NOP Social and Political

NOP World
United Business Media

Communal TV systems and digital switchover

Report

450459 / February 2005

Communal TV systems and digital switchover

Report

450459 / February 2005

Prepared for:

Department for Culture, Media and Sport

Prepared by: Alan Bredee

NOP Consumer

Ludgate House

245, Blackfriars Road

London, SE1 9UL

Tel: 020 7890 9689

Fax: 020 7890 9744

Email: abredee@nopworld.com

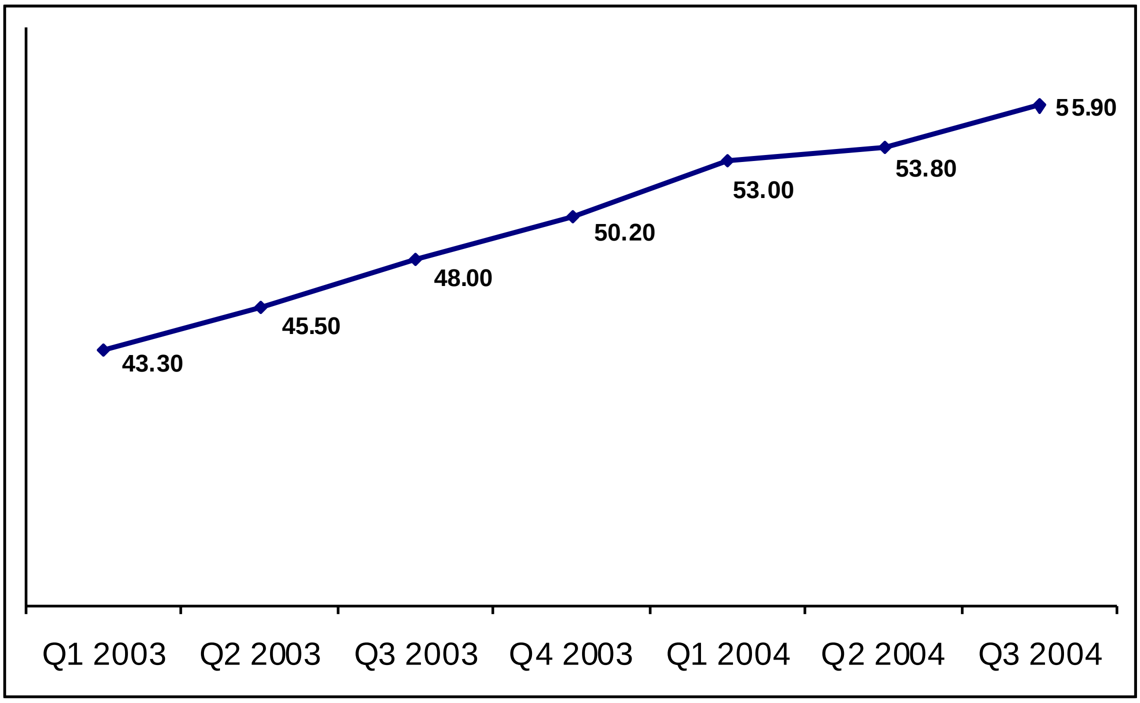
CONTENTS

1 INTRODUCTION AND BACKGROUND

1.1 Policy background

Digital television services were launched in the UK on satellite and terrestrial in 1998 and on cable networks in 1999. According to the latest Ofcom data for Q3 2004, just over half of UK households (55.9%) are currently receiving digital television on at least one TV set. Figure 1 below shows the increase in digital penetration over the last two years:

Figure 1 – Digital penetration – over time (source Ofcom)



The Government said in 1999 that the switch-off of analogue terrestrial networks could be completed by 2010, subject to digital transmissions being available to all households and digital equipment being affordable for the vast majority of consumers. The Government is continuing to work with broadcasters, industry, consumer groups and other stakeholders on the *Digital Television Action Plan,* which will set out how digital switchover can best be achieved.

In July 2004, the Government gave a progress report to Parliament indicating that Broadcasters were looking at the option of switchover taking place between 2008-2012[1]. Ofcom announced, in December 2004, that the ITV companies, Channel 4 and Five had accepted new digital replacement licences committing them to switching off on a region by region basis by 2012. Although the Government has not confirmed the timetable for digital switchover, there is an expectation that they will confirm the timetable set out by Ofcom at some point during 2005.

1.2 Communal television systems

Local authorities and other social landlords have been providing tenants and other residents (including right-to-buy shared ownership leaseholders) with access to communal TV systems for at least 40 years. Communal TV systems enable TV signals to be received by a single aerial, dish (or both in the case of an Integrated Reception System) or from a cable provider, and then relayed to the flats in a building via an electronic distribution system, thus avoiding problems with interference and that individual households might face in accessing television services.

Communal TV systems are mainly found in flats but some systems may cover houses as well (particularly if the system has evolved from an old analogue cable system). According to a report in December 2003 by the Digital Television Group[2], all communal TV systems which were set up for analogue reception will need some upgrading if they are to work efficiently in a digital environment.

Since 1998 local authorities and housing associations have been installing or upgrading TV systems for digital reception. The motivation for social landlords has been to facilitate access to the new television services that are available on satellite, cable and digital terrestrial platforms and has been partly driven by demand from residents. There are currently four main options for replacing or upgrading analogue communal systems available to all landlords (including social landlords):

- *Integrated Reception System (IRS)* – systems capable of running satellite and terrestrial services, at the same time as other services such as DAB radio and broadband. Requires full re-cabling of a building;
- *Cable-based service* – but no integration with terrestrial network, so households have no access to free-to-view digital services; again requires full re-cabling;

[1] Written Statement by Rt Hon Tessa Jowell MP to the House of Commons 22 July 2004.
[2] Survey of MATV and SMATV Systems. Digital Television Group (DTG) December 2003. Report published by DTI and available from www.digitaltelevision.gov.uk

- *Upgrading existing communal system to deliver Freeview services* – if the system is in good condition, this will normally avoid the need for full re-cabling, but it does not give access to the range of pay services available on cable and satellite pay-services;
- *ADSL-based services* – via telephone lines; currently only in Kingston-upon-Hull and in North, North West and West London. The availability of ADSL services is likely to increase between now and switchover.

There is no empirical research on the proportion of UK social landlords who own / manage communal TV systems, nor on the proportion of these systems that are digital ready. The English House Conditions (EHCS) survey does collect details of properties with access to systems and the state of repair/disrepair. However, it does not provide any information on whether homes with access to communal TV systems are able to access digital TV services using the system.

In June 2004, DCMS undertook some initial exploratory research amongst local authorities and Registered Social Landlords (RSLs), looking at the implications of digital switchover for social landlords. This was based on a questionnaire which accompanied a letter from DCMS and DTI alerting local authorities and RSLs about the need to prepare for digital switchover. However, this approach - whilst helpful in seeing what progress had been made - did not give a clear and representative picture, given the likelihood that local authorities and RSLs that had made progress would be more likely to respond. In order to gain a more representative picture, DCMS needed a more detailed and comprehensive research study of social landlords.

NOP Social and Political was therefore commissioned by DCMS in August 2004 to undertake an independent survey, amongst senior housing officials from local authorities and RSLs.

2 RESEARCH OBJECTIVES

The overall objective of this research project is to enable the Department for Culture, Media and Sport (DCMS) to find out the level of preparations made by social landlords in the UK, i.e. local authorities and RSLs, in terms of upgrading communal TV systems or facilitating access to digital television.

There are four main objectives of this research:

- to assess the number of social housing units (in blocks managed by a social housing provider), that currently have access to communal TV systems;
- to determine the proportion of communal TV systems / units that have already been upgraded for digital TV and the extent of this upgrading work;
- to assess the current status of communal TV systems that haven't yet been updated for digital TV, in particular what proportion:
    - are currently in process of updating units, and when this will be completed by;
    - have updated some properties, and exploring options / tendering for remainder of works;
    - have outline plans only, but waiting on clear Government guidance about the timetable for digital switchover;
    - have no plans for digital switchover, and have not considered its implications;
- to determine the proportion of social housing providers who have taken action or have firm plans for updating communal TV systems, and the proportion with tentative or no plans.

3 METHODOLOGY

A quantitative telephone methodology using CATI (Computer Aided Telephone Interviewing) was employed for this survey. The survey was initially piloted, in order to help refine the questionnaire and sample design, with the main interviewing stage then being conducted between 4th October and 12th November 2004. A copy of the final questionnaire can be found in Appendix 2.

3.1 Sample selection

The sample of social landlords was split into two distinct categories – local authorities and Registered Social Landlords (RSLs). The term Registered Social Landlord includes all UK housing associations. The sample frame for the survey covered England, Wales and Scotland only, due to the different management arrangements for social housing in Northern Ireland. A list of local authority housing directors was supplied from the Municipal Year Book, and RSLs were obtained from The *HousingNet* website, which offers a comprehensive list of all RSLs in the UK. Only *registered* social landlords were contacted, because of the difficulty in defining this group and making contact with a representative sample of unregistered social landlords.

3.2 Respondent type

For both local authorities and RSLs, the most eligible respondents were senior decision-makers in housing departments, who managed housing stock and communal TV systems. This often varied depending on the size of the landlord, but covered a wide variety of job roles, including Director of Housing, Clerk of the Trustees, Chief Executive and Property Manager. In some organisations, a more specialist person was required to complete the survey, such as the Technical Services Officer or Technical Administrator. Full details of the types of job roles covered in this survey, can be found in Figure 1, Appendix 1.

3.3 Defining a Communal TV System

The earlier DCMS survey found that respondents' views on what constituted a communal TV system was open to different interpretations, and some respondents had classed simple aerials as communal systems. In the light of this, we took great care in the design of the survey to make sure that interviewer and respondent were both clear about what we meant by a communal TV system. We are grateful to Henry Price, Chair of the Digital TV Project's Technology and Equipment Group (TEG) for helping to clarify this.

3.4 Sample profile

A total of 684 interviews were conducted for the main stage of interviewing, of which 508 were RSLs and 176 local authorities. Organisations that owned or managed less than five dwellings were excluded, as DCMS considered - based on its earlier study - that it was unlikely many smaller RSLs would have communal TV systems for such a small number of properties.

The majority of organisations interviewed (73%) were single-site offices, with responsibility for all their housing, and only 27% divided the management of their housing across different offices, mainly local authorities (38%, compared with just 23% of RSLs). For those organisations where housing management was split across separate offices, the information collected (such as total number of dwellings owned) therefore related only to that particular office where the respondent was based.

3.4.1 RSLs

A wide range of different types of RSLs were interviewed, in terms of type of organisation (e.g. stock transfer, Abbeyfield etc), size of stock owned/managed and region. The regional breakdown of RSL interviews achieved is detailed in Table 1a below. Figure 2 in Appendix 1 details the breakdown of different types of RSL interviewed in this research.

It was often the case that RSLs operated from a number of separate, often autonomous offices. In fact, of the 508 RSLs surveyed, around four-fifths were defined on the *HousingNet* database as "Parent" offices, with only around 1 in 10 being "Area Offices". The remaining RSLs were a mixture of Subsidiaries, Associates or were "not stated". To avoid any confusion (and as described above), at the beginning of the questionnaire (for *all* interviews) we confirmed that each organisation's social housing was managed from that particular office, or whether it was divided across a number of separate local or regional offices, *including* the specific office we contacted.

Table 1a: RSLs – regional sample breakdown

Region	Size of stock owned / managed					TOTAL
	5-100	101-500	501-1000	1001-10,000	10,001 +	
All England	177	94	22	115	17	* 426
- England (excluding London)	*144*	*65*	*17*	*102*	*13*	** 342*
- London	*33*	*29*	*5*	*13*	*4*	*84*
Scotland	3	22	15	27	1	68
Wales	1	4	2	7	0	14
TOTAL	**181**	**120**	**39**	**149**	**18**	*** 508**

** NB – includes one 'don't know' response for a London RSL*

3.4.2 Local authorities

No quotas were imposed on local authorities, since we originally aimed to achieve as close to a census as possible, of all local authorities in Great Britain. However, by the very nature of the types of senior-level decision-makers we required, it proved very difficult to achieve this census within a reasonable timescale, even though we had issued an introductory letter. Another difficulty discovered during the interview stage was the lack of management information held by some local authorities on communal TV systems.

In spite of the challenges, we still managed to achieve a sample which had a good mixture of local authorities regionally, including 14 of the largest 25 local authorities in Britain (in terms of stock owned/managed). This accounts for nearly 50% of all housing stock owned / managed by these 25 local authorities. As a proportion of local authorities with housing stock, we managed to interview about two-thirds of them (64%). The regional breakdown of local authorities, and the proportion of all local authorities with housing that were interviewed, is shown in table 1b below.

Table 1b: Local authorities – regional sample breakdown

Region	No. interviews achieved	No. of LAs with housing stock	Total no. of LAs	% of eligible LAs interviewed
All England	150	227	354	66
England (excluding London)	*137*			
London	*13*			
Scotland	14	29	32	48
Wales	12	21	22	57
TOTAL	**176**	**277**	**408**	**64**

3.5 Interpreting the data

Most of the findings in this report are expressed as a proportion of social landlords with communal TV systems, as opposed to the proportion of *properties* with systems. We did not ask landlords what number of properties were covered by each communal system, because not all respondents would have known the answer (thus making the survey questionnaire more complex and also reducing our chances of achieving a robust sample). Therefore the most accurate way to determine the level of upgrading work done by landlords, was simply to look at this as a proportion of *systems* which have (or have not) been upgraded.

4 SUMMARY & CONCLUSIONS OF MAIN FINDINGS

4.1 Summary of main findings

4.1.1 Availability of communal TV systems

- The level of access to communal television (whether analogue or digital enabled) is high. 95% of local authorities and 74% of RSLs surveyed own or manage properties which have access to communal TV systems.
- Stock transfer RSLs are more likely to have properties with access, compared with non-stock transfer RSLs (83% and 73% respectively).
- Overall, the social landlords interviewed own or manage a broadly even number of flats and houses, although RSLs manage slightly more flats (54% compared with 46% houses).
- Local authorities interviewed own or manage 1,567,186 dwellings between them (46% of all local authority households in Great Britain[3]), of which 479,289 have access to communal systems (31%).
    - 61% of local authority dwellings with communal TV access are based in England (outside of London).
- RSLs interviewed own or manage 975,979 dwellings (accounting for 67% of all RSL household in Great Britain[4]), of which 335,557 have access to communal TV systems (34%).
    - 53% of RSL dwellings with communal TV access are based in England (outside London), with another 30% based in Scotland.

[3] Refer to Appendix 3 for total number of dwellings, as defined by ONS 2003
[4] Ditto

4.1.2 Availability of digital ready systems

- 59% of local authorities and 47% of RSLs have upgraded at least some of their communal systems.
    - nearly one 1 in 3 have upgraded more than 30% of their systems.
    - less than 1 in 5 (16% of local authorities and 18% of RSLs) have upgraded all of their systems.
- Local authorities are more likely to have adopted solutions giving access to digital pay channels, not just digital terrestrial Freeview, compared with RSLs. 56% of local authorities have upgraded stock for pay and free digital services compared to 42% of RSLs.
- Overall 75% of social landlords are willing to consider allowing to permit households to have satellite equipment installed, whilst only 10% allow tenants to do this without needing permission. The remaining 25% of social landlords do not permit installation of satellite equipment under any circumstances.
- The majority of social landlords indicated that they were awaiting a clear Government statement on the timescale for digital switchover: 49% said decisions on the action to be taken would be influenced to "a great extent" by such a statement, and 37% to "some extent".
- Local authorities are more likely to be influenced than RSLs (59% and 44% influenced to a great extent).
- Nearly half of all local authorities (49%) and 44% of all RSLs with communal TV systems expect to have completed <u>all</u> upgrading by 2008[5], almost all social landlords who have started upgrading or who have made plans expect to complete upgrading work digital switchover by 2012.

[5] NB – this includes all those landlords who have already completed all upgrading required, and also those who have yet to do any upgrading / have no plans

4.1.3 Plans to convert to digital amongst organisations that have not yet started

- Less than half of all social landlords, 46% (more RSLs than local authorities) have not yet carried out any upgrading, mainly where a smaller numbers of dwellings are managed.
- There are a variety of reasons for this, the most prominent are the costs involved and the perceived lack of demand for digital TV from tenants. Lack of information and the absence of a clear timetable from Government are also factors.
    - 46% of RSLs and 45% of local authorities who have not started upgrading (and 23% and 17% of those with communal TV systems) have yet to think about this and have not made any plans.
    - Around a third of RSLs and a quarter of local authorities have drawn up plans, but are waiting for a clearer Government lead on the timescale for digital switchover, before they do anything more.

4.1.4 Readiness for digital switchover within BBC's timescale

- Of those landlords which still have communal systems requiring upgrade, around 9 in 10 claim they are likely to complete this within the BBC's suggested switchover timescale of between 2008 and 2012, although local authorities are slightly more confident than RSLs.
- Confidence is also high amongst landlords who had not even started upgrading any properties, with more than 4 in 5 RSLs and local authorities saying they were likely to meet the BBC's timescales.
- This suggests that when made aware of the issue, most local authorities and RSLs believe that the programme of work involved can be commenced reasonably quickly.

5 MAIN FINDINGS

5.1 Availability of communal TV systems

5.1.1 Size of stock owned / managed

The 176 local authorities interviewed own or manage 1,567,186 dwellings between them. This accounts for 46% of all local authority dwellings in Great Britain[6]. The 508 RSLs interviewed own or manage 975,979 dwellings. This accounts for 67% of all RSL dwellings in Great Britain. Table 2 below shows how these figures break down on a regional basis.

Table 2: Total number of dwellings owned / managed, by region

	Survey sample					
Region	**Local authorities (173)**		**RSLs (507)**		**TOTAL (680)**	
	N	**%**	**N**	**%**	**N**	**%**
England (excl. London)	1,087,354	69	648,899	66	1,736,253	68
London	252,400	16	155,949	16	408,349	16
Wales	101,648	7	16,805	2	118,453	5
Scotland	125,784	8	154,326	16	280,110	11
TOTAL	*1,567,186*	*100*	*975,979*	*100*	*2,543,165*	*100*

Base: All social landlords interviewed, excluding don't know responses

As regards the number of flats and houses managed by each of local authorities and RSLs, a significant minority could not answer this. However, based on those social landlords who could provide a positive answer, Table 3 below shows the proportion split between flats and houses for each of local authorities and RSLs.

[6] Refer to Appendix 3 for total number of dwellings (as defined from ONS)

Table 3: Proportion split between houses and flats managed (n; %)

	Survey sample					
	Local authority		RSLs		TOTAL	
Flats (Base)	578,218 (129)	51%	372,820 (454)	54%	*951,038* *(583)*	*52%*
Houses (Base)	565,166 (130)	49%	318,835 (452)	46%	*884,001* *(582)*	*48%*
TOTAL	*1,143,384*		*691,655*		*1,835,039*	

Base: all who could provide a positive answer; i.e. excludes all "don't know" responses

5.1.2 Housing with care

Housing with care is also an important segment of RSL provision that needs to be taken into account, in understanding the types of social landlord interviewed here. Of the 508 RSLs interviewed, 6% were classified as Abbeyfield facilities, and another 56% said they owned or managed any sheltered housing or housing with care, i.e. 314 of these 508 RSLs.

5.1.3 Access to communal TV systems

Four-fifths (80%) of social landlords surveyed said that at least some of the properties their organisation owns or manages has access to a communal TV system (analogue or digital ready) either managed by themselves or by third parties under contract. A larger proportion of local authorities than RSLs had properties with such communal systems, (95% compared with 74%). This may be due to the fact that local authorities are more likely to still manage large estates, which necessitate such systems.

All local authorities interviewed in Greater London have properties which have access to communal TV systems. The same is true for Wales (NB – small base size) but lower for Scotland (79%). For RSLs, London has the lowest proportion with such access (69%), compared with 75% in the rest of England. The pattern of local authority housing stock having more communal TV systems is reflected in the proportion of RSLs which manage stock transfer properties with access to Communal TV systems – 83% of such RSLs have (at least some) communal TV access compared with 73% of non-stock transfer RSLs.

There is some correlation between size of stock held and the likelihood of having a communal TV system. For example, 92% of those RSLs with 1,001-10,000 dwellings have (at least some) access, compared with just 55% of those with 5-100 dwellings. The correlation is less significant for local authorities. Although 100% of authorities with more than 10,000 dwellings have (at least some) communal TV access, this is also true of 93% for those authorities with stock of less than 5,000.

The 176 local authorities interviewed own / manage communal TV systems which cover around 31% of dwellings (either owned or managed) In the case of RSLs, communal TV systems cover 34% of all such dwellings (either owned or managed). Table 4 below breaks down the number of dwellings with such access for each nation and for London

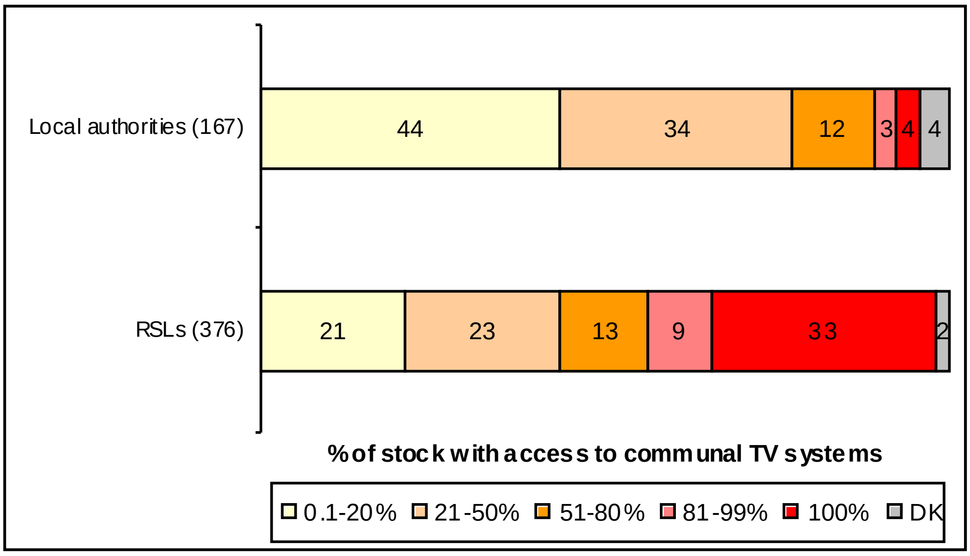
Table 4: Number of dwellings with communal TV access, by region

Region	**Local authorities (146)**	**RSLs (350)**	***TOTAL (496)***
England (excl. London)	291,089	177,949	*469,038*
London	161,300	52,688	*213,988*
Wales	14,707	3,422	*18,129*
Scotland	12,193	101,498	*113,691*
TOTAL	*479,289*	*335,557*	*814,846*

NB – data excludes 49 “don’t know” responses

For social landlords which own / manage any properties with access to communal TV systems, on average around 50% of all *dwellings* owned or managed by each organisation have access to communal TV systems. However, it is a significantly higher proportion for RSLs than local authorities (60% versus 29%). Figure 2 below shows the difference in proportion of social housing with access to communal TV systems between local authorities and RSLs.

Figure 2: Social landlords with access to communal TV systems, as a percentage of all housing owned/managed (%)



Base: All organisations which own / manage any properties with access to communal systems

Local authority provision in London tends to have a higher level of access to communal systems (56% - NB small base size), compared with 28% for the rest of England. This reflects the fact that nearly half of large and medium sized blocks managed by English local authorities are in Greater London[7]. There is a smaller difference between RSLs regionally, with 67% of those in London having access, compared with 60% in the rest of England.

In terms of size of stock owned / managed by RSLs, the smaller the size of stock, the greater the proportion of dwellings which have access to communal systems, as a proportion of all social housing they own or manage. For example, an average 86% of RSLs with 5-100 dwellings have at least some access, compared with just 37% of those with 1,001-10,000 dwellings. An average of 33% of local authorities with more than 10,000 dwellings have at least some access, compared with 27% of those with less than 5,000 dwellings.

[7] This is taken from a breakdown of LA dwelling stock held by ODPM as of 1 April 2003.

5.2 Digital upgrading

Of those social landlords which own / manage any properties with access to communal TV systems, around one third (32%) have upgraded more than 30% of communal TV systems for digital reception. For larger social landlords, the figure is higher: 34% of social landlords with more than 1000 properties have upgraded more than 30% their systems for digital reception.

Table 5 below shows the difference in level of work done between local authorities and RSLs.

Table 5: Level of upgrading works completed or currently being undertaken

	Local authorities	**RSLs**
Total number with communal systems	167	376
All upgraded (100%)	16%	18%
More than 30% (31% -100%) of systems upgraded.	32%	29%
Some systems upgraded (1-100%)	59%	47%
None upgraded	37%	50%
Don't know	4%	3%

The only significant difference between local authorities and RSLs, is that a higher proportion of RSLs have done *no* upgrading yet, compared with local authorities (50% versus 37%). Looking at type of RSL, Almshouses and Abbeyfield facilities are most likely to have done no upgrading (74% and 76% respectively), compared with 46% of stock-transfer RSLs.

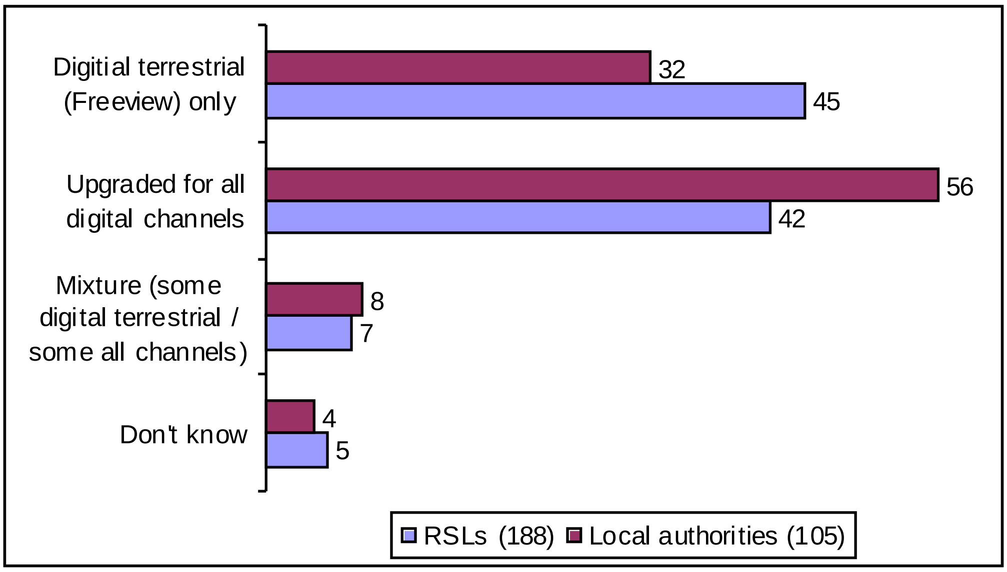
In terms of size of stock managed by RSLs, up to a certain size, the larger the stock the greater the proportion of communal systems which have been / in process of being upgraded (i.e. for RSLs with 501-1,000 dwellings, an average of 41% of stock has been or is in the process of being upgraded, compared with just 19% of RSLs with 5-100 dwellings). Similarly, 68% of RSLs with 5-100 dwellings have not done any upgrading to date, compared with 37% of RSLs with 501-1,000 dwellings. As regards local authorities, 45% of authorities with less than 5,000 dwellings have not done any upgrading, compared with 23% of those with more than 10,000 dwellings. There are a number of reasons why no upgrading work has been undertaken yet by such organisations, these are discussed in greater depth in chapter 5.3.4 below.

5.2.1 Type of upgrading carried out or currently being undertaken

For those organisations which have started to upgrade (or are in the process of upgrading) their communal systems, overall a broadly even proportion of systems have been either upgraded *only* for digital terrestrial TV channels such as Freeview (41%) or upgraded so that they can receive *all* digital channels, i.e. terrestrial and cable or satellite only channels (47%).

The extent of the upgrading work done by local authorities appears to be more substantial than that of RSLs: 56% of communal systems in local authority housing that has been upgraded can receive all digital TV channels, compared with just 42% of those in RSLs. Figure 3 below compares the different types of upgrading work undertaken by local authorities and RSLs.

Figure 3: Type of upgrading work undertaken (%)



Base: All social landlords who have upgraded or in process of upgrading to digital TV (%)

RSL stock-transfer housing (housing originally owned or managed by local authorities) appears to be better prepared compared with RSL non-stock transfer housing (47% and 41% respectively have upgraded for all digital TV channels). On a regional level, London appears to be less prepared than the rest of England – 32% of all RSLs in London which have had any upgrading done have upgraded all channels, compared with 41% for the rest of England.

5.2.2 Attitudes to satellite installation

Given the variation between the progress made by different social landlords in upgrading TV systems to digital, many residents in buildings with communal systems have decided not to wait and have sought to access digital television services via satellite. The majority of social landlords have guidelines in place with regard to their tenants being allowed to install their own digital television equipment, such as satellite dishes. Overall 75% are willing to consider allowing to permit households to have satellite equipment installed, but only 10% allow tenants to do this without needing permission. The remaining 25% of social landlords do not permit installation of satellite equipment under any circumstances.

There are differences in attitudes between local authorities and RSLS to satellite installations, with 28% of RSLs having outright restrictions compared with just 14% of local authorities. This may in part be due to the different attitudes of some types of RSL. Around half of Almshouse landlords (49%) have complete restrictions on installations, possibly because of planning considerations. Regionally, RSLs are strictest in London, where 36% will not allow any private upgrades, compared with 28% in the rest of England and only 21% in Scotland.

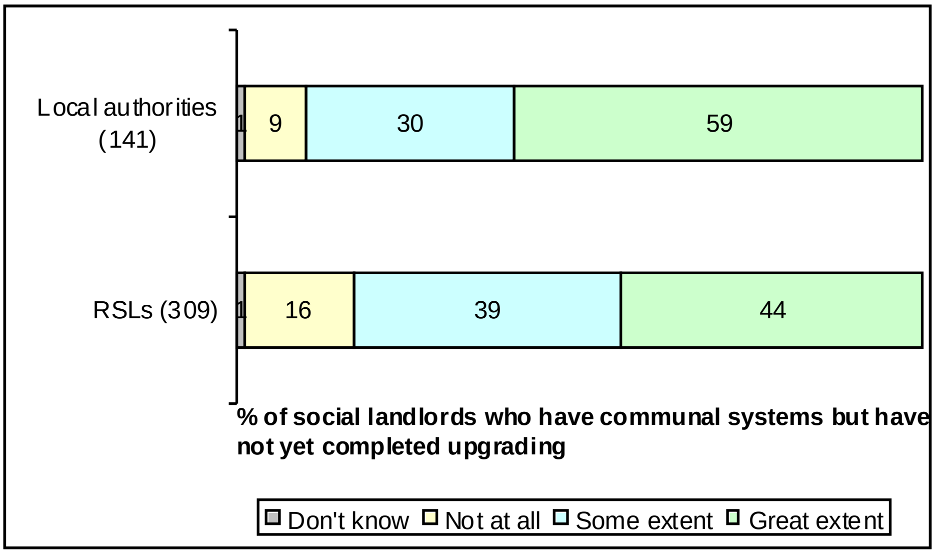
RSLs with no communal systems are much more likely to allow their tenants to go ahead with their own upgrades – 17% versus 9% of those RSLs with such systems. Similarly, those RSLs which do have communal TV systems but have yet to do any upgrading work are likely to be less strict, as are stock transfer RSLs (only 16% say private upgrade works are not allowed under any circumstances, compared with 30% of non-stock transfer RSLs).

5.2.3 Impact of Government statements on plans to upgrade to digital

The survey shows that, in the absence of strong demand from tenants, many social landlords are waiting for a clear Government statement on the timescale for digital switchover before giving priority to updating communal TV systems. 37% of landlords with systems in need of upgrading said they would be influenced to some extent by Government statements; another 49% said Government statements would influence them to a great extent.

Local authorities say they are likely to be more influenced by such statements than RSLs are (59% influenced to a great extent, compared with 44% of RSLs). For local authorities, the larger the size of stock managed, the more influence such Government statements have (61% of authorities with more than 10,000 dwellings say that they are influenced to a great extent, compared with 51% of those with less than 5,000). Those RSLs with 1,000-10,000 dwellings are also most likely to be influenced (53% to a great extent). Stock-transfer RSLs are more likely to be influenced by the Government than non-stock transfer RSLs (49% vs. 43% influenced to a great extent). However, RSLs in London are less likely to be influenced than those in the rest of England (28% to a great extent, compared with 47% of RSLs in the rest of England). Figure 4 below shows the different extent of influence.

Figure 4: Extent to which Government statements impact on digital switchover for its communal systems (%)



Base: All organisations with any communal systems that still require some upgrading

5.2.4 Likely timescales for completion

Around half of all social landlords interviewed (49%) have communal TV systems which still require digital upgrading, or have not done any upgrading to date but at least have made plans to upgrade. Of these 335 social landlords, nearly a quarter (23%) do not know when they expect to have completed digital upgrading of all their communal TV systems in properties they own or manage. Another 13% say this depends on Government statements on the timescale for digital switchover.

The majority of social landlords (65%) expect to have all digital upgrading works completed between 2004 and 2010. Nearly half of local authorities say this will be by 2008 (47%), although another 22% between 2009 and 2012. This compares with 37% for RSLs hoping to get works completed by 2008, and also a quarter (23%) not expecting to have them completed before 2009.

Regionally, local authorities in London tend to be more organised at upgrading than the rest of England (60% in London[9] expect to have works completed by 2008, compared with 47% in rest of England). However, London RSLs seem to be less well prepared than those in the rest of England (23% of London RSLs expect to have works completed by 2008, compared with 40% of RSLs in the rest of England). Interestingly, stock transfer RSLs are less prepared for completing upgrading than non-stock transfer RSLs (23% vs. 32% expect to complete upgrading by 2008). There is also a higher proportion of RSLs than local authorities that do not know when they expect to complete all upgrading (26% compared with 18% don't know).

[9] NB – small base size for London (n=10), treat with caution

5.3 Social landlords who have carried out no digital upgrading

Just under half of all social landlords with communal systems surveyed (46%) have not upgraded, nor are currently in the process of upgrading, any of their communal TV systems. The combined figure masks a significant difference between local authorities and RSLs (only 37% of local authorities have done no upgrading compared to 50% of RSLs).

In terms of size of social landlord, those RSLs which manage / own between 5-100 dwellings are most likely to have not yet done any upgrading (68%) and those with 501-1,000 dwellings least (37%). Smaller local authorities are also most likely to have done no upgrading (45% of those which own/manage less than 5,000 dwellings, compared with 23% of those with more than 10,000).

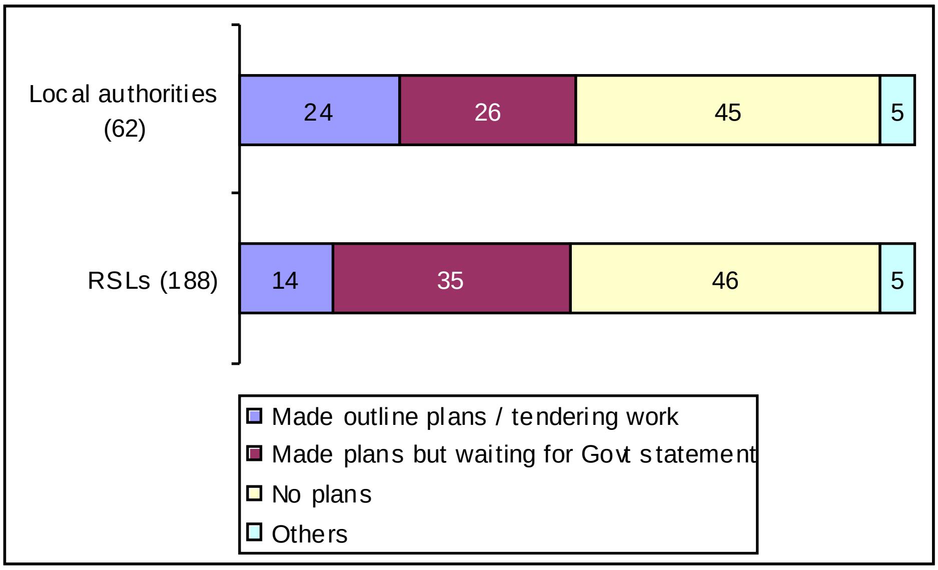
5.3.1 Level of plans for upgrading

Nearly half of those RSLs (46%) which have not carried out any digital upgrading to date have "yet to think about this and currently have no plans." This equates to 23% of all RSLs with communal systems. This is especially the case for non-stock transfer RSLs (48% of those RSLs which have not carried out any upgrading, compared with 34% of stock transfer RSLs). A similar proportion of local authorities have also not made any plans (45% or 17% of all local authorities with communal systems, and 57% of those authorities with less than 5,000 dwellings, compared with 18%[12] of those with more than 10,000).

A third of RSLs who have not started upgrading (35%, 17% of all RSLs with communal systems) have said they have drawn up outline plans, but are not minded to do anything until the Government makes a clear statement about the timetable for digital switchover. This compares with 26% of local authorities who have not started upgrading (10% of all local authorities which have communal systems). Figure 5 compares the level of upgrade plans made by local authorities and RSLs.

[10] NB – small base size for London (n=13), treat with caution
[11] NB – small base size for Wales RSLs (n=11) – treat with caution
[12] NB – small base size for LAs with more than 10,000 dwellings (which have not done any upgrading / no plans) (n=11)
[13] NB – small base size for LAs with 5001-10,000 dwellings (which have not done any upgrading / no plans) (n=21)

Figure 5: Level of plans made for digital upgrading (% of those who have not started upgrading)



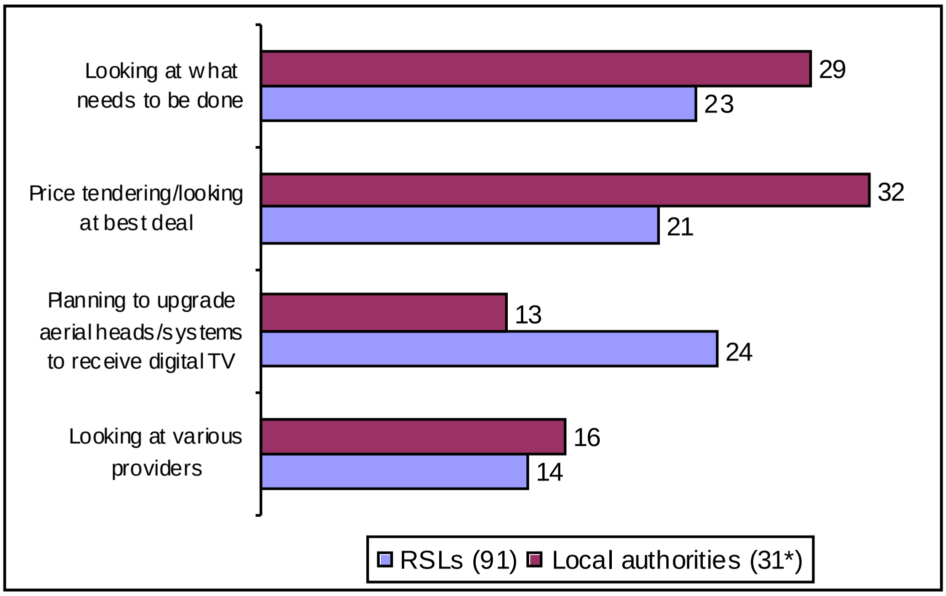
Base: All social landlords which have not upgraded communal systems for digital TV

As regards the strength of influence that Government statements have on investment in communal systems, organisations which have done no upgrading yet are, broadly speaking, not influenced any more or less than those which have done some upgrading. But for local authorities, those which have done nothing appear to be slightly less influenced by the Government (52% saying influenced to “a great extent”, compared with 64% of those which have done some upgrading). The difference may be due to a lack of awareness in some local authorities about the potential effects of digital television on local authority.

5.3.2 Types of plans made

As regards the *types* of plans that social landlords have made, a wide variety of options were cited. Of the 31 local authorities interviewed who have not yet done any upgrading, a third (32%) had made plans which consisted of price tendering / looking at the best deal / outline plan cost (21% of RSLs). Twenty-nine per cent of local authorities said they were looking at what needs to be done / getting the survey on the property done (23% RSLs). Figure 6 below lists the main outline plans suggested.

Figure 6: What do outline upgrade plans consist of? (%)



Base: All social landlords who have not done any digital upgrading (to date) but do have outline plans
(* NB – small base, treat data with caution)

5.3.3 Likely timescales for completion

Organisations which have *not* made any plans were less able to estimate how long it will take their housing stock with communal systems to be upgraded for digital TV (39% of these RSLs and 29% of these local authorities answering 'don't know', when asked if they know when the majority of their stock will be upgraded by). The remainder were able to give some indication of the timescales involved, with 65% of local authorities claiming that the majority of stock will be upgraded within the next 5 years, and 40% of RSLs.

Of those organisations which believe that the majority of their communal systems will be upgraded within the next 5 years, a significant majority believe they will have upgraded all their systems within this timeframe (83% of those local authorities and 74% of those RSLs). The likely timescales for completing all such upgrading works varies between local authorities and RSLs: Of the relevant 28 local authorities completion is anticipated between 2007 and 2012, with most in 2009 (29%[14]). However 29% answered "don't know" and another 14% say this still depends on Government statements on digital switchover. As regards RSLs, over a third answered don't know (37%), and those who suggested dates, from 2007 to 2014.

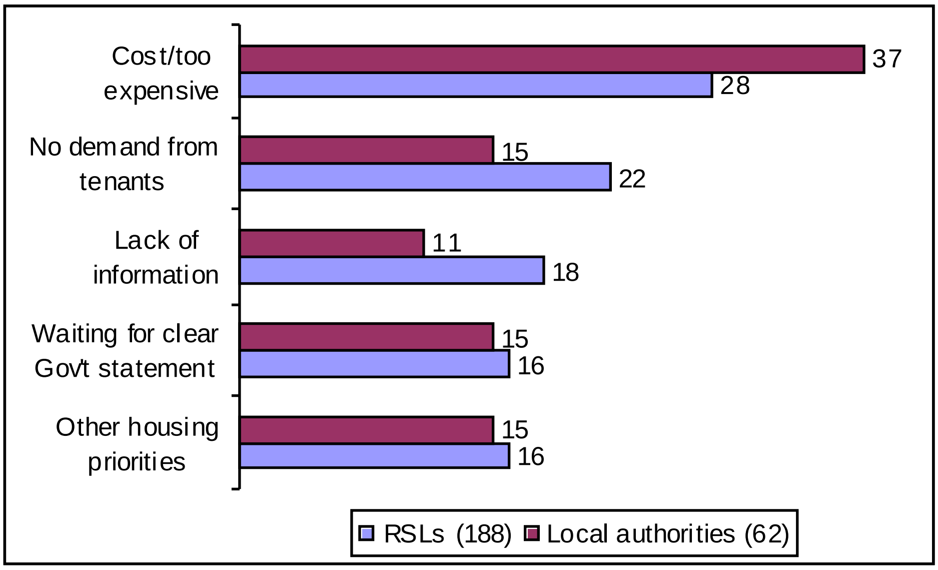
[14] NB – small base size – all local authorities which have not upgraded any of their communal TV systems, but have made some plans to upgrade (n=28)

Not surprisingly, social landlords which have made upgrade plans and tendered for work think they are more likely to definitely complete all digital switchover between 2008 and 2012, than those who have made outline plans but are waiting for a more definitive Government statement on the issue (for example, 62% of RSLs which have made outline plans and currently tendering for works claim they will definitely complete the works by 2012, compared with just 29% of those RSLs which have made plans but are waiting for another Government statement).

5.3.4 Reasons for not having started upgrading

The most prominent reasons cited as to why social landlords have not started any digital upgrading to date are the perceived costs and lack of demand from their tenants. Other reasons include other housing priorities, lack of information and the absence of a clear lead from Government. Thirty-seven per cent of local authorities who have not done any upgrading cite "cost / too expensive" as a reason, compared with 28% of RSLs. RSLs in London are also more likely to mention cost, than those in the rest of England (33% compared with 26%). Cost also understandably becomes more of an issue, the larger the number of dwellings an organisation owns/manages, (for example, 35% of RSLs with 1,001-10,000 dwellings cite cost, compared with just 19% of those with 5-100 dwellings). Figure 7 below compares the main reasons cited by local authorities and RSLs.

Figure 7: Top 5 reasons for no digital upgrading to date (%)



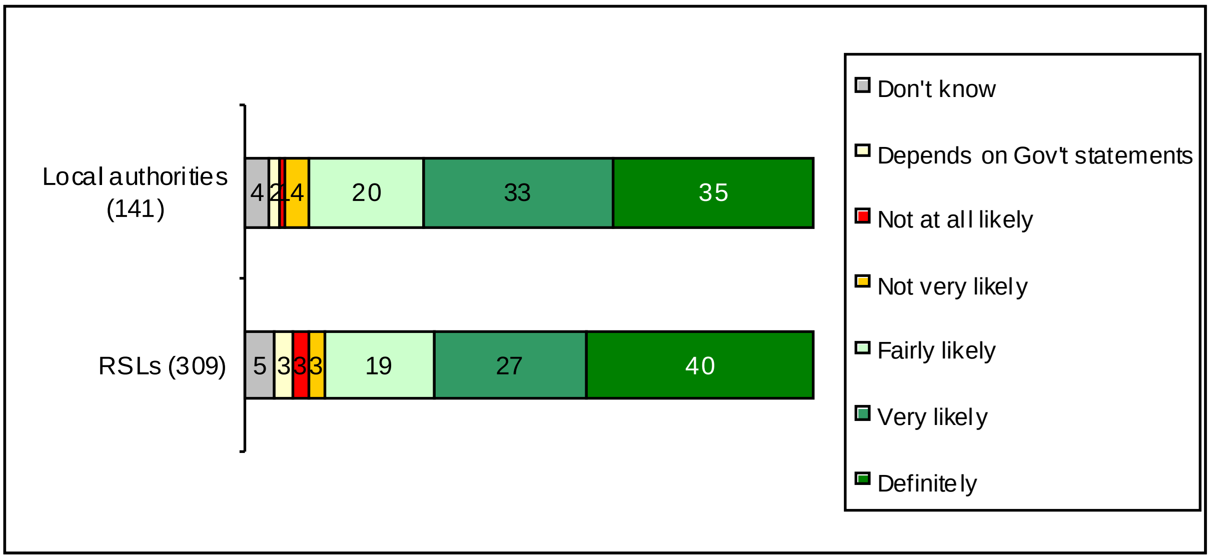
Base: all social landlords which have not upgraded communal systems for TV

5.4 Readiness for digital switchover within BBC's timescale

In order to assess how attitudes might be affected by a possible firm announcement, we asked all social landlords who have not completed upgrading how likely they were to meet the timetable suggested by the BBC in April 2004, that full digital switchover from analogue signals could take place between 2008 and 2012. The responses to this question were higher, indicating that announcements will lead to upgrading work getting a higher priority.

Of the social landlords with *any* communal TV systems which still need to complete upgrading (including those with no plans), 89% of local authorities and 86% of RSLs say that they are likely to complete all remaining upgrading works within this timescale. When asked to elaborate, around two-thirds of each of local authorities and RSLs are either "definitely" or "very likely" to complete these works within the BBC's timetable, although slightly more RSLs than local authorities were confident that they could *definitely* complete within this timescale (40% compared with 35%). RSLs outside of London are more likely to complete upgrading by 2012 (44% definitely likely, compared with 28% of RSLs in London). Figure 8 below illustrates the difference of likelihood to complete upgrading by 2012.

Figure 8: Likelihood of completing all digital upgrading between 2008 and 2012 (%)



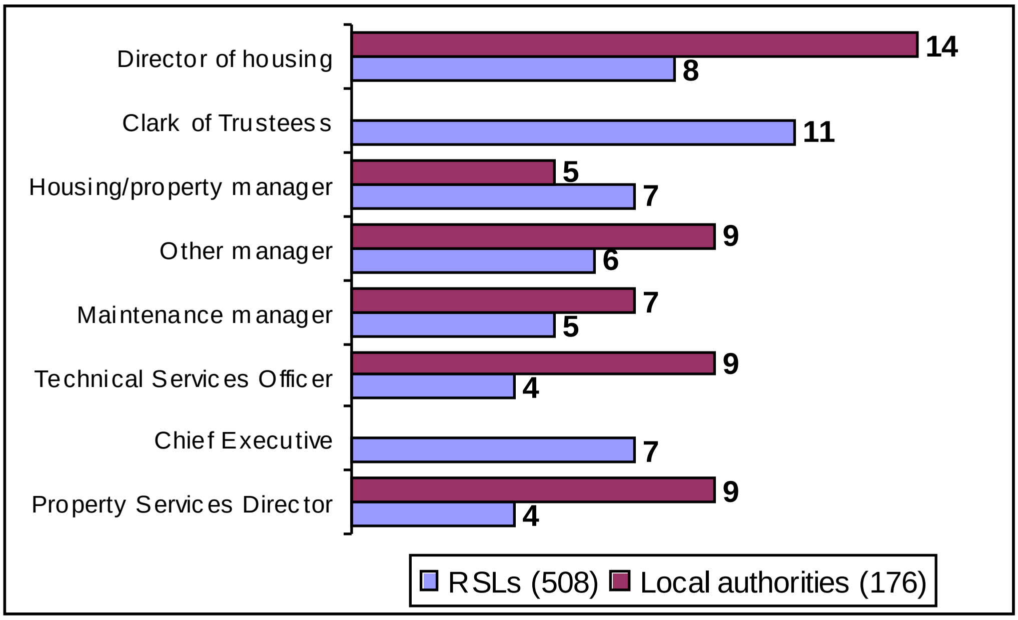
Base: All social landlords with any communal systems that still require upgrading

Social landlords who have not started any upgrading work are nevertheless confident that if needed they would be able to complete the upgrading of stock within the timetable suggested by the BBC[15] of 2008-2012. More than 4 in 5 of those RSLs which have done no upgrading to date (85%) said they are likely to complete all upgrading between 2008 and 2012, with 37% saying "definitely", compared with 47% of those RSLs which have done at least some upgrading work. Interestingly, 36% of those RSLs which have made no plans whatsoever also still think they will definitely complete all upgrading within the BBC's suggested timescale. Eighty-four per cent of local authorities which have done no upgrading work are likely to have all upgrading completed by 2012 (26% saying definitely, compared with 41% of those local authorities having done some upgrading). This suggests that social landlords, when made aware of the issue, are not particularly phased by the challenge of the timetable suggested by the BBC and are confident of meeting the challenge. It is not clear from our research, however, whether they fully appreciate the scale of the task that might be involved.

[15] BBC Building Public Value – June 2004

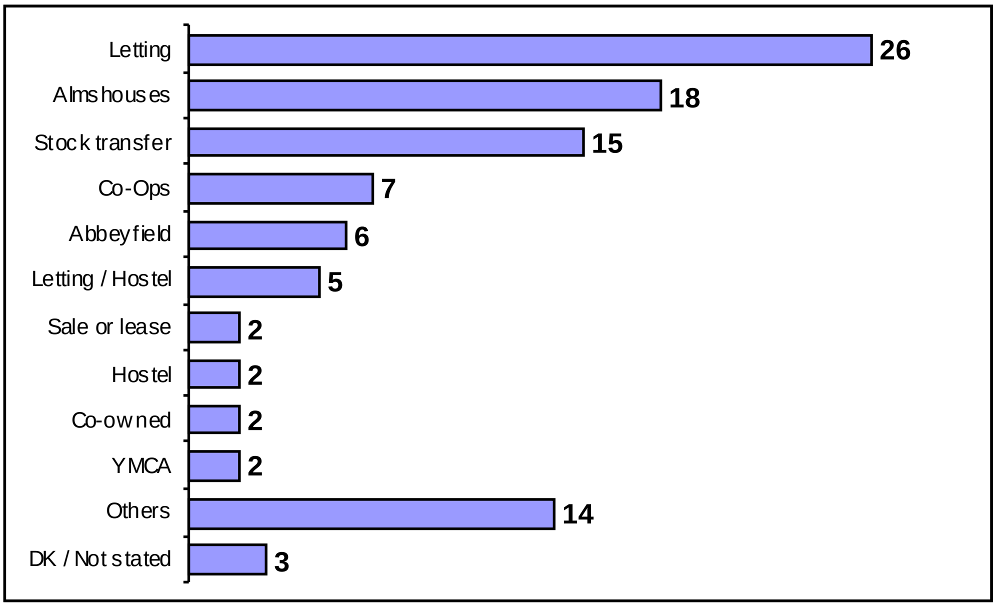
APPENDIX 1: Respondent details

Figure 1: Respondent Job title (%)



Base: All respondents

Figure 2: Types of RSL interviewed (%)



Base: All RSLs (508)

APPENDIX 2: Questionnaire

J450459

DCMS COMMUNAL SYSTEMS AND DIGITAL SWITCHOVER RESEARCH

MAIN STAGE QUESTIONNAIRE – v5 - FINAL (28/9/04)

INTRODUCTION – IF NAMED RESPONDENT:
Good morning / afternoon, my name is ……., and I'm calling from NOP, an independent market research agency.

ASK TO SPEAK TO NAMED RESPONDENT: Please can I speak to (NAMED RESPONDENT)

INTRODUCTION – IF NO NAMED RESPONDENT:
Good morning / afternoon, my name is ……., and I'm calling from NOP, an independent market research agency.

Please can I speak to someone in your organisation who manages housing stock and communal television systems?

ADD IF NECESSARY: For example, the Director of Housing

(When speaking to relevant respondent)
We are conducting research on behalf of the Department for Culture, Media and Sport, regarding the level of preparations made towards digital switchover for communal television systems in social housing.

You should have received a letter and basic outline of the survey questions from the Department for Culture, Media and Sport, explaining the purpose of the survey.

ADD AS NECESSARY:

- All your answers will be treated in strictest confidence
- Survey will take about 10 minutes depending on your answers
- This survey is for market research purposes only. It is not a sales call

Screener questions

Firstly, I need to confirm that you are the most suitable person to take part in this survey.

S1. Are you the most appropriate person in your organisation who is able to answer questions about its housing stock and readiness to receive Digital TV?

Yes	**- CONTINUE S2**
No – somebody else	**- TRANSFER S1b**
N/A – NO SOCIAL HOUSING MANAGED BY ORG.	**- THANK & CLOSE 1**

THANK & CLOSE 1:
Thank you, but for this survey we are only looking to speak to organisations and local authorities which manage or own social housing.

TRANSFER:
S1b. Please could you put me through to the person who is best placed to provide this information?

INTERVIEWER NOTE: IF TRANSFER TO ANOTHER SITE, PLEASE REMEMBER TO RECORD NAME OF NEW OFFICE

Yes – transfer now same site	**– GO BACK TO S1**
Yes - arrange appointment, same site	**– RETURN TO SMS**
Yes – transfer another site, arrange appointment	**- RETURN TO SMS**
No – refused	**- THANK & CLOSE 2**

THANK & CLOSE 2:
In that case, I'm sorry to have disturbed you.

ASK ALL:
S2. And can I just confirm, does your organisation (INSERT NAME) have responsibility for the management of AT LEAST 5 DWELLINGS?

ADD IF NECESSARY:
If this is a regional / local office for a larger/national organisation, please only think about the social housing that <u>your particular office is responsible for.</u>

Yes	**- CONTINUE S3**
No	**- THANK AND CLOSE 2**

READ OUT IF YES AT S2:
I'm now going to ask you a question on communal TV systems.

Communal TV systems are commonly found in flats, though they may also connect houses on a particular development or estate. Typically, a single aerial – and in some cases, dish as well – transfers the signals by cable to all the flats in a building. There are also some systems that are fed by cable (from NTL or Telewest).

ADD IF NECESSARY
Communal TV systems avoid interference, and the need for all units to have separate aerials.

ASK IF YES AT S2:

S3. Are you the person with responsibility for the management of communal TV systems, for any properties owned or managed by your organisation/local authority?

Yes	**- CONTINUE Q1a**
No – someone else in organisation	**- GO TO S5**
Not applicable – no communal TV systems	**- GO TO S4**

ASK IF NOT APPLICABLE AT S3:

S4. Would you be the person with responsibility for the management of areas in your organisation such as communal TV systems, if you had them?

Yes	**- CONTINUE Q1a**
No – someone else in organisation	**- TRANSFER S5**

ASK IF NO AT S3 or NO AT S4:

S5. Please could you transfer me to the person who would deal with (IF NO AT S4 – areas such as) the management of communal TV systems, for properties owned or managed by your organisation?

INTERVIEWER NOTE: IF TRANSFER TO ANOTHER SITE, PLEASE REMEMBER TO RECORD NAME OF NEW OFFICE

Yes - transfer now, same site	**– GO BACK TO S1**
Yes - arrange appointment, same site	**– RETURN TO SMS**
Yes – transfer another site, arrange appointment	**- RETURN TO SMS**
No – refused	**- THANK & CLOSE 2**

MAIN QUESTIONNAIRE

ASK ALL:

Q1a. Is all your organisation's social housing managed from this one office, or is its management divided across a number of different local or regional offices, including your office?

PROMPT IF NECESSARY. SINGLE CODE

All organisation's housing managed from this one office

Management of housing divided across different local offices, including your office

READ OUT IF CODE 2 AT Q1a:

For the rest of the survey, please think about the social housing that ONLY your office has responsibility for.

ASK ALL:

Q1b. Thinking about ALL the social housing owned or managed by your particular office, how many dwellings is your organisation / local authority (INSERT NAME) responsible for, **IN TOTAL**?

INSERT NUMBER (range 1+)

IF LESS THAN 5, THANK AND CLOSE 2

ALLOW DK

I'd like to know how this total number of dwellings breaks down in terms of the number of flats and houses.

Q1c. How many of these **(INSERT NUMBER FROM Q1b)** dwellings are flats?

INSERT NUMBER (DP CHECK – RANGE MUST NOT BE GREATER THAN ANSWER AT Q1b)

ALLOW DK

SKIP IF Q1c=Q1b:

Q1d. And how many of these dwellings are houses?

INSERT NUMBER; DP CHECK – ANSWERS AT Q1c and Q1d MUST EQUAL VALUE AT Q1b

ALLOW DK

INTERVIEWER NOTE: IF RESPONDENT JUST ANSWERS "THE REMAINDER", CLARIFY WHAT THE ACTUAL NUMBER OF HOUSES IS

ASK ALL:

Q2. Do any of the properties your organisation owns or manages have access to a communal TV system – either systems managed by you or by third parties under contract?

ADD IF NECESSARY:

Communal TV systems are commonly found in flats, though they may also connect houses on a particular development or estate. Typically, a single aerial – and in some cases, dish as well – transfers the signals by cable to all the flats in a building. There are also some systems that are fed by cable, for example through cable companies such as NTL or TeleWest?

Communal TV systems avoid interference, and the need for all units to have separate aerials.

Yes **- GO TO Q2b**

No **- SKIP TO Q14**

ASK ALL EXCEPT NO AT Q2:

Q2b. How many of these **(INSERT ANSWER FROM Q1b)** social housing dwellings owned or managed by your organisation, have access to communal TV systems?

INSERT NUMBER (RANGE 0 – ANSWER AT Q1b)
IF NONE = **SKIP TO Q14**

(DP CHECK – IF ANSWER GIVEN IS MORE Q1b ANSWER, RECODE)

READ OUT: "You said that the number of dwellings with access to communal TV systems is **(ANSWER AT Q2b)**, and the total number of flats your organisation manages is **(ANSWER AT Q1c).** Does this sound correct?

IF ANSWER IS "NO", REPEAT QUESTION AND RECODE IF NECESSARY

IF DON'T KNOW, READ OUT:
"If you are unable to give an exact figure, a rough estimate will do."

IF RESPONDENT STILL SAYS "DON'T KNOW" PROMPT WITH RANGES

1-4
5-10
11-25
26-50
51-100
101-200
201-300
301-400
401-500
501-750
751-1000
1,001-2,500
2,501-5,000
5,001-7,500

7,501-10,000
More than 10,000
Don't know

ASK ALL EXCEPT NONE / 0% AT Q2b:

Q2c. And how many dwellings have access to communal TV systems, **as a percentage** of all social housing owned or managed by your organisation / local authority?

READ OUT IF CODE 1 AT Q1a:
NB: this is as a proportion of ALL the social housing managed by your organisation, from this one office.

READ OUT IF CODE 2 AT Q1a:
NB: this is as a proportion of the social housing that ONLY your office has responsibility for.

INSERT PERCENTAGE
IF DON'T KNOW – PROMPT WITH RANGES

Less than 10%
10-20%
21-30%
31-40%
41-50%
51-60%
61-70%
71-80%
81-90%
91-99%
100% - all social housing
DK

Q3. What proportion of these communal TV systems <u>have been or are currently in the process</u> of being upgraded for digital television, for example Freeview?

IF RESPONDENT QUERIES WHAT IS MEANT BY "UPGRADING": Communal TV systems will need some degree of attention if they are to work with a digital signal. This could either mean upgrading for Freeview or installing a new system to cope with satellite or cable based services.

INSERT PERCENTAGE (0-100%)
IF DON'T KNOW – PROMPT WITH RANGES

Less than 10%
10-20%
21-30%
31-40%
41-50%
51-60%
61-70%
71-80%
81-90%
91-99%

100% - all communal systems have been / in process of being upgraded	**- CONTINUE Q3b**
NONE / 0%	**– GO TO Q5**
DK	**- CONTINUE Q3b**

ASK IF 1-100% or DK AT Q3:

Q3b. And which of the following two statements best describes the upgrading work your organisation has completed or is in the process of completing for its communal TV systems?

READ OUT. SINGLE CODE

Systems have been upgraded so that they can receive digital terrestrial TV channels, such as Freeview, but not other stations such as cable or satellite only channels.
Systems have been upgraded so that they can receive ALL digital TV channels, i.e. terrestrial such as Freeview, as well as cable or satellite only channels
Some systems have been upgraded for digital terrestrial TV channels such as Freeview, and others so that they can receive ALL digital TV channels **(DO NOT READ OUT)**
DON'T KNOW **(DO NOT READ OUT)**

IF Q3=100%, NOW SKIP TO Q14, OTHERWISE GO TO Q6

Q4 and Q4b - DELETED

ASK IF 0% / NONE AT Q3:

Q5. I'd now like you to think about the plans you have made to take account of digital switchover for communal TV systems. Which of the following three statements best applies to your organisation/local authority?

READ OUT. SINGLE CODE

1 - We have made outline plans, and are now exploring options, and tendering work for all communal systems requiring upgrading	**- ASK Q5b**
2- We have made outline plans, but will not be doing anything until the Government makes a clear statement about the timetable for Digital switchover	**- ASK Q5b**
3- We have yet to think about this and currently have no plans	**- GO TO Q8**
OTHER (SPECIFY)	**- GO TO Q6**

ASK IF CODE 1 or 2 AT Q5:

Q5b. What do these outline plans for digital upgrading consist of?

OPEN END. PROBE FULLY. ALLOW DK

ASK ALL <u>EXCEPT</u> IF (NONE / 0% AT Q3 AND Q5=3):

Q6. And when does your organisation / local authority expect to have completed digital upgrading of **<u>ALL</u>** its communal TV systems in properties it manages or owns?

PROMPT FOR YEAR;
ALLOW DON'T KNOW

DON'T KNOW – DEPENDS ON GOVERNMENT STATEMENTS ON DIGITAL SWITCHOVER

NOW SKIP TO Q12

DP NOTE – Q7 DELETED

ASK IF "NONE" / 0% AT Q3 AND CODE 3 AT Q5 (OTHERS SKIP TO Q12 INSTRUCTION):

Q8. You said that none of the communal television systems in properties owned or managed by your organisation have been upgraded for digital television, nor have you made any plans for such an upgrade.

When do you think the majority of this stock will be upgraded for digital television?

READ OUT. SINGLE CODE

Within the next 3 years
Within the next 3-5 years **- ASK Q9**

In longer than 5 years' time **- GO TO Q10**
DON'T KNOW

ASK IF CODE 1 or 2 AT Q8:

Q9. What proportion of communal TV systems do you think you will have upgraded for digital television within the (**ANSWER AT Q8** - next 3 years / next 3-5 years)?

INSERT PERCENTAGE (0 – 100%)
IF DON'T KNOW – PROMPT WITH RANGES

Less than 10%
10-20%
21-30%
31-40%
41-50%
51-60%
61-70%
71-80%
81-90%
91-99%
100% - all communal TV systems
DK
NONE / 0% **- CONTINUE Q10**

Q10. **(IF NOT NONE / 0% AT Q9** - Thinking about the likely timescale for these upgrading plans), when does your organisation/local authority expect to have completed ALL digital upgrading of communal TV systems, in properties it manages or owns?

PROMPT FOR YEAR
ALLOW DK

DON'T KNOW – DEPENDS ON GOVERNMENT STATEMENTS ON DIGITAL SWITCHOVER

ASK IF "NONE" / 0% AT Q3:

Q11. What reasons does your organisation have, for not having done any digital upgrading of communal TV systems to date?

DO NOT READ OUT. PROBE FULLY. MULTICODE

Can't recruit staff to do the work
Cause too much disruption to properties
Cost / too expensive
Just not got round to it
Lack of information
No demand from tenants for upgrading
Other housing priorities
Unable to receive good quality / any Digital Terrestrial/Freeview signals in our area
Uncertainty due to options appraisal for local authority stock **(LA SAMPLE ONLY)**
Waiting for Government to make clear statement on switchover schedule
We do have plans for upgrading in future
Other (specify)
DON'T KNOW
REFUSED

ASK ALL EXCEPT IF Q3=100% OR IF Q2=NO

Q12. The BBC have said digital switchover could take place between 2008-2012. How likely are you to complete all upgrading of communal TV systems within this timescale?'

Would you say…

READ OUT. SINGLE CODE

Definitely
Very likely
Fairly likely
Not very likely
Not at all likely
DEPENDS ON GOVERNMENT STATEMENTS ON DIGITAL SWITCHOVER (DO NOT READ)

ASK ALL EXCEPT NO AT Q2 or 100% AT Q3:

Q13. As you are probably aware, the Government has previously said that it wants to achieve full digital television switchover from analogue terrestrial transmissions, by 2010.

To what extent do Government statements on digital switchover timescale influence your organisation's plans for achieving switchover for its communal TV systems?

READ OUT. SINGLE CODE

A great extent
Some extent
Not at all
DON'T KNOW (DO NOT READ)

ASK ALL:

Q14. Does your organisation allow tenants to install their own digital TV equipment, such as satellite dishes?

PROBE TO CORRECT PRECODE. SINGLE CODE

Yes – without conditions
Yes – if application is agreed by us
No – not allowed under any circumstances

<u>CLASSIFICATION</u>

Finally, I just have a few questions for classification purposes:

ASK RSL SAMPLE ONLY:

C1. Into which of the following types of Registered Social Landlord (RSL), would you categorise your organisation?

READ OUT. SINGLE CODE

Almshouses
Abbeyfield
Co-ops
Co-owned
Letting / hostel
Hostel
Letting
Sale or lease
Stock transfer
YMCA
Other (specify)
DON'T KNOW (DO NOT READ)

ASK ALL EXCEPT IF ABBEYFIELD AT C1:

C2. Does your organisation own or manage any sheltered/very sheltered housing, or housing with care?

SINGLE CODE

Yes
No

ASK ALL:

C3. Which ITV region is received by the MAJORITY of dwellings owned/managed by your organisation?

READ OUT IF NECESSARY. SINGLE CODE
IF MORE THAN ONE, ASK WHICH IS THE MAIN ITV REGION

Tyne Tees
Yorkshire
Granada
Central
HTV
Anglia
Carlton / LWT
Meridian
West Country Television
Grampian
STV
Border
DON'T KNOW (DO NOT READ OUT)
MULTI-REGION (DO NOT READ OUT)

C4. Can I check what is your job title?

READ OUT IF NECESSARY. SINGLE CODE

Chairman
Chartered Surveyor
Chief Executive
Clark of the Trustees
Deputy Chief Executive
Director of Housing
Director of Operations
Engineering Services Manager
Management Assistant
Office Manager
Property Services Director
Services Officer
Technical Administrator
Technical Services Officer
Other (specify)
REFUSED

C5. The Department for Culture, Media and Sport would like to analyse these results at an individual level, to get a better understanding of the levels of preparations made for digital switchover by social landlords such as yours.

Would you be willing to have your answers attributed to your organisation? I can assure you that all your answers will still be treated in the strictest confidence and will only ever be used for market research analysis purposes. This will help DCMS in completing the Digital Action Plan.

Yes
No

C6. Please can I just confirm your name?

IF INCORRECT - TYPE IN CORRECT NAME

C7. Can I confirm that the full name of your organization is: INSERT NAME FROM SAMPLE?

IF INCORRECT - TYPE IN CORRECT NAME OF ORGANISATION

ADD IF NECESSARY. If this is a regional office with responsibility for its own housing, please just give me the full name of the regional office.

C8. And can I confirm your organisation's address is …?

INSERT ADDRESS FROM SAMPLE

C9. And this is the best telephone number to contact you on?

INSERT PHONE NUMBER FROM SAMPLE

C10. Finally, if NOP conducts any future research on behalf of DCMS, would you be willing to take part again?

Yes
No

THANK & CLOSE

Thank you very much for your time, that is the end of the survey. If you have any queries about the research, I can give you the name and telephone number of the executive managing the survey and a representative at the Department for Culture, Media and Sport. Would you like this information?

(If YES to research) – The project executive is Alan Bredee. His telephone number is 020 7890 9689.

(If YES to further information from DCMS) – Gary Mundy is the representative at the Department for Culture, Media and Sport. His phone number is 020 7211 6451

If you want to check NOP's credentials, you can contact the Market Research Society, on free-phone 0500 396 999, who will confirm that NOP is a bona fide market research organisation.

APPENDIX 3: TOTAL NUMBER OF DWELLINGS AS DEFINED BY ONS 2003

	All households	Percentage of households: Owner occupied: Owns outright	Percentage of households: Owner occupied: Owns with a mortgage or loan	Percentage of households: Owner occupied: Shared ownership*	Percentage of households: Rented from: Council (local authority)**	Percentage of households: Rented from: Housing Assocation / Registered Social Landlord	Percentage of households: Rented from: Private landlord or letting agency	Percentage of households: Rented from: Other#
ENGLAND AND WALES	21,660,475	29.46	38.76	0.64	13.24	5.95	8.72	3.22
Scotland	2,192,246				21.57	5.58		
GB (2001 census)	23,852,721							
ENGLAND AND WALES					2,867,847	1,288,798		
Scotland					472,867	122,327		
GB					3,340,714	1,411,126		
ENGLAND AND WALES					2,945,670	1,323,772		
Scotland					485,699	125,647		
GB (2003)	**24,500,000**				**3,431,370**	**1,449,419**		

(estimate of numbers based on 2003 household total)

APPENDIX 4: CALCULATING SAMPLING ERRORS

Confidence intervals

Confidence Intervals are a statistical device which allow us, using our survey results, to put upper and lower limits on what the true value is likely to be.

We can calculate confidence intervals for both percentages and mean scores. They are calculated using the following general formula:

*Confidence interval = ± z * standard error*

The z-value is a measure of how sure we want to be. (It is derived from the standard normal distribution.)

Typically we use a 95% confidence interval. This allows us to be 95% sure that the interval between the upper and lower limits will contain the true (population) value. A z-value of 1.96 is used to produce a 95% confidence interval.

Standard error is a measure of how variable a survey estimate will be. The size of the standard error depends upon the size of the sample and the variability in the responses given by respondents. A more detailed discussion of standard error can be found below in the explanations of confidence intervals for means and percentages.

Using the Confidence interval (CI) table below, we can therefore see that for an answer of 50%, on a sample of 1000, the CI is + / - 3.1%. This means that we can be 95% sure that the true answer lies somewhere between 46.9% and 53.1%.

Significance Tests

Significance tests are a statistical procedure which allow us to decide whether or not a difference between two survey estimates is likely to be a real one.

We can perform significance tests for both percentages and mean scores. A significance test will have one of two outcomes - either a difference is said to be significant or it is not. A significant difference is one we can be reasonably sure exists in the population.

Significance tests can be performed at different levels of stringency. Typically we test at the 95% significance level. This allows us to be 95% certain of detecting a difference when one exists in the population.

Sampling error: significant difference

Percentage	Sample size 70	100	200	300	400	500	600	800	1000	2000
5	7.2	6.0	4.3	3.5	3.0	2.7	2.5	2.1	1.9	1.4
10	9.9	8.3	5.9	4.8	4.2	3.7	3.4	2.9	2.6	1.9
15	11.8	9.9	7.0	5.7	4.9	4.4	4.0	3.5	3.1	2.2
20	13.3	11.1	7.8	6.4	5.5	5.0	4.5	3.9	3.5	2.5
25	14.3	12.0	8.5	6.9	6.0	5.4	4.9	4.2	3.8	2.7
30	15.2	12.7	9.0	7.3	6.4	5.7	5.2	4.5	4.0	2.8
35	15.8	13.2	9.3	7.6	6.6	5.9	5.4	4.7	4.2	3.0
40	16.2	13.6	9.6	7.8	6.8	6.1	5.5	4.8	4.3	3.0
45	16.5	13.8	9.8	8.0	6.9	6.2	5.6	4.9	4.4	3.1
50	16.6	13.9	9.8	8.0	6.9	6.2	5.7	4.9	4.4	3.1
55	16.5	13.8	9.8	8.0	6.9	6.2	5.6	4.9	4.4	3.1
60	16.2	13.6	9.6	7.8	6.8	6.1	5.5	4.8	4.3	3.0
65	15.8	13.2	9.3	7.6	6.6	5.9	5.4	4.7	4.2	3.0
70	15.2	12.7	9.0	7.3	6.4	5.7	5.2	4.5	4.0	2.8
75	14.3	12.0	8.5	6.9	6.0	5.4	4.9	4.2	3.8	2.7
80	13.3	11.1	7.8	6.4	5.5	5.0	4.5	3.9	3.5	2.5
85	11.8	9.9	7.0	5.7	4.9	4.4	4.0	3.5	3.1	2.2
90	9.9	8.3	5.9	4.8	4.2	3.7	3.4	2.9	2.6	1.9
95	7.2	6.0	4.3	3.5	3.0	2.7	2.5	2.1	1.9	1.4

MEAN SCORES

	Sample size 70	100	200	300	400	500	600	800	1000	2000
5 point scales	0.33	0.28	0.20	0.16	0.14	0.12	0.11	0.10	0.09	0.06
7 point scales	0.47	0.39	0.28	0.23	0.20	0.18	0.16	0.14	0.12	0.09
10 point scales	0.66	0.55	0.39	0.32	0.28	0.25	0.23	0.20	0.18	0.12

Sampling error: Confidence intervals

Percentage	*Sample size* 70	100	200	300	400	500	600	800	1000	2000
5	5.1	4.3	3.0	2.5	2.1	1.9	1.7	1.5	1.4	1.0
10	7.0	5.9	4.2	3.4	2.9	2.6	2.4	2.1	1.9	1.3
15	8.4	7.0	4.9	4.0	3.5	3.1	2.9	2.5	2.2	1.6
20	9.4	7.8	5.5	4.5	3.9	3.5	3.2	2.8	2.5	1.8
25	10.1	8.5	6.0	4.9	4.2	3.8	3.5	3.0	2.7	1.9
30	10.7	9.0	6.4	5.2	4.5	4.0	3.7	3.2	2.8	2.0
35	11.2	9.3	6.6	5.4	4.7	4.2	3.8	3.3	3.0	2.1
40	11.5	9.6	6.8	5.5	4.8	4.3	3.9	3.4	3.0	2.1
45	11.7	9.8	6.9	5.6	4.9	4.4	4.0	3.4	3.1	2.2
50	11.7	9.8	6.9	5.7	4.9	4.4	4.0	3.5	3.1	2.2
55	11.7	9.8	6.9	5.6	4.9	4.4	4.0	3.4	3.1	2.2
60	11.5	9.6	6.8	5.5	4.8	4.3	3.9	3.4	3.0	2.1
65	11.2	9.3	6.6	5.4	4.7	4.2	3.8	3.3	3.0	2.1
70	10.7	9.0	6.4	5.2	4.5	4.0	3.7	3.2	2.8	2.0
75	10.1	8.5	6.0	4.9	4.2	3.8	3.5	3.0	2.7	1.9
80	9.4	7.8	5.5	4.5	3.9	3.5	3.2	2.8	2.5	1.8
85	8.4	7.0	4.9	4.0	3.5	3.1	2.9	2.5	2.2	1.6
90	7.0	5.9	4.2	3.4	2.9	2.6	2.4	2.1	1.9	1.3
95	5.1	4.3	3.0	2.5	2.1	1.9	1.7	1.5	1.4	1.0

MEAN SCORES

	Sample size 50	100	200	300	400	500	600	800	1000	2000
5 point scales	0.23	0.20	0.14	0.11	0.10	0.09	0.08	0.07	0.06	0.04
7 point scales	0.33	0.28	0.20	0.16	0.14	0.12	0.11	0.10	0.09	0.06
10 point scales	0.47	0.39	0.28	0.23	0.20	0.18	0.16	0.14	0.12	0.09