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The Border TV Region and the Digital Switchover

Research report prepared for the Department of Trade and Industry

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Key Research Objectives

The overall objective was to assess the state of readiness of organisations in the Border ITV region for the Digital Switchover (DSO) in 2008, by:

- measuring awareness of the Borders DSO date
- estimating the number of TV sets and communal systems able to receive digital signals and the number of TV sets and communal systems that remain to be converted or adapted
- gauging the level of upgrading of TV sets and communal TV systems which has been done - and is yet to be done
- assessing the likely impact of failure to convert in time
- provide guidance on the communication channels likely to be effective for information on the DSO

The research concentrated on public sectors, especially those likely to have communal TV systems, such as health, education and social housing, where failure to convert in time could have an impact, particularly for the general public.

Assumptions have been made in order to assess the degree of conversion work remaining, based on the data provided by the respondents. We estimate that the findings are within the plus or minus 20% parameter prescribed by the DTI.

Please note that where differences exist between sectors, they have been highlighted throughout this report. However, care needs to be exercised when comparing differences as the sample sizes in the sectors, in the regions and other sub-samples (such as size of organisations) are relatively small. Therefore the differences are not statistically significant, and could mislead.

Methodology

Stage 1 - Desk research and pilot stage

Firstly a ‘scoping’ exercise was conducted – to confirm numbers of all qualifying institutions in the Border TV region in the primary sectors, their names and contact details. The social housing sample was provided by the DTI.

Secondly: adding the names of organisations in the secondary sectors. The DTI approached ‘sensitive’ sectors (prisons, armed forces barracks) which were then added to the sample lists

Final sample lists for the main quantitative stage were then compiled, by sector and region, followed by a summary report on the first stage and then 10 pilot telephone interviews were conducted with Hospitals, Schools and Social Housing to assist in questionnaire development and to check qualifying job functions in each institution and best approach for securing interviews with the most appropriate person

The sample lists were then checked with the DTI to agree the target number of interviews per sector

Stage 2 - Quantitative stage – telephone interview

Nearly all primary target organisations were contacted by telephone between the 15th February and the 9th March, 2006. Often these calls in themselves acted as an ‘alert and call to action’.

A total of 542 telephone interviews was achieved:

- 362 full interviews (lasting around 15 minutes) were conducted with the person responsible for, or knowledgeable about, the organisation’s TV sets or systems
- 180 short interviews with those not eligible for the full interview due to: ‘did not receive TV signals from Border TV’, ‘no TVs’, ‘not responsible for residents’ or patients’ TVs’ or ‘already converted’ (eg through Patientline). See Appendices for further details.

Response rates were high (see table in Appendices). There were very few refusals, but some organisations were ‘non-contactable’

These results are based on the 362 full interviews with organisations which had responsibility for TVs and/or communal systems – most of which had not yet fully converted. As some questions are asked only of those applicable, for example, the 326 who have analogue TVs, it is important to note the sample size quoted at the base of each table or graphic.

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Sample Composition by Sector

362 full interviews with relevant personnel who were able to answer questions regarding the number of TVs, types of communal systems, etc, who may or may not have been responsible for budgets or decisions. Respondents were from organisations with responsibility for TVs or communal systems;180 in Cumbria, 129 in Scottish Borders, 53 in Northumberland. Within sectors, there are major variations in size of organisation.

The interviews were conducted by telephone and computer aided to route respondents through the appropriate questions and ensure there were logic checks at key questions. Nevertheless there were a few inconsistencies in some respondents' estimates of the number of televisions or systems in use, and, where feasible, we have called respondents back for clarification.

- 101 interviews with Care Housing organisations
- 84 interviews with Schools (47 secondary, 35 primary, 2 independent)
- 79 with Hotels
- 30 with Daycare Centres
- 21 with Hospitals, speaking on behalf of 25 hospitals (nearly all were contacted), cottage hospitals ► large hospitals; 5 had staff accommodation
- 16 in the Social Housing sector (nearly all were contacted)
- 5 Universities/colleges plus 3 student accommodation
- 4 Armed Forces Barracks; 1 Prison; 1 Police accommodation
- 17 'various' (job centres, courts, pubs, social venues, town halls, holiday flats; caravan parks)

N.B. Care must be exercised when drawing conclusions based on small sample sizes, as in some sectors a relatively small number of interviews were conducted. Where percentages do not add up to 100%, this can be due to rounding up the decimal places, multiple responses or the omission of 'don't know' or 'other' responses.

Summary

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Summary

• Of the 362 organisations interviewed, 7 in 10 were aware of the Borders DSO date prior to the interview. Awareness is higher in Hospital sector, lower in Care and Social housing sectors. Yet as many as 8 in 10 have made little or no progress towards the switchover – especially Secondary schools, Day care centres and Hospitals. The reasons given are various. Several are ‘waiting’ - for a decision, or for a budget, or for more information. Many others, however, do not seem to be taking any action as they are under the impression that there is still “plenty of time” – perhaps an issue future communications need to address.

• Nevertheless the majority are confident their organisation will be ready by the switchover date – although a third are unsure.

• Of the 362 organisations, 326 have some analogue TV sets. These are felt to be ‘vital’ or ‘very’ important to 8 in 10 of the 326 organisations. This proportion rises to 9 in 10 in Social and Care housing and falls to 5 in 10 in Primary schools and Day care centres.

• Half of those with some analogue TV sets feel the impact of not being ready by the DSO date will be ‘extremely’ or ‘very’ serious. This is particularly the case in the Social housing sector where 9 in 10 feel the impact will be serious, followed by two thirds of those in Care housing and hotels.

• The scale of the task ahead is considerable – in practical and in communication terms. 9 in 10 of the 362 organisations have analogue TVs. Nearly 8 in 10 of all the TV sets are analogue and nearly all these sets (90%) are used for watching or recording TV programmes.

• Of those organisations with some analogue TVs, over half use communal systems (likely to be MATV), many with aging cabling. Moreover of all the analogue TVs, 15% rely on portable indoor aerials.

• Apart from the TV and radio, direct mail and the <u>local</u> press are suggested as the more effective communication channels.

Awareness and Importance

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Awareness of the DSO date for Borders

All of the 362 respondents who completed the full interview were informed of the expected date when the analogue signal will be switched off in the Border region and asked if they were aware of this prior to the interview.
Overall 72% of the 362 were aware - marginally fewer in Northumberland where there has been less publicity. Over a quarter (28%) were not aware. As shown below, those in some sectors were more aware than others.

Q1. Were you aware before today that the date for the digital switchover in the Borders region, when the analogue TV signal will be switched off, is between late 2008 and early 2009 - in 2 to 3 years' time?

Yes (aware) – 72%

No (not aware) - 28%

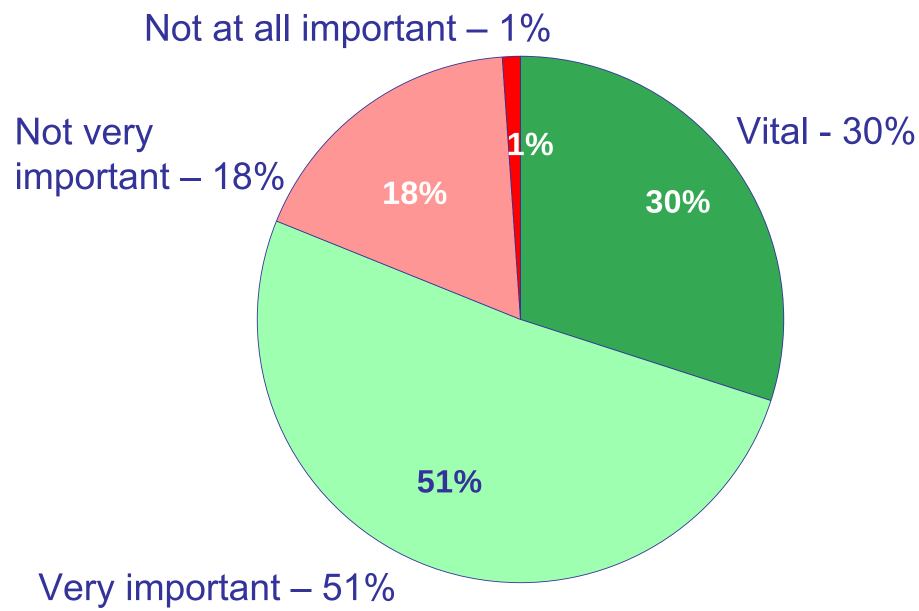
	Yes	No
Overall	72%	28%
Hospitals	86%	14%
Day care centres	80%	20%
Schools - primary	77%	23%
Hotels	75%	25%
Schools – secondary	72%	28%
Social housing	69%	31%
Care housing	63%	37%

Base: All respondents (362)

Importance of the TVs

During the course of the interview we identified those respondents with analogue TVs (326 in total) and asked the importance of these TVs to their users. Four in five of those 326 with analogue TVs feel the TV sets are ‘vital’ (30%) or ‘very’ (51%) important to users and the organisation.
The variations by sector are shown below.

Q7. How important are these TV sets to the users and the organisation? On the whole, would you say they are …?



	% Vital/very important
Overall	81%
Hospitals	95%
Care housing	93%
Social housing	90%
Schools – secondary	88%
Hotels	86%
Day care centres	54%
Schools – primary	50%

Base: All with analogue TVs (326)

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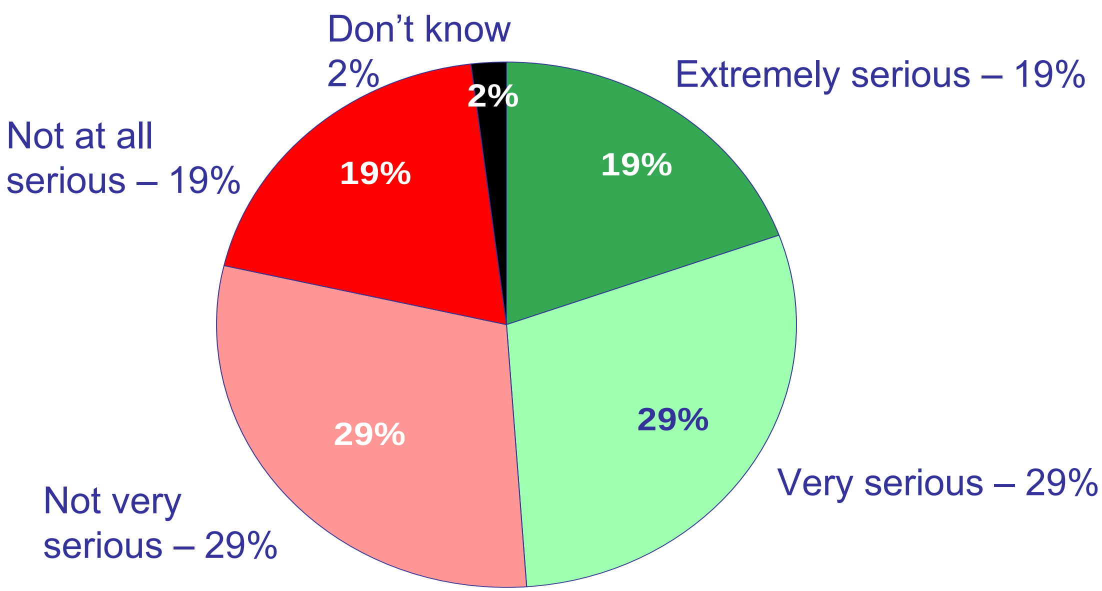
Perceived impact of not converting TVs

We asked the same 326 who have analogue TVs what the likely impact of not being ready for the digital switchover would be. When asked how serious it would be if users were unable to watch live TV broadcasts, answers varied with half stating it would be ‘extremely’ or ‘very’ serious (49%). However this ranged from 90% for Social housing to 3% for Primary schools (where the TVs are mainly used for playing DVDs or videos). The seriousness of any impact is felt most in organisations providing accommodation, such as staff accommodation, care housing, social housing and hospitals.

Q23. If, for some reason, a significant proportion of the TVs in your organisation were not converted in time for the digital switchover and users were unable to watch live broadcast TV programmes, how serious an impact would this have on your organisation, would it be… ?



% Extremely/very serious	
Overall	49%
Social housing	90%
Care housing	67%
Hotels	66%
Hospitals	60%
Day care centres	27%
Schools – secondary	21%
Schools – primary	3%

Base: All with analogue TVs (326)

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Current Status of TVs and Systems

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Current Status of TVs and Systems

Analogue vs digital TV balance

Currently, the majority of TVs in each sector are analogue. However, there is a differing distribution of analogue to digital balance between the sectors. This is shown on the next page - illustrating the breakdown of types of TVs per sector as a percentage of the estimated total number of TVs in that sector. Overall, 78% of the TVs are analogue, 10% are digital, 11% are only used for playback. While 76% of secondary schools and 56% of primary schools say they use analogue TVs for watching or recording TV broadcasts, in both around nine in ten report also using TVs for playing DVDs or videos. However, as a proportion of all the TVs, this use is much more common in secondary than in primary schools. Of all the 362 organisations interviewed 90% had at least one TV receiving analogue signals. This percentage varies by sector, (showing a similar pattern to the chart overleaf) from 95% of Hospitals having at least one analogue TV to 62% for Social housing (as this sector has been progressing further in converting sets and systems to digital). This is discussed in more detail in each of the sector summaries (from page 28).

While digital TVs are being used by three in ten (31%) of the total number of those interviewed (362), they account for only 10% of all TVs, on average – with an equal split between digital satellite and digital terrestrial signals. The Social housing sector is the most likely to have digital TVs (56%), followed by Hotels (49%). Least likely to have digital TVs are Primary schools (6%), Day care centres (13%), Secondary schools (23%) and Hospitals (24%).

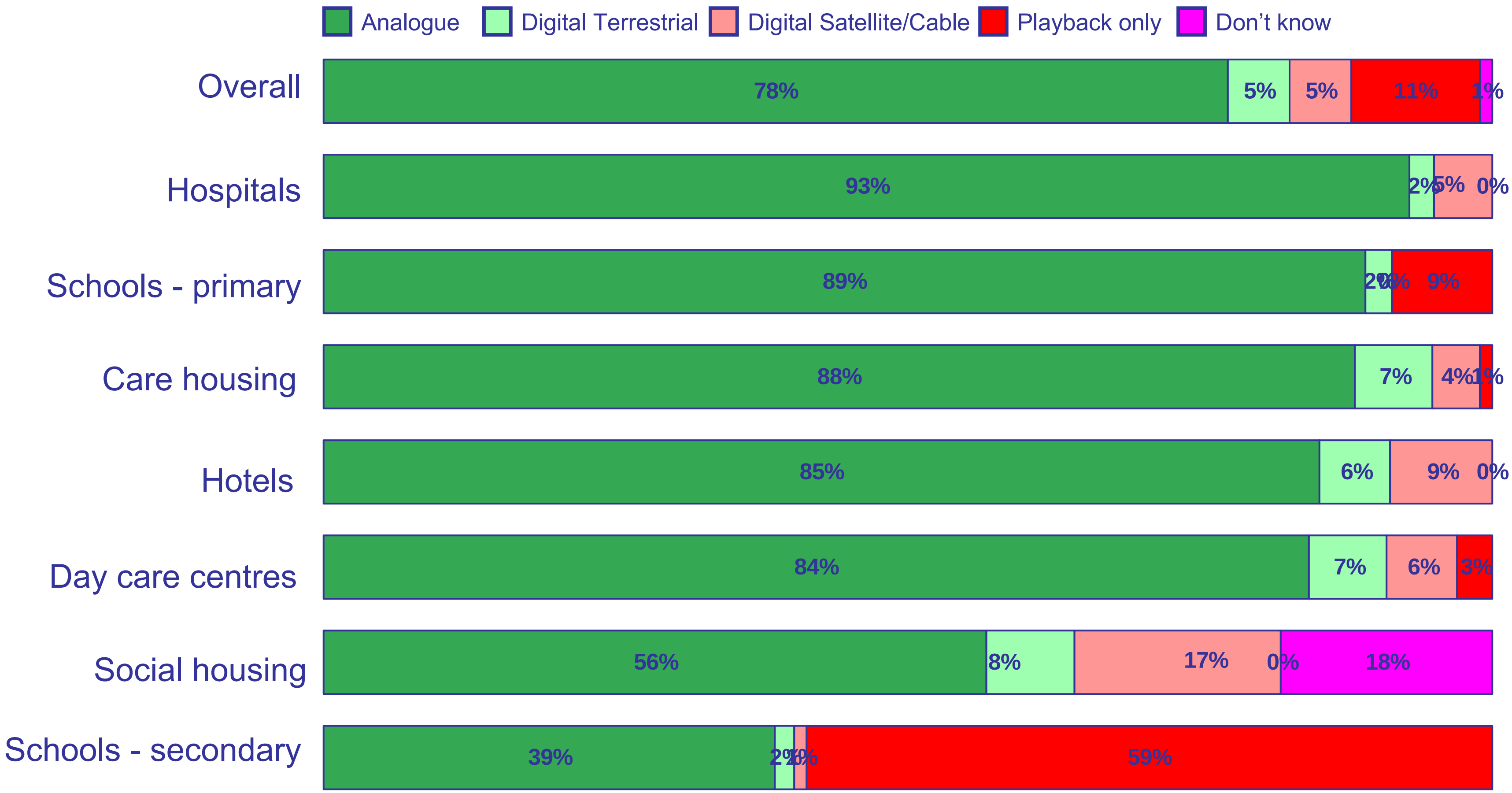
Communal systems

Of the 326 organisations which have analogue TVs, over half of the analogue TVs (54%) are fed by communal systems - see page 16. The proportion of analogue TVs that receive their signals through communal systems differs by sector and is as high as 80% of all analogue TVs in the Social housing sector and as low as 26% of analogue TVs in the Day care centres. This is discussed further in the sector summaries (from page 28).

There are differing types of communal systems in use but the main system used is Master Antenna TV (MATV), with relatively few using an Integrated Reception System (see page 18). The average age of the oldest cabling used by those establishments with analogue or digital communal systems is 9 years and differs by sector (a breakdown of which is found on page 18)

Type of TV signal received

Q3. Approximately how many of these TV sets are currently ……….
The figures shown are a percentage of the total number of TVs per organisation in each sector



NB. 3 large Social housing organisations were unable to supply details of their tenant’s TVs

Base: All respondents (362)

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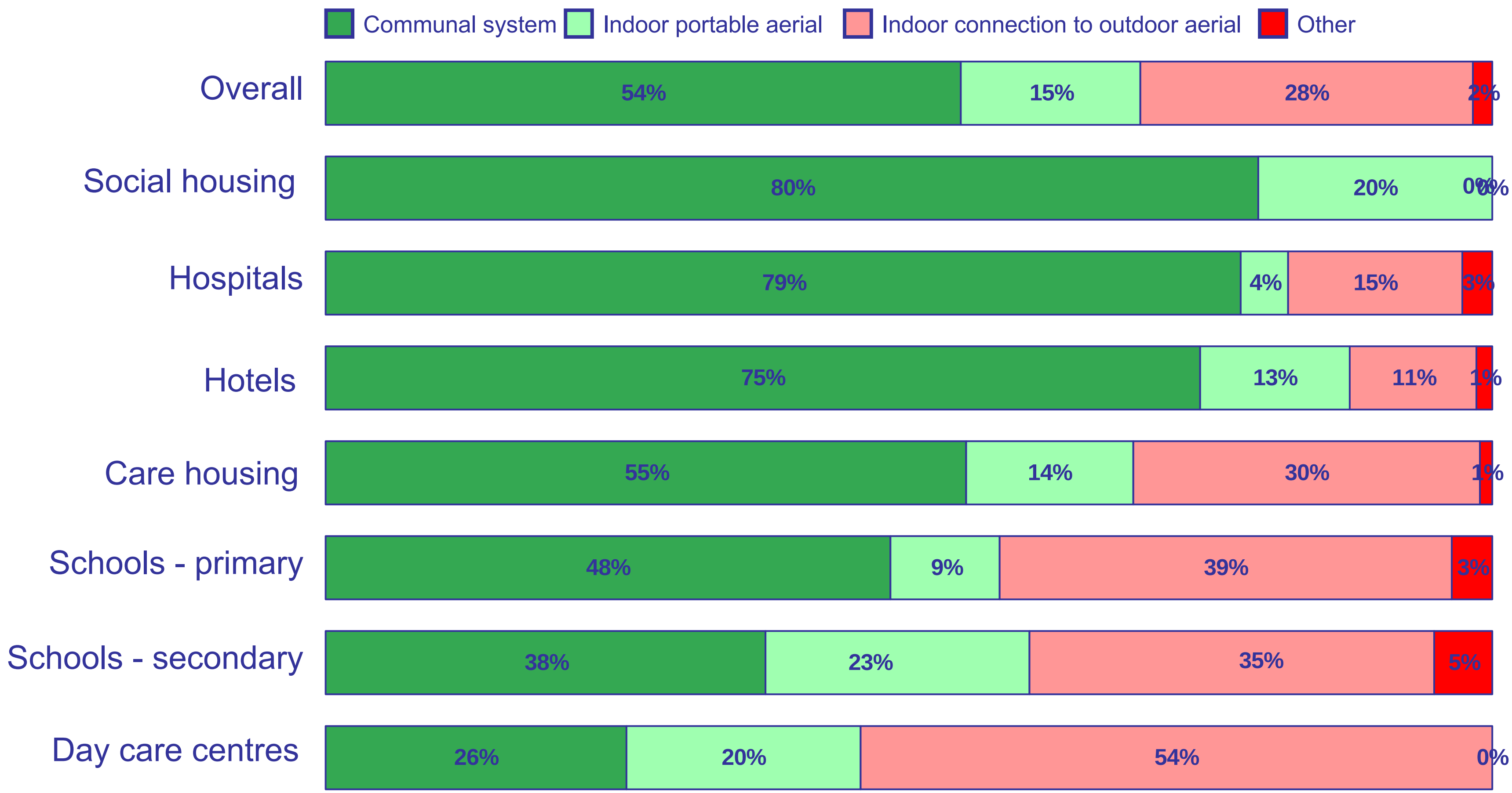
Type of aerial connection

Q9. Thinking of the type of aerial connection that supplies your organisation's analogue TV sets, approximately how many receive their signals through… (shown as a percentage of the total number of analogue TVs)



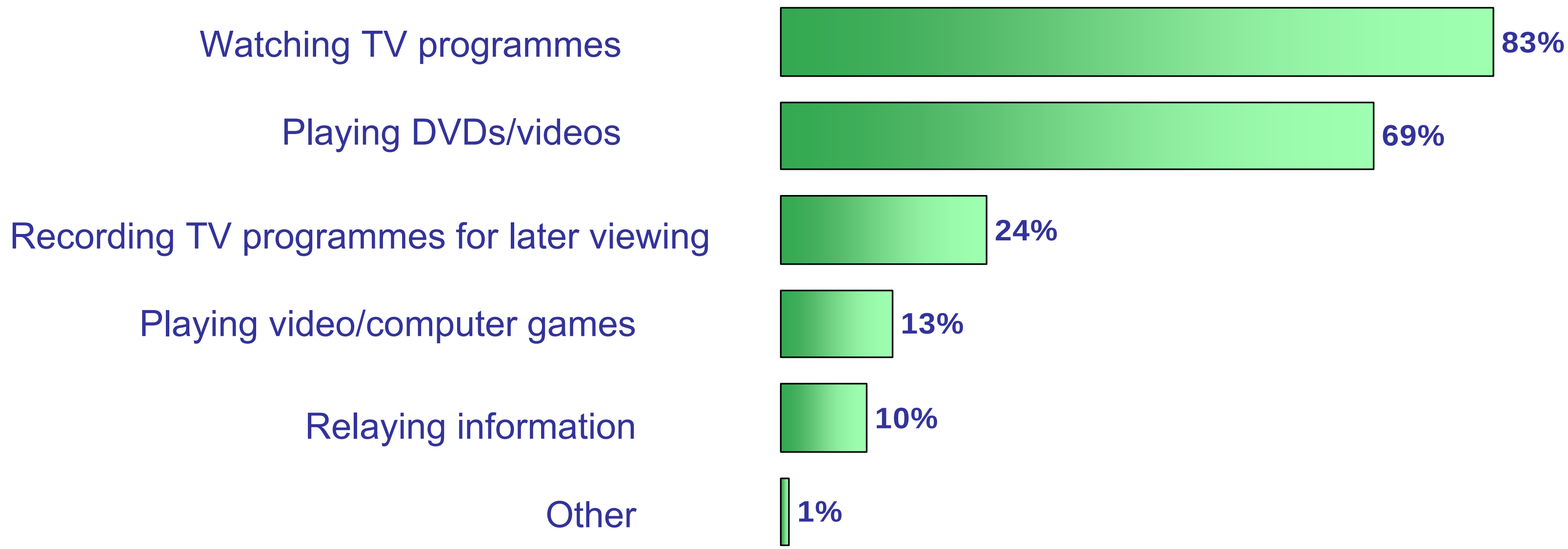
Base: All respondents with analogue TVs (326)

Location and use of analogue TVs

Three quarters (75%) of those with analogue TVs (326) have these in a communal room where the TV can be watched by more than one person, while 61% have TVs in an occupant's room or home, making these two locations by far the most common. More detail is given on a sector specific basis from page 28.

Among those with analogue TVs (326), the most popular use for analogue TVs is for watching TV programmes (83%), though 69% use these analogue TVs for playing DVDs/videos. The use of analogue TVs differs by sector and will be covered in each of the sector summaries (from page 28).

Q6. What are these analogue TVs used for?



Base: All with analogue TVs (326)

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Types of Communal Systems

The majority of communal systems (analogue or digital) in use in the Borders region use Master Antenna TV (51%). Other systems used are Integrated Reception Systems (9%) and other types of digital (4%) or analogue (28%) systems.

The average age of the oldest of the communal systems' head cabling and wiring is 9.1 years and varies by sector - from 7.8 years in Hotels, to 12.5 years in the Social housing sector (see below).

Q20. What number, or percentage, of the communal TV systems in use at your organisation's sites in the Borders region are using each of the following types of communal TV systems?

Master Antenna TV (MATV) – 51% (the main variations are: 65% for Care housing, less than 25% in Hospitals and Social housing)

Integrated Reception System (IRS) – 9% (the main variations are: 18% in Social housing, 16% in Hospitals, 10% in Care housing)

Other digital – 4%
Other analogue – 28%

Q21. Average age of the oldest of the communal systems' head cabling and wiring (in years)

Overall	9.1
Social housing	12.5
Schools – primary	12.3
Hospitals	10.4
Schools – secondary	10.4
Day care centres	9.2
Care housing	8.0
Hotels	7.8

Base: All who have analogue/digital communal systems (181)

Progress to date

Progress and Upgrades

Progress to date

The graphic which follows illustrates the degree to which the 362 organisations say they have progressed towards the digital switchover. Half (51%) have not yet started and have no firm plans to do so, especially Secondary schools (66%), Day care centres (63%) and Hospitals (62%).

A quarter have started but are less than 10% complete - especially Primary schools. However, the perceived importance of analogue TVs and the impact of not being ready for the DSO in this sector is relatively low (only 3% of those with analogue TVs say it would be extremely/very serious if they did not convert in time).

Overall, one in ten of the 362 organisations are between 75% and 100% complete - for Social housing this figure improves to one in five (19%).

The expected impact of non-conversion does not appear to be a factor in the degree of progress being made towards switchover. Regardless of whether the impact on their organisation is expected to be serious or not serious, the proportion saying they have made no progress towards conversion is much the same.

More details on the progress being made by sector appear in the sector summaries (from page 28).

Type of upgrade

Of the 164 respondents who have carried out some upgrading or are in the process of upgrading, 40% have upgraded to digital terrestrial, 18% to digital cable or satellite and 13% to a mix of digital terrestrial and digital cable or satellite. Three in ten (30%) are, as yet, unsure of which type of digital system they are going to upgrade to.

Progress to date

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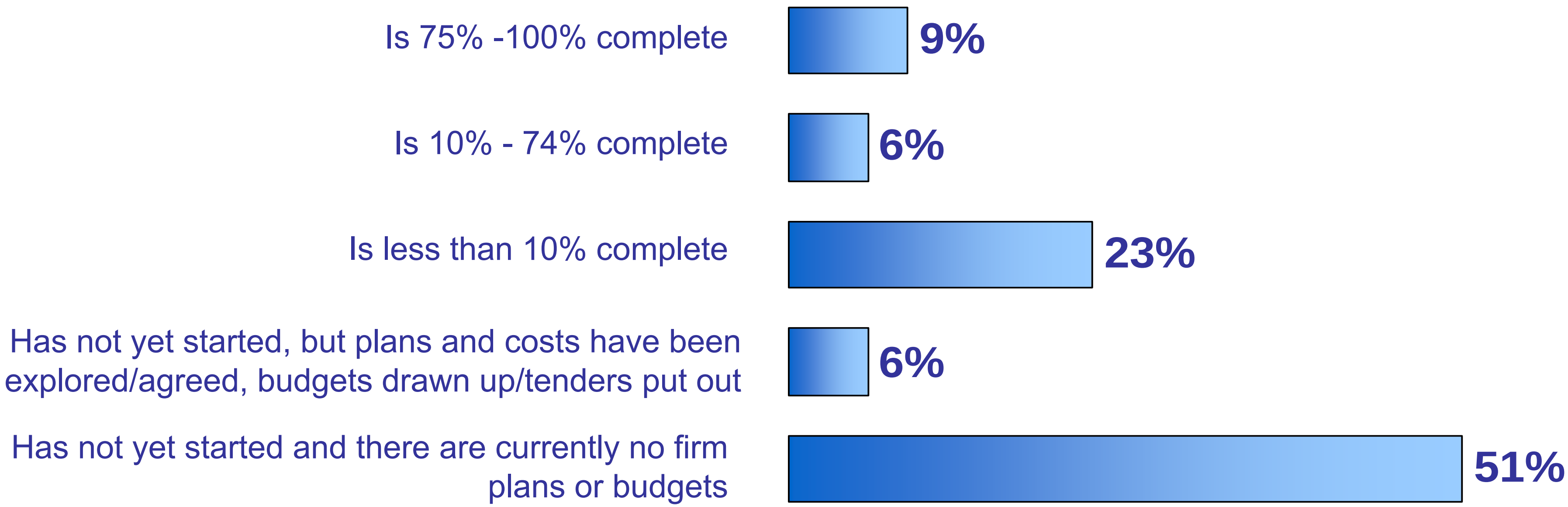
One in ten of the 362 organisations interviewed have nearly completed the switchover to digital.
Three in ten are underway, accomplishing between 'less than 10%' to 74%' of the necessary work for the DSO.
A few (6%) have drawn up plans or put tenders out, but half have not yet started at all (51%).
These figures vary by sector and are noted in the sector summaries (from page 28).

Q14. In my organisation, the switchover to digital TV …



The remainder do not know

Base: All respondents (362)

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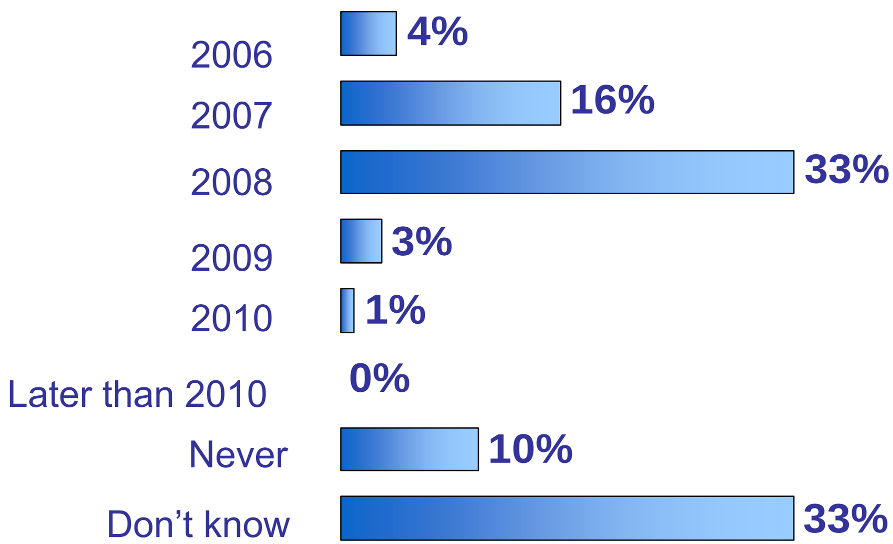
Over half expect to be ready by end of 2008

One in five expect to be ready for the DSO before the end of next year, a further third anticipate being ready in 2008 – making over half likely to be ready in time. Among the remainder, the majority are not sure of the date by which they will be ready. This is largely because ‘the decision is taken elsewhere’ (especially in the Hospital sector). The minority who say ‘never’ are mainly Primary schools, relatively few of which use TVs for live broadcasts.

Q16. In which year do you anticipate the switch to digital TV will be finally completed for all the TV sets and systems in your organisation?



% of those who will complete DSO by end of 2008

Overall	54%
Social housing	62%
Hotels	62%
Schools – secondary	56%
Care housing	54%
Schools – primary	47%
Day care centres	46%
Hospitals	37%

Base: All who have not completed DSO (326)

Reasons for not having any firm plans for the DSO

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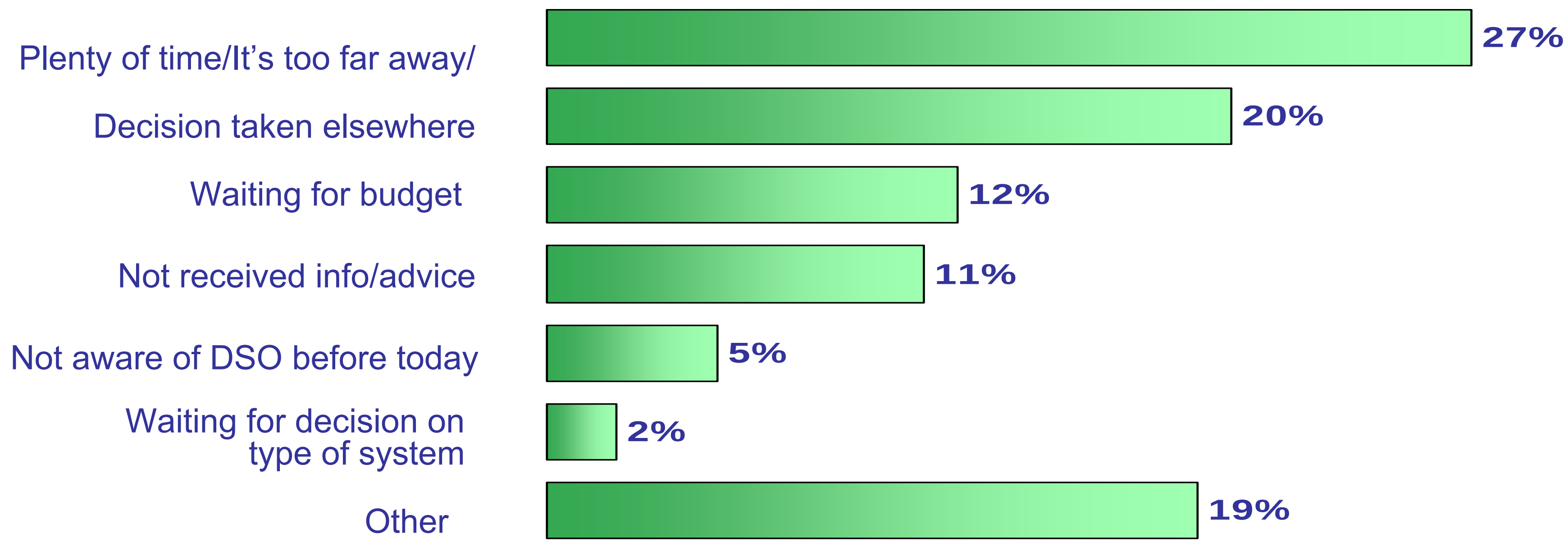
Reasons for not having firm plans vary

All those whose organisations which have not yet started the planning stage of the conversion process (186) were asked why no firm plans had been drawn up. As shown below, one in five of these attributed this to the fact that the decision was taken elsewhere and this is particularly the case among Hospitals (77%). The main reason given however, by a quarter, was the perceived timescale - 27% feel *"there's plenty of time".* Other reasons given for not having started the DSO were *'waiting for a budget'* (12%) and *"not receiving any information or advice"* (10%). Examples of these comments which highlight these themes are shown on the next page.

Q18. Why has your organisation not drawn up any firm plans for the DSO?



Other reasons are noted overleaf

Base: All with no plans or budget (186)

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Examples of comments made

Reasons for not having firm plans are shown below:

Perceived urgency: *“Plenty of time yet” “It’s a long way away”*

Funding: *“Lack of money” “Costs too much” “Budget restrictions/waiting for budget”*

Information, lack of pro-activity or awareness: *“Not received any information or advice yet” “To be honest, I haven’t even thought about it yet” “Not heard of it before today”*

Priorities: *“Too busy with other things” “Not a priority for us at the moment” “Not worth converting”*

Responsibility, contracts: *“Waiting for decision” “Decision taken elsewhere in organisation” “Current contract runs out in 2008”*

Importance: *“It’s not of great importance to us” “Not interested in getting any more channels” “More important things to think about” “We can survive without”*

Other: *“Waiting to hear final plan and date for the switchover” “The council will let us know” “Don’t trust what I’m being told” “No demand” “Can’t receive digital TV in this area” “TVs are too old” “All we’ll need is a Freeview box”*

Base: All with no plans or budget (186)

Sources of Information

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Effective sources of information

All of those who were interviewed were asked what would be the most effective media for getting information across to their sector about the forthcoming DSO in the Borders. On the left are the more general media mentioned, by all sectors, with direct mail featuring strongly, followed by the <u>local</u> press.
The box on the right notes the more sector-specific journals or channels that emerged – these were mentioned far less frequently than mailshots or the local press

Q25. Apart from TV, radio and newspapers, what would be most effective in getting the message across to your particular sector?

- **Leaflet, flyer, mailshots**
- **<u>Local</u> press**
- TV
- Radio
- Internet, websites
- Email
- TV listings magazines
- National press
- Personal visit
- Letter from DTI, Council, TV Licensing

- Social and Care housing, Day care centres: 'Social services', 'Scottish Care', 'Care Commission', 'Tenants newsletters' 'Caring Weekly/Times'
- Hotels: 'Tourist boards', 'Hotel and Catering'
- Schools/colleges: 'Council education departments', 'LEAs', 'Head Teachers Association', 'Teachers Net on D*f*ES website', 'TES', 'education journals'
- Other: 'IT Weekly', 'Computing', 'Housing Today'

Sector Summaries

Sector Summary - Hospitals

Sector summary – Hospitals

Background: the 44 hospitals identified in the Borders region were contacted and interviews were undertaken with 21 respondents - who were speaking on behalf of 25 hospitals. Of the remaining hospitals, two small cottage hospitals refused to grant an interview (feeling it was not relevant to them), a few receive non-Border TV signals, a few said they did not have any TVs or had already converted. At least one of these is served by Patientline. We interviewed Patientline's Chief Technical Officer who assured us that their systems at all the hospitals they serve are already converted or 're-modulised' to receive digital signals (mainly via IPTV).

Thirteen respondents are from Scotland (11 with less than 100 beds, 2 with more than 100) , seven from Cumbria (4 with less than 100 beds, 3 with more than 100) and one from Northumberland (30 to 100 beds). As the individual sub-sample sizes are small no major differences between the three regions emerged, although the Scottish hospitals tended to be smaller and were more likely to have analogue communal systems (only two of them had digital TVs); and of course, the larger the hospital, the more TVs and communal systems it had.

Awareness: of the 21 respondents, most are aware of the Borders DSO date (86%); 14% were not aware (3 respondents, two speaking on behalf of several small hospitals in Dumfries and Galloway, one in Cumbria).

Impact: of the 21 respondents, 20 had some analogue TVs and 19 of these (95%) say the TV sets are 'vital or very important' to users and the hospital, while 12 say the impact of not converting in time for the DSO will be 'extremely or very serious'. Of the other 8 for whom the impact will not be serious, 3 are in Cumbria, 5 in Scotland, 5 are hospitals with up to 30 beds, 3 are hospitals with over 100 beds.

Location and use of analogue TVs The analogue TVs are generally in one of two places: 90% of the 20 with analogue TVs report having them in communal rooms or places that more than one person can watch the TV, 60% report having them in occupants' rooms and 15% in staff accommodation. All of the hospitals with analogue TVs say they are used for watching live TV, 60% say they are used for playing DVDs/videos, 15% for recording TV programmes,10% for relaying information and 10% for playing video or computer games.

Base: All in sector: 21/25

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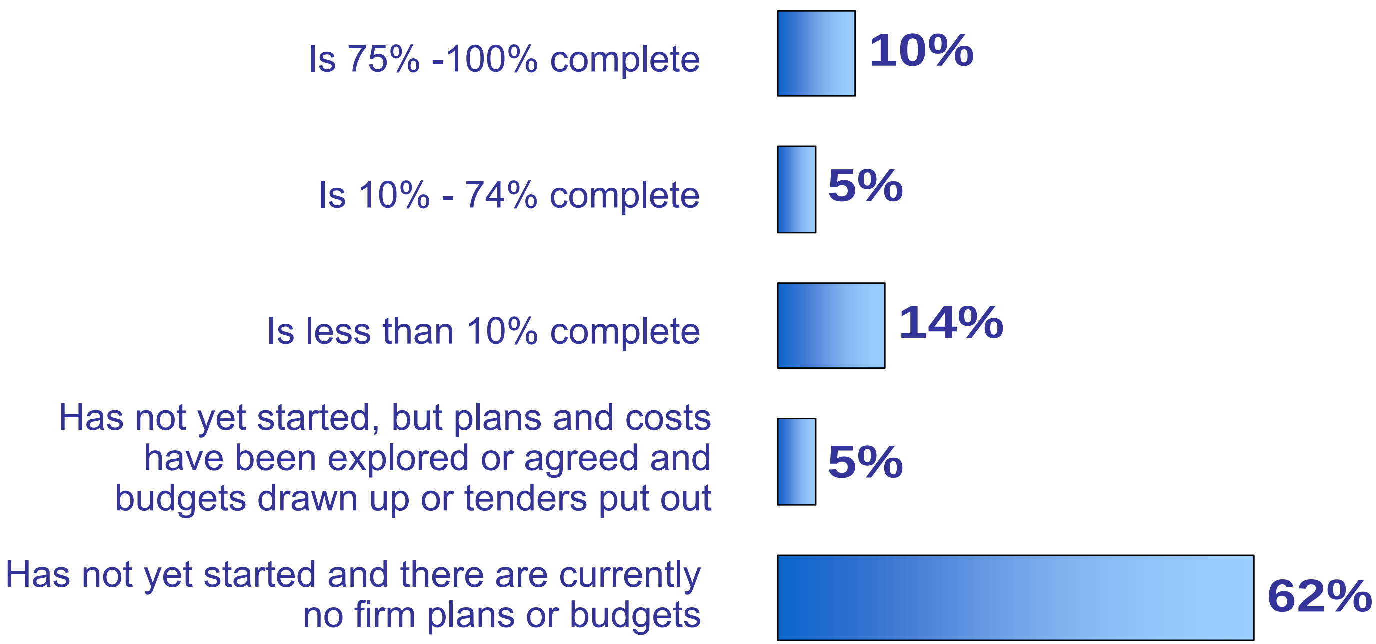
Rate of DSO by sector – Hospitals

Conversion progress: only one in ten of the 21 respondents report completing 75% to 100% of the switchover. Indeed 13 of the 21 interviewed (62%) say they have not yet begun the planning or budgeting for the DSO, while 7 hospitals have made some progress.

Q14. In my organisation, the switchover to digital TV …



The remainder do not know

19 of the 20 hospitals with analogue TVs see these as vital or very important to their users (95%). There is no real difference in amount of progress made and the degree of importance – or seriousness of the impact. However, the one respondent (from a large hospital in Cumbria) who regards their analogue TVs as 'not very important' did not know how much of the switchover has been completed.

2 of the 20 hospitals with analogue TVs see the impact of not converting in time as 'extremely' serious, 10 as 'very' serious (60% in all). Of these 12, 10 have not yet started working nor planning for the switchover, one is over 75%, the other 10% to 74%, complete. All of the remaining 8 hospitals, who say the impact will not be serious, have made little or no progress to date.

Base: All in sector – 21/25

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Sector summary – Hospitals (21)

Of the 13 hospitals which have ‘not yet planned/budgeted’:

- 10 say this is because decisions are taken elsewhere in the organisation
- 3 say it is because the DSO is ‘too far away’ and/or because they’ve not received any information

Nearly two in five hospitals (37%) expect to complete the DSO during 2007 or 2008. The remainder do not know – as the decision, budget and timing are controlled elsewhere (this seems to be especially the case in Scotland).

Type of aerial connection for analogue TVs: four in five of all analogue TVs across the Hospital sector receive signals via communal systems, and 15% via an individual connection to an outdoor aerial.

Number of TVs: all but one of the hospitals have analogue TVs (95%), and of all the TV sets nearly all are analogue (93%). Just over half these hospitals have fewer than 15 analogue TVs, while just under half have 15 sets or more (with three of these reporting over 100 sets). A quarter have digital TVs - four have fewer than 5 digital TVs, one has 15 or more. The average number of all TVs reported per hospital is 73, of which 48 are analogue, and 25 digital (mainly digital satellite or cable**,** although 4 hospitals have one or two digital terrestrial TVs).

Communal systems: nine in ten hospitals have communal systems -12 systems per hospital on average, of which 10 are analogue systems, 2 are digital. Of those with analogue communal systems, just over half have one system, a third have between 2 and 4 systems while a couple report having several systems over different sites. Analogue communal systems account for around 79% of all analogue TVs, with most of the remainder being served by individual connections to an outdoor aerial (15% of analogue TVs) rather than an indoor portable aerial (which accounts for 4% of the analogue TVs).

The oldest of the cabling was last upgraded 10 years ago, on average.

Base: All in sector: 21/25

Sector summary – Hospitals & Hospital Accommodation (5)

Estimated amount of conversion work remaining: substantial – among the hospitals interviewed 95% had analogue TVs and 93% of all the TVs they are responsible for are analogue (some 1,500 TVs in total). Of these analogue TVs, 79% receive signals via communal analogue systems, 15% via an outdoor aerial and 4% via a portable indoor aerial.

As each hospital has an average of 10 communal analogue systems and 48 analogue TVs, it is likely that up to 200 communal analogue systems, involving some 1,000 TVs, remain to be converted. - and most of this work is not yet at the planning stage. Only one of the 21 interviewed reports that the switchover to digital TV is '100% complete', 5 have made a start, while 13 are not yet at the planning or budgeting stage. It also needs to be borne in mind that over half these hospitals rate the impact of not converting in time as 'extremely or very serious'.

When asked the most effective media for getting the DSO message across (apart from TV and radio), most suggested direct mail and the local press, with one or two mentioning the IT press.

Hospital staff accommodation: all the respondents were asked whether or not the hospitals they were speaking on behalf of provided residential accommodation for staff. In total 5 did so and were able to provide some information about hospital accommodation. In three, staff are responsible for their own TVs and can install their own digital TV equipment. One hospital has 50 TVs in total, with 5 communal digital TV systems, one has 20 TVs in total, with two communal systems, both of which have been or are being upgraded. The remainder have less than three TVs.

Base: All in sector: 21/25/all answering about hospital accommodation (5)

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Sector Summary – Social Housing

Sector summary – Social Housing (16)

Background: there is a wide range of different organisations in this sector – by size and by differences in the scale of their responsibilities for TV signals and systems. We interviewed 16 Social housing organisations – all were responsible for ensuring that tenants' TV sets will be capable of receiving digital signals when the analogue signal is switched off (such as through any communal systems). However, it is the tenant that is responsible for the TV sets, and in most cases they are already permitted to install set top boxes or subscribe to satellite or cable TV. In addition we contacted another 16 organisations in the Social housing sector which proved to be outside the scope of this research – 7 being in another TV region and 9 which did not have any responsibility for the residents' TV signals.

The sample for this sector was supplied by the DTI and majority of the organisations interviewed were Registered Social Landlords - 7 from Cumbria, 3 from Northumberland and 6 from the Scottish Borders. 8 were each responsible for up to 30 dwellings, 4 for between 31 and 100, 4 for over 100. There are no major differences in responsibilities by region (but note that these sub-group sample sizes are very small).

Awareness: seven in ten are aware of the date for the DSO in the Borders (69%); 31% were not aware. Awareness was relatively lower in Cumbria, higher in the Scottish Borders (5 out of the 6 were aware).

Impact: all but one of the 10 organisations with responsibilities for analogue TV signals say the TVs are 'vital' or 'very' important to their users and that the impact of failure to convert all the TVs in time would be 'extremely' or 'very' serious. The only social housing respondent that said that the (analogue) TVs are not important and would not be serious was only responsible for one TV.

Location and use of analogue TVs: the analogue TVs are generally in two places: 90% of those interviewed say they are in occupants' rooms and 80% report having analogue TVs in communal rooms or places where more than one person can watch the TV. Data on the total number of TVs in each type of location is not available, however it can be assumed that most are in occupants rooms and are the occupants responsibility. Nine of the ten Social housing organisations with analogue TVs say they are used for watching or recording live TV and six of the ten for playing DVDs/videos and two of the ten for playing games. None are used for relaying information.

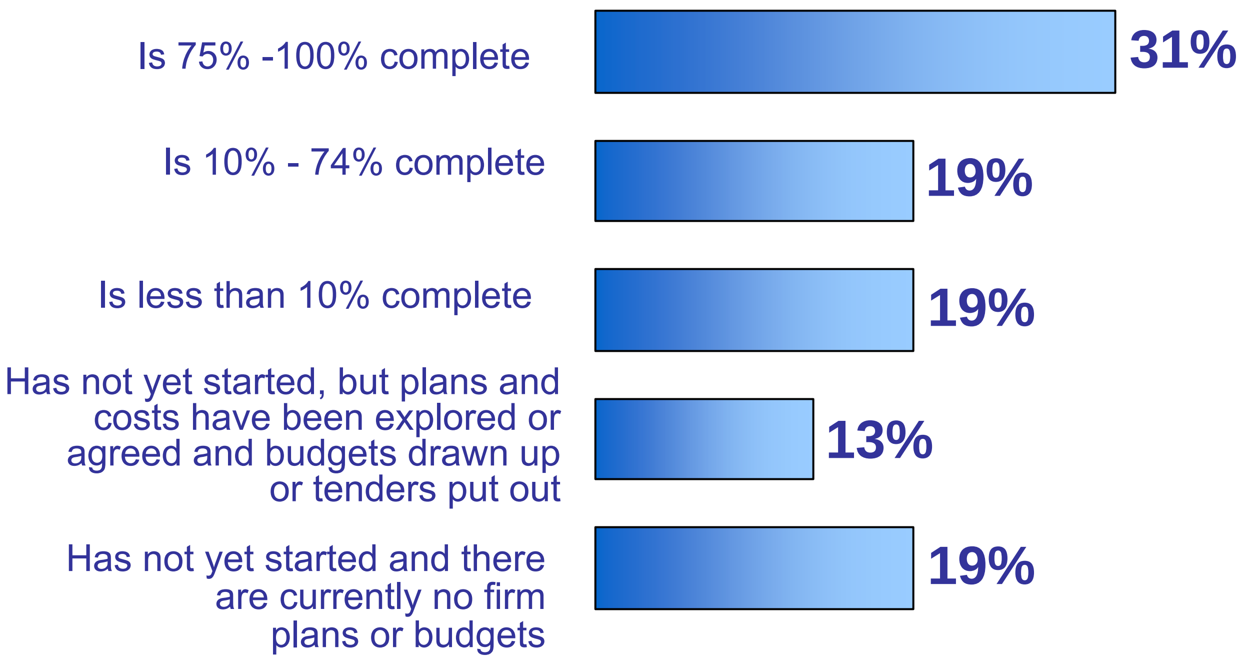
Base: All in sector: 16

Ipsos MORI

Rate of DSO by sector – Social housing

Conversion progress: This sector is making progress. As can be seen below, nearly a third have completed 75% to 100% of the work needed for the digital switchover, half have made a start and just 3 of the 16 have not. The three who have not made any plans or set a budget for the DSO work to be done (19%) tend to be those that have relatively few TVs (an average of 15 – served by just a few communal systems or individual portable aerials). The reasons given for a lack of progress are: *"it's a long time/too far away"*, *"we have other priorities at the moment"* or *"the tenants supply their own TVs".*

Q14. In my organisation, the switchover to digital TV …



90% of those with responsibility for some analogue TV services see these as vital or very important to their users. Those that say the analogue TVs are 'vital' are more likely to have completed more of the DSO work than those who said the TVs are 'very' important.

There is no correlation between the perceived seriousness of the impact of not converting and the rate of progress. The three organisations which have not yet started work and have no firm plans or budgets all say the impact would be extremely or very serious.

Base: All in sector - 16

Ipsos MORI

Sector summary – Social Housing (16)

Number of TVs: there are, on average, 440 TVs per organisation, but this is inflated by two that have c3,000 TVs and one which had 500. Unfortunately these organisations were unable to provide a full breakdown by type of TV (analogue or digital) and so missed some of the further questions. Excluding these three organisations brings the average number of TVs per organisation is 43, around half of which are analogue - 20 per organisation on average.

Communal systems: seven in ten have communal systems. Of the 16, 8 have analogue systems (8.5 systems on average), 5 have digital systems (4 systems on average). In addition, there are two organisations which are not responsible for the TVs but are responsible for the communal systems. One has completed the switch to digital, whereas the other still has c33 communal systems to upgrade – just the aerial connections. One said that their role was also to inform the tenants of the DSO and of what they needed to do. The vast majority of analogue TVs (80%) are linked to analogue communal systems, which serve around 31 TVs on average. The digital systems also serve around 31 TVs. In this sector, the average age of the oldest cabling is 12.5 years.

Of those with analogue TVs or analogue communal systems, 62% intend to have fully completed the DSO by the end of 2008, 15% in 2009 - although 23% do not know when they will have completed it (mainly those with few TVs).

Conversion work remaining: five of the organisations have already converted all or most of the TVs or systems to digital. The upgrading that has taken place, or is in progress, in these and other organisations varies – equally distributed between digital terrestrial, digital cable or satellite and a mix of these. In the remaining 2 (large) organisations, plans and budgets have been agreed but work has yet to begin on their communal analogue systems. Despite the progress in this sector, the results indicate some 60 communal analogue systems remain to be converted. In addition, there are those organisations where the tenants are responsible for their own TVs – an unknown number of which will need to be converted.

When asked the most effective media for getting the DSO message across there were a range of responses. Apart from TV and radio, these ranged from the local press and the trade media (“Housing Today” seems to be a key one) to setting up briefing sessions for tenants or leaflets for tenants and mail shots.

Base: All in sector: 16

Ipsos MORI

Sector Summary – Care Housing

Sector summary – Care housing (101)

Background: of the 372 Care homes in the Borders region, we contacted 150 and interviewed 101. Nearly 50 were not eligible for interview – mainly those in Northumberland which did not receive their TV signals from Border. Of the 101 interviewed, half were in Cumbria, a third in the Scottish Borders, the remainder in Northumberland. The majority (75%) were responsible for up to 30 residents, a quarter for 30 to 100, just 2 for over 100, with no difference between the regions. All were responsible for ensuring that occupants' TV sets will be capable of receiving digital signals when the analogue signal is switched off. However, responsibility for the TV sets varies – three-quarters say occupants are permitted to install set top boxes or subscribe to satellite or cable TV, but a quarter are not permitted.

Awareness: nearly two-thirds are aware of the Borders DSO date (63%), but 37% were not. Although there is no pattern by size, those in Northumberland tended to be slightly less aware than those elsewhere.

Impact: of the 96 Care homes with analogue TVs, 93% say they are 'vital or very important' to users and the home - less so those in Scotland (88%). Two thirds of those with analogue TVs (67%) say the impact of not converting in time for the DSO will be 'extremely or very serious', more so those in Northumberland (83%) than those in Scotland (58%). These include some of those who were not yet aware of the DSO date for the Borders. For only 8 homes would the impact be 'not at all serious'.

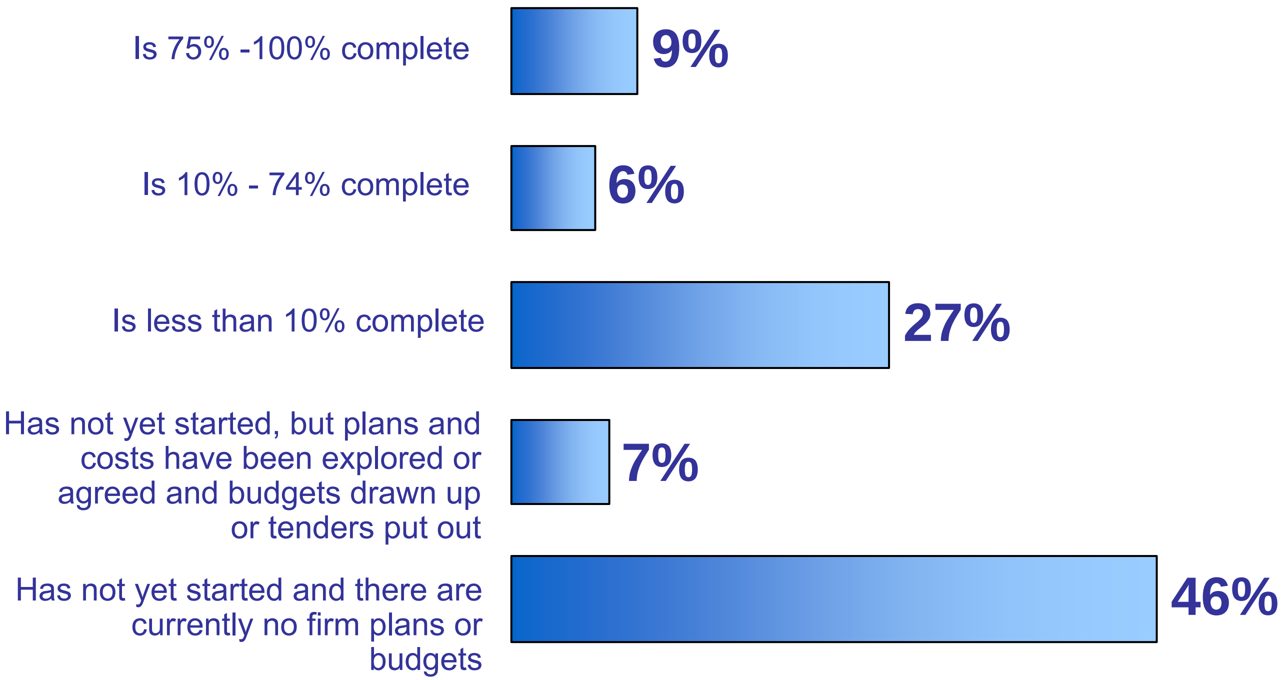
Number of TVs: the average number of TVs reported per home is 14. While a third of the 101 Care homes have digital TVs, these account for just 10% of the total number of TVs in the Care housing sector as most of the homes with digital TVs have fewer than 5 sets, and only one has 15 or more (a mix of digital terrestrial or digital satellite/cable). All but five of the 101 homes have analogue TVs (95%), which account for 88% of all the TVs in the Care homes interviewed. Half these homes have fewer than 10 analogue TVs on average, however a third have 15 sets or more.

Base: All in sector: 101

Rate of DSO by sector – Care housing

Conversion progress: 8 Care homes, including the 2 large homes have nearly completed work for the digital switchover, a further third (33 homes) are underway. However, over half have not actually started, with 46% having 'not yet planned or budgeted'. The main reasons given for this are: *"it's a long time/too far away"* (24%), *"the decision is taken elsewhere in the organisation"* (20%), *"not received any information"* (15%). While there were no differences by region, it seems the larger care homes are less well advanced than the smaller homes.

Q14. In my organisation, the switchover to digital TV …



The remainder do not know

93% of those with analogue TVs see these as vital or very important to their users. There are indications that the more important the TVs, the more likely that progress is being made.

Similarly, 67% of those with analogue TVs regard the impact of not converting as extremely or very serious and these are more likely to have made more progress.

However, it appears that those with more TVs are less likely to have made progress. There are no differences by region.

Base: All in sector - 101

Sector summary – Care housing (101)

Location and use of analogue TVs: the analogue TVs are generally in two places: 86% report having analogue TVs in communal rooms or places where more than one person can watch the TV and 82% report having them in occupants' rooms. Data on the total number of TVs in each type of location is not available, however it can be assumed that the majority are in occupants rooms with the responsibility for many of these lying with the occupants themselves. All of the homes with analogue TVs use them for watching or recording live TV and 69% use their analogue TVs for playing DVDs/videos. These are by far the main uses of the analogue TVs although other uses include playing computer/video games (8%) or relaying information (7%).

Type of aerial connection for analogue TVs: c57% of this sectors' analogue TVs use communal systems to receive their signals, 30% use individual connections to outdoor aerials and 14% use indoor portable aerials.

Communal systems: there were slight inconsistencies in a few responses from those in the care housing sector. Overall, 52 respondents say they have TV sets connected to a digital or analogue communal system (more so those in Cumbria than Scotland), yet, later, 62 say they have at least one analogue communal system. The actual penetration of communal analogue systems in the sector could well fall between these two figures (c57%). In addition, 34 say they have a digital communal system (some in addition to any analogue systems). Those with digital systems have, on average, 1.7 systems and those with communal analogue systems have, on average, 2.5 systems, each accounting for 10 analogue TVs (on average). The average age of the oldest communal cabling is 8 years.

Conversion work remaining: of the c375 care homes in the Borders region, just over half are likely to have analogue communal systems, and half of these are unlikely to have done much upgrading on their average of 2.5 analogue systems. Taking into account the fact that some are likely to receive TV signals from other ITV regions, it is likely that c200 communal systems will need upgrading by 2008. In addition there are around 1,000 individual analogue TV sets receiving signals via outdoor or indoor aerials that will require converting.

Half expect the switch to digital will be achieved by 2007/8, but 5% think it will be later and over a third are unsure.

Base: All in sector: 101

Ipsos MORI

Sector Summary – Day care centres

Sector summary – Day Care Centres (30)

Background: of the 132 Day care centres in the region, 44 were contacted; of these 30 were eligible for interview. These Day care centres tend not to be major users of TVs - only 4 of the 30 have more than 10 TVs. All were responsible for the TVs in their organisation although a quarter (26%) say they allow users to attach digital equipment. All but one receives TV signals only from Border TV and the majority were speaking for just one site.

Twelve day care centres were in Cumbria, 5 in Northumberland and 13 in the Scottish Borders. Any major differences in results between regions are highlighted, although the relatively small numbers mean that any differences will not be statistically significant.

Awareness: 80% were aware of the date for the DSO in the Borders prior to being interviewed. Those that were not aware (20%) tended to be relatively low users of TVs, having, on average, one TV per organisation.

Impact: opinion is divided on the importance of the TV sets to their users and the organisation. Half of those with analogue TVs (54%) say they are 'vital' or 'very' important whereas the remainder say that they are not important. The perceived importance increases with the number of TVs in each day care centre. However, despite their importance, it seems the impact of not converting the analogue TVs in time is not felt to be serious. Of the 26 Day care centres with analogue TVs, 73% say the impact of failing to convert these TVs in time for the DSO would not be 'not very' (35%) or 'not at all' (38%) serious. This is despite the fact that several of these centres have over 30 users - though not many TVs. This, plus the fact that a major use is playback is perhaps why the impact is thought to be less serious.

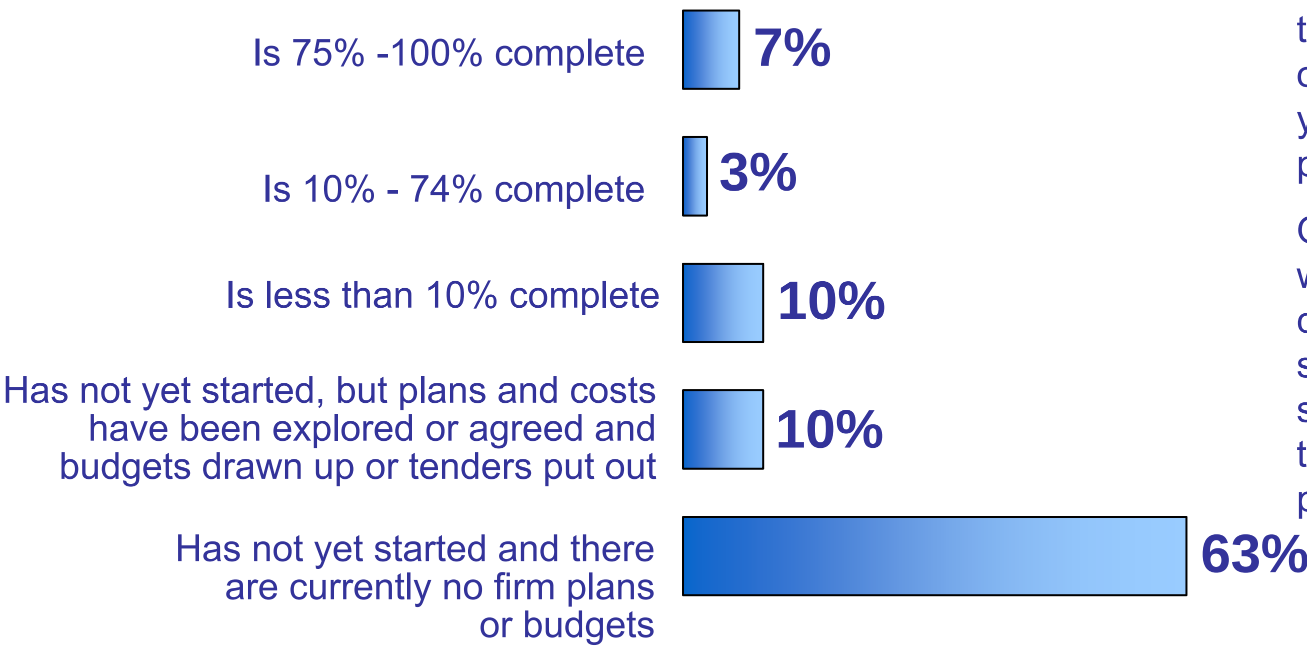
Location and use of analogue TVs: in a quarter of the centres the TVs can be found in users' rooms, but are mainly situated in communal areas. They are predominantly used for both watching live TV and playing back DVDs or videos (in roughly equal measure), secondary uses include games, recording and relaying information.

Base: All in sector: 30

Sector summary – Day Care Centres (30)

Conversion progress: is slow – three-quarters have not yet started. Of the 19 centres which have 'Not yet planned/budgeted' (63%), the main reasons given are: *"waiting for budget/budget restrictions"* (32%), followed by *"decision is taken elsewhere in the organisation"* (21%). Interestingly some said: *"we are not interested in the DSO/switching to digital"* (11%) while some say they *"can't receive a digital signal"* (11%).

Q14. In my organisation, the switchover to digital TV …



The remainder do not know

Over half (54%) of those with analogue TVs see these as vital or very important to their users; yet this group accounts for 11 of the 19 day care centres who have not yet started the DSO and have no firm plans or budgets.

Only 7 day care centres (27% of those with analogue TVs) see the impact of not converting in time as extremely or very serious. Yet none of these have made a start on converting, these include two sites that have 100+ users and have no current plans or budgets.

Base: All in sector: 30

Ipsos MORI

Sector summary – Day Care Centres (30)

Number of TVs: each centre reported being responsible for 8 TVs on average (and just 2 if the four larger centres at the top of the range are excluded). Nine in ten (87%) have some analogue TVs and these account for most or all of the TVs in their centre.

Communal systems: A quarter of day care centres say they have communal systems (26%). One has two communal systems (one analogue, one digital), the remainder have just the one system. All are analogue – and these account for the majority of the analogue TVs in use. While communal systems serve 18 TVs on average, this figure is inflated by 4 large systems. Typically half the centres report their systems serve fewer than 5 TVs.

One of the centres has 45 TVs, some receiving signals via a communal analogue system, some via individual indoor and outdoor aerials. Regardless of the number of TVs, this varied pattern was typical of this sector . If any type of connection predominates, it is the individual connection to an outdoor aerial – accounting for half the analogue TVs in use.

Conversion work remaining: ‘moderate’ - 1 in 4 have communal analogue systems which will need upgrading, and most of these have not started any of the conversion work. However, as the average number of TVs per centre is small and half use individual outdoor aerial connections the switchover could be achieved relatively quickly and easily – once the relevant funds are cleared.

Given the number of Day care centres reliant on Border TV signals (c100) and that 85% use their TVs for watching TV programmes (and assuming this pattern is also to be found among those not interviewed), it seems some 25 centres will need to upgrade their communal systems. Among the remainder, it is likely that up to 500 individual TVs (and/or aerials) will also need to be upgraded.

Base: All in sector: 30

Ipsos MORI

Sector Summary - Schools

Ipsos MORI

Sector summary – Secondary schools (47)

Background: There are over 700 schools in the Border region (including nurseries), roughly 46% in Cumbria, 20% in Northumberland and 33% in Scottish Borders. 110 were contacted and 82 were interviewed. Of the c90 Secondary schools in the region, 47 were interviewed (around half the universe): 24 in Cumbria, 16 in the Scottish Borders and 7 in Northumberland (where they are less likely to receive TV signals from Border TV). The remaining 35 interviews were with primary schools.

Awareness: 72% of those in secondary schools say they were aware of the date for the Borders DSO prior to the interview. Those not aware (28%) are to be found in each of the three regions, but are more likely to be in Northumberland.

Impact: while 88% of those in secondary schools with analogue TVs feel these TV sets are 'vital or very important', just 21% feel that the impact of failure to convert all TVs to digital in time would be 'extremely or very serious'. For a third it would be 'not very serious', for a further third 'not at all serious'. This is probably because the main use of the schools' TV sets is for playing DVDs or videos. Just 50% of secondary schools use the TVs for watching live broadcasts, however, this figure increases to 76% if recording TV broadcasts is included.

Number of TVs: 40% of secondary schools report having fewer than 15 TV sets, while 60% have 15 or more. There are 20 sets per school on average - 7 are used mainly for receiving broadcasts via analogue signals and 13 are used more for playing pre-recordings. One in five schools has digital TV – typically just the one set.

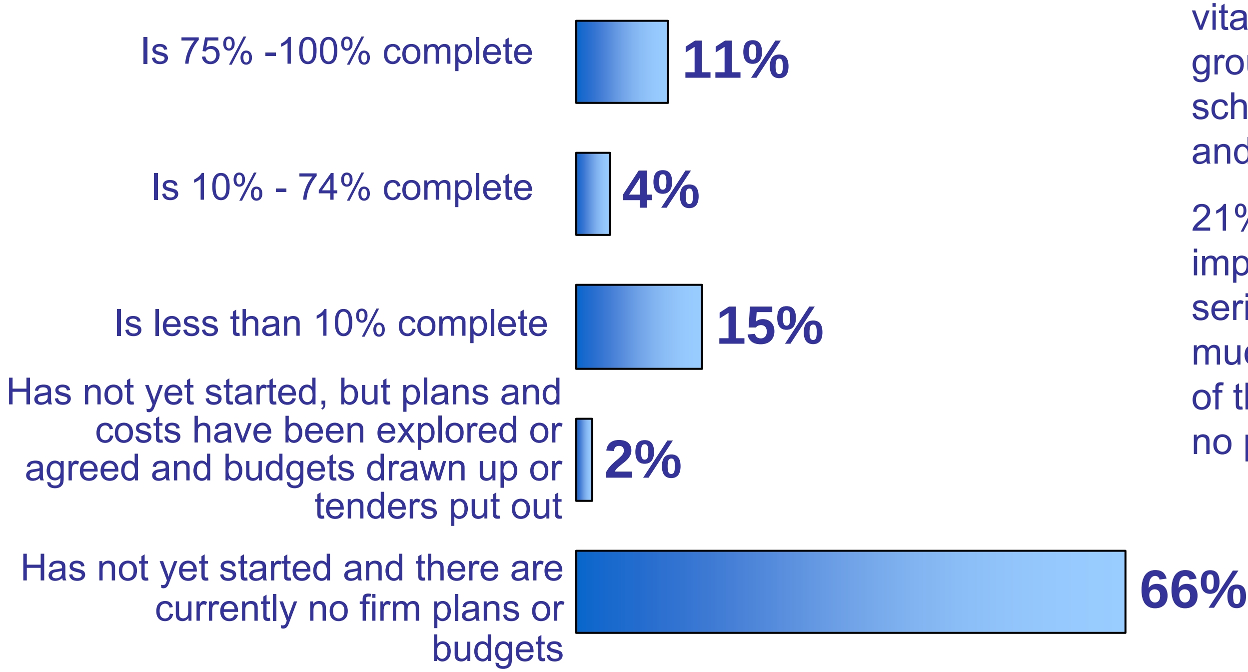
Location and use of analogue TVs: most of the TVs are situated in a communal room or classroom and are used predominantly for playing DVDs/videos (95%) or recording TV programmes for later viewing (60%). Half say they are used for watching TV programmes, 14% for relaying information.

Base: All in sector: 47

Rate of DSO by sector – Secondary schools

Conversion progress: one in nine (11%) have almost completed work for the digital switchover, while a further one in five have made a start. Of the 31 secondary schools which have 'not yet planned/budgeted' for the DSO (66%), the main reasons given are: *"decision is taken elsewhere in the organisation"* (23%), *"it's a long time/too far away"* (13%) and *"still plenty of time to convert TVs"* (13%).

Q14. In my organisation, the switchover to digital TV …



88% of those with analogue TVs see these as vital or very important to their users, yet this group accounts for the majority of secondary schools who have not yet started the DSO and have no firm plans or budgets.

21% of those with analogue TVs see the impact of not converting as extremely or very serious. However, this group has not made much progress towards the DSO, with only 1 of the 9 having done any work, the rest having no plans nor budgets.

Base: All in sector - 47

Ipsos MORI

Sector summary – Secondary schools (47)

Communal systems: one in three secondary schools has a communal analogue system. Half of these schools have just the one analogue system (53%), 18% have 2, 3 or 4 analogue systems, while just under a third (29%) have 5 or more systems. On average each secondary school has just over 3 analogue communal systems, each accounting for 9 analogue TVs (on average).

The oldest cabling was last upgraded 10 years ago (on average).

Just 3 schools say they have a digital communal system – serving a very small number of sets.

Over half (56%) expect to have complete work for the DSO by the end of 2008, 30% do not know while 14% do not see the need as they do not use their sets for live broadcasts.

Conversion work remaining: work is probably required in some 70 secondary schools, involving c50 communal systems that need converting. For the remainder it will be a question of upgrading some 350 individual TV sets.

Base: All in sector: 47

Sector summary – Primary schools (35)

Background: there are c500 primary and nursery schools in the Borders region; 35 were interviewed: 20 in Cumbria, 13 in the Scottish Borders and 2 in Northumberland (where they are less likely to receive TV signals from Border TV).

Awareness: 77% say they are aware of the date for the Borders DSO. Those not aware (23%) are to be found in each of the three regions.

Impact: just 50% of those in primary schools with analogue TVs feel these TV sets are ‘vital or very important’ and only 3% feel that the impact of failure to convert all TVs to digital in time would be ‘extremely or very serious’. For 66% it would be ‘not very serious’, for 31% ‘not at all serious’. This is probably because of the use to which primary schools put these TV sets.

Location and use of analogue TVs: in most cases the TVs are situated in a communal room (78%) or in a classroom (19%). As with secondary schools, the main use of these analogue TVs is for playing DVDs or videos (88%), with around two-fifths (38%) being used for watching TV programmes and a third (34%) for recording programmes for viewing later. In total, 56% use the TVs for recording or watching TV programmes.

Communal systems: one in three primary schools claims to have a communal system (but we suspect a few may have misunderstood the term). Most of these have just the one analogue system, while a few say they have 2 or 3 systems. Just 2 schools say they have a digital communal system – serving a very small number of sets. Communal analogue systems each account for 3 analogue TVs, on average.

The oldest cabling was last upgraded 12 years ago (on average).

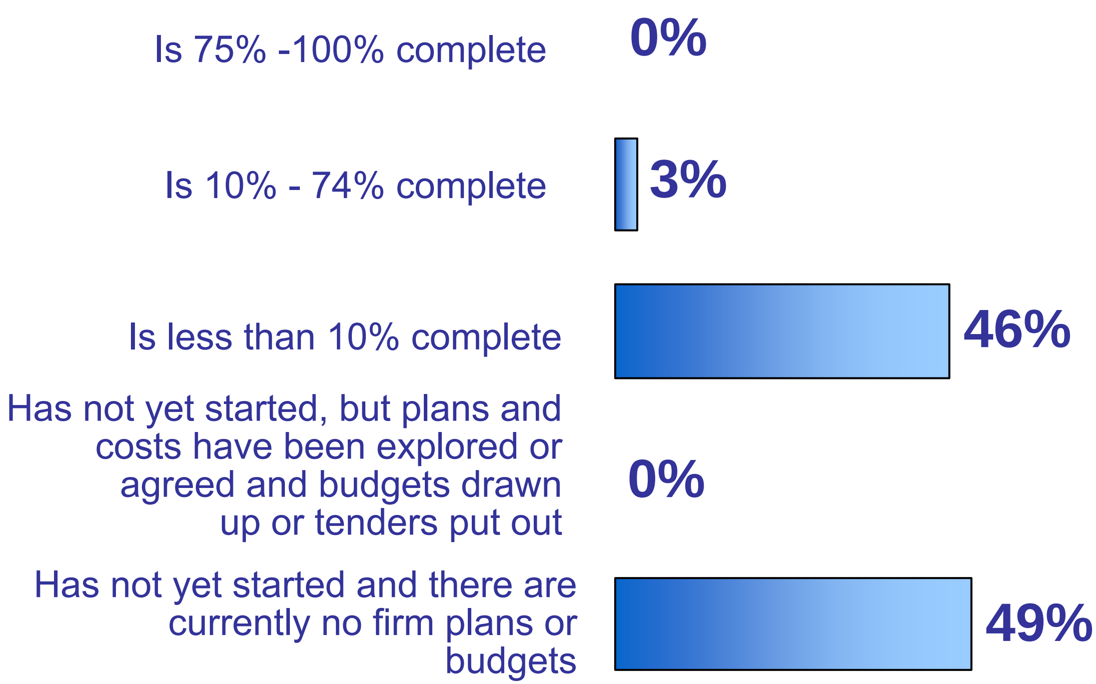
Base: All in sector: 35

Ipsos MORI

Rate of DSO by sector – Primary schools

Conversion progress: as can be seen from the graphic below, very little progress has been achieved. Of the 17 which have ‘not yet planned/budgeted’ for the DSO (49%), the main reasons given are: *“it’s a long time/too far away”* (18%), *“not yet received information”* (18%) or *“decision is taken elsewhere in the organisation*” (12%).

Q14. In my organisation, the switchover to digital TV …



(the remainder do not know)

The perceived impact of failure to convert in time and the importance of TVs is low in this sector. 50% of those with analogue TVs regard these as vital or very important to their users. The 49% who have no current plans of budgets is split between those who rate their TVs as important and those that do not.

This is perhaps related to the fact that only 3% of those with analogue TVs see the impact of not converting in time as extremely or very serious.

Base: All in sector - 35

Ipsos MORI

Sector summary – Primary schools (35)

Number of TVs: 80% of primary schools report having fewer than 5 TV sets, 20% have between 5 and 14. There are 3 sets per school on average – nearly all are analogue. 5% have a digital TV – typically just the one set.

Conversion work remaining: despite the fact that 29% do not expect to have to convert and 56% use TVs only for watching or recording TV programmes, work is probably required in the majority of primary schools **-** and most of these have made little or no progress as yet. Of the c500 primary schools in the region, around 150 are likely to have an analogue communal system that needs converting. In addition individual TV sets and aerials will need up-grading – probably involving 750 to 1,000 sets.

Half the primary schools expect to be ready for the digital switchover by the end of 2008, 29% say never (they think there is “no need”) and 18% do not know.

Base: All in sector: 35

Sector Summary - Hotels

Ipsos MORI

Sector summary – Hotels (79)

Background: A sample list of c1,500 hotels was sourced for the region from the Cumbria Tourist Board, Quality in Tourism, One North East, the North East Chamber of Commerce and Visit Scotland. Although these listings aimed to be as complete as possible we cannot guarantee that it is an exhaustive list of hotels in the region. Of the 79 hotels interviewed, half were in Cumbria, a third in the Scottish Borders with the remainder in Northumberland. The majority (62%) were small hotels with less than 10 beds.

Awareness: 75% are aware of the Borders DSO date, 25% are not (mainly small hotels).

Impact: 86% of those with analogue TVs say the sets in their establishment are 'vital or very important'. Rather fewer (66%) say the impact of failure to convert all TVs in time would be 'extremely or very serious'. For those with 1 to 30 clients at their hotels this figure is 63%, while for those with 31 to 100 clients it is 89%. Although 'importance' and 'seriousness of failure to convert' do increase with the size of hotel, the more telling correlation is with the number of TVs in each hotel. Those with one to four TVs view the importance of the TVs and the impact of not converting in time as less serious than those with 5 or more TVs (perhaps relating to the expectations of their clientele or because they feel the conversion process would be easier with few TVs).

Location and use of analogue TVs: 93% say the analogue TVs are situated in occupants' rooms, while nearly half (45%) have sets located in communal rooms. All say the TVs are used for watching TV programmes, 45% say they are used for playing DVDs/videos and a quarter (25%) say the sets are used for recording programmes for later viewing.

Number of TVs: the average number of TVs reported per hotel is 13, of which the great majority are analogue (11 per establishment on average). Of all the analogue TVs in the hotels interviewed, 85% are analogue, 1% are digital.

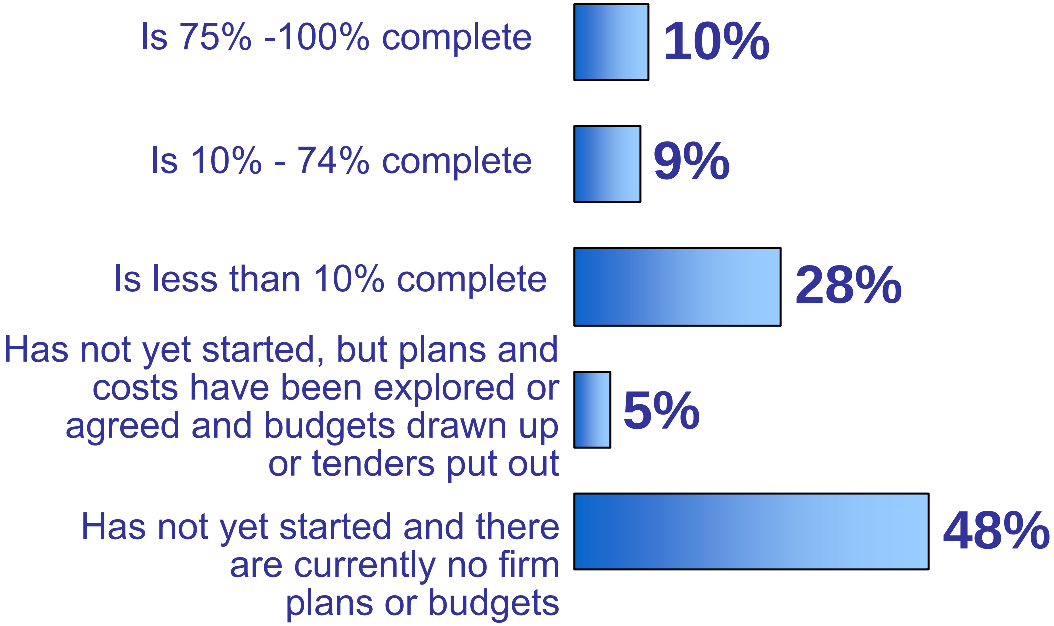
Base: All in sector: 79

Ipsos MORI

Rate of DSO by sector – Hotels

Conversion progress: some progress is being made in this sector – nearly half have made a start. Of the 48% which had 'not yet planned/budgeted', the main reasons given are: *"it's a long time away"* (24%), *"plenty of time yet to convert TVs"* (16%), *"not received any information"* (13%), *"waiting for budget/budget restrictions"* (13%)

Q14. In my organisation, the switchover to digital TV …



86% of those with analogue TVs see these as vital or very important to their users, while 66% feel the impact of not converting in time will be extremely or very serious. There is no relationship between these responses and the degree of conversion work achieved.

There are minor differences in conversion progress by region – those in Northumberland are relatively less likely to have made a start. There are no differences by the number of TVs in the hotel.

Base: All in sector - 79

Ipsos MORI

Sector summary – Hotels (79)

Communal systems: seven in ten have communal analogue systems. Half of these have just the one analogue system, although the average is 3 systems (as one in five hotels has 5 or more analogue systems). Communal analogue systems supply three quarters (75%) of all the analogue TVs in the hotel sector.

Nearly all of those that have digital communal systems (20 of 79 interviewed) operate just one or two systems.

On average, the communal analogue systems in the hotel sector account for 9 TVs.

The oldest cabling for these systems was last upgraded 8 years ago, on average.

Conversion work remaining: there are at least c1,500 hotels in the Border region. Seven in ten of these probably have communal analogue systems - around 1,000 hotels with 3 systems each on average. Of these, over half have not yet commenced up-grading. This indicates that over 1,500 communal analogue systems in this sector will need upgrading. Similarly, around 25% of all analogue TVs in the hotel sector use either indoor portable aerials or individual connections to outdoor aerials. Assuming around 80% of hotels have not yet converted these individual TVs **(**and an average of 3 TVs per hotel), in total between 3,500 and 4,000 individual TV sets would need upgrading (in addition to the communal systems).

Despite this, 62% expect to have completed the DSO by the end of 2008, most of the remainder are unsure.

Base: All in sector: 79

Sector Summary – Tertiary - Public

Ipsos MORI

Sector summary – Tertiary Public (20)

Barracks (4): TVs are not seen as important in the four barracks in the Border TV region and for three of the four the impact of not converting in time is not felt to be serious.

The barracks have between 1 and 20 TVs. The one with 20 is the only one using a communal system - and the only one to have started work towards the DSO. To date, the other three barracks have no plans drawn up nor a budget set aside. The barracks with 20 TVs plans to have completed the switchover by 2007; the others do not know if and when it will happen.

Prison (1): we interviewed a representative from the one prison in the Border TV region. TVs are regarded as very important for the inmates and the impact of not converting in time is felt to be very serious. The prison has 150 TVs, half receiving just analogue and half receiving digital terrestrial signals, all through MATV communal systems.

Even though half the prison's TVs are already receiving digital terrestrial signals the respondent stated that the conversion to digital 'has not really started' - referring to the conversion of the current 75 analogue TVs. The prison reported that plans and costs have already been agreed and they have gone to tender and are looking to have the work completed by early 2007.

Universities/colleges (5): have quite a wide ranging number of TVs, from 1 to 25. In four of the establishments the majority of these TVs are used for playback of DVDs or videos. All those with a greater number of TVs were aware of the Borders DSO date before the interview. Two of the establishments have one analogue communal system each. All of them are in the very early stages of work for the DSO, but two have not done any work as yet, while those that have, have only explored tenders or budgets.

Base: All in sector: 20

Sector summary – Tertiary Public (20)

Student accommodation (3): one of the organisations has 3 TVs - which are all fully digital. Another organisation is responsible for 5 TVs in the summer (when they rent out rooms to non-students). All these 5 TVs are analogue and the impact of not upgrading is not felt to be serious - so there are currently no plans for the DSO. The other organisation has 19 TVs fed by a mix of analogue and digital communal systems. Conversion work has not yet started on the remainder of analogue systems as they are currently waiting on a decision on the type of system to install.

Courts (2): both of the courts had only one TV, placed in communal areas and running off individual connections to outdoor aerials. Neither thought the impact of not converting would be serious, nor had they started work for the DSO but both felt they would get it done before the end of 2008.

Police accommodation (1): based in Cumbria, this establishment has 20 TVs. 19 of these are analogue TVs and there is one analogue communal system in place which supplies 20% of these analogue TVs. The contact did not know if there were any plans for the DSO and did not know what the impact of not converting the TVs would be.

Job centres (2): both of the job centres have TVs that they only use for playback of DVDs/videos. The impact of not converting is not seen to be serious and there are currently no plans nor budgets for the DSO.

Local town halls (2): one has one TV and the other has two. The TVs are analogue and run off either indoor portable aerials or connections to outdoor aerials. Both respondents feel that the TVs are very important though neither felt the impact of not converting in time would be serious. One has no plans or budgets so far for the DSO. The other says that they have completed ‘less than 10%’ of the work for the DSO. As only two TVs are involved it is likely that they have formatted plans, and feel they are 10% along the way to executing them.

Base: All in sector: 20

Sector Summary – Tertiary - Private

Sector summary – Tertiary Private (13)

Independent schools (2): both were aware of the date for the DSO prior to the interview. One has 20 TVs and the other 6. The majority of the TVs are used for playback (DVD/video) or playing computer games. The TVs that are used for watching TV programmes are digital enabled. The school with 20 TVs uses a digital terrestrial system to relay signals to some of its TVs.

Caravan and camping parks (2): one of the campsites we spoke to was not responsible for the TVs although all 100 on the premises are analogue only. It would appear that these are owned by the owners of the caravans on the site. The other one has just 5 TVs which are all analogue. It is waiting on a budget to be able to convert. They feel that the TVs are important to their customers and there would be a serious impact if they did not convert in time.

Holiday homes and flats (2): we spoke to two organisations of differing size. One has 150 analogue TVs and 10 analogue communal systems but was not aware of the Borders DSO date before the interview and has no firm plans or budgets. The other is much smaller with just 10 TVs, one of which is digital enabled. Both organisations planned on completing the DSO by end of 2008. Both say that the TVs are very important to their users and that failure to convert would be extremely serious.

New build (1): this house construction company is aware of the switchover and is in the process of building 19 flats over 2 sites. It is installing a communal system at each of these sites – to feed c19 TVs. It has two TVs - being used for playback rather than watching TV programmes, one in the office, one in the show flat. One of these TVs is analogue and the other is digital satellite/cable. The company says it is almost 100% digital enabled as it plans to provide purchasers with digital terrestrial boxes for their TVs.

Base: All in sector: 13

Sector summary – Tertiary Private (13)

Nurseries and playgrounds (2): both of these organisations have two analogue TVs each, which they use only for DVD/video playback. They were aware of the date of the Borders DSO before the interview. One feels that the TVs are not important and that the impact of not converting would not be serious. However, the other does, which is curious considering they do not use the TVs for watching TV programmes – but perhaps they plan to in the future as both say they have started plans or work for the DSO.

Pubs (2): one of the pubs has 4 televisions running off a digital communal system which relays digital satellite or cable signals. The other has one analogue TV connected to an outdoor aerial and was not aware of the date of the Borders DSO before the interview. This pub says that the TV is very important to its customers though the impact of not converting would not be serious. This pub says it has started plans and work for the DSO for its one television, apparently intending to convert it (and another) to receive digital terrestrial and digital satellite/cable signals.

Social venues (2): one of the organisations is a leisure centre and only uses its one TV – mainly for training videos and says it will never convert. The other, a working men's club, has just one TV which is uses to watch live TV broadcasts. Neither feel their TVs are important to their users or that there would be a serious impact if they have not converted them before the DSO.

Base: All in sector: 13

Appendices

Ipsos MORI

Response rates

Response rates are calculated as the percentage of the total eligible sample that was converted to a full or short interview.

Overall: 67%

Key sectors:

Social housing: 89%

Hospitals: 85%

Day care centres: 76%

Schools: 74%

Care housing: 68%

Hotels: 55%

Ipsos MORI

Short interviews

Below shows the breakdown of the short interviews, illustrating the main reason for non-eligibility for interview being 'receiving TV signals only from another ITV region', followed by the organisation not having responsibility for any televisions.

Reason for short interview:	Total	Signals from other ITV region	Not responsible for TVs	Other reason
Overall:	180	151	24	4
Key sectors:				
Hospitals:	6	5	0	1 (Patientline interview)
Social housing:	16	7	9	0
Care housing:	49	35	12	2
Day care centres:	11	9	2	0
Schools:	28	26	0	2
Hotels:	59	59	0	0