



Residential Care and Nursing Homes: Readiness for Digital Switchover

Chris Owen
BMG Research
October 2007

Summary

The Department for Culture Media and Sport commissioned BMG Research to undertake a study to assess the extent to which residential and nursing care homes across the UK have so far prepared for 'digital switchover' – the phased conversion of analogue terrestrial television services to digital services over the period from 2008 to 2012. This included homes dealing primarily with elderly people, and those focusing on other key client groups, and encompassed establishments in the public, private and voluntary sectors, of all sizes. Research was limited to those establishments (the vast majority) which had a communal television system serving communal rooms (and also frequently providing a TV signal to residents' private rooms).

The main survey was delivered using telephone (CATI) interviews, comprising a sample structured by television region and establishment size. Additional interviews were conducted in the four television regions where switchover was taking place earliest – Border, West Country, HTV Wales and Granada. Interviews took place over a four week period through April and early May 2007. In total, the main survey comprised 1,491 interviews. These were supplemented with 23 face to face depth interviews with establishments not yet upgraded to digital television, and 2 telephone interviews with the head offices of such establishments. These interviews were undertaken in June 2007.

Methodology and structure of sample

As part of the preparations for Digital Switchover, DCMS and Digital UK wanted to investigate the extent to which residential care and nursing homes have prepared for switchover, a process which begins in the Copeland area of Cumbria in October 2007, and continues by TV regions until 2012. Such homes typically have communal television systems delivering a signal to residents' rooms, and homes will be at different stages of the process of converting to digital signals, and in choosing between the various technical options. This survey does not explore the extent to which residents actively make use of the signal offered by the care home.

The quantitative telephone survey was undertaken with 1,491 residential care and nursing homes across the UK during a four week period through April and early May. This was supplemented by face to face in-depth interviews with 23 homes which had indicated in the telephone survey that they had not yet taken steps to prepare for digital switchover, and 2 telephone interviews with head offices of care home groups.

Of the homes interviewed, 25% had between 1 and 19 resident places, 53% had between 20 and 49 places, 19% had between 50 and 99 places, and 3%

had 100 places or more. Homes catering for residents with learning disabilities tended to be small. Homes which were part of large groups of homes themselves tended to be larger.

Sample sizes by television region varied in line with the number of care homes in each region from Ulster (43 interviews) and Borders (50 interviews) to Central (172 interviews) and Granada (219 interviews).

Of the homes interviewed, 72% were private sector homes, 17% were in the voluntary sector, and 11% in the public sector (NHS or Local Authority-run). 53% of homes were part of larger groups with HQs elsewhere, and 10% were themselves the main site of a group of homes. 36% were single site organisations.

66% of homes interviewed offered mainly residential care. 20% offered mainly nursing care, and 14% provided a mixture of both.

64% of homes provided places primarily for elderly people, with the other main client groups being people with learning disabilities (15% of homes), people with mental health problems (11%), and people with physical disabilities (3%).

Current communal television systems

Based on all contacts with care homes [1,607] more than 90% of care homes have a communal TV system of some description. Of care homes that have a communal system [1,491] about two-thirds (67%) of homes reported that all their residents had access to a TV in their own room served by the communal signal.

There were clear relationships between the extent to which homes offer the communal signal in residents rooms, and the client group – those primarily serving elderly people and people with physical disabilities were the homes most likely to offer access to a communal TV aerial in residents' rooms, whilst this was less likely amongst those whose primary client groups were those with learning disabilities or mental health problems.

Where systems serve some rooms, but not all, the primary reason appears to be the personal choice of the resident, rather than any innate technical issue. Where this is the case, residents have frequently made their own arrangements to receive television signals either via a set top or an individual external aerial or satellite dish.

Where no connection to the communal signal was provided to residents' rooms (either all rooms, or some), 18% had already provided advice and support to residents about switching to digital TV on their own televisions, and 29% had not yet done so, but had plans to do this. Another 26% indicated that they would help residents on request.

More than two-thirds (68%) of homes said that television was important or very important to their residents, compared to 14% which thought it was not important. This did not appear to vary across different types or sizes of home, or client groups.

Current levels of digital upgrading

34% of homes report having upgraded their communal television systems for digital TV reception, and another 11% were in the process of doing so. However, 55% have so far not taken steps to upgrade. Residential homes, homes which are part of a group, homes in the voluntary sector, and those providing care to people with learning difficulties, were the most likely to have switched, whilst those caring for elderly people, and medium sized homes (between 15 and 99 residents) were least likely to have switched.

By television region, the proportion of homes switched or in the process of switching was a little higher in some of the early switchover regions but West Country appeared to be only average, Wales is dependent on a relatively large proportion of homes in the process of switching, and even in Border, the

region with the highest proportion switched, still more than 2 in 5 had yet to take any action. Elsewhere the lowest level of switching activity to date has been in the STV North and Ulster regions, and the highest in Tyne Tees.

Those care homes that have upgraded or are in the process of upgrading had, in the main, chosen a digital terrestrial solution (67%). 17% had opted for an IRS. Similarly 68% reported having adopted Digital Terrestrial/Freeview only solutions, 10% satellite, 6% cable/broadband TV, and 8% some combination of these solutions (i.e. for example where more than one system covers a single establishment).

Planning for digital switchover

Very few homes that had not upgraded had plans for switchover. Amongst those not switched, only 15% were aware of switchover and had plans to switch, whilst 72% were aware, but had no plans. Another 12% were unaware of digital switchover.

Proportions of homes not switched who had plans to switch was higher than the average in three of the four early switchover areas – Border, Granada and West – but in Wales the proportion with plans was well below average, and the proportion of homes claiming to be unaware was higher than average. Where homes at least have plans, most expected to have completed switchover by 2008.

Amongst those who had not yet switched, but were at least aware of the digital switchover process, the primary reasons for not yet having switched were that this was not a priority in their current plans (47%), for reasons of cost (16%), and not having 'got round to it' (12%).

Amongst this same group, 60% were definite they would complete switchover by the deadline date for their region, 22% thought it very likely they would complete, 9% fairly likely, and only 2% through this not very or not at all likely. However, many in Wales, one of the early switchover areas, did not know whether or not they would be ready in time.

Support required for switchover

Unprompted, most homes who had not yet switched did not think they would need help to do so. However, when prompted with a list of types of support, 66% said that they would appreciate advice about which approach to take, 61% would like advice about finance, 60% general information about switchover, and 54% a list of contractors able to help with upgrade work.

Findings from qualitative research

The importance of television in the lives of residents was underlined in the qualitative research, even for those residents who didn't really actively watch or understand it. Homes expressed some concerns that the extra channels available might confuse residents, and that for some, a 'limited universe' of channels might be helpful. However some new channels (documentary, film and sport, including some premium channels) may be welcome.

Most homes felt that their responsibility was to provide a signal to the resident's room, but not to provide receiving equipment. The role of residents' relatives in providing and maintaining such equipment was highlighted.

Many homes appeared concerned about the strength of the digital signal, and whether this would be sufficiently robust. They would appreciate clarification on this issue. There was also concern to ensure that the quality of digital subtitling would be as good as that currently available through analogue signals, with the view at present being that it was not. Clearly this is critical for the many homes that have residents with hearing disabilities.

The qualitative interviews were with homes that had not yet upgraded to digital, and the discussions confirmed the relatively low level of awareness and lack of knowledge about the switchover process. Respondents tended to have some understanding of switchover and the reasons for it, but sometimes confused it with the introduction of high definition television.

Respondents appeared to want information through a number of channels, including electronic media – but many still wanted the hard copy guidance. For many homes, their head office will be a critical source of advice and information, confirming findings implicit in the main survey. Others will look to retailers for advice. Two stages of information appeared to be required, the first to raise the basic level of understanding of switchover, and the second stage to provide more tailored and technical information. It was clear that at present many detailed technical issues are not well understood by respondents.

Provision of information to the families of residents was important. They often provided a great deal of advice, support and practical help to residents, and they needed to understand the process of switchover if they were to provide advice to residents.

Some homes may leave it relatively late to switch to digital, and budgeting schedules will have a significant impact upon the timing of upgrading activity. Smaller homes thought that they may struggle with the costs of upgrading. Both advice and subsidy was wanted from Digital UK / DCMS. Digital

Terrestrial/Freeview was likely to be the most popular choice for care homes, largely because of the perception of tying homes or residents to ongoing subscription charges.

Conclusions

Given the numbers of care homes that had not yet switched, and the level of knowledge of switchover evident amongst many respondents, the task of effectively informing the sector about switchover is substantial. This is true even in early switchover areas, and Wales appeared the least well prepared of these four areas.

A two stage approach to informing the sector may well be advisable – the first stage generic, moving the issue to a greater level both of understanding and priority, and then a second stage which is more tailored and technical. General advice may also be required to better inform homes about digital signal strength, and the quality of text services available on digital, particularly subtitling.

Head offices and headquarters are critical channels of communication, given the number of homes which are part of larger groups. Likewise, friends and family of residents need to be sufficiently informed to support and advise residents. Regional contacts and relations with representative groups are also useful.

There may be value in offering a limited number of channels to residents in some homes, to avoid confusion. On balance, it appeared that homes think the benefits of digital television outweigh some potential concerns.

The popularity of the digital terrestrial solution in homes may have been due to its lack of subscription costs, and the relatively limited number of channels it offers.

For further information about the research methods and data analysis in this study please contact Adam Cooper at the Department for Culture, Media and Sport.

Email: adamc.cooper@culture.gsi.gov.uk

Post: Adam Cooper, Department for Culture, Media and Sport, 2-4 Cockspur Street, London SW1Y 5DH.

Telephone: 020 7211 6402

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