department for
culture, media
and sport

Communal TV systems and preparation for digital switchover

Susan Nicholson and Tracy Logan
BMRB Ltd – Social Research

December 2006

improving
the quality
of life for all

Communal TV systems and Digital Switchover

Report

December 2006

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

Prepared by: Susan Nicholson and Tracy Logan

BMRB Social Research

Telephone: 0161 4557920

Email: susan.nicholson@bmrb.co.uk

Part of BMRB Limited (British Market Research Bureau)

BMRB/SN/TL 45104852

BMRB is ISO9001 accredited, and is certified as working to the requirements of MRQSA/BS7911 market research quality standards

Table of Contents

Index of Tables and Charts

Introduction

1.1 Background

In September 2005, the Government confirmed the timetable for digital television switchover. Starting in Whitehaven at the end of 2007, the rest of the Border ITV region in 2008, the existing analogue terrestrial TV services in the UK will be switched-off and replaced by a nationwide digital terrestrial television network. The timetable for digital switchover is set out in the following table.

Table 1.1 Timetable for digital switchover in the UK

TV Regions	Switchover date
Border	2008-09
West Country, Granada	2009
Wales	2009-10
West, Grampian, STV North	2010
STV Central	2010-11
Central, Yorkshire, Anglia	2011
Meridian, Tyne Tees, London, Ulster	2012
Channel Islands	2013

Source – Digital UK
http://www.digitaluk.co.uk/en/when.html

All TV equipment used by viewers to access analogue TV services will need to be adapted when digital switchover takes place. This can be done by the installation of a set-top box (with a digital terrestrial or "Freeview" Box or one provided by a satellite or cable provider) or by replacing an existing TV set with an integrated TV set with built in digital tuner.

Most homes use either external reception equipment - an outdoor aerial or satellite dish – or receive TV services through a cable connection. However, around one in five homes are in flats served by communal television aerial systems. Many of these systems were originally designed for analogue television reception and those living in buildings served by them may face difficulties in converting to digital TV unless the system is adapted or upgraded. In most cases it is the responsibility of the landlord to make sure that communal TV systems can convey digital TV signals to individual flats.

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. In particular, DCMS was interested to determine what progress had been made by social landlords since the announcement of the Switchover timetable. This research was conducted amongst: UK Local Authorities 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).

Previous research carried out in 2004 by NOP World had shown that around 95% of Local Authorities (LAs) with housing stock and 74% of Regional Social Landlords (RSLs), have communal TV systems in place. The inability of many communal TV systems to carry the digital services now demanded by many residents has led to an increase in aerials and satellite dishes on roofs, walls and balconies of blocks of flats. Projects to upgrade or replace existing communal TV systems may take several years to complete (depending on the size of the provider) and demand for the services of specialist installers will increase as the start of switchover draws closer. Thus, it is important for all landlords including social sector landlords to take on board their responsibilities as soon as possible to ensure a smooth and efficient switchover.

1.2 Outline of previous research in this area

In July 2004, DCMS undertook some exploratory research amongst LAs and RSLs looking at the implications of digital switchover for social landlords. This research was based on a questionnaire which accompanied a letter from DCMS and DTI alerting LAs and RSLs to the need to prepare for digital switchover.

Following on from this research, NOP conducted a survey of senior housing officials from LAs and RSLs. This research found that only one in five LAs (16%) and RSLs (18%) providing communal TV systems to five or more dwellings had fully upgraded or were in the process of upgrading all of their TV systems in preparation for digital switchover. Whilst a large majority of communal housing providers were not fully ready for switchover, it was encouraging that over eight in ten (83%) had made plans, or started to, upgrade their TV systems. The absence of a clear timetable for digital switchover seemed to be a factor preventing some from beginning work. Indeed, the majority of social landlords (86%) indicated that clarification of the timetable from the Government would affect their decision-making with regards action to be taken. Given that the timetable has now been announced, it was important for DCMS to conduct a follow-up piece of research to assess whether providers have put more plans into action.

1.3 Research objectives in 2006

The key aim of the current survey was to bring the research conducted by NOP in 2004 up-to-date by conducting the following two strands of research:

- an attempted census of all UK Local Authorities with housing stock covering local authority directly managed housing and housing stock managed by an Arms Length Management Organisation (ALMO)

- a sample of UK Registered Social Landlords (including Housing Associations)

The main objectives of the project were:

- to measure the level of awareness amongst social landlords about the regional timetable for digital switchover and the need to ensure communal TV systems are upgraded for digital switchover following the confirmation of the timetable by Government in September 2005;

- to reassess the number of social housing units in blocks managed by a social housing provider with access to communal TV systems that may not be owned or managed by commercial providers;
- to reassess the proportion of properties with communal TV systems that have now been specifically upgraded for digital television;
- to assess the current status of those with stock that hasn't been upgraded, according to the following segmentation; those which:
    - are in the process of updating units and will complete this work by the stated regional switchover date,
    - have completed some properties and are exploring options/tendering work on the remainder,
    - are exploring options/tendering work,
    - have developed outline plans but have not made any commitments,
    - have yet to think about the implications of digital switchover and currently have no plans.
- to determine the proportion who have taken action/have firm plans/tendered for some work, and the proportion whose plans are tentative or non-existent;
- to identify the reasons why preparations have not been made with in-depth questions for larger social housing organisations that have failed to progress from the tender stage;
- to assess the proportion of systems that are satellite, terrestrial or cable based.

2 Methodology

As there was no single sample source (of individuals responsible) available for this research, a sample-building survey was conducted between the 7th and the 18th August in order to build a named sample for the main survey. This ensured that the most appropriate person within each organisation received the advance letter and pro forma document explaining the purpose of the survey and giving the respondent the opportunity to gather vital numeric data ahead of the telephone interview. 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.

2.1 Sample source & selection

To keep the method consistent with the 2004 survey, two separate sampling approaches were taken for the survey of LAs and the survey of RSLs.

2.1.1 Survey of LAs

As with the 2004 study, the survey of LAs was an attempted census of the total sample universe. The Department of Communities and Local Government (DCLG), the Welsh Assembly, and the Scottish Executive provided lists of all LAs, in their respective countries in the UK, who had at least five dwellings in their housing portfolio.

The survey of LAs also included Arms Length Management Organisations (ALMOs) for the first time, and the sample for these bodies was also provided by DCLG. ALMOs are companies set up by Local Authorities to manage and improve their housing stock.

2.1.2 Survey of RSLs

The Housing Corporation, the Welsh Assembly, the Northern Ireland Housing Executive and Communities Scotland provided definitive lists of RSLs in the UK. A random selection of RSLs was drawn with proportions in each UK region being matched to the natural profile.

2.2 Response rate by type

In total, 658 interviews were conducted, 515 of these were with RSLs and 143 with LAs. Response rate calculations are based on the total number of interviews completed divided by the total sample issued, excluding those who were ineligible and those with whom no contact could be made.

The final response rates were 37% and 76% amongst RSLs and LAs/ALMOs respectively.

Table 2.1 Breakdown of response

	RSL	LA/ALMO
Total in starting sample	1533	187
Unusable numbers	40	4
Ineligible	123	2
Total number of completed interviews	507	143
Response rate	37%	76%

2.3 Respondent type

The diverse organisational structure of both RSLs and LAs meant that there was no common job title that interviewers could ask for. The most eligible person was the individual within each organisation who managed communal television systems for their housing stock. The job title of the person interviewed varied greatly across all the organisations surveyed, including for example housing managers, technical managers, administrators and chief executives. Respondents' names and job titles were collected at the sample-building stage, which made the main survey fieldwork more productive. Chart 8.5 illustrates the wide range of job titles of those who participated in 2006.

2.4 Sample profile

A total of 658 interviews were conducted for the main stage of interviewing, of these 515 were RSLs and 143 were Local Authorities (including 33 ALMOs). DCMS considered it unlikely that smaller organisations would have communal TV systems so those that owned or managed less than five dwellings were excluded.

Further details on the final sample profile are provided in the Appendix.

3 Executive Summary

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.

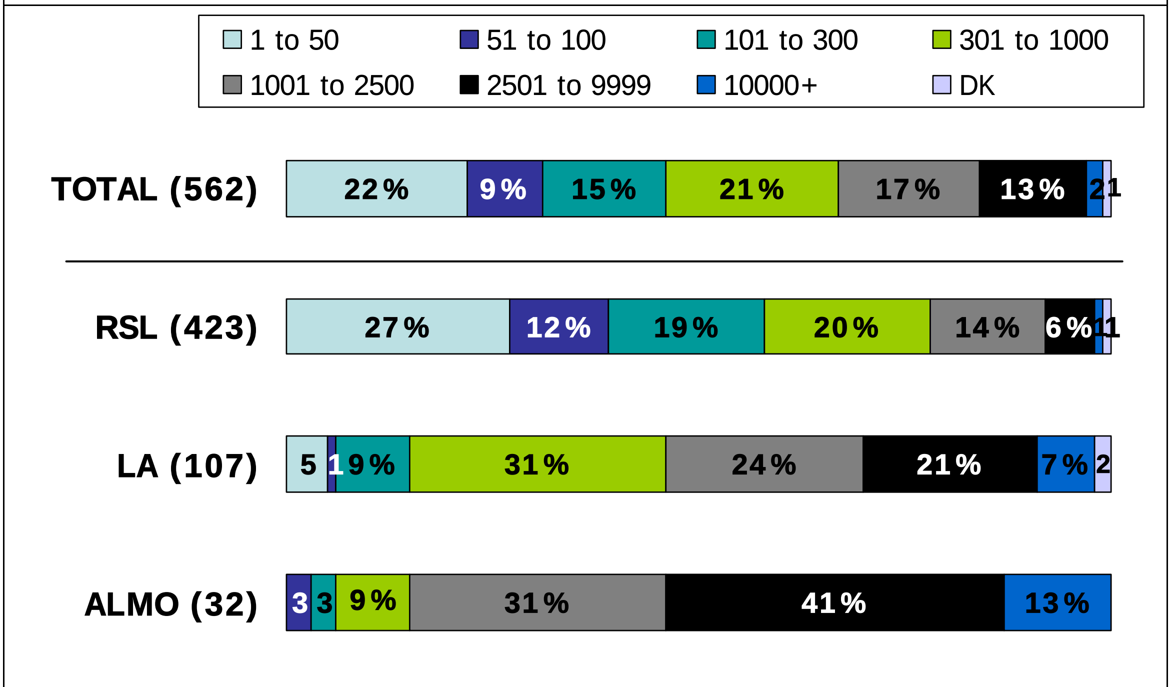
- Reasons given for not yet starting preparations included: not being a priority for the organisation; the cost involved; and lack of demand and lack of information.

4 Availability and number of communal TV systems amongst providers

In 2006, providers were sent an advance letter and a datasheet prior to the main stage of interviewing in order to enable interviewees to gather information needed prior to interview. Some providers that did not have any communal TV systems may have refused to take part in the survey, as they did not feel it was relevant to them. Of those that did participate, eight in ten (85%) had at least one communal TV system within their portfolio. This is a similar proportion to 2004, when four fifths (80%) of landlords surveyed had at least some properties with access to a communal TV system.

The majority of the survey was only asked of those with dwellings that had access to communal systems (n=562). Looking firstly at the actual number of dwellings that providers were responsible for that had access to communal TV, Chart 4.1 illustrates the total number amongst all providers surveyed and by each type of provider (RSL, LA and ALMO).

Chart 4.1 Number of dwellings with access to communal systems

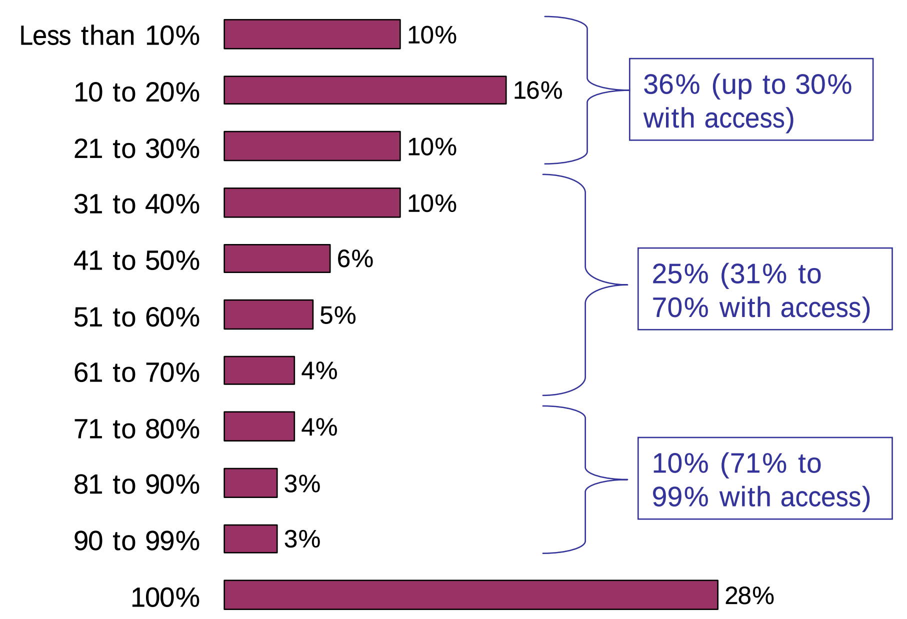


Base: All providers with dwellings who have access to communal TV systems (562)

Whilst RSL providers tended to have relatively few properties with access to communal television systems, LA and ALMO providers were more likely to have a greater number of dwellings with access to communal TV (reflecting the fact that they were also more likely to have a greater number of properties in their total portfolio). Half of LAs (52%) and the vast majority of ALMOs (84%) had more than 1001 properties in their portfolio with communal TV access, with one in ten (7% and 13% respectively) holding more than 10000 dwellings with access to communal TV systems.

As well as looking at the actual number of dwellings with access to communal TV systems represented in the data, it is also useful to consider this as a proportion of providers' total portfolio.

Chart 4.2 Proportion of dwellings with access to communal systems (all providers)

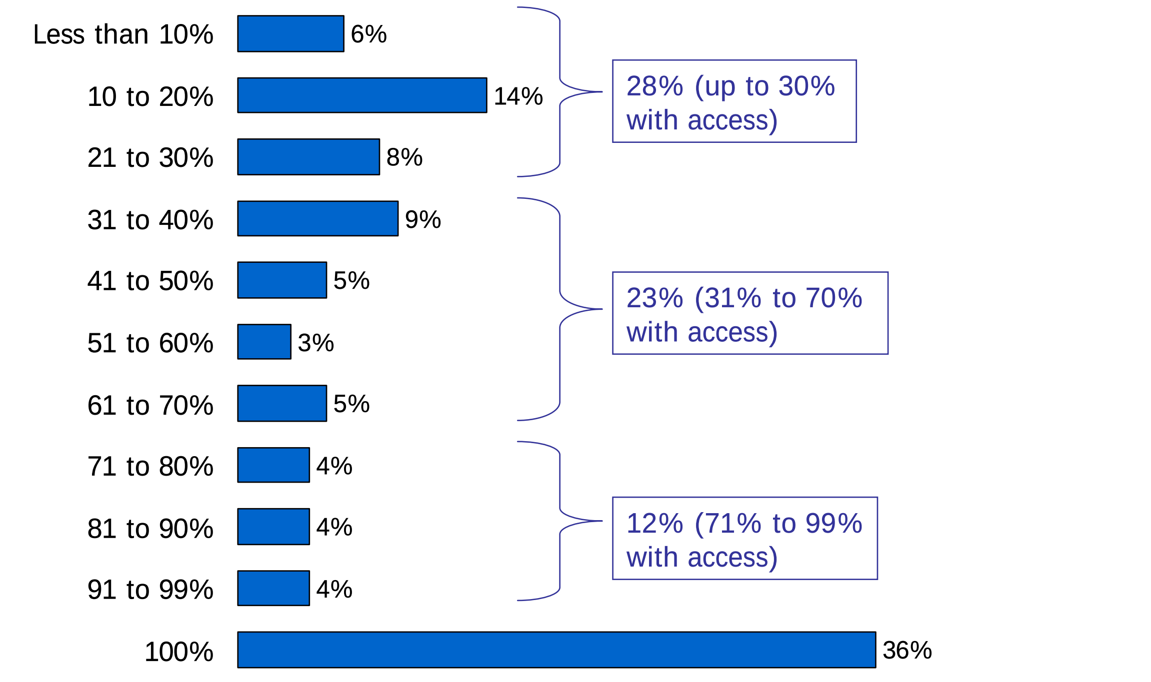


Base: All providers with dwellings that had access to communal TV systems (562)

As Chart 4.2 demonstrates, over a quarter (28%) had communal TV access in all of their properties, but the norm was to have access in only a proportion. This divides equally with half (52%) reporting such access in half or less properties, and half (47%) reporting 51% or greater with communal TV access.

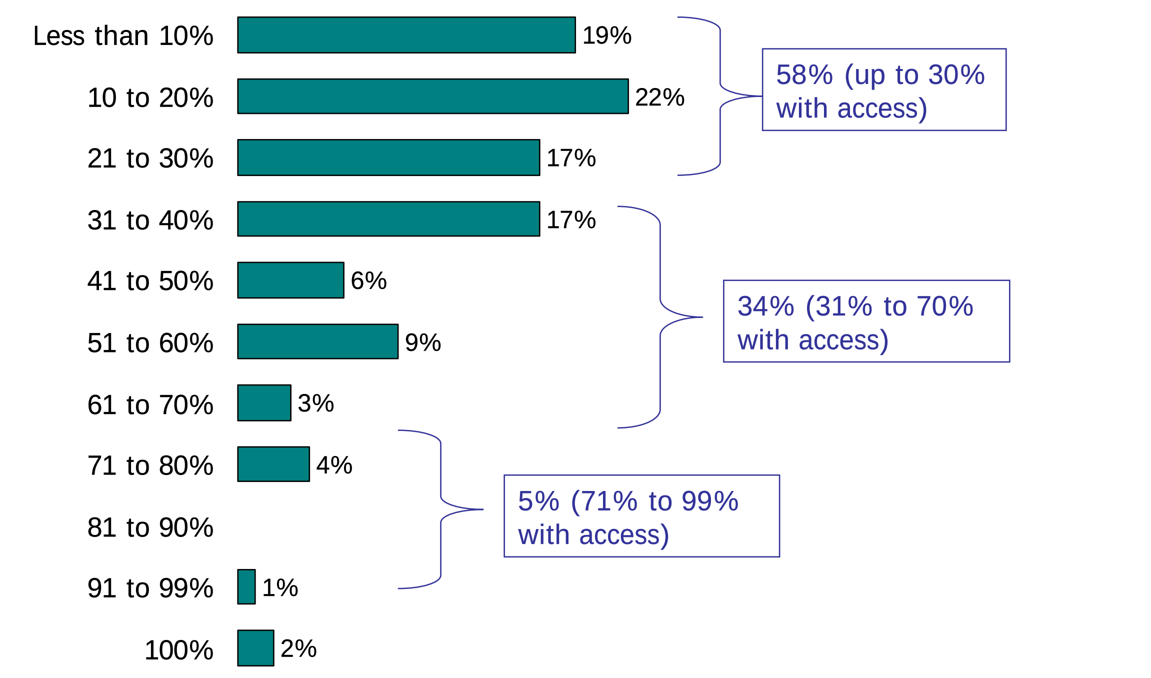
As Charts 4.3 and 4.4 show, this breakdown differs between RSLs and LAs/ALMOs, with the former having much higher proportions of properties with communal TV systems (as had been the case in 2004).

Chart 4.3 Proportion of dwellings with access to communal systems in RSLs only



Base: All RSL providers with dwellings that had access to communal TV systems (423)

Chart 4.4 Proportion of dwellings with access to communal systems in LAs/ALMOs only



Base: All LA and ALMO providers with dwellings that had access to communal TV systems (139)

Since the timetable for switchover has been staggered over a period of five years, it is useful to consider which ITV regions have the largest proportion of properties with access to communal TV (Table 4.1).

Table 4.1 Proportion of dwellings with access to communal TV amongst those providers who have at least one communal TV system by ITV region (in 2006)

By ITV Region	Up to 30%	31% to 70%	71% to 99%	100%
All providers with communal TV systems (562)	*33%*	*27%*	*11%*	*28%*
Carlton/LWT (108)	10%	32%	16%	44%
Central (88)	31%	30%	10%	27%
STV (61)	41%	15%	23%	20%
Meridian (55)	27%	31%	5%	36%
Granada (53)	42%	26%	6%	26%
Anglia (41)	37%	34%	7%	22%
Yorkshire (34)	50%	26%	9%	15%
Tyne Tees (20)	70%	10%	0%	15%
West (20)	30%	25%	10%	30%
Wales (19)	79%	16%	0%	0%
West Country TV (19)	26%	42%	11%	21%
Grampian (10)	50%	10%	30%	10%
Ulster (8)	38%	50%	13%	0%
Border (6)	50%	0%	0%	50%

Base: All providers with dwellings that had access to communal TV systems (562)

As Table 4.1 demonstrates, providers in some ITV regions differed greatly from the average in the proportion of their dwellings that have access to communal TV. Providers with the majority of their dwellings in the Carlton/LWT region were significantly more likely (44%) than average (28%) to have communal TV access in **all** dwellings (highlighted in green), and subsequently less likely (10%) than average (33%) to have communal TV access in less than 30% of their dwellings (highlighted in red). It seems likely that this relates to the very densely populated London area, with a higher proportion of properties containing multiple dwellings and a greater amount of social sector stock.

On the other hand, some of the smaller ITV regions – in particular, Yorkshire, Tyne Tees and Wales - were more likely (50%, 70% and 79% respectively) than average (33%) to have communal TV access in less than 31% of their dwellings.

5 Digital Upgrade Work

There was an increase in the level of upgrade work being undertaken between 2004 and 2006. Of providers that had dwellings with access to communal TV systems, around one third (32%) had completed or were in process of completing all their systems for digital TV (up from 17% in 2004), nearly half (48%) had upgraded or were currently upgrading more than 30% of their systems for digital TV (an increase from 32% in 2004) and only 30% had not upgraded any of their systems (down from 46% in 2004).

The level of upgrading work completed or in the process of being completed by Local Authorities, by RSLs and by ALMOs is shown in Table 5.1.

Table 5.1 Level of upgrading work undertaken by provider type

		All providers (562)	**Local Authorities (107)**	**ALMOs (32)**	**RSLs (423)**
No systems upgraded		**30%**	**24%**	**22%**	**32%**
Upgrade work completed or in the process of being completed…	on up to 30% of systems	**17%**	**24%**	**35%**	**15%**
	on 31 -70% of systems	**11%**	**13%**	**3%**	**12%**
	on 71-99% of systems	**5%**	**7%**	**0%**	**6%**
	on all systems (100%)	**32%**	**30%**	**34%**	**32%**

Base: Providers with communal TV systems (562)

There were no differences between Local Authorities, ALMOs and RSLs in the proportion that were in the process of completing the upgrade of all their systems (30%, 34% and 32% respectively). However, Local Authorities were more likely than RSLs to have started upgrading at least some of their systems (74% of Local Authorities had started upgrading work compared with 65% of RSLs).

Looking at differences by type of RSL, as in 2004, Abbeyfield and Almhouses were most likely to have done no upgrading (64% and 45% respectively), while just over half (55%) of Co-operative RSLs had completed or were in the process of completing upgrades to all their stock. RSLs with a mid to large portfolio of properties were the most proactive in relation to digital upgrading. Over half (55%) of RSLs with over 100 dwellings had upgraded at least 30% of their housing stock compared with just one in three (36%) RSLs with 100 or less dwellings.

Table 5.2 Level of upgrading work undertaken by TV region					
	No systems upgraded	**Upgrade work completed or in the process of being completed**			
		on up to 30% of systems	**on 31 -70% of systems**	**on 71-99% of systems**	**on all systems (100%)**
Providers with communal systems* Base - *(562)	*30%*	*17%*	*11%*	*5%*	*32%*
Carlton/LWT (108)	40%	18%	10%	2%	26%
Central (88)	29%	25%	14%	1%	28%
STV (61)	18%	16%	13%	8%	41%
Meridian (55)	25%	16%	11%	13%	35%
Granada (53)	28%	25%	4%	10%	34%
Anglia (41)	27%	14%	12%	5%	41%
Yorkshire (34)	15%	24%	21%	3%	38%
Tyne Tees (20)	30%	20%	10%	5%	30%
West (20)	20%	20%	10%	5%	45%
Wales (19)	37%	16%	11%	0%	32%
West Country TV (19)	37%	21%	5%	5%	32%
Grampian (10)	10%	20%	10%	30%	30%
Ulster (8)	50%	25%	25%	0%	0%
Borders (6)	100%	0%	0%	0%	0%

As the results in Table 5.2 demonstrate, the level of upgrading work varied by TV region and seems to suggest that the timetable for switchover is not yet a strong driver of upgrade work. Given that switchover is due to start in the Border region first, it was slightly surprising to find that none of the providers surveyed from this region had undertaken any upgrade work. However, the results on the Borders region are from a very low base size (n=6), and, as discussed in Chapter 6, providers from the Borders region (where Digital UK have to date been most active) did believe they would be completed by 2008. In early 2006, IPSOS Mori also conducted a research project about preparations for switchover in the Borders region (with a sample size of 362 public and private sector enterprises).[1] This research found that 49% of organisations from this region had already started preparations for digital switchover.

Although not scheduled for switchover until 2012, two fifths (40%) of providers in Carlton/LWT TV regions had not started *any* upgrade work. As mentioned previously (in Section 4), providers in Carlton/LWT (particularly in the Greater London area) were significantly more likely than average to have communal TV access in all dwellings, therefore any delay in upgrading work would be likely to affect a large proportion of residents. Providers in the STV and West TV regions appeared to be making the most progress towards upgrading their systems with around two fifths (41% and 45% respectively) reporting that upgrade work was underway for all of their systems.

Looking at these results by geographical region, half (50%) of providers interviewed in Northern Ireland (n=8) had not yet started upgrading communal TV systems in their portfolio. In England, London providers were least likely to have upgraded their systems, with two in five (40%) saying they had done/planned no upgrade work. This is similar to the picture in Wales where 37% of providers had not upgraded any communal TV systems. By comparison, providers in Scotland were more likely than average (22% compared with 16%) to have started upgrade work on 100% of their portfolio.

It is also interesting to look at the level of upgrade work being undertaken by size of organisation. Table 5.3 shows the proportion of upgrade work underway for small (up to 1000 properties) and large (1001 or more properties) housing organisations.

Table 5.3 Level of upgrading work undertaken by size of organisation

	All providers (562)	Up to 1000 properties in portfolio (246)	1001+ properties in portfolio (316)
No systems upgraded	**30%**	**39%**	**24%**
Upgrade work underway on up to 30% of systems	**17%**	**10%**	**28%**
Upgrade work underway on 31 - 70% of systems	**11%**	**9%**	**14%**
Upgrade work underway on 71-99% of systems upgraded	**5%**	**4%**	**6%**
Upgrade work underway on all systems (100%)	**32%**	**38%**	**28%**

Base: Providers with communal TV systems (562)

[1] *http://www.digitaltelevision.gov.uk/pdf_documents/publications/2006/mori_borderregion_dtvsw_readiness_es.pdf*

As Table 5.3 demonstrates, smaller organisations were more likely not to have started work (39%) than those with 1001 or more properties in their portfolio (24%). This may be because they feel they have less work to do (and therefore need less time to do it) than those with a greater number of properties in their portfolio. Despite being more likely to have started work, larger organisations had not progressed as far in their upgrade work (in terms of the proportion of their total portfolio underway) as those in smaller organisations. Indeed, larger organisations were more likely than smaller organisations to be in the early stages of upgrading their systems, with 28% having started upgrade work in up to 30% of their properties, compared with only 10% of smaller organisations. Furthermore, smaller organisations were more likely to have started all their upgrade work (38%) than larger organisations (28%).

Table 5.1 and 5.3 seem to suggest that the type of provider and the size of the organisation are two of the main drivers in providers' likelihood to have completed, or be in the process or completing, a greater proportion of their communal systems.

5.1 Proportion of individual dwellings with access to communal TV systems that have been upgraded

An additional question was added to the 2006 survey which went a step further, asking providers about the proportion of dwellings that had access to a digital ready system (that is, that had access to a system where upgrade work was already complete).

Table 5.4 shows the proportion of providers that had given none, 1-30%, 31-70%, 71-99% and 100% of its individual dwellings (that had communal TV systems) access to an upgraded system by autumn 2006.

Table 5.4 Proportion of providers offering a proportion of dwellings access to a digital-ready communal TV system by time of interview

Proportion of dwellings (with communal TV) with access to a digital ready system	**Total (562)**	**Local Authorities (107)**	**ALMOs (32)**	**RSLs (423)**
No dwellings with access to a digital-ready system	30%	24%	22%	32%
1-30% of dwellings with access to a digital-ready system	35%	41%	59%	32%
31-70% of dwellings with access to a digital-ready system	11%	12%	3%	11%
71-99% of dwellings with access to a digital-ready system	5%	6%	0%	5%
All dwellings with access to a digital-ready system (100%)	16%	13%	16%	17%

Base: All providers with communal TV systems (562)

As has already been noted, three in ten (30%) providers had not upgraded any of their communal TV systems and therefore did not offer access to digital-ready TV systems to any individual dwellings. Just over one in six (16%) reported that *all* individual dwellings in their housing stock had access to an upgraded system at the time of interview. This increases to one fifth (22%) of providers with access to a 'digital-ready' system by the end of 2006, when incorporating answers given in response to a further question about when they hoped to complete all their upgrade work (for those who had already started all their upgrade work).

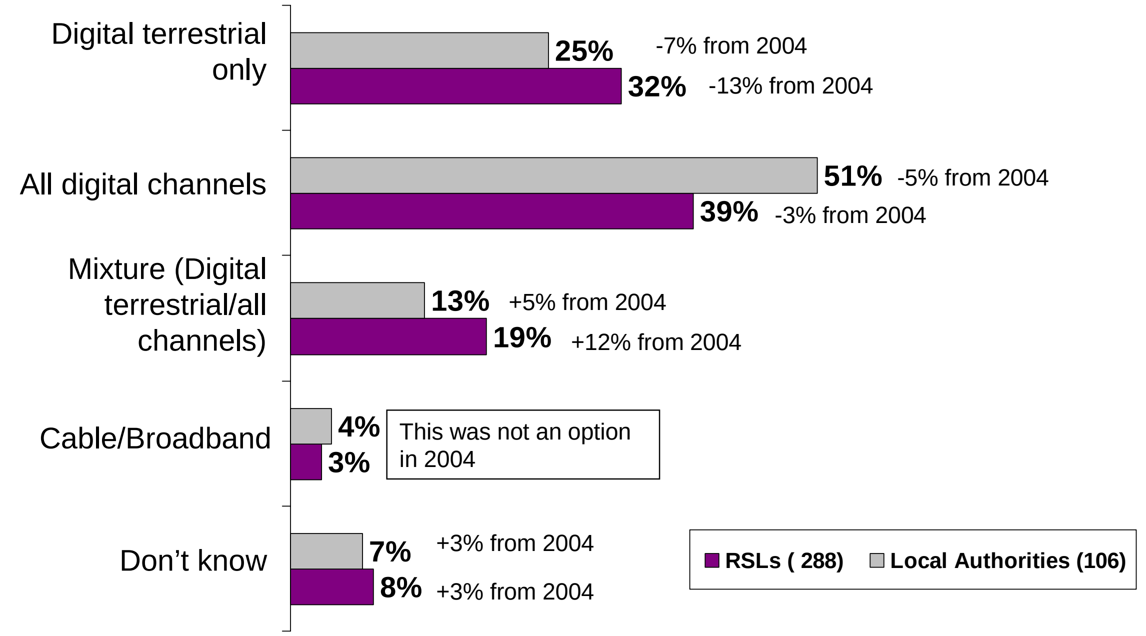
Unsurprisingly, there was a direct correlation between the proportion of *individual dwellings* with access to an upgraded system and the proportion of all communal TV systems that were currently in the process of being upgraded by providers. Half (47%) of providers for whom upgrade work was completed, or in the process of being completed, (n=180) were already able to provide digital-ready access to *all* individual dwellings (rising to 68% by the end of 2006), compared with just 3% of social landlords that had started upgrading less than 30% of its systems.

There was also a correlation between the size of the providers' portfolio and its propensity to be providing digital-ready access across its entire portfolio. Three in ten (30%) of those with between five and 500 properties said they would be offering 'digital-ready' access to 100% of individual dwellings by the end of 2006, compared with just one in ten (12%) of those with more than 500 properties.

5.2 Type of upgrading

All providers who had started at least some upgrade work were asked about the type of system they were installing. Of those that had started to upgrade their communal TV systems (n=394), two fifths (42%) were upgrading systems so that they could receive *all* digital channels, i.e. terrestrial and cable or satellite only channels and 30% were upgrading systems to receive just digital terrestrial TV channels such as Freeview. One in five (18%) were installing a mixture of systems across their portfolio and 3% said they were using Cable or Broadband systems. The remaining one in ten (8%) were not sure which type of system they were installing. Chart 5.1 shows the type of upgrading work undertaken by provider type, as well as indicating the comparison data from 2004.

Chart 5.1 Type of upgrading work undertaken



Base: Providers that had that have started to upgrade communal TV systems (RSLs 288, Local Authorities 106)

As in 2004, Local Authorities appeared to be carrying out more substantial upgrading work than RSLs. Half (51%) of upgraded communal systems in Local Authority housing could receive all digital channels, compared with two fifths (39%) of upgraded systems in RSLs.

Looking at differences by size of RSLs, the larger the landlord the more likely it was that they had upgraded their systems to receive all digital TV channels. Just over half (53%) of RSLs with 1000+ properties had upgraded their systems to receive all digital channels compared with a third (33%) of landlords with between 5 and 1000 properties.

Table 5.5 shows the type of upgrading work undertaken by providers in each TV region.

Table 5.5 Type of upgrading work undertaken by TV region

	Systems upgraded to receive digital terrestrial only	**Systems upgraded to receive a wider range of digital channels**	**Mix of upgrading**
Upgraded at least some communal systems *(394)*	*30%*	*42%*	*18%*
Carlton/LWT (65)	25%	42%	14%
Central (62)	39%	35%	16%
STV (50)	18%	54%	16%
Meridian (41)	49%	29%	20%
Granada (38)	29%	55%	13%
Anglia (30)	27%	50%	10%
Yorkshire (29)	34%	41%	21%
Tyne Tees (13)	54%	15%	23%
West (16)	19%	31%	38%
Wales (12)	17%	50%	8%
West Country TV (12)	33%	42%	25%
Grampian (9)	11%	44%	44%
Ulster (4)	0%	25%	50%

Providers in STV and Granada were most likely (54% and 55% respectively) to have installed systems that receive a wider range of digital channels (including pay services), with providers in the Tyne Tees and Meridian regions more likely (54% and 49% respectively) to have installed more basic terrestrial only systems.

5.3 Attitudes towards satellite installation

Rather than having to wait for their landlord to upgrade the communal TV system many tenants have sought access to digital television services via satellite. Table 5.6 shows providers' attitudes to satellite installation by tenants.

Table 5.6 Whether tenants can install their own satellite equipment				
	All (658)	**RSLs (515)**	**LAs (110)**	**ALMOs (33)**
Yes - without any conditions	7%	7%	9%	3%
Yes - if application is agreed	65%	62%	77%	73%
No – due to planning rules	10%	11%	5%	18%
No – not under any circumstances	15%	18%	7%	6%
Base: All providers (658)				

Three quarters (72%) of providers were willing to consider allowing households to have satellite equipment installed, of which, just 7% allowed tenants to install equipment without any conditions. A further quarter (25%) did not permit private upgrades. There has been no change in the proportion allowing tenants to install their own systems since 2004 (75% were willing to consider applications in 2004 and 25% did not).

As in 2004, Local Authorities were least likely to have forbidden satellite installations: 29% of RSLs and 24% of ALMOs did not permit private satellite installations compared with 12% of Local Authorities.

The smaller the RSL the more likely it was to have outright restrictions on private satellite installation. Nearly two fifths (38%) of smaller RSLs (up to 1000 properties) did not allow tenants to install their own satellite equipment compared with just 13% of larger RSLs (over 1000 properties).

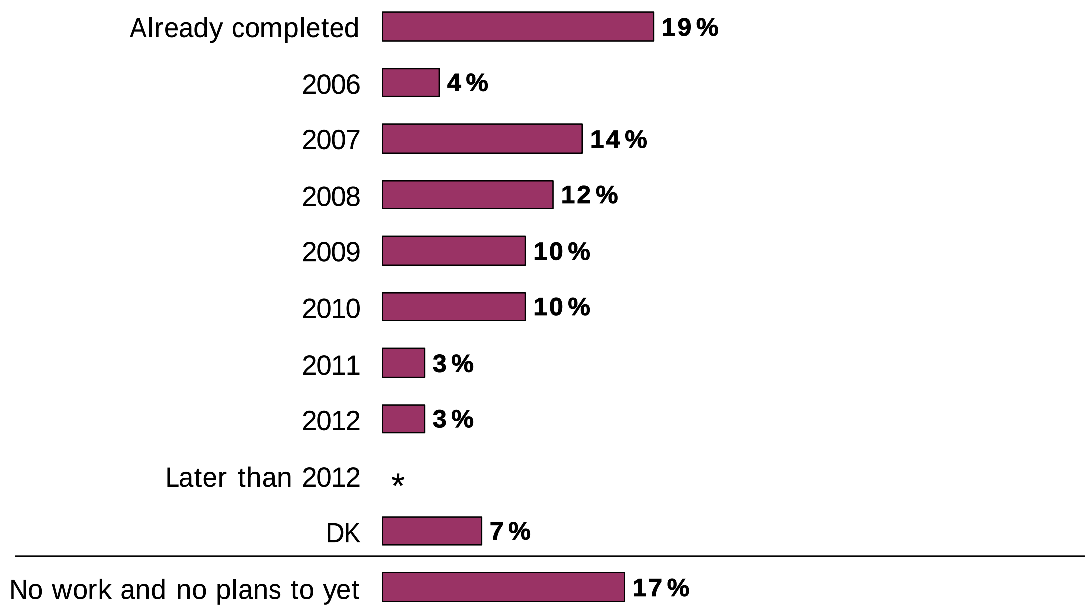
6 Awareness of and timescales for upgrading for digital switchover

This chapter looks at spontaneous and prompted measures of providers' likelihood to have completed their upgrade work before digital switchover takes place in their TV region, before assessing where providers first got their information about digital switchover.

6.1 Likely year of completion (spontaneous)

Chart 6.1 shows the proportion of all providers with communal TV systems that said they were likely to complete their upgrade work in each year leading up to 2012. Those who had not started any upgrade work nor made any plans to do so (n=96) were not asked this question as they would have been unable to give an accurate answer; however, they have been included in the base for Chart 6.1, to illustrate the proportion of **all** providers with communal TV systems that believed they are on track to complete their upgrade work over the next seven years.

Chart 6.1 Likely year of upgrade completion



Base: All providers with communal TV systems (562)

As Chart 6.1 illustrates, three quarters (76%) of all providers with communal TV systems said they hoped to complete their upgrade work by 2012. Indeed, one in five (19%) providers had already completed all their upgrade work, with a further 4% hoping to finish by the end of 2006. Only 6% of providers expected to complete work as late as 2011 and 2012, with less than 1% (n=1) saying they would complete later than 2012.

In 2006, a substantial minority (24%) were still not able to give a definite year for upgrade completion. 7% did not know when they would complete their upgrade work and 17% still had not started making any plans (and so were not asked to say exactly when they would complete).

However, plans had still moved on since 2004, when a quarter of providers with communal systems (23%) did not know when they would complete their work and a further one in ten (13%) said they were waiting for the Government to announce the timetable for switchover.

6.1.1 Likely year of completion (by provider type)

Table 6.1 shows the anticipated completion dates by provider types.

Table 6.1 Anticipated year of upgrade completion by provider type

Year/type	All (562)	RSLs (423)	LAs (107)	ALMOs (32)
Already completed	19%	20%	20%	6%
2006	4%	4%	2%	6%
2007	14%	15%	12%	6%
2008	12%	12%	14%	9%
2009	10%	9%	15%	22%
2010	10%	9%	11%	28%
2011	3%	2%	4%	9%
2012	3%	3%	3%	3%
Later than 2012	*	*	-	-
Don't know	7%	7%	6%	6%
No work done / plans made as yet	17%	19%	14%	3%

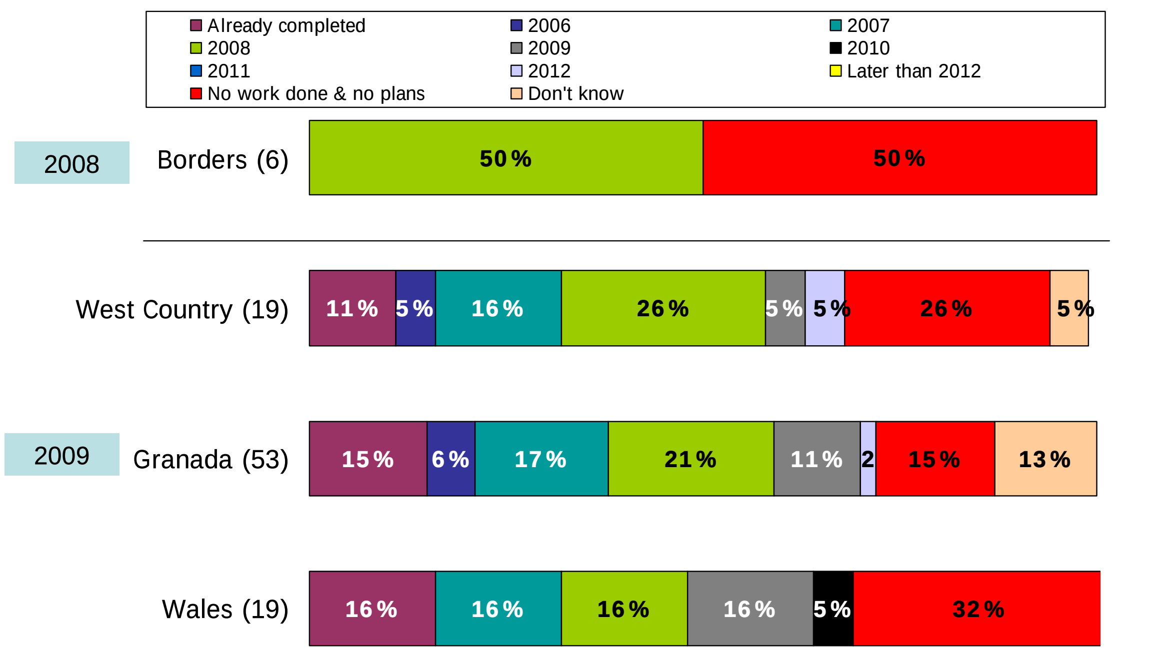
Base: All providers with communal TV systems (562)

ALMOs were less likely (6%) than average (19%) to have already completed their upgrade work, although this is likely to be partly due to recent stock transfers and the fairly recent creation of some of these organisations. Furthermore, the majority of ALMOs surveyed operated in TV regions that are not due to switchover until 2010 or later. Aside from this, Table 6.1 shows that the pattern was fairly consistent across all types of providers.

6.1.2 Likely year of completion (by ITV region)

Perhaps the most useful way to analyse this data is by TV region and therefore by the deadline for switchover. Charts 6.2, 6.3 and 6.4 illustrate the percentage of providers within each ITV region that plan to upgrade over the coming eight years. For some ITV regions, the percentages are based on a very small number of respondents. These results are provided for **illustration** only and should be treated with caution; in particular, Borders (n=6), Grampian (n=10) and Ulster (n=8).

Chart 6.2 Likely year of completion (2008 and 2009 regions)



Base: All providers with properties with communal TV systems in Borders, West Country, Granada or Wales (97)

Of the small number of providers surveyed from the Borders region (n=6), half expected to complete their upgrade work by 2008 (Chart 6.2). This is despite the fact that no provider surveyed from this region had started work yet. With the switchover currently set to take place between the final quarter of 2008 and into the middle of 2009 in this region, these providers expected to have completed their work before switchover takes place.[2]

Three regions are currently scheduled to switch in 2009: the West Country (in the second and third quarters of the year); Granada (in the final quarter of the year); and Wales (during the final

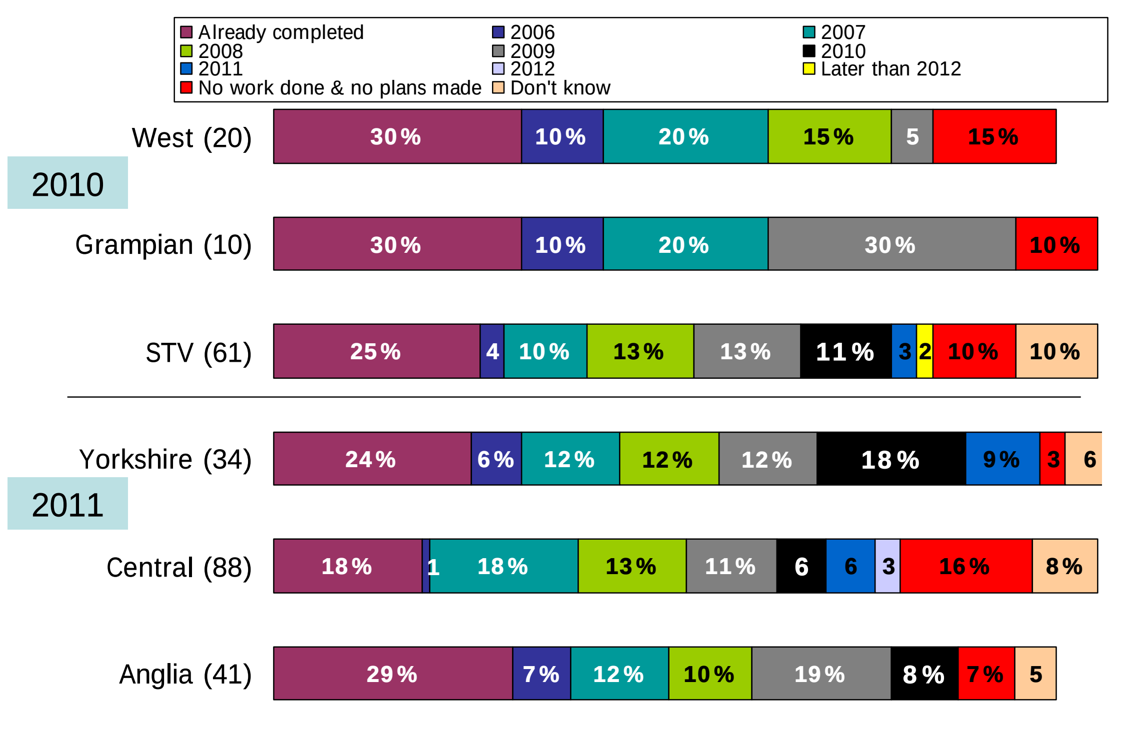
[2] *Further information about preparations made in the Borders region are available from: http://www.digitaltelevision.gov.uk/pdf_documents/publications/2006/mori_borderregion_dtvsw_readiness_es.pdf*

two quarters of 2009 and into early 2010). In total, two thirds (66%) of providers with communal TV systems in the regions due to switchover in 2009 said they would complete by or before 2009.

On average, one in five (19%) providers in these three regions had already completed their upgrade work in October 2006 or were due to finish by the end of 2006. One in six (16%) hoped to complete in 2007, one in five (21%) in 2008 and 11% in 2009. Just 3% said they would complete their work between 2010 and 2012. However, a further one in ten (9%) said they did not know when they would complete all their upgrade work and one in five (21%) had yet to make any plans to start work. As Chart 6.2 illustrates, providers in the West Country, the first of these three to switchover in this year, were most likely to say they will be ready before 2009.

Chart 6.3 shows the expected completion dates for the TV regions currently scheduled for switchover in 2010 and 2011.

Chart 6.3 Likely year of completion (2010 and 2011 regions)



Base: All providers with properties with communal TV systems in West, Grampian, STV, Yorkshire, Central or Anglia (254)

Three ITV regions are scheduled to switchover in 2010: STV, Grampian and the West (Chart 6.3). In total, eight in ten (78%) providers with communal TV systems in the TV regions due to switchover in 2010 expected to complete their upgrade work before the end of 2010.

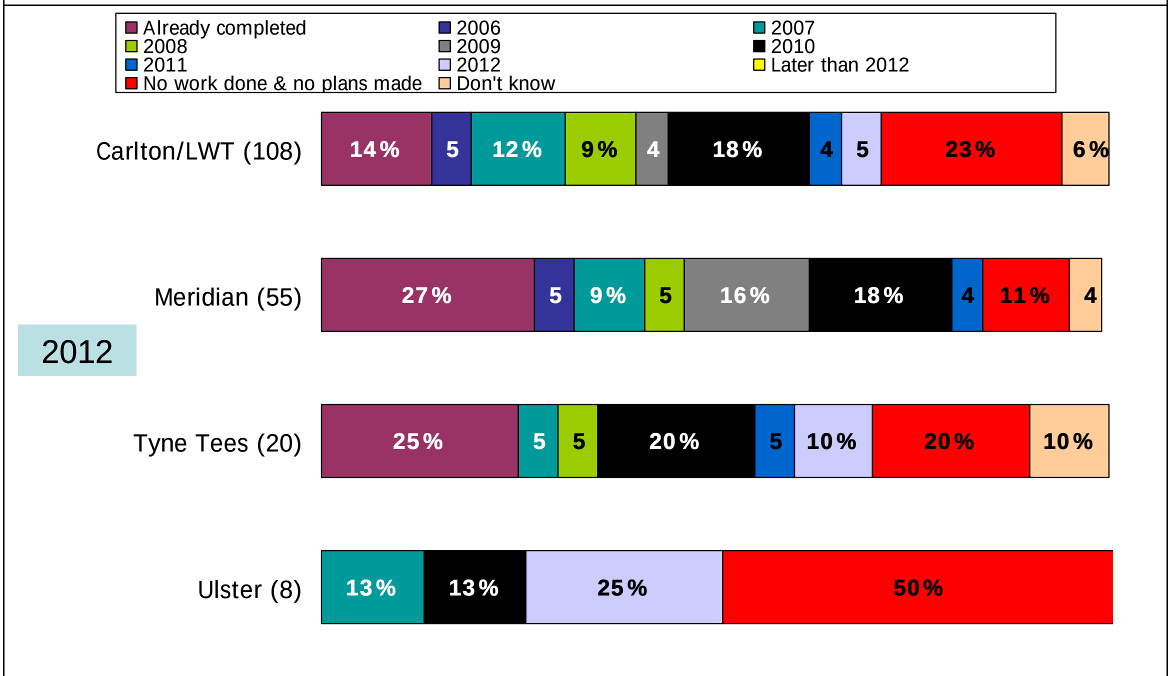
Levels of preparation made by providers in these three regions were very similar. On average, a quarter (26%) of these regions' providers (with communal TV systems) had already completed their upgrade work, with a further 5% planning to do so by the end of 2006. Just over one in ten planned to complete their upgrade work in 2007 (13%) and in 2008 (12%). 13% aimed to complete in 2009, leaving just 8% (all from the STV region) that expected to complete in 2010. Whilst only 3% gave a completion date later than 2010, a further 10% did not know when they would complete all their work (and these were all providers in the STV region) and one in ten (11%) providers with systems in these three regions had still to make any plans to start work.

Yorkshire, Central and Anglia ITV regions are currently due to switch in 2011. These three regions had similar patterns of readiness (as shown in Chart 6.3). In total, eight in ten (80%) providers with communal TV systems in the TV regions due to switchover in 2011 expected to complete their upgrade work in time for switchover.

On average, two in ten (22%) providers in these regions were already ready for the switchover, with a further 4% on line for completion by the end of 2006. Around one in seven (15%) intended to complete their work in 2007, a further 12% in 2008, 13% in 2009 and 9% in 2010. One in twenty (5%) were scheduled to complete in the switchover year of 2011. Once again, only 2% said they would complete after switchover (in 2012), but 7% could not give an exact year and a further one in ten (11%) had not yet made any plans to start (and so could not specify a completion year). Of the three regions due to switchover in 2011, providers with communal systems in dwellings in the Anglia region were marginally more advanced in their preparations.

Chart 6.4 shows the levels of preparation amongst the regions scheduled to switchover in 2012.

Chart 6.4 Likely year of completion (2012 regions)



Base: All providers with properties with communal TV systems in Carlton, Meridian, Tyne Tees or Ulster (191)

The final four ITV regions – Carlton/LWT, Meridian, Tyne Tees and Ulster – are due to switchover in 2012 (Chart 6.4). In total, three quarters (74%) of providers with communal TV systems in the TV regions due to switchover in 2012 expected to complete their upgrade work in time for switchover.

Despite being the last ITV regions to switch, a similar proportion of providers from these regions had already upgraded all their systems (18%) and around 4% intended to have done so by the end of 2006. Between 2007 and 2009, a quarter (25%) of providers with communal systems in these regions hoped to complete their upgrade work, with a peak scheduled for 2010, when one in five (18%) providers from these regions hope to finish their upgrade work. One in ten plan to complete in 2011 or in 2012 (4% and 5% respectively). Of the remaining providers due to experience the switchover in 2012, 6% could not say an exact year when work would be completed by and a sizeable minority (20%) had yet to make plans to start any upgrade work (and so were not asked to specify an exact year for completion). At this early stage, providers from the Meridian region seemed set to complete their preparation for the switchover first, very slightly ahead of Tyne Tees.

6.1.3 Likely year of completion (by geographical region)

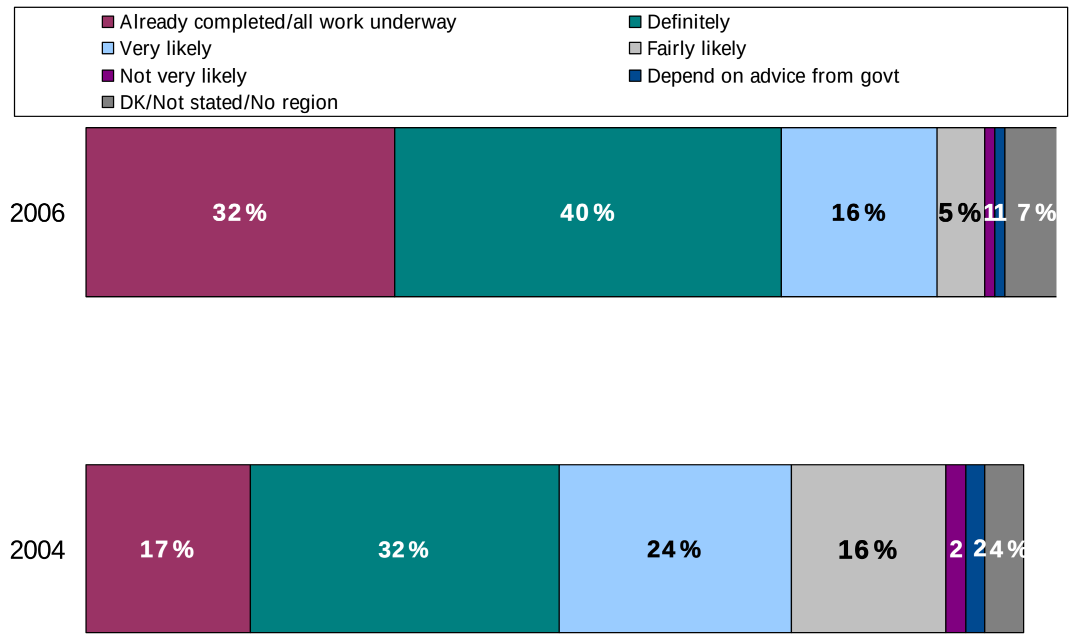
It is also interesting to look at the likely year of completion across the geographic regions. The most notable regional difference was amongst those in London. Whilst over a quarter of providers with communal systems in Scotland (n=77) and the rest of England (n=330) had completed all their upgrade work by the end of 2006 (27% and 26% respectively) and only one in five (19%) providers in London had done so. Even more notably, a greater proportion of providers in London (23%) had yet to start making plans to carry out the necessary upgrade work, compared with 13% of providers in Scotland and the rest of England.

Providers with systems in Wales (2009 switchover) and Northern Ireland (2012 switchover) also appeared to be behind the other UK nations in their preparations: 16% of providers operating in Wales had completed all their work whilst none of the providers interviewed in Northern Ireland had finished their upgrade work by the end of 2006. Furthermore, a third (32%) of providers in Wales and half (50%) of those from Northern Ireland were yet to start making plans for upgrading their systems.

6.2 Perception of likelihood to complete in time for switchover (prompted)

Those who were still to start some of their upgrade work were prompted with the timetable for switchover in their ITV region and asked to consider how likely they were to complete the necessary upgrades by this date. Chart 6.5 is based on all providers with communal TV systems and shows the proportion for whom all work was already underway, as well as the proportions likely (and unlikely) to complete within the timetable in 2004 and 2006.

Chart 6.5 Likelihood of completion by switchover deadline in 2004 and 2006 (prompted)



Base: All providers with properties with communal TV systems (562)

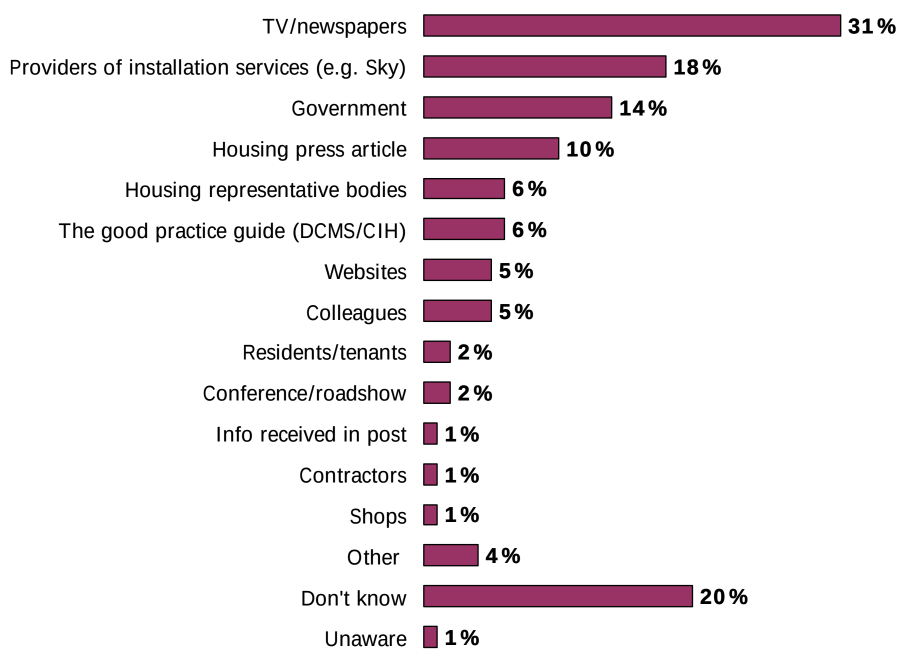
Confidence has increased over time with regards providers' likelihood to complete all upgrade work within the timetable for switchover. In 2004, fewer providers (17%) had started all their work, and only 32% said they would definitely be ready in time. A quarter (24%) said they were very likely and one in six (16%) said they were fairly likely to be ready.

As Chart 6.5 shows, by 2006 the majority were confident about being ready on time: on top of the three in ten (32%) who had already started all their upgrade work by 2006, a further four in ten (40%) believed they would *definitely* be ready in time (Chart 6.5). One in six (16%) said they were *very likely* to be ready within their deadline and one in twenty (5%) said it was *fairly likely* they would have completed all upgrade work by their required date. Only a very small minority (1%) felt it was *not very likely* that they would have all systems upgraded prior to the deadline in their region and 1% said they were waiting on further advice from the Government. There was no difference in the propensity to have all upgrade work completed amongst the different provider types, or by ITV region.

6.3 Where first heard about timetable for digital switchover (spontaneous)

The vast majority (99%) of providers with communal systems were aware of the timetable for switchover, with only 1% remaining unaware. In order to assess how providers were informed about the timetable for switchover, all providers who were aware of the timetable were asked where they had first heard about it (Chart 6.6).

Chart 6.6 Where first heard about timetable (spontaneous)



Base: All providers with properties with communal TV systems (562)

The most common source of information about the switchover for providers was the general media, with three in ten (31%) citing TV and/or newspaper articles as their primary source (Chart 6.6). One in five (18%) said they first heard about the timetable from a provider of installation services, and LAs were more likely (27%) than average to say this was their first source of information. One in seven (14%) said they first heard from the Government and one in twenty (6%) found out about it through the Good Practice Guide (published by DCMS and the CIH). ALMOs were more likely (16%) than average (5%) to have first heard about digital switchover from their colleagues.

7 Status of social landlords who have not started upgrade work

This chapter looks in more detail at the three in ten (30%) providers with communal systems that had not started **any** upgrade work. This is notably fewer than the number in 2004, when just under half (46%) of providers had not started any upgrade work. As in 2004, RSLs were more likely than Local Authorities and ALMOs to have not done *any* upgrading (32% compared with 23% of Local Authorities and 22% of ALMOs).

In terms of size of landlord, smaller RSLs (up to 100 properties) were least likely to have started this work. Nearly half (49%) had not upgraded any of their systems compared with around a quarter of the larger landlords (23% of landlords with 1000+ properties). Once again, this mirrors the level of preparation amongst different sized providers in 2004.

7.1 Type of plans in place for upgrading

Providers that had not started any upgrading of their communal TV systems were asked what plans they had made to take account of the digital switchover. The results are shown in Table 7.1. (Please be aware that the base sizes are quite small for LAs and ALMOs and the results are shown for illustration purposes only).

Table 7.1 Whether provider has made plans in relation to the digital switchover

	All (168)	RSLs (135)	LAs (26)	ALMOs (7)
Aware of switchover, made outline plans	43%	41%	42%	86%
Aware of switchover no plans	54%	56%	58%	14%
Unaware of switchover	3%	4%	0%	0%

Base: Providers that had not started any upgrading of communal TV systems (168)

Around half (54%) of providers that had ‘not started’ upgrading their systems were aware of digital switchover but had not made plans to start any upgrading work. Looking at the results for ‘not started’ RSLs, 56% had not made any plans to start upgrading their systems, this equates to 18% of all RSLs with communal systems. Small RSLs (less than 100 properties) were most likely to report not having made any plans to start upgrading (73%, or 37% of all RSLs with less than 100 properties).

Of the 26 the Local Authorities that had not carried out any digital upgrading, 11 had made outline plans and were exploring options and 15 were aware of the switchover but didn’t have any plans to start upgrade work. All but one of the seven ALMOs surveyed had made outline plans and were exploring options.

Providers that had made outline plans for upgrading communal TV systems were asked what these plans consisted of. Percentages have been provided for the RSLs, but numbers are given below for Local Authorities due to the very small base sizes.

Of the 17 Local Authorities (including ALMOs) that had made outline plans, eight said they were looking into types of upgrading and contractors available (25% of RSLs); four were planning to implement or upgrade a system (36% of RSLs); four were researching pricing and discussing funding (20% of RSLs); three were planning to consult with tenants (9% of RSLs); two planned to assess their current status (11% of RSLs) and one planned to evaluate what needed to be done (4% of RSLs).

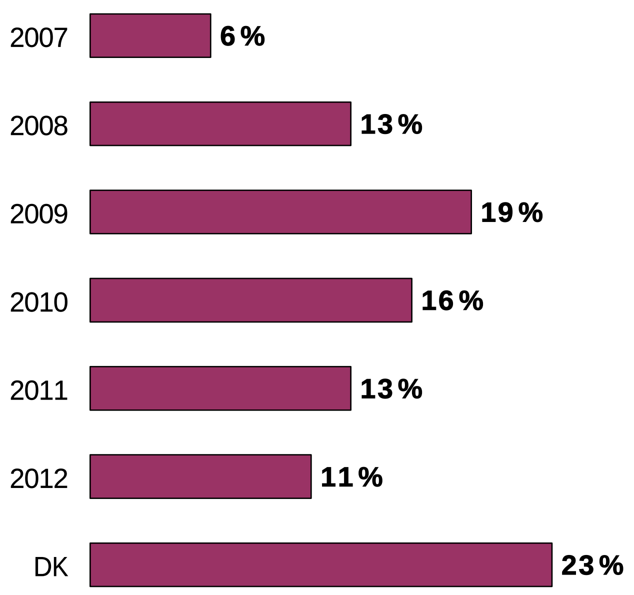
7.2 Estimated year of completion for upgrade work

Just as those who had started work (or had made plans to do so) were asked in what year they hoped to finish this work (Chapter 6.1), those who had not yet made any plans (17% of providers with communal systems) were also asked when they estimated they were 'likely' to complete this work.

7.2.1 'Likely' year of completion

Providers that had not yet made any preparations for switchover were asked when they thought they might complete upgrade work, in light of the deadlines they faced (Chart 7.1).

Chart 7.1 'Likely' year of completion (those who had not started work and or made plans)



Base: All providers that not started upgrade work and were unaware of the implications for their residents (96)

Almost a quarter (23%) did not know when they would complete this work, which is perhaps understandable since they have not yet made any plans to do this work. One in twenty (6%) expected to complete within the next year (despite having not yet made any plans about what to do). In general, those with properties in the last TV regions to switch were more likely to say they did not know when they would be ready than those in the regions to switch first. There was no notable difference between provider types and providers with different numbers of properties in their portfolio when looking at these results.

7.2.2 Proportion likely to upgrade within the next 5 years

Providers that had not made any plans to upgrade their communal TV systems were asked when they thought the majority of their housing stock would be upgraded for digital television. The results are shown in Table 7.2.

Table 7.2 When majority of housing stock will be upgraded for digital TV

	All (96)	RSLs (80)	LAs (15)	ALMOs (1)
Within the next 3 years	48%	48%	47%	100%
Within the next 3-5 years	33%	35%	27%	0
Over 5 years time	6%	6%	7%	0
Don't know	13%	11%	20%	0

Base: Providers that had not made any plans to upgrade their communal TV systems (96)

Despite claiming they were not aware of digital switchover, nearly half (48%) of providers thought that all their systems would be upgraded within the next three years.

7.3 Reasons for not starting upgrade work

A range of reasons were given for why providers had not yet started upgrade work. Table 7.3 shows these in detail.

Table 7.3 Reasons for not having started upgrading any communal TV systems

	All (168)	RSLs (135)	LAs/ALMOS (33)
Not a priority for organisation in current plans	23%	23%	24%
Cost / too expensive	21%	21%	24%
No demand from tenants for upgrading	13%	14%	6%
Have future plans but cannot start until later	8%	10%	3%
Lack of information	8%	8%	6%
Just not got around to it	7%	7%	9%
Unable to receive good quality digital / Freeview digital	5%	7%	-
Other housing priorities	2%	-	12%
Not aware of timetable	2%	1%	3%
Would cause too much disruption	1%	1%	3%
Uncertainty due to options appraisal for local authority stock	1%	1%	3%
Can't recruit staff to do the work	1%	1%	-
Other	15%	16%	9%
Don't know	8%	5%	18%

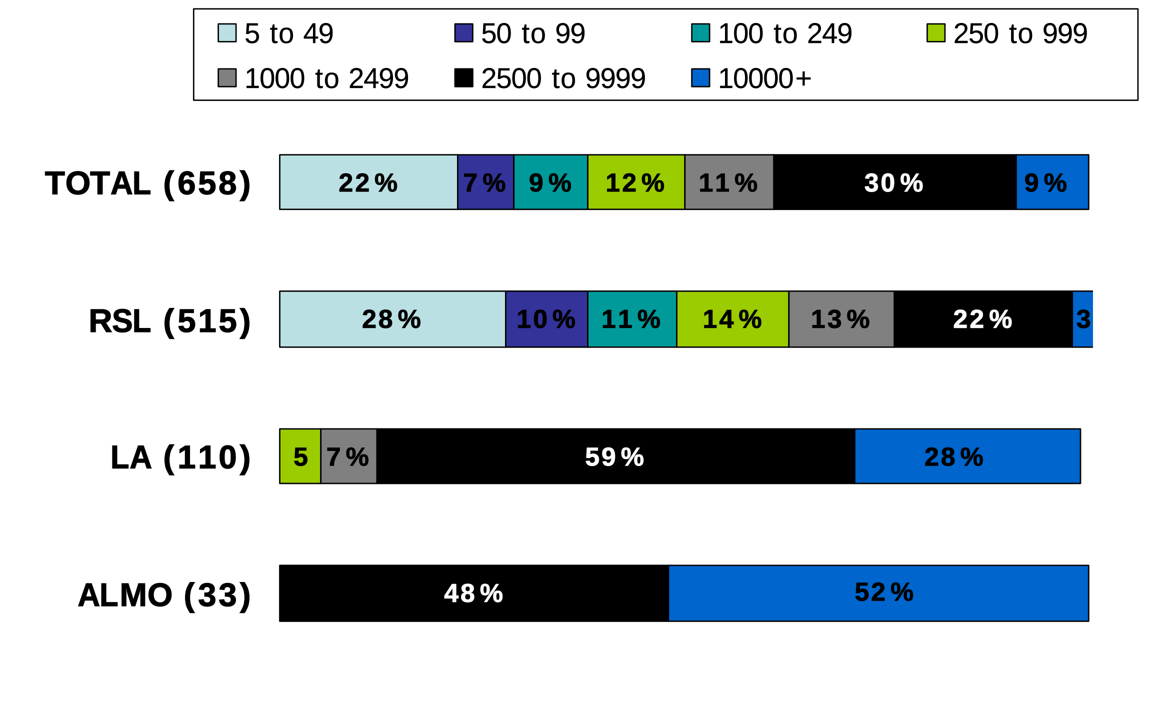
Base: Providers that had not started upgrading any communal TV systems (168)

Providers were most likely to say they had not started the process of upgrading their communal TV systems because it was not a priority in the organisation's current plans (23%) or it was due to the cost involved in upgrading (21%). Other reasons cited were lack of demand from tenants (13%); it wasn't the right time (8%) and lack of information (8%). One in ten (12%) LAs/ALMOs mentioned having other housing priorities, although this reason was not given by any RSLs.

Appendix

Sample profile

Chart 8.1 Total number of dwellings in portfolio

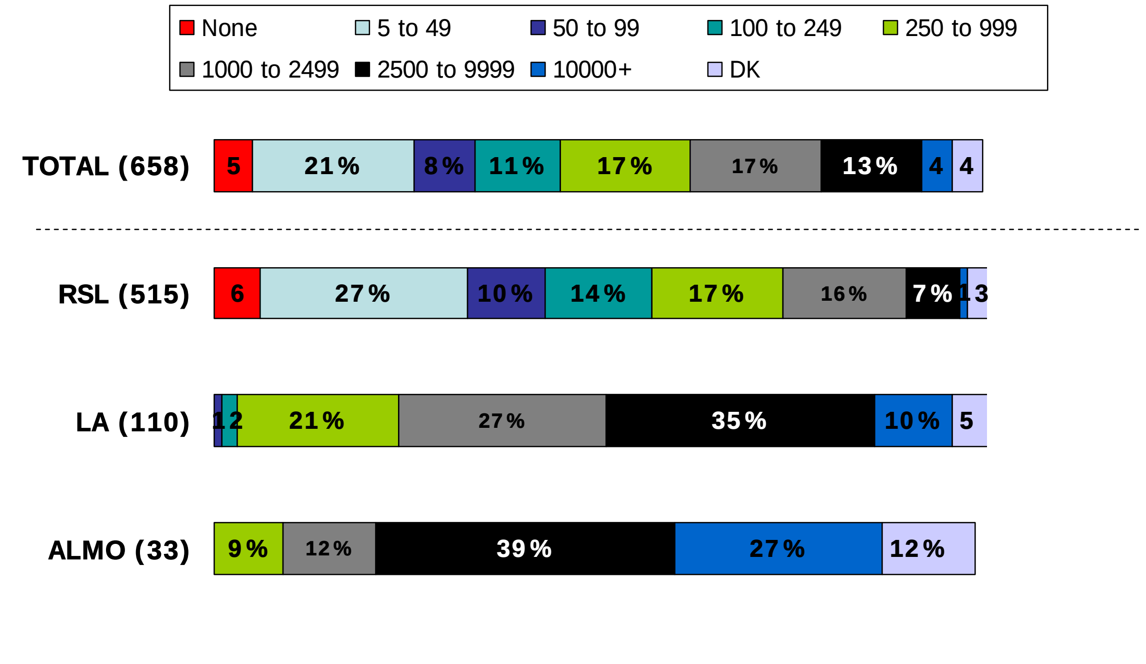


Base: All providers (658)

As Chart 8.1 illustrates, one in five (22%) providers had between 5 and 49 properties, one in ten (7%) had 50 to 99, one in ten (9%) had 100 to 249 dwellings, one in ten (12%) had 250 to 999, one in ten (11%) had 1000 to 2499 and three in ten (30%) had 2500 to 9999 dwellings. One in ten (9%) had 10000 or more dwellings.

LAs and ALMOs were responsible for a greater total number of dwellings than RSLs. The majority (87%) of LA providers had more than 2500 dwellings in their portfolio, and half of ALMOs (48%) had 2500 to 9999 properties and half (52%) had 10000 dwellings or more.

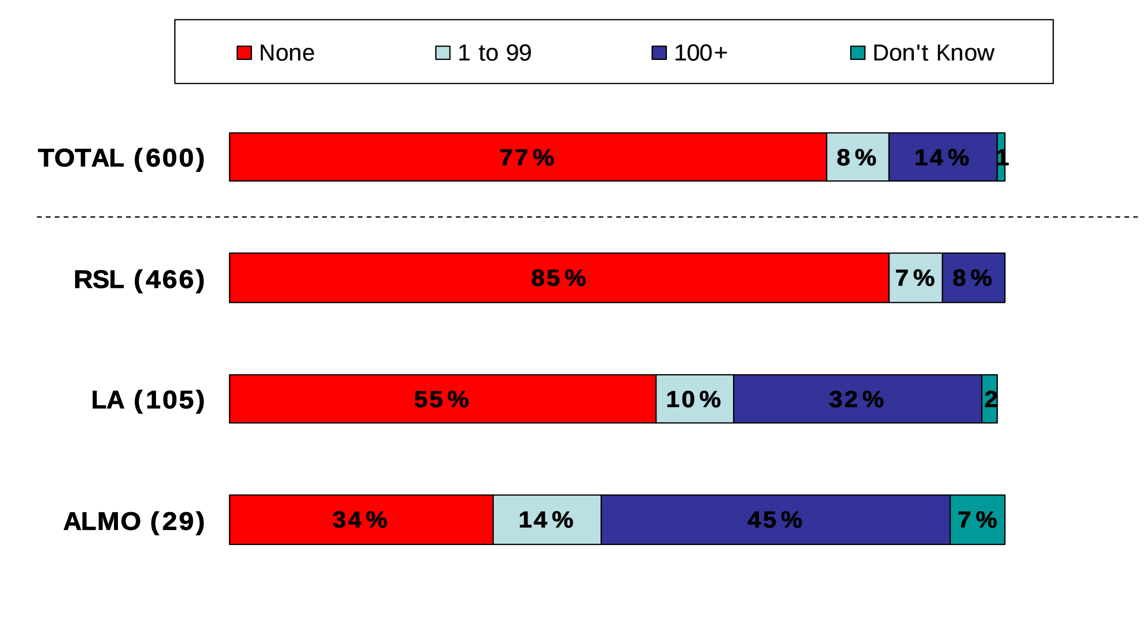
Chart 8.2 Total number of dwellings that are flats in portfolio



Base: All providers (658)

Only one in five providers (5%) had no flats in their portfolio, and these were all RSLs (Chart 8.2). Again, the total numbers held were greater amongst LAs and ALMOs. A quarter (24%) of RSLs had 1000 or more flats in their portfolio, compared with seven in ten (72%) LAs and three quarters (78%) of ALMOs.

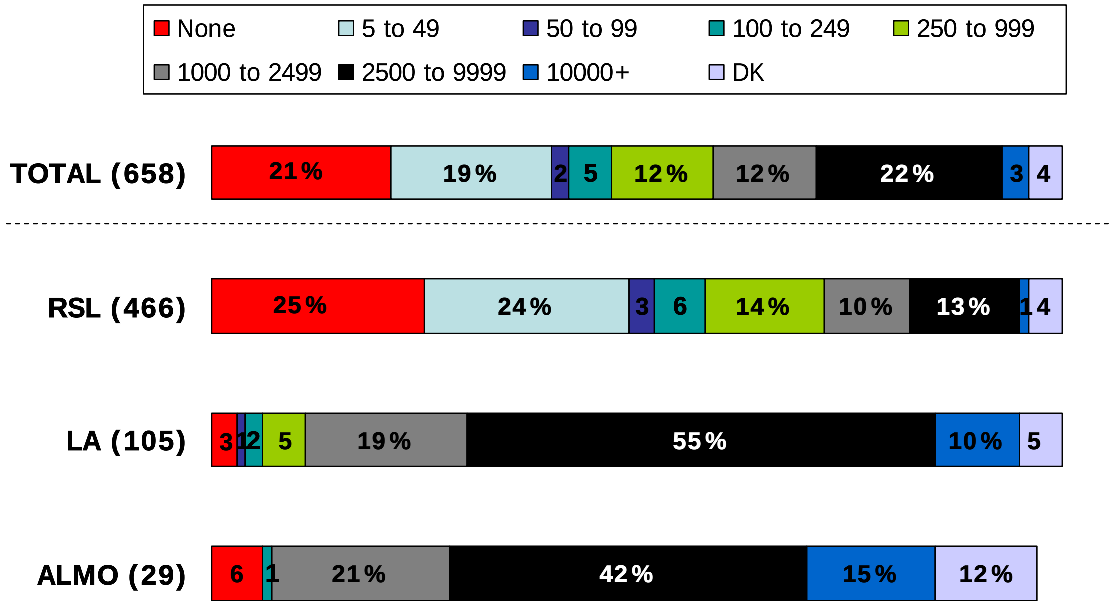
Chart 8.3 Total number of dwellings that are high rise flats in portfolio



Base: All who said they had flats in their housing portfolio (600)

As Chart 8.3 demonstrates, only one in five (22%) providers with flats in their portfolio had at least one high rise flat (that is, at least six stories high). Again LAs (42%) and ALMOs (59%) were more likely to have high rise flats than RSLs (15%). Three in ten (32%) LA providers with flats had more than 100 flats in high rise blocks and 45% of ALMOs had 100 or more high rise flats in their portfolio of flats.

Chart 8.4 Total number of houses in portfolio

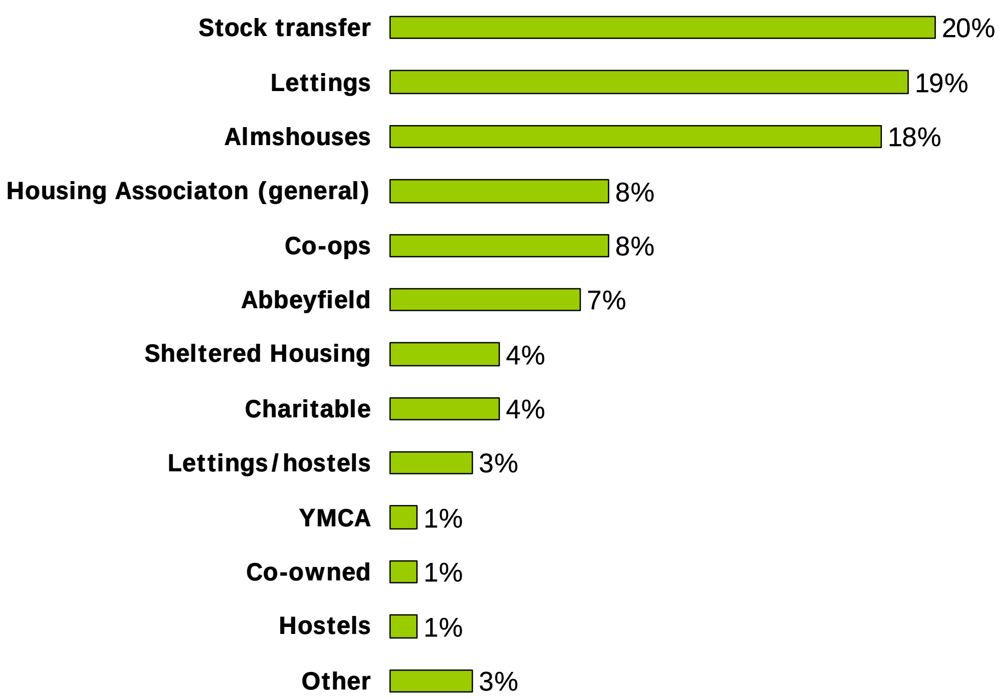


Base: All providers (658)

One in five providers (21%) said they had no houses in their portfolio, and RSLs were more likely (25%) to have no houses than LAs (3%) and ALMOs (6%). As was the case when looking at the number of flats in their portfolios, LAs and ALMOs were more likely to have a greater number of houses in their portfolio than RSLs. One in five LAs (19%) and ALMOs (21%) had between 1000 and 2499 houses (compared with one in ten RSLs), half of LAs (55%) and four in ten (42%) ALMOs had 2500 to 9999 houses, and one in ten LAs (10%) and ALMOs (15%) had 10000 or more houses in their housing portfolio.

Sheltered housing (including the Abbeyfield oprganisations) are of particular concern to DCMS with regards their readiness for switchover, as resdietns in these properties are less able to prepare themselves. Chart 8.5 shows the breakdown of the types of RSL providers interviewed.

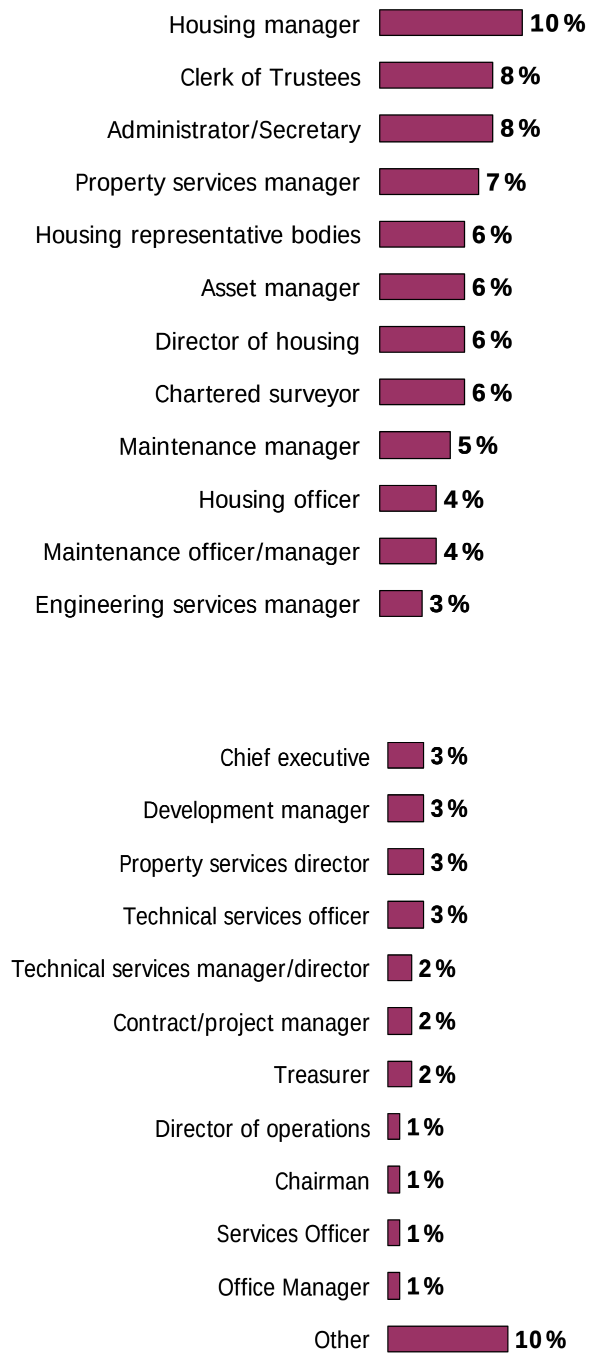
Chart 8.5 Types of RSL interviewed



Base: All RSLs (515)

Chart 8.6 shows the range of job titles of the respondents who took part.

Chart 8.6 Job title of respondents



Base: All providers (658)

Questionnaire

DCMS COMMUNAL SYSTEMS AND DIGITAL SWITCHOVER RESEARCH

BMRB QUESTIONNAIRE – MAIN QUESTIONNAIRE – FINAL VERSION (210906)

INTRODUCTION:

Good morning/ afternoon. My name is ...... calling from BMRB Social Research, an independent research organisation. I am calling on behalf of the Department for Culture, Media and Sport who are conducting research about the levels of preparations that have been made for digital switchover in communal housing.

You should have recently received a letter telling you more about this research, along a short form to fill in. It would be useful if you could have the short form to hand during this short interview.

ADD AS NECESSARY:

• All your answers will be treated in strictest confidence

• Survey will take about 10 minutes depending on your answers

Screener questions

S1. Can I just check that you are the most appropriate person in your organisation to answer questions about its housing stock and its' readiness to receive Digital TV?

- Yes - CONTINUE S2
- No – somebody else - TRANSFER S1b
- N/A – NO SOCIAL HOUSING MANAGED BY ORG. COLLECT CONTACT DETAILS OF OTHER ORGANISATION – note: we don't think this should occur very often as this should be covered at the screening stage.

IF N/A at S1:

S1c. Can you give me the name of the organisation that is now responsible for your social housing stock?

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 LA/RSL/ALMO 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 your particular office is responsible for.

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

IF YES AT S2:

S3. 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
- No

S4. Are you the person with responsibility/who would have responsibility for the management of communal TV systems, for any properties owned or managed by your organisation/local authority (if you had any)? (text substitution based on S3)

- Yes - CONTINUE Q1a
- No – someone else in organisation - GO TO S5

ASK IF NO AT S3:

S5. Please could you transfer me to the person who deals/would deal with the management of communal TV systems, for properties owned or managed by your organisation? (text substitution based on S3)

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.

Q2. 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
- Wales – formerly HTV Wales
- West – formerly HTV West
- Anglia
- Carlton/ LWT
- Meridian
- West Country Television
- Grampian

- STV
- Border

DON'T KNOW (DO NOT READ OUT)
MULTI-REGION (DO NOT READ OUT)

ASK ALL:

Q3a. Thinking about ALL the social housing owned or managed by your particular office, how many dwellings is your organisation (INSERT NAME) responsible for IN TOTAL?

- INSERT NUMBER (range 1+)

IF LESS THAN 5, THANK AND CLOSE 2

ALL:

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

Q3b. How many of these (INSERT NUMBER FROM Q3a) dwellings are flats?

- *INSERT NUMBER (DP CHECK – RANGE MUST NOT BE GREATER THAN ANSWER AT Q3a)*
- Don't know

SKIP IF Q3a=Q3b:

Q3c. And how many of these dwellings are houses?

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

- *INSERT NUMBER; DP CHECK – ANSWERS AT Q3b and Q3c MUST EQUAL VALUE AT Q3a*
- Don't know

SKIP IF Q3b = 0:

Q3d (NEW) What proportion of flats would you say are in high rise blocks – 6 stories or above?]

- *INSERT NUMBER; DP CHECK – RANGE MUST NOT BE GREATER THAN ANSWER AT Q3b*
- Don't know

ASK ALL EXCEPT NO AT S3:

Q4a. How many of these (INSERT ANSWER FROM Q3a) social housing dwellings owned or managed by your organisation/office, have access to communal TV systems?

INSERT NUMBER (RANGE 0 – ANSWER AT Q3a)

IF NONE = SKIP TO Q14

DP CHECK – IF ANSWER GIVEN AT Q4a IS MORE Q3b ANSWER, SEND BACK THROUGH THIS SECTION.

IF DON'T KNOW at Q4a, ASK:

Q4ai In that case, can you give us an estimate of the number of social housing dwellings with access to communal TV systems?

READ OUT BANDS

- 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
- 10,000-15,000
- 15,000 – 20,000
- More than 20,000
- Don't know

ASK ALL (EXCEPT NONE AT Q4a):

Q4b.How many dwellings have access to communal TV systems, as a percentage of all social housing owned or managed by your organisation/office?

READ OUT IF CODE 1 AT Q1a:

That is, as a proportion of ALL the social housing managed by your organisation, from this one office.

READ OUT IF CODE 2 AT Q1a:

That is, as a proportion of the social housing that ONLY your office has responsibility for.

- INSERT PERCENTAGE

IF DON'T KNOW AT Q4b, ASK Q4bi

Q4bi In that case, can you give me an estimate of the number of social housing dwellings with access to communal TV systems as a percentage of all social housing owned or managed by your organisation/office?

READ OUT BANDS

- 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
- Don't know

Q4c. What proportion of these communal TV systems in properties managed from your organisation/office have been or are currently in the process of being upgraded for digital television, for example Freeview?

IF RESPONDENT ASKS WHAT IS MEANT BY "UPGRADING": Most 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%)
- Don't know

IF DON'T KNOW AT Q4c, ASK Q4ci

Q4ci In that case, can you give me an estimate of the number of communal TV systems in properties managed from your organisation/office have been or are currently in the process of being upgraded for digital television, for example Freeview?

READ OUT BANDS

- No communal systems have been / are currently in the process of being upgraded
- 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
- Don’t know

IF Q4c = 0 OR Q4ci = No communal systems have been / are currently in the process of being upgraded, SKIP TO Q5c. ELSE ask Q5a & Q5b

Q5a In terms of individual dwellings that you own or manage what proportion of dwellings have access to communal TV systems that have been upgraded.

- Less than 10%
- 10-20%
- 21-30%
- 31-40%
- 41-50%
- 51-60%
- 61-70%
- 71-80%
- 81-90%
- 91-99%
- 100% - all dwellings with communal systems have access to digital-ready system
- Don’t know

Q5b. And which of the following four 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 [described as Integrated Reception Systems or IRS]
- Some systems have been upgraded for digital terrestrial TV channels such as
- Freeview, and others so that they can receive ALL digital TV channels
- Some systems have been upgraded using Cable or Broadband TV services
- Don't know

ASK IF 0% AT Q4c OR None at Q4ci:

Q5c. 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

- We are aware of digital switchover and the implications on the provision of TV services to residents and have made outline plans, and are now exploring options and tendering work for all communal systems requiring upgrading - ASK Q5d
- We are aware of digital switchover and the implications on the provision of television services to residents but have made no plans to start this work – GO TO Q7
- We are unaware of the digital switchover and its implications for television services. We currently have no plans to upgrade systems - GO TO Q8

ASK IF Q5c = CODE 1:

Q5d. What do these outline plans for digital upgrading consist of?

PROBE FULLY.

- OPEN END
- Don't know

ASK ALL EXCEPT IF ((0% AT Q4c OR None AT Q4ci) AND (Q5 =code 2 OR code 3))

Q6. In which year does your organisation / local authority expect to have completed digital upgrading of ALL its communal TV systems in properties it manages or owns?

PROMPT FOR YEAR;

- Already completed ALL upgrade work
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- Later than 2012
- Don't know

IF ((0% AT Q4c OR None AT Q4ci) AND (code 1 OR 2 at Q5) ask:

Q7 (NEW) You said you were aware of the impact of digital switchover on television services to residents. Can you recall where you got the information from?

OR different wording IF Q4c>0 AND q4ci= 1+

Can you recall where you first got information about the impact of digital switchover on television services to residents?

DO NOT READ OUT:

- Television/Newspapers
- Housing Press articles
- Shops selling digital equipment
- Government
- The Good Practice Guide [Pink] published by DCMS/Chartered Institute of Housing (CIH)
- Housing representative bodies
- Web sites
- Providers of installation services (including Sky/Cable Cos)
- Colleagues
- Other (specify)
- Don't Know

ASK IF ((Q4c = 0% OR Q4ci = None) AND (Code 2 OR 3 AT Q5 (OTHERS SKIP TO Q12):

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

IF CODE 1 or 2 AT Q8:

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

- INSERT PERCENTAGE (0 – 100%)
- Don't know

IF DON'T KNOW AT Q9

Q9a In that case, can you give me an estimate of the proportion of communal TV systems do you think you w ill have upgraded for digital television within the (ANSWER AT Q8 - next 3 years / next 3-5 years)?

READ OUT BANDS

- 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

Q10. (IF NOT 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?

- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- Later than 2012
- Don't know

ASK IF 0% AT Q4c OR Q4ci = None:

Q11.Why have you not yet upgraded any communal TV systems to digital?

DO NOT READ OUT. PROBE FULLY. MULTICODE

- Not a priority for organisation in current plans
- Cost / too expensive
- No demand from tenants for upgrading
- Lack of information
- Can't recruit staff to do the work
- Cause too much disruption to properties
- Other housing priorities
- Just not got round to it
- 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)
- Not aware of the digital switchover timetable
- We do have plans for upgrading in future but cannot start them until later
- Other (specify)
- DON'T KNOW
- REFUSED

ASK ALL EXCEPT ((100% at Q4c or Q4ci) OR QS3 = No OR (Q2= DK or MULTI REGION))

Q12 (NEW) You said your region is [name from Q2] – this region will switch-off [date 2008-2012]. With this date in mind and the possible implications for residents, how likely are you to complete all upgrading of communal TV systems by [date - 2008-2012)? Would you say…

READ OUT. SINGLE CODE

- Definitely
- Very likely
- Fairly likely
- Not very likely
- Not at all likely
- DEPENDS ON CLEARER INFORMATION AND ADVICE FROM GOVERNMENT/OTHERS ON DIGITAL SWITCHOVER (DO NOT READ)
- Don't know
- Refused

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 – no because planning rules tie our hands
- No - not allowed under any circumstances
- Don't know

CLASSIFICATION

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
- Don't know

ASK ALL:

C4. Can I check w hat 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 w ill 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 BMRB 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.