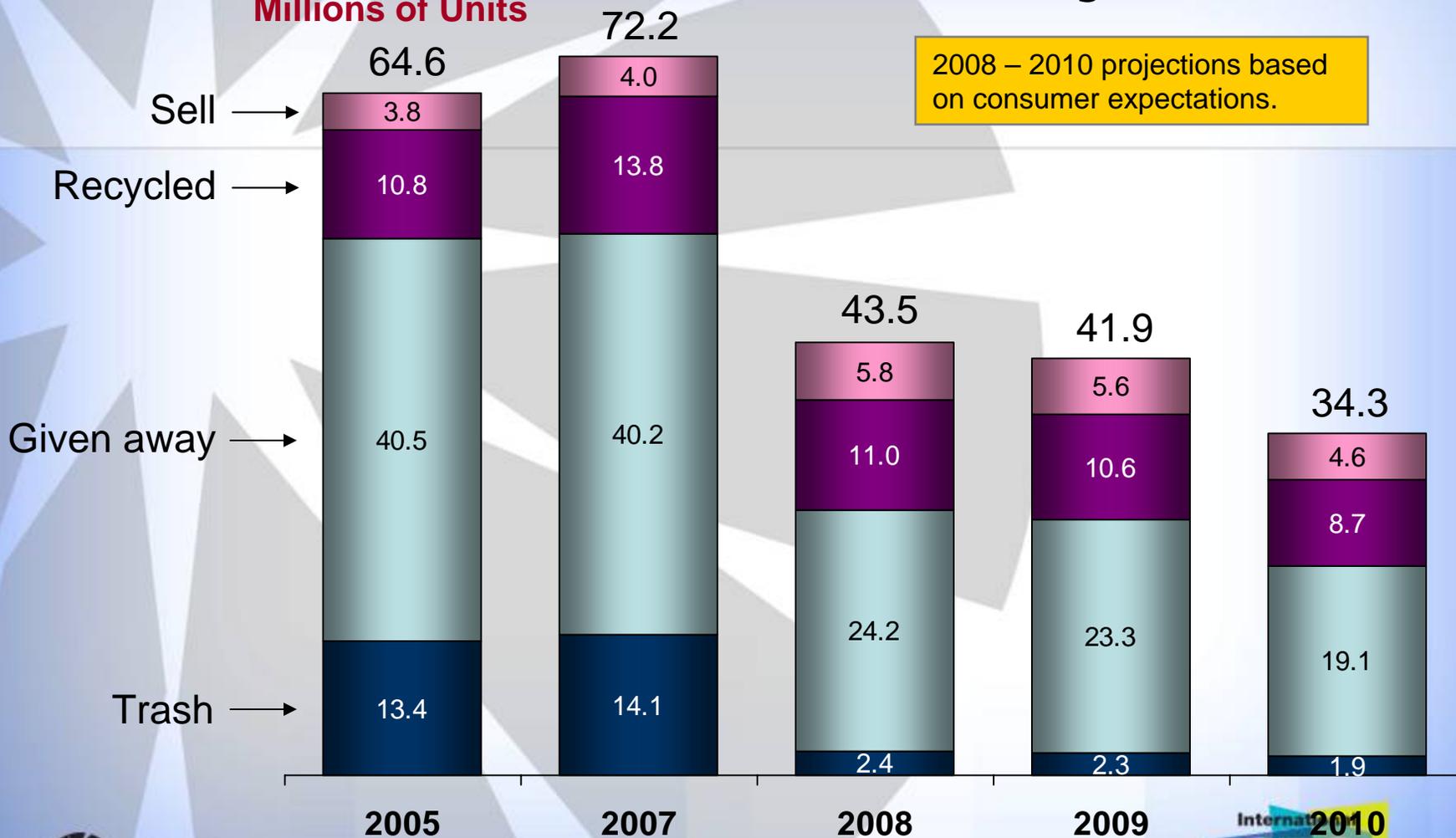
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Television Removal Projections

Millions of Units



2008 – 2010 projections based on consumer expectations.



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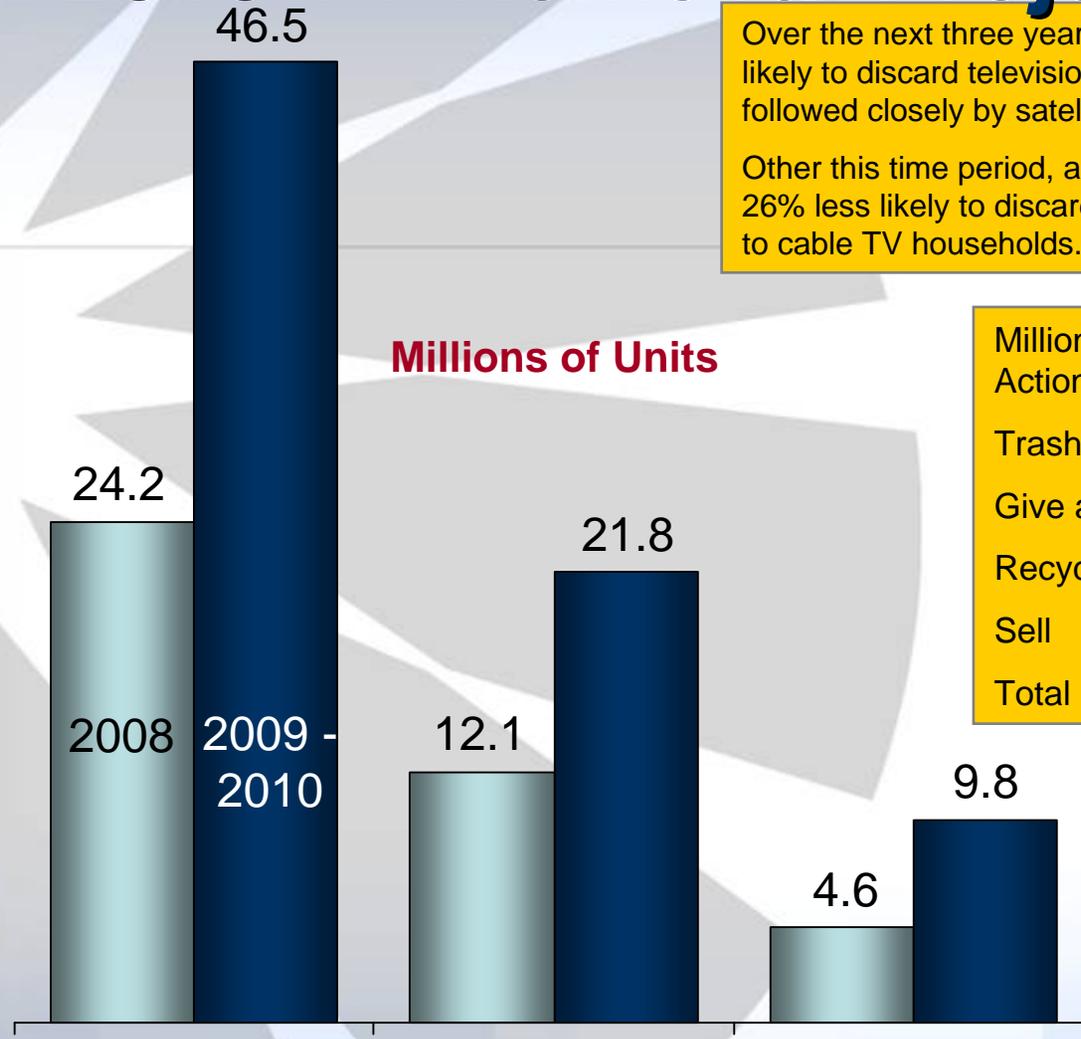


2009 – 2010 TV Removal Projections

Over the next three years, cable households are likely to discard televisions at the highest rate, followed closely by satellite TV households.

Other this time period, antenna households are 26% less likely to discard a television compared to cable TV households.

Millions of Units



Millions of TVs – Anticipated Action during 2009-2010		
Trash	0.54	5.5%
Give away	5.46	55.7%
Recycle	2.49	25.4%
Sell	1.31	13.3%
Total	9.8	



Cable TV HH

Satellite TV HH
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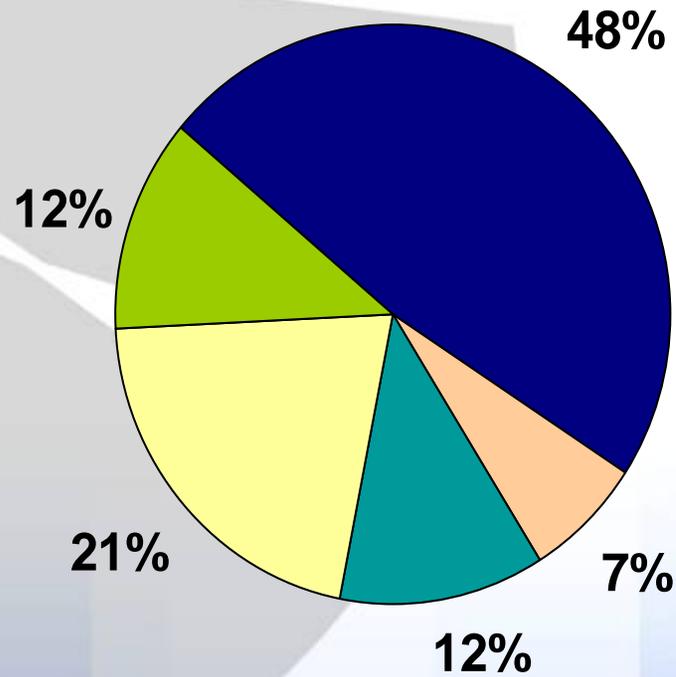
Antenna HH
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Note: combination cable & satellite households not included

Actions Antenna Only Consumers Expect to Take due to the Transition

- Purchase a Converter Box
- Subscribe to a Paid TV Service
- Buy a DTV
- Do Nothing
- Don't Know



Potential Impact of the DTV Transition

Figure 11 – Resulting # of <u>Antenna Only</u> Households that Expect to Take Action due to DTV Transition	Units of TVs assuming action taken with only <u>primary TV</u>	Units of TVs assuming action taken with <u>all</u> TVs
	% Taking Action	
Buy a new TV capable of receiving and displaying digital television signals	1,530,092	(12%) 3,366,202
Buy a digital converter box and continue using current TV and an antenna	6,120,368	(48%) 13,464,809
Connect or start subscribing to a cable or satellite service for that TV	892,554	(7%) 1,963,618
Do nothing since the TV isn't used to watch television	2,677,661	(21%) 5,890,854
Don't know	1,530,092	(12%) 3,366,202
Total	12,750,766	28,051,685



*Antenna Only households own an average of about 2.2 TVs used in the past 3 months www.CE.org

Source: February 2008 DTV Transition Trends Study

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279 Days Left!