

The Border TV Region and Readiness for the Digital Switchover

Executive Summary prepared for:
The Department of Trade and Industry

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- During February and March, 2006, Ipsos MORI conducted telephone interviews with appropriate personnel representing a range of public and private sector institutions and enterprises within the Border ITV region. The purpose of the research was to assess the state of readiness for the forthcoming digital switchover in the region. The research focused on those organisations which have not yet fully switched to digital - resulting in a total of 362 full interviews.
- A full report is available which describes the findings in more detail. In interpreting the results, it is important to be aware that there are significant variations both between and within sectors. This, along with the small sample size in some sectors and the fact that some respondents were better informed than others, or had more technical understanding of digital broadcast issues, means that caution is advised when comparing the results across sectors.
- Overall, 72% were aware of the digital switchover date in the Borders, 28% were not. This is broadly comparable to the level of awareness among the general public in this region.
- TV services are seen as vital or very important to users and the organisation by 81%, although fewer, 49%, see the impact of losing TV services at switchover as extremely or very serious. Organisations which provide accommodation over a period of time, such as social and care housing, hotels or hospitals, are more likely to think the impact of not converting in time will be serious.
- Half the organisations have not yet started preparing or drawing up firm plans for the switchover (51%). A quarter of these feel that there is 'plenty of time'; for a further fifth the reason given was that 'the decision would be taken elsewhere'. Nevertheless, the majority are confident they will be ready in time, although a third are unsure.
- Progress being made in planning for, and achieving, the switchover to digital varies widely between organisations and sectors. On average, only 15% of all the organisations contacted are more than 10% along the way to completing the switchover to digital. In some cases the degree of progress being made seems to be related to the importance and seriousness attached by the organisation to TV services, as well as to the way that organisation uses its TVs (whether for watching live TV programmes, for recording or just for playing videos or DVDs).

The sectors:

- Social housing: this is a very diverse sector, both in terms of the size of the organisations, the number of communal systems and degree to which they are responsible for residents' TV sets. While some 31% in this sector were not aware of the date of the switchover in the Borders region, most are making good progress. A relatively high proportion in this sector, 69%, have already started or completed conversion, while a further 13% have explored options, made plans or put out tenders. Perhaps this progress is partly related to the finding that this sector is, by some margin, the one that views the impact of losing TV signals at switchover as particularly serious.

- Care housing: awareness of the date of the digital switchover was relatively low in this sector (63%). On the other hand, nearly all in this sector attach a high importance to TV services and two-thirds feel the impact of not being ready in time for the switchover would be serious. Despite this, over half have yet to make a start and 46% have not yet drawn up any firm plans or budgets. There are indications that those who attach the greatest importance to TV services are more likely to have started preparations for switchover.
 - Day care centres: despite a very varied degree of TV use in the different centres, awareness of the date of the switchover was high (80%). Those which make relatively little use of TV services were less likely to be aware of the switchover date. Across the sector, opinion is divided on the importance of TV services, while the impact of not converting by the date of the switchover is seen serious by 27%. This is low compared with other sectors, and is reflected in the low level of preparations and progress towards switchover in this sector.
 - Hospitals: the research identified this sector as the one with the most work to do. Despite high awareness of the switchover date, the near universal importance attached to TV services and the impact of losing the TV service being viewed as serious, over 60% of those who still have analogue TVs have not yet made any plans for the switchover. The most common reason given was that they are waiting for a decision, or budget, from elsewhere.
 - Secondary schools: while TVs seen as important, the impact of a failure to convert by switchover is relatively low. This reflects the fact that 95% of the schools report that the main use of the TV sets is for replaying DVDs/videos, 60% use them for recording TV broadcasts for later viewing and half use them for watching live TV broadcasts. Two-thirds (66%) are yet to start making any plans for switchover.
 - Primary schools: just half view the TV sets as important and very few regard the impact of a failure to convert in time as serious (3%). Again this is likely to be a function of the way the TV sets are used – mainly for playing DVDs and videos. Very little has been done in this sector to date - 29% said they saw no need to switch; and half (49%) are yet to start thinking about it.
 - Hotels: as larger hotels are more likely to have more TVs, they are more likely to regard TV services as important and to be aware of the date of the switchover. Progress is being made in this sector: 52% have at least made a start or are well on the way to completing the conversion to digital.
 - Other public and private sector establishments: this includes armed forces barracks, courts, town halls, student, police and health workers' accommodation, pubs and a prison. By their very nature these establishments have very small sample base sizes and are discussed individually in the report.
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