



Communal TV systems and preparation for digital switchover

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Summary

Aims

In September 2005, the Government confirmed the timetable for digital television switchover. In July 2006, Department for Culture, Media and Sport commissioned BMRB to evaluate the level of preparations made by social landlords with communal dwellings in the UK for digital TV switchover. This research was conducted amongst: UK Local Authorities (LAs) with housing stock (including local authority directly managed housing and housing stock managed by Arms Length Management Organisations (ALMOs); and properties owned by UK Registered Social Landlords (including Housing Associations).

Method

A sample-building survey was conducted between the 7th and the 18th August in order to build a named sample for the main survey. CATI (Computer Aided Telephone Interviewing) was used to conduct both the sample-building and the main survey. The sample-building survey was conducted six weeks prior to the main fieldwork, which was conducted between 28th September 2006 and 14th November 2006. A pilot was carried out on the 14th September.

Sample and response rate

The survey of LAs was an attempted census of local authorities and ALMOs and a response rate of 76% was achieved with this group. The survey of RSLs achieved a response rate of 37%. A total of 658 interviews were conducted, of these 515 were with RSLs and 143 were with local authorities (including 33 ALMOs). These response rates matched (or bettered) those achieved in the 2004 research. The eligible respondent in each case was the individual within each organisation who managed communal television systems for their housing stock.

Availability and number of communal TV systems

- Of those surveyed, broadly the same proportion of providers (85%) had at least some dwellings with access to a communal TV system within their portfolio in 2006 (compared with 80% in 2004).
- The sample was evenly split between those with very few dwellings using communal systems, those with hundreds, and those with thousands. Nearly one in three (30%) had up to 100 dwellings with access to communal TV, just over a third (36%) had between 101 and 1000 properties with access, and a quarter (27%) had more than 1000 properties with communal TV access.
- Not surprisingly, LAs and ALMOs were more likely to have a greater number of properties with communal TV access, reflecting the fact that they were also more likely to have a larger proportion of flats in their total portfolio.
- As many as three in ten (28%) providers had communal TV access across their entire portfolio, but most providers had such access across only a proportion of their stock.

Digital upgrade work

Proportion of upgrade work started

- There was an increase in the level of upgrade work being carried out between 2004 and 2006.
- Almost twice as many providers had upgraded or were in the process of completing the upgrade of all of their systems by 2006 (17% up to 32%). In total, around half (48%) were in the process of upgrading at least 31% of their systems by 2006, up from a third (32%) in 2004.
- However a significant minority of providers with communal systems had still not carried out any upgrade work by the time of interview (30%); this was down from 46% in 2004.
- The survey looked for the first time at upgrade work already completed by individual dwellings with access to a communal TV system. One in five dwellings (22%) with communal TV systems had, or were on track to have, access to digital ready systems by the end of 2006.
- LAs remained more likely than RSLs to have started upgrading at least some of their systems. Amongst the RSLs, Abbeyfield (36%) and Almshouse (50%) providers also remained least likely to have started their upgrade work, whilst Co-operatives were most likely (55%) to have at least started upgrade work on all properties.
- Smaller organisations with less than 1000 properties were less likely than those with 1001 or more properties to have started upgrade work (39% had not started compared with 24%). However, smaller organisations that had started had made more progress than larger organisations and were more likely (38%) to have started

work on their entire portfolio than larger organisations (28%).

Type of systems being installed

- Two fifths (42%) of those that had started to upgrade their systems (n=394) (including those who have completed the work) were installing systems that could receive all digital channels (that is terrestrial *and* cable/satellite channels), whilst three in ten (30%) were upgrading to systems that just receive digital terrestrial channels, such as Freeview. One in five (18%) were installing a mixture of systems across their portfolio and a minority (3%) had upgraded to Cable or Broadband systems.
- As in 2004, LAs were more likely (51%) than RSLs (39%) to be upgrading to systems that could receive all digital channels.

Whether permit private installation

- The proportion of providers who allow tenants to install their own equipment remained static over time. Three quarters (72%) were willing to consider allowing tenants to install their own satellite equipment, although less than one in ten (7%) did so unconditionally. A quarter (25%) did not allow private installation, with one in ten (10%) citing planning rules and 15% saying they did not allow it under any circumstances.
- As in 2004, LAs were less likely (12%) to have outright restrictions on private installation, than RSLs (29%).

Awareness of and timescales for preparation for digital switchover

Anticipated year of completion (spontaneous)

- Three quarters (76%) of all providers with communal systems said they expected to complete all their upgrade work by 2012. Almost a quarter (23%) expected to finish

by the end of 2006, and only 6% anticipated finishing as late as 2011/12.

- A substantial minority (24%) remain uncertain about when they are likely to complete – 7% could not give a date when asked, and 17% had not yet made any plans to start upgrade work (so were not asked to estimate when they might finish this work).
 - ALMOs were less likely (6%) than average (19%) to have already completed their upgrade work, although the majority of ALMOs operate in regions that switchover after 2009.
 - **2008 switchover.** Of the six providers (small sample size) interviewed with property in the Borders region, half expected to complete by 2008 and half had yet to make any plans to start work.
 - **2009 switchover.** Two thirds (66%) of providers with property in the three regions due to switchover in 2009 – the West Country, Granada and Wales – said they would complete their upgrade work by 2009. One in five (19%) would complete in 2006 and just 3% would still be upgrading in 2011/12. One in five (21%) had yet to start planning for this work. Those in the West Country were most advanced in their preparations for switchover at the time of the interview.
 - **2010 switchover.** The STV, Grampian and the West ITV regions are due to switchover in 2010. Eight in ten (78%) providers anticipated being ready in time, with three in ten (31%) expecting to have completed work by the end of 2006. Providers operating in these regions were least likely to have not started any work, with just one in ten (11%) yet to make any plans for upgrading their systems.
 - **2011 switchover.** Eight in ten (80%) providers with property in the three regions due to switchover in 2011 – Yorkshire, Central and Anglia – said they would complete their upgrade work in time for the switchover date, with a quarter (25%) having already done so. One in ten (11%) had not started to plan for this work and 7% could not say when they would finish it. Of the three regions due to switchover in 2011, Anglia was most advanced in its preparation for switchover.
 - **2012 switchover.** Providers with properties mainly in Carlton/LWT, Meridian, Tyne Tees and Ulster will need to ensure their communal systems are digital-ready by 2012. Three quarters (74%) expect to meet this deadline, with two in ten (22%) having completed their work in 2006. A sizeable minority from these regions (lead mainly by providers in London) had not started to plan for this work as yet (20%) and a further 6% could not specify the year in which they anticipated completing upgrade work. At this early stage, providers from the Meridian region were most advanced in their preparations, although Tyne Tees were not far behind.
 - A larger proportion of providers operating in Wales and Northern Ireland had not started making plans to upgrade their communal systems, compared with the rest of the UK. However, providers in London (switchover 2012) were less likely than their counterparts throughout the rest of England to have started preparing for the switchover.
- Likelihood of completion before switchover deadline among providers (prompted)**
- When prompted about the date of switchover in their region, a third (32%) of providers with communal systems had

already started upgrading all of their TV systems by the time of interview, and a further four in ten (40%) said they would definitely do so within their region's timetable for switchover (when prompted with their region's date). Only a very small minority (1%) said it was not very likely they would be ready.

- Confidence in the likelihood to complete work within the switchover timetable has increased since 2004, perhaps partly due to confirmation from the Government in 2005.

Sources of awareness of digital switchover

- Three in ten (31%) providers with communal systems had first heard about the timetable for switchover on TV or in newspapers; one in five (18%) from installation service providers, 14% from the Government and 10% from Housing press articles.

Status of social landlords who had not started upgrade work

- Three in ten (30%) providers with communal TV systems had not started any preparations for digital switchover at all, which is lower than the proportion that had not started in 2004 (46%). RSLs were less likely to have started upgrade work than LAs. The proportion not having started among RSLs was one third (32%) compared with two in ten LAs (23%) and ALMOs (22%).
- Lack of awareness about digital switchover at the time of interview did not seem to be a causal factor for the great majority of those providers that had not started upgrading. Only 3% reported being unaware of the switchover policy and its implications. Around half (54%) of the "no start" group were aware of the switchover but had not yet made any plans

(representing 16% of all providers with communal systems). By contrast, just over four in ten (43%) of the "no start" group were aware and had made some plans (13% of all with communal systems).

- Around half (48%) of "not started and unaware" group said they hoped to finish the upgrade work within three years, a third (33%) said they would complete within three to five years and one in twenty (6%) after five years time.
- Reasons given for not yet starting preparations included: not being a priority for the organisation; the cost involved; and lack of demand and lack of information.

The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Culture, Media and Sport

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For the full report and any associated technical information please visit our website:

<http://www.culture.gov.uk>

