



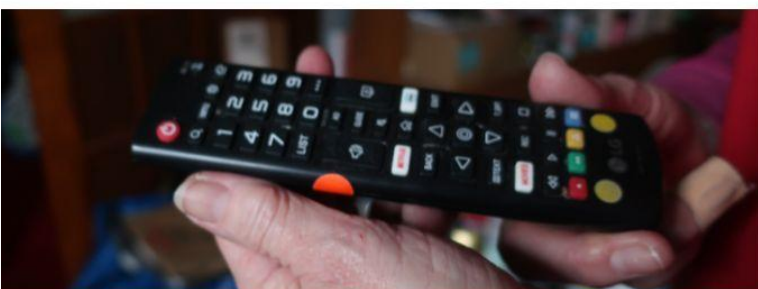
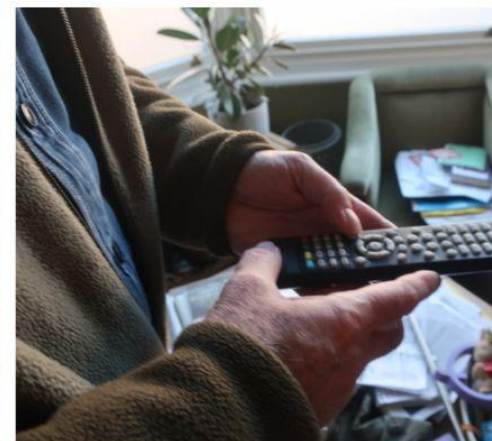
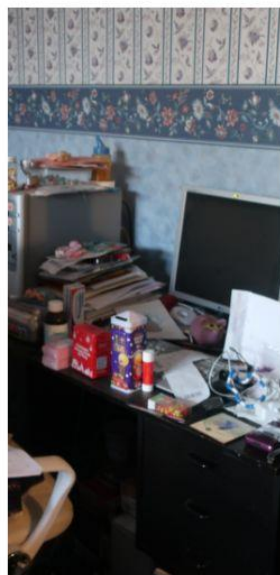
Department
for Culture,
Media & Sport

REVEALING REALITY

DCMS

Future of TV distribution

*Research report
March 2025*



About Revealing Reality

Revealing Reality is an independent, multi-disciplinary research agency, working with regulators, government, charities and private sector organisations. We provide insight to inform decision-making, policy recommendations and service design and to help drive change.

We conduct detailed qualitative and quantitative research into services and their users – observing how systems function and capturing a range of different perspectives to understand user experience and unmet needs. Our work also includes the exploration of people's behaviours and motivations, with an emphasis on understanding these within the context of people's real lives.

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Glossary

Digital Terrestrial Television (DTT)	A television broadcasting system that transmits free-to-air channels through an aerial, without requiring satellite or cable subscriptions.
DTT only users	Participants who rely solely on DTT for watching television on a TV set and have not connected to IPTV.
Hybrid users	Participants who have connected to IPTV within the last five years but continue to use DTT as part of their TV setup.
DTT users	Participants who watch TV on DTT, whether as hybrid or DTT only users.
Internet Protocol Television (IPTV)	A system where television content is delivered via the Internet rather than traditional terrestrial, satellite, or cable formats. For the purposes of this report, IPTV includes both live and on-demand viewing.
IPTV only users	Participants who have fully transitioned to IPTV within the last five years and no longer use DTT.
Recently connected	Participants who have started using IPTV within the last five years, whether as hybrid or IPTV only users.
Streaming device	A hardware device (e.g., Amazon Firestick, Roku, Chromecast) that allows users to access IPTV services on their television.
Television (TV)	The physical television set used for viewing content, regardless of whether it is connected via DTT, IPTV, or another source. In this report, references to TV specifically relate to content viewed on a television screen, not on mobile devices, laptops, or other personal devices unless stated otherwise.

A qualitative approach

This research is qualitative, meaning it is designed to explore attitudes, experiences and behaviours in depth, rather than to produce numerical findings or be statistically representative of the wider population. The sample is purposively selected to ensure diversity.

As a result, findings should not be used to make quantitative claims. However, we refer to the scale of experiences across the sample of 100 using terms such as:

- **Few** participants: less than a quarter
- **Some** participants: between a quarter and half
- **Many** participants: nearly half or more
- **Most** participants: a significant majority

Executive summary

TV provided a range of different roles in participants' lives

What TV brings to people's lives varies. In this research, many were using it to relax and unwind, whether by themselves or with friends and family. Others used it less actively, having familiar programs playing in the background as they spent time at home. This was especially important for those who were older or more socially isolated.

As TV consumption evolves, more households are incorporating internet-based TV into their viewing habits, sometimes alongside Digital Terrestrial Television (DTT), cable, or satellite. Understanding the barriers audience members face in transitioning to Internet Protocol Television (IPTV) will be crucial to assessing whether transitioning away from DTT infrastructure could be possible, and if so, how the impact on current DTT users could be reduced.¹

As TV consumption changes, it's important to understand what is shaping people's decision making

Maintaining the DTT network is becoming increasingly costly as viewership declines. Given this, policymakers and industry stakeholders are considering the future of DTT and the feasibility of transitioning audiences to IPTV. However, a significant number of households still rely solely on DTT, and without intervention, some groups may struggle with this transition. Conversely, proponents of IPTV point to a number of potential benefits, including greater choice and additional features.

To inform future policy decisions, the Department for Culture, Media and Sport commissioned this research to understand the barriers preventing DTT only users from adopting IPTV, the motivations and enablers that led others to make the switch, how these factors vary across demographic groups, and how potential market developments or policy interventions might affect audiences.

This research involved qualitative interviews with 100 participants about how TV fit into their lives and their current TV setup. There were three types of participants:

- **DTT only users** – those who relied solely on DTT (*N.B. Around a half of these participants watched TV content on other devices, such as phones or tablets*).
- **Hybrid users** – those who had connected to IPTV in the last five years but continued using DTT
- **IPTV only users** – those who had fully transitioned to IPTV in the last five years

Interviews took place either in-home or remotely, ensuring inclusion of participants with low digital skills or no internet access. Recruitment was designed to enable participants to be accurately allocated into the three types of TV setup and ensure a diverse sample across geographies, demographics, and housing situations, while ensuring representation of those most likely to face barriers to switching to IPTV.

Key findings

A range of factors influenced participants' decisions about their TV setup. Some acted as **barriers**, preventing or delaying their adoption of IPTV services, while others served as **prompts or enablers**, encouraging participants to move to IPTV. However, for some, they simply had no interest in moving to IPTV and were satisfied with their existing set up.

Barriers to connecting to IPTV

Perceptions, awareness, and understanding of IPTV: Many DTT only users were satisfied with their current setup and had never actively considered switching. Some lacked awareness of IPTV options, while others misunderstood what IPTV entailed. Misconceptions included assumptions that IPTV required a costly pay-TV subscription, that they would lose access to live TV, or that IPTV would be complex to set up and use.

¹ Ofcom (2024). Future of TV distribution: Early market report to Government

Internet connection: A stable internet connection is essential for IPTV; however, participants' confidence in their existing internet access varied. While most DTT only users had broadband, some faced issues with reliability and therefore assumed IPTV might not work consistently in their homes. A small number had no home broadband, either due to financial reasons or personal choice, relying instead on mobile data for internet use.

Some of those participants had not explored ways to improve their connection, such as using an ethernet cable or Wi-Fi booster, contributing to concerns about IPTV reliability. Others were apprehensive about becoming fully reliant on the Internet for TV, fearing outages or connection issues.

Technical confidence and ability: Confidence in using technology varied widely. Most participants were comfortable setting up and using IPTV independently, but a smaller group – primarily older individuals or those with low digital confidence – felt they would struggle.

Some DTT only users assumed they could rely on family or friends for support if needed, while others would require paid-for or professional assistance. A few were particularly reluctant to seek help, which could pose a greater challenge if DTT were switched off.

Financial situation: While some assumed IPTV would be expensive, many were surprised by the affordability of free or low-cost IPTV options, such as streaming devices. However, a minority faced genuine financial constraints that made IPTV currently unattainable. Some of those participants could not afford broadband, while others worried about sustaining the ongoing cost.

Even among those who could afford IPTV, some were hesitant to invest in new equipment if their current DTT setup met their needs. A few were unwilling to pay for home broadband solely for TV access.

Enablers and prompts for moving to IPTV

Some IPTV and hybrid users had encountered barriers but were able to overcome them due to external factors that made the adoption of IPTV easier or more appealing.

Support from others: Family and friends were a key source of help. This was particularly important for those with lower technical confidence.

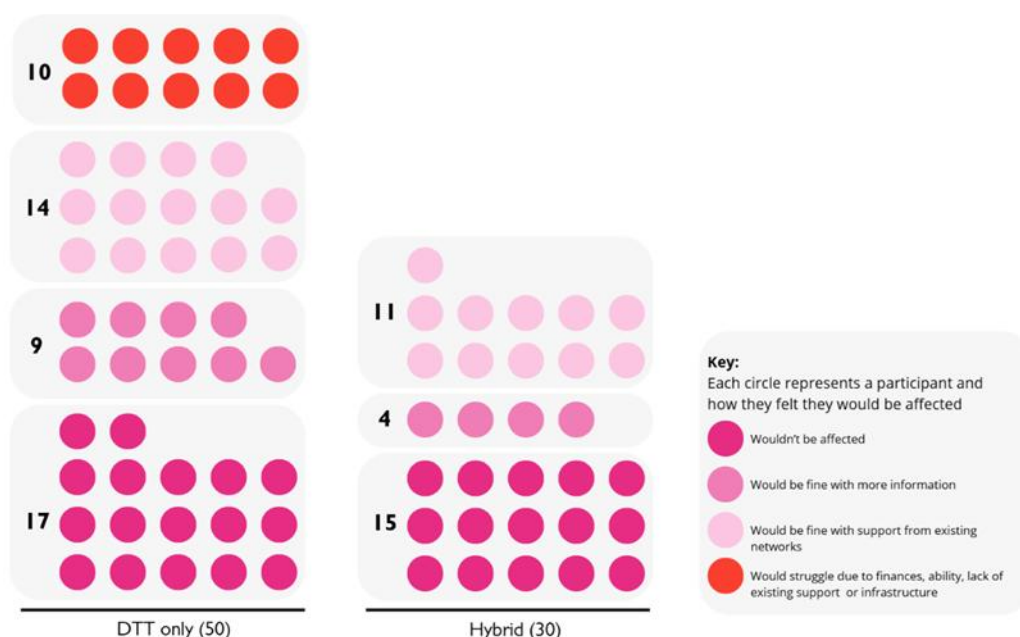
Improved internet access: For some, improved internet access acted as a trigger for switching. Changes such as upgrading broadband or moving to a home with a better connection, gave them confidence in IPTV's reliability. Similarly, financial changes, such as a new job or improved financial stability, allowed a small number of participants to afford IPTV when it had previously felt out of reach.

Changes in their wider life: Other external prompts, such as moving home, often provided a natural moment to reconsider TV setups, particularly when purchasing new household items. A few were introduced to IPTV after being gifted a smart TV or streaming device by family or friends, while a few parents connected to IPTV to access more content for their children. A small number transitioned after their TV setup broke, or their aerial signal became unreliable, making IPTV the most practical replacement.

Impact of a hypothetical DTT switch-off

Participants were asked how they would feel if DTT were switched off. Many were unconcerned, believing they could adapt if necessary – this was especially the case for hybrid users who had already connected to IPTV but continued to use DTT. Many had already considered switching to IPTV but had not prioritised it. Some initial concerns – such as assumptions about cost, complexity, or the need for subscriptions – were misconceptions that were easily addressed when participants learned more about IPTV options.

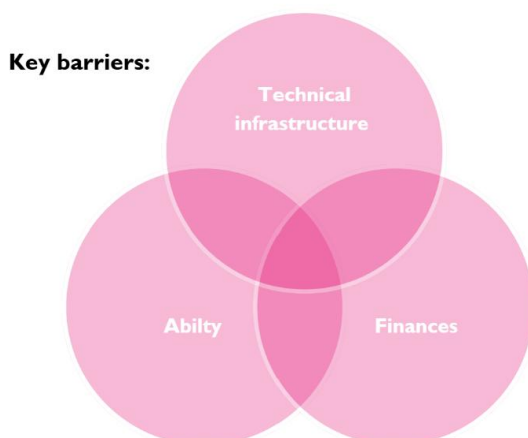
The diagram below outlines all participants' reflections on the impact of a hypothetical DTT switch-off.



Note: This is a qualitative diagram. The numbers included are used to give a sense of the relative scale of views within the sample and should not be interpreted as representative or used to extrapolate to the wider population.

However, a few participants would struggle if DTT were no longer available. Their challenges fell into three key areas:

- Financial barriers – A few reported that they would not be able to afford the costs associated with IPTV, either for a broadband subscription or new equipment.
- Technical ability – A few lacked the skills or confidence to set up and use IPTV independently, particularly those without support networks.
- Internet reliability – A few worried about losing TV access if their internet connection was unstable, though many of those participants had not explored ways to improve their setup.



These barriers did not exist in isolation. Our findings suggest that the biggest risk of exclusion lies where these challenges overlap – for example, those with both financial constraints and low digital confidence, particularly if they lacked support systems to help them. In contrast, those who faced only one challenge (e.g. limited technical skills but strong financial resources) were often able to find workarounds or access support.

Efforts to support these people to adopt IPTV could focus on:

- Addressing misconceptions – Providing clear information on free or low-cost IPTV options, how to access live TV, and simple setup processes.

- Structured support for those without informal help – Ensuring practical, hands-on guidance is available for people who cannot rely on family or friends, covering both initial setup and learning to use IPTV confidently over time.
- Addressing financial barriers – Raising awareness of free IPTV services, existing financial support schemes, and potential subsidised broadband options for low-income households.
- Improving awareness of internet solutions – Helping people understand alternative broadband providers, wired connections (such as ethernet cables), and Wi-Fi boosters to improve IPTV reliability.
- Ensuring broadband access – Continuing efforts to expand affordable and reliable broadband coverage to support IPTV adoption.

Introduction

Background to the research

As TV consumption continues to evolve, more households are incorporating internet-based TV (IPTV) into their viewing habits, often alongside traditional platforms such as DTT, cable, or satellite. Over the next decade, the number of IPTV only and hybrid households is expected to grow, gradually becoming the majority.²

At the same time, maintaining the DTT network is becoming increasingly costly and less sustainable. The infrastructure costs remain broadly fixed, meaning that as the number of DTT viewers declines, the cost per remaining viewer rises. While a natural shift towards IPTV is expected, a significant number of households still rely solely on DTT, and without government intervention, some groups may find it difficult to adopt IPTV.

To inform future policy decisions, the Department for Culture, Media and Sport commissioned this research to understand the barriers, motivations, and preferences of TV viewers – particularly those who are currently unconnected to IPTV or have only recently made the switch. This research explores:

- The barriers preventing DTT viewers from adopting IPTV
- The motivations and enablers that led recently connected viewers to make the switch
- How these factors vary across different demographic groups
- How potential market developments or policy interventions might affect viewers

Research approach

Fieldwork

The research was conducted by Revealing Reality between December 2024 and March 2025, exploring the experiences, preferences, and potential barriers associated with adopting IPTV faced by TV viewers in the UK. A total of **100 qualitative interviews** were conducted with participants across three key groups:

- DTT only users – those who solely relied on DTT (**50 participants**) (*N.B. Around a half of these participants watched TV content on other devices, such as phones or tablets*)
- Hybrid users – those who had recently connected to IPTV within the last 5 years but continued to use DTT (**30 participants**)
- IPTV only users – those who had transitioned fully to IPTV in the last 5 years (**20 participants**)

Current satellite and cable users were excluded from the research³.

The sample was categorised by participants' primary TV setup rather than all the ways they watched content. For example, some DTT only users also viewed TV on mobile devices, but they were classified based on how they watched content on a television screen rather than their broader viewing habits across different devices.

Interviews were conducted either in-home or remotely, with the majority of DTT only users and a proportion of hybrid users interviewed in their homes. This approach ensured the inclusion of participants with low digital skills or no internet access, allowing researchers to fully explore these as potential barriers to IPTV adoption.

Interviews explored the role of TV in participants' lives, their awareness and perceptions of IPTV, and the barriers or enablers shaping their decision-making. Participants were also asked how their lives may be impacted if DTT were no longer available, helping to assess how different groups might respond to this hypothetical change.

All participant names used in this report are pseudonyms.

² Ofcom (2024). Future of TV distribution: Early market report to Government

³ One participant in the sample adopted IPTV and Satellite TV at the same time.

Recruitment and sampling

Participants were recruited through multiple channels to reach a broad sample, including those who may be more isolated. Given that many struggled to accurately identify their TV setup, a rigorous screening process was used. This included pre-interview calls, photo verification of TV setups (e.g. aerial connections, home screens), and in-home checks during interviews where necessary.

The sample was designed to ensure a broad geographic and demographic spread, covering all four nations and including participants from rural, suburban, and urban areas. This was designed specifically to ensure coverage of those most likely to be affected by a hypothetical DTT switch-off.

The sample reflected a diverse mix of ages, genders, ethnicities, and socioeconomic grade (SEG). Additionally, the sample included participants from different housing situations, including homeowners, private renters, and social housing tenants, as well as those living alone and in shared households. The research also incorporated participants with additional needs, such as cognitive impairments, mental health conditions, and physical disabilities.

SEG is a classification system used in UK social research to group individuals based on the occupation of the main income earner in a household.⁴

Please refer to the annex for a full sample breakdown.

The recruitment process provided key insights that shaped the final sample. While it was initially assumed that few participants would have moved back to DTT after using IPTV, 10 participants had done so for various reasons. Moving home also emerged as a trigger for reconsidering TV setups, prompting some to adopt IPTV, and was therefore included in the sample. Additionally, the definition of 'recently connected' was extended from three to five years. Many participants who had connected within the last three years were still in transition – often continuing to use DTT alongside IPTV – so were classified as hybrid users. Extending the time frame made it more realistic to recruit participants who had fully switched to IPTV.

Analysis

Analysis combined behavioural frameworks, thematic exploration and structured comparison to understand the factors shaping participants' decisions around IPTV.

Researchers used interview transcripts and fieldnotes to populate a structured analysis grid, allowing for systematic comparison across the sample. Thematic analysis was used to identify common experiences, perceptions and viewpoints, while also examining patterns across key characteristics such as age, socioeconomic group, digital confidence and location.

A central part of the approach was the use of the B=MAP behaviour change framework, which considers:

- Motivation – why someone may or may not want to adopt IPTV
- Ability – what makes it easier or harder to do so
- Prompts – triggers or external circumstances that influence when a change happens

This helped identify the full range of behavioural influences - highlighting both the barriers that prevent or delay adoption and the factors that enable or encourage it.

⁴ SEG categories:

- AB – Higher and intermediate managerial, administrative or professional occupations
- C1 – Supervisory, clerical and junior managerial, administrative or professional occupations
- C2 – Skilled manual workers
- DE – Semi-skilled and unskilled manual workers, people on long-term state benefits

The role of TV in participants' lives

Understanding the potential impact of a hypothetical DTT switch-off requires examining the role TV plays in participants' lives. Participants' TV viewing habits varied significantly, influencing how much they relied on their TV setups. While a few had the TV on for most of the day, others watched only occasionally.

Beyond how much they watched, TV played different roles in participants' lives – providing entertainment, a source of relaxation, social connection, information, and often companionship. Moreover, the way participants accessed TV content also varied, with some only watching TV on their TV sets, whilst others combined this with streaming TV content on other devices.

Participants' TV viewing habits varied

Unsurprisingly, participants watched different amounts of TV, affecting how reliant they were on their different types of TV setup. Some participants watched TV all day, making it a central part of their daily routine, and relied heavily on their TV setup.

"The television's nearly always on...in the mornings, [I turn on] Breakfast television because it's got the clock and it just keeps me awake."

Minah, 56, South East England, A/B, Hybrid

"I would be absolutely lost without a TV. I don't think I could survive without a TV...I wouldn't know what to do with myself."

George, 73, South East England, D/E, DTT only

However, some participants very rarely watched TV at all. It played a minimal role in their life, making them less reliant on their TV setups.

"I don't use [it], but I have a TV because there's no point getting rid of it."

Jemima, 61, South East England, A/B, DTT only

"We [watch TV] once a month ... maybe"

Sumaya, 34, Scotland, C2, Hybrid

TV played a range of roles across participants' lives

Many participants watched TV for entertainment

The most common reason participants across the sample watched TV was for entertainment.

"I like to watch kind of suspense thriller series ... like entertainment drama."

Amanda, 33, London, C1, IPTV only

"If I get a little bit bored or something, I can just turn it on and entertain myself a little bit."

Misha, 27, West Midlands, D/E, DTT only

"I like watching things that are entertaining, instructive if possible but not necessarily."

Leanne, 76, London, A/B, DTT only

Many used TV to relax and unwind

For a large number of participants, television was a way to decompress. Many had favourite shows they tuned into regularly, seeing this as a valued part of their day.

"It's just relaxing... It's kind of the end of the day activity for me."

Nina, 60, South East England, A/B, DTT only

"It gives you an escape and something to relax with... I'll have that me time."

Kirsty, 38, Wales, C1, IPTV only

Most DTT users watched popular, public service broadcasting channels such as those provided by the BBC, ITV and Channel 4. However, some participants enjoyed watching less-mainstream channels too, like Talking Pictures, which was mentioned by a few participants in the sample. Examples of other channels mentioned included QVC, GB News, Challenge, Sky Arts and Dave.

"Yeah, so BBC, ITV, Film4, BBC 4, then you know I have a dalliance with Drama"

Nick, 44, London, A/B, DTT only

"On Saturday night we watched a film on Film 4, then we watched the Heritage Chart show and then we watched another film on Talking Pictures...my mum's favourite channel is Talking Pictures"

Dolly, 49, London, D/E, DTT only

"My mum likes QVC as well, she likes watching QVC and buys things from QVC as well."

Nadia, 40, South East England, C1, Hybrid

"I watch news channels, GB News, Challenge channel for all the quizzes. And I also like...UK drama."

George, 73, South East England, D/E, DTT only

"The only thing I watch on terrestrial is Sky Arts."

Harold, 74, South East England, C1, Hybrid

TV helped some participants feel connected to friends and family

For some, watching TV was a shared activity that strengthened relationships. This included watching with family or friends in person, as well as discussing shows with loved ones who lived elsewhere.

Katie used TV to connect with her family who lived in Brighton, by catching up on shows they both enjoyed.

"When I FaceTime my family, about 90% of a conversation is like TV and about the people."

Katie, 30, London, C1, IPTV only

Watching TV was a chance for Edgar to spend time with his neighbour

Edgar, 69, London, C1, DTT only

Edgar, who lives in social housing, regularly watches TV with a neighbour that he had grown close to after watching TV together for many years. Every evening they get together to watch shows they enjoy. They particularly like watching Talking Pictures on Freeview, but also sometimes watch box sets through IPTV services on his iPad.

"I've got my neighbour downstairs who I'm very close to... We like watching Talking Pictures."



There were examples of participants who used TV as a link to their culture

A few participants who were connected to IPTV relied on television to maintain a connection to their heritage. Some of those watched international on-demand channels, and a few engaged with faith-based content. Several of them noted that they particularly valued the wider range of international content that IPTV made available.

"I watch Filipino shows, or on YouTube I find Filipino movies."

Reyna, 40, South West England, A/B, IPTV only

"I use Catholic channels from Poland and the UK to pray with others."

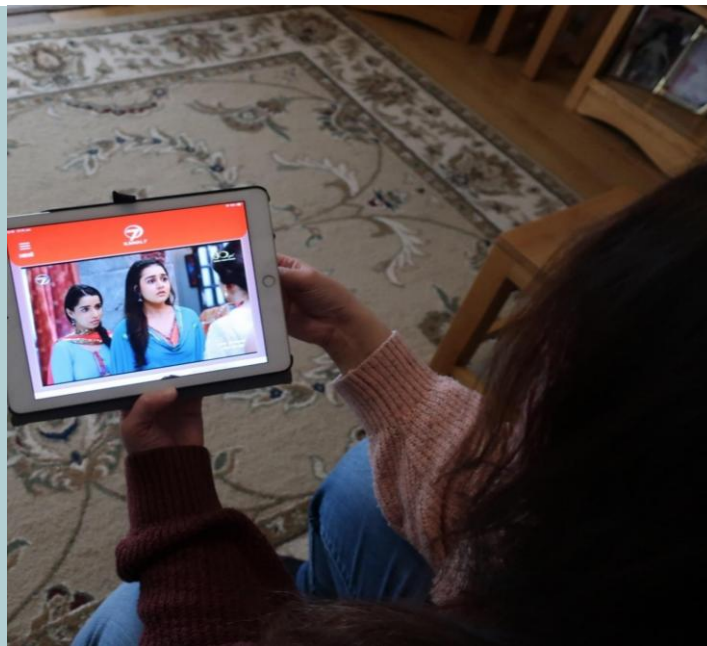
Aleks, 43, Wales, D/E, IPTV only

Nadia's mum connected to her culture with Turkish TV

Nadia, 40, South East England, C1, Hybrid

Nadia, 40, lives with her elderly mother who she cares for. Although they are mostly reliant on DTT, she reported that she streams Turkish on-demand channels that she can access through her iPad, allowing her to connect with her cultural heritage.

"Because our heritage is Turkish, [my mum] watches on-demand Turkish channels on her iPad."



A small number of participants used TV as their main source of information

Many participants mentioned using the TV as a source of information, sometimes watching the news, or documentaries, to learn new things or keep informed. DTT only viewers were slightly more likely to rely on TV content as a source of information. However, participants across the sample often also looked to other sources for information, such as news apps on their phones. A smaller group of older viewers, however, were particularly reliant on TV news as their primary source of information.

"It's just keeping informed of news really."

Robert, 66, London, C1, DTT only

"I watch the news first thing in the morning, every morning."

Eliza, 65, Northern Ireland, C1, IPTV only

TV provided comfort and company to several participants

For many, particularly older, and more socially isolated participants, television served as an important presence in the home, offering a sense of companionship.

"I've just got to have a sound in the house...my life used to be so busy, and always noisy, so if I don't have some noise, I'm just not comfortable"

Maureen, 58, North England, D/E, Hybrid

“I’m single, it’s like company to me.”

Annie, 60, South West England, C1, Hybrid

“It’s always usually on, so it’s like a background friend, if you like.”

Angela, 61, London, C1, Hybrid

For some more vulnerable participants who faced additional challenges, TV played a particularly significant role, providing comfort, stability, and connection. Sally, 42, who had experienced a number of challenges including homelessness in the past, felt TV helped relax her busy mind.

“I have it [on] all the time ... I think because of my mental health I always have my radio and the TV on. I don’t like it being too quiet. ... I don’t go out much ... Just because of my past, I don’t want to be going back into any of the circles that I used to be in ... so I keep myself to myself ... My TV is my little sanctuary.”

Sally, 42, North England, D/E, DTT only

The way participants watched TV content varied

Furthermore, the way participants consumed TV content also varied significantly. Some hybrid users still frequently used their DTT setups, with DTT serving as their main source of TV content.

“[I’ve got] a Sky box. To be honest with you, because I’m not that tech savvy and I don’t want to go on all the different channels ... I’m not using it very much.”

Alisha, 40, North England, C2, Hybrid

“We tend to watch mostly live [DTT] TV to be honest.”

Wendy, 64, North England, C2, Hybrid

On the other hand, some hybrid users had transitioned almost entirely to IPTV for their TV viewing, using their DTT setups only occasionally for specific programs or channels.

“We tend to use the streaming devices more. We’re both fans of the BBC ... we’re on iPlayer all the time.”

Harold, 74, South East England, C1, Hybrid

“We don’t use [DTT] that much ... anything that’s on Freeview is available on the Internet somewhere.”

Layla, 29, North England, D/E, Hybrid

It is also worth noting that DTT only users often engaged with TV content across different devices, such as laptops, tablets, and phones. While they had access to a DTT setup, many preferred streaming content on other screens, finding it more convenient and flexible.

“With the TV, obviously, then you’ve got to just sit here... If I want to be moving around, doing something else ... I can just stick it on my phone and I can listen to it even if I’m not watching it, do my cooking, doing my preparing for my cooking ... So in some ways it’s easier just moving around and having it on a different device. And I think there’s a lot of people that have moved away from TVs, to be honest.”

Gelli, 40, North England, C2, DTT only

“I’m quite happy with just the two of us watching a film on the tablet ... it’s absolutely fine. It’s a lovely picture. We can hear what’s going on.”

Edgar, 69, London, C1, DTT only

“I don’t really watch live [DTT] TV at all ... I watch on my phone.”

Margaret, 58, North England, D/E, DTT only

Other DTT only users, however, watched almost everything on their television, making it their primary or sole source of TV content. Participants like Josie, for whom TV played a significant role in their lives, and exclusively used their DTT setup, were the most dependent on it.

Josie watches TV all hours of the day, exclusively on her DTT setup

Josie, 65, North England, D/E, DTT only

Josie lives alone, after having lost her partner a few years ago. She has been off work since November due to vasculitis in her legs, requiring rest for recovery. She therefore spends most of her time alone, at home, watching TV.

When you're on your own [TV] makes you feel as though somebody's around you all the time ... it's nice to just have it there ... I can't imagine a house not having a television."

She is not comfortable using or setting up technology independently, and has not connected to the Internet at home, so has never considered adopting IPTV. She turns on her DTT TV first thing in the morning, and usually either watches it or has it on in the background for the rest of the day, until she goes to bed.

"The TV goes on in the morning when I first have my breakfast then I [turn it off] at 11pm, sometimes it might be a bit later."



Factors influencing participants' decision-making

A range of factors shaped participants' decisions about their television setup, influencing whether they had adopted IPTV or remained reliant on DTT. Some of these factors acted as barriers, preventing or delaying the transition, while others served as prompts or enablers, encouraging participants to make the switch.

For some, decisions were based on direct experiences – such as the reliability of their internet connection or their confidence in using digital technology. For others, concerns were hypothetical, shaped by perceptions of cost, difficulty, or potential risks of change.

This chapter explores these factors in detail, including:

- Perceptions, awareness, and understanding of IPTV – how knowledge (or lack of knowledge) shaped decisions
- Internet access and reliability – whether participants had the connection they needed for IPTV, or concerns about relying on it
- Technical ability – confidence in setting up and using IPTV independently
- Finances – the affordability of IPTV and its associated costs

Some of these factors directly affected someone's ability to adopt IPTV, while others shaped motivation and willingness to do so.

Finally, we examine the key enablers and prompts that helped participants adopt IPTV. For some, this involved practical support, such as help from family or friends, while for others, switching was not a deliberate choice but a response to external prompts, such as moving home or a change in circumstances.

Perceptions, awareness, and understanding of IPTV

Participants had different perceptions of IPTV and technology in general, influencing their openness to adopting IPTV. Awareness and understanding of IPTV options also shaped decision-making, with some participants holding misconceptions about what was required to connect.

Most DTT only viewers were satisfied with their current setup and saw no reason to change it

Many of those who hadn't adopted IPTV saw no reason to, as their current setup met their needs. As a result, they had never felt the need to explore alternative TV options or consider IPTV.

"I'm just happy with the way it is... It's a big screen, it's got a good picture, the sound quality is quite good... So am I really going to be any better off with a smart TV?"

Dale, 56, North England, CI, DTT only

"At the moment, it just kind of does what it needs to do."

Connor, 45, London, CI, DTT only

For some, TV played a minimal role in their lives - it was simply background noise at home, they had no strong attachment to specific programmes, or they rarely watched television at all.

"I'm not one of these people who go, oh, I must watch this and I must watch that. I'm more sort of selective with my viewing. So [switching to IPTV], to be honest, it's right at the bottom of my list."

Margaret, 58, North England, D/E, DTT only

While their current TV setup met their needs, some acknowledged that this might change as their lifestyle or priorities evolved. They were open to switching to IPTV in the future but saw no immediate need or urgency to do so.

“No, I’m not considering it at the moment... Possibly when I retire that might be different, you know, when I have more time on my hands.”

Samuel, 56, West Midlands, A/B, DTT only

Many DTT users lacked awareness of IPTV setup options and the process involved

Many DTT only users had limited awareness of IPTV, including the available options, how to set them up, and their different features. A small number had never heard of IPTV, while others had only a vague idea of what it offered.

“I’ve not heard of internet TV.”

Rosemary, 82, London, D/E, DTT only

“I haven’t heard of that I-P-T-V.”

Alan, 56, North of England, D/E, DTT only

“What’s iPlayer, what’s ITVX? I don’t know these channels.”

Britney, 46, London, D/E, DTT only

Not everyone who still used DTT had made a conscious choice to do so. Some had never actively looked into other TV options, so they were simply unaware of what alternatives were available.

“I’ve never been interested in finding out about it [IPTV]. I mean, I guess there’s things like BBC iPlayer, which I’ve never wanted because I just go to the website [on my laptop].”

Jemima, 61, South East England, A/B, DTT only

“I know that you can stream programmes, you can get Netflix... And that’s fine... But I’ve never really looked at it. I’ve never done it. So maybe I’m missing out, but I don’t know what I’m missing because I’ve never done it [before].”

Chole, 49, South East England, CI, DTT only

“I’ve heard about the Firestick... I haven’t really looked into it... When I think of a Firestick, I just think of a USB stick and I’m guessing it’s got a lot of data or something to kind of show you loads of files and maybe different channels.”

Misha, 27, West Midlands, D/E, DTT only

A small number of participants had misconceptions about IPTV

For some, limited awareness of IPTV led to misunderstandings about what using it would involve. These misconceptions created barriers to adoption, as participants assumed they would lose access to features they valued or face unexpected costs.

Others had concerns about losing access to DTT features they were used to. While many in the sample were aware that apps like BBC iPlayer and ITVX offered live streaming, a few were hesitant to switch to IPTV because they believed they would no longer be able to access live TV.

“I didn’t think the Roku could give me live [...] TV.”

Minah, 56, London, A/B, Hybrid

Others were hesitant to switch to IPTV because they feared losing familiar features they valued. This included using a TV guide to browse programmes, switching between channels with ‘up’ and ‘down’ buttons on their remote, and having live TV playing as soon as they turned their television on.

A few participants with additional needs, such as Simon and Rosemary, who both had visual impairments, had adapted to their DTT setups and were uncertain whether IPTV would offer the specific features they relied on, such as the BBC’s Red Button – referred to by Simon below as “teletext”.

“You can get teletext on the TV... sports, weather, football, travel. I used it two days ago for the forthcoming football fixtures...I guess I could get it on the iPad or on my phone, but on my phone, because of the size of it, I struggle to see it.”

Simon, 74, London, CI, Hybrid

“What I tend to do, it's a bit silly, but ... if I know what I'm going to watch the next day ... like [Good] Morning Britain ... I put it on that channel the night before, so the next morning I'll put it on and it's already on that station ... I prepare everything.”

Rosemary, 82, London, D/E, DTT only

Similarly, a few assumed that IPTV would not provide them access to their favourite channels that they could currently access via their existing DTT setup.

“I think you could watch the main channels like BBC One and Channel 5 through like iPlayer but some of the other stuff you get on Freeview, [like Talking Pictures] you wouldn't be able to watch live.”

James, 45, London, A/B, DTT only

There were also misconceptions around the costs associated with IPTV. A small number of participants assumed IPTV required purchasing paid subscriptions or packages. They were not aware of the free options available.

“So when you have internet TV, does that mean you have to pay so much a month?”

Rosemary, 82, London, D/E, DTT only

“I mean if it was internet-based you'd have to pay some sort of subscription.”

Janette, 75, South East England, D/E, DTT only

The perceived costs of IPTV also related to the devices or technology required. For example, a small number of viewers assumed that upgrading to IPTV would require purchasing a new TV altogether, which made it a less attractive option.

“My first thought process is I would need a smart TV ... I don't even know how much a TV would cost you these days ... one or two thousand pounds?”

Nina, 60, South East England, A/B, DTT only

“People have recommended the Firestick. Allegedly, that will work. But I just think my TV's too old, if that makes sense.”

Nick, 44, London, A/B, DTT only

A few participants expressed a broader aversion towards new technologies

Reluctance to switch to IPTV stemmed from a general aversion to technological advancements for a small number of DTT users. These individuals often viewed new technologies with scepticism, seeing them as unnecessary, overwhelming, or even intrusive.

“Unfortunately, nowadays [technology] is impossible to survive without... I don't like things on screens.”

Beatrice, 67, West Midlands, A/B, DTT only

“I don't think it's a great thing to have Internet on all the time because you're getting all these radio waves through your house... I don't think people should live online, I think they should live naturally.”

Maisy, 62, North England, C2, DTT only

While this sentiment was more common among older participants, some younger viewers also found the rapid evolution of technology daunting. For example, Sumaya, a single mother living in Scotland, was currently waiting to be assessed for ADHD, and described regularly feeling overwhelmed by the complexity of modern technology and having to set up new devices.

“I feel like there's so many advanced things that are coming out with TV and mobile phones that I wouldn't know how to use all these features, and I wonder are they even of any use?”

Sumaya, 34, Scotland, C2, Hybrid

A small number of participants were wary that the increased availability of options provided by IPTV would encourage them to spend more time watching TV, which they viewed as a negative habit.

“I think, to be honest, what [IPTV Apps] are, is time stealers. I do think the more TV [options] we have, the more time we would spend watching TV.”

Chloe, 49, South East England, C1, DTT only

"I'm a snob is the truth of it ... I don't want the focal centre of my house to be, what my parents would have called, 'the goggle box' where you just sit and gawp at the screen."

Jemima, 61, South East England, A/B, DTT only

A few participants also linked their frustration with possible changes to TV distribution to wider technological changes, such as analogue landline network switching off.

"It's not something I'm looking forward to. It's like going back to the phone again. It was announced, what was it, two, three years ago that ultimately the landlines were going."

Rupert, 76, South West England, A/B, DTT only

Internet connection

Having a stable internet connection is essential for IPTV, but participants had varying levels of access and confidence in using it. While most DTT users had broadband at home, some struggled with unreliable connections or lacked confidence in using it for streaming. A small number did not have home broadband at all, but this was due to personal choice or financial reasons rather than a lack of availability.

Some participants thought their internet connection would be unable to support IPTV

Some participants believed their internet connection was not strong enough to rely on IPTV. This concern was raised by both DTT only and hybrid users, who feared losing access to TV altogether if they could no longer fall back on DTT.

"[The Wi-Fi] is always jumping and buffering... If I can't get Wi-Fi that's 100 per cent, why would I get a smart TV that's gonna work from Wi-Fi? Because I've been told it either works or it doesn't work, so if the signal's intermittent the TV won't go on."

Joy, 44, London, C2, DTT only

"[The Wi-Fi] works, you can watch telly, you can be on the phone, but if all the children are around and they've got everything on, it won't handle it."

Harold, 74, South East England, C1, Hybrid

Lisa had broadband at home but had been unable to use IPTV for 18 months because her Wi-Fi signal did not reach the TV. She was not aware that using a wired connection, such as an ethernet cable, could have provided a more stable alternative.

"[The TV] is in one of those dead zones. It's in a little alcove and the signal just doesn't get there."

Lisa, 49, South East England, D/E, DTT only

Despite these concerns, very few had explored ways to improve their connection, such as using an ethernet cable, a Wi-Fi booster, or switching broadband providers. Additionally, participants often conflated 'internet connection' with 'Wi-Fi', assuming that IPTV required a wireless connection.

A small number of participants who had adopted IPTV mentioned using ethernet cables or Wi-Fi boosters to strengthen their internet connection to watch IPTV.

"The issue we have with the Internet in our house is...the walls are a bit too thick for the Internet and therefore, instead of having it wireless, they have actually wired up our TVs. So we are wired through the house to get around the problem of the internet signal dropping in certain rooms."

Stanley, 64, North England, A/B, IPTV only

"To get round that problem of rubbish internet connection, I got an ethernet cable to wire up the conservatory."

Peter, 71, South West England, A/B, IPTV only

Others expressed general unease about relying on the Internet for TV

Some participants were concerned about relying on the Internet for TV, even if they had not personally experienced major connectivity issues. While their concerns were largely hypothetical, they shaped attitudes towards switching.

"I think we were probably concerned about the system going down and the television going off because it was linked direct to the Internet. But I can't recall a time when this has happened, so although it's a concern, it hasn't happened."

Martin, 55, West Midlands, C1, Hybrid

Despite describing his broadband as "pretty good", Connor was sceptical of relying on IPTV.

"If your Wi-Fi goes down you're kind of a little bit screwed, and especially if you don't have an aerial, so DTT is probably the most reliable because it never goes down."

Connor, 45, London, C1, DTT only

Some participants did not have broadband at home

Thirteen participants did not have broadband at home at all. Some could not afford a broadband contract, while others did not see the need for home internet, relying instead on mobile data for essential online tasks.

"I haven't got the Internet. There's no way I can set it up."

Audrey, 81, South East England, C2, DTT only

"I don't have Internet in the flat at all... Doing things on the Internet didn't interest me at all."

Janette, 75, South East England, D/E, DTT only

"I haven't got Internet because I've got what I need... I can do everything I want without getting it in the house. So mobile internet's good enough for me."

Maisy, 62, North England, C2, DTT only

Technical ability

Technical ability varied across the sample and played a part in participants' decision-making over their TV setup. Most of the sample were confident with technology, so hadn't or wouldn't face challenges learning how to use IPTV and adapt to a new TV setup.

Among those who expressed lower confidence in their ability to use technology, most reflected they would be fine using IPTV with help from family and friends with the initial setup and being shown how to use different functions. However, there were a small number of participants whose difficulties using technology would mean they would struggle connecting to IPTV, and may need more support.

Most participants were confident using technology, with recent IPTV adopters finding the setup easy

Across the whole sample, over half were confident enough with technology that they didn't, or wouldn't, face any difficulties setting up IPTV by themselves. Most of those who had recently connected to IPTV found the setup and use of IPTV a smooth process.

"That was really easy actually, it was literally plug in and play. You plug it [the Firestick] into the TV and then it sort of tells you what to do, finds the Internet and you just put in the password."

Tilly, 45, South East England, D/E, Hybrid

"My wife put it [the TV] together, set it up following the instructions, I put in the Wi-Fi and within five minutes it was all up and running."

Brynn, 81, Wales, C1, Hybrid

"It's very easy to use. It's about three presses of a button and you're where you need to be."

Richard, 59, North England, C2, Hybrid

Among the DTT only users, most had enough technical ability and confidence that they felt they would be able to set up and use IPTV.

"I'd feel really quite confident... I'd definitely have a go... I mean, what's it called, plug and go? That in itself couldn't be more descriptive if you try."

Martha, 62, London, A/B, DTT only

“Yeah, I’m alright [with technology]. I can use it. I use pretty much everything... It’s not a problem for me.”
Arjun, 53, South East England, A/B, DTT only

“I’d pick it up straight away probably... Well, to me, every time you get a new TV, it’s all straightforward. It virtually does it for you now, technology. Just switch it on, it’ll say do you want initial setup, go onto the next stage, automatic tuning, bang bang away you go.”

George, 73, South East England, D/E, DTT only

However, confidence in using and setting up technology was low among some participants

Across the sample, several participants expressed a lack of confidence in using technology and digital devices, particularly those perceived as new or complicated. This lack of confidence was evident in different ways.

Some found adapting to new technology independently stressful and something they preferred to avoid. A key barrier to regular engagement with technology was a fear that something might go wrong, which led some participants to limit their use of digital devices or avoid them altogether.

“I’m not really that confident [with technology] I get a little bit overwhelmed if I need to do something.”

Margaret, 58, North England, D/E, DTT only

“I’m not enthusiastic about doing it myself. I would try to get other people to, if not help, be there.”

Minah, 56, London, A/B, Hybrid

“I would worry that I’d do something wrong and [a new device] wouldn’t be set up properly.”

Lola, 73, North England, C1, DTT only

Some participants were comfortable with basic digital activities, such as sending messages or browsing the Internet, yet lacked confidence in using newer or less familiar functions. For example, Julie, 65, was confident using her smartphone to message friends and family, but said she avoids having to use or set up new technology. She said she would usually just “pass it on to someone else”.

“Technology... I’m not a fan”

Julie, 65, South West England, D/E, Hybrid

Similarly, Janette used her iPhone for texting, calling people and for looking things up on the Internet, but didn’t feel confident in setting the phone up herself.

“I went straight back to Vodafone and the guy [set the phone up] for me... I don’t try to do it myself. I haven’t got the patience.”

Janette, 75, South East England, D/E, DTT only

A lack of confidence in technology was particularly common among those still using DTT. These participants were typically over 55, but there were also younger individuals, like Sumaya and Gelli, who shared similar concerns.

“I think [technology] is just moving on so fast ... it’s like you have to be constantly on it because things are just evolving constantly ... generally I don’t like [setting up new devices] ... Even when I got my Apple phone, I’ll be in the store and I’ll say, ‘oh can you help me? And they set it all up ... I find it a bit daunting.”

Gelli, 40, North England, C2, DTT only

“[Technology] is the one part of my life that I haven’t got up to date with ... I’m waiting to be assessed for ADHD ... when it comes to setting something up technology wise, I find it quite overwhelming, and I get quite stressed. ... So I tend to avoid it. ... I know with my phone and my past phones I have never used them to their full potential.”

Sumaya, 34, Scotland, C2, Hybrid

Despite low confidence, some had managed to upskill for new technologies and devices previously seen as confusing

Low confidence in technology did not always prevent its use. Some participants had developed workarounds to navigate digital tasks, while others felt they could overcome their difficulties if the need arose. Aileen felt

out of touch with technology, but was pleasantly surprised when she got a new iPhone and found that the setup was easier than she had expected.

“[Her iPhone] was the newest one... when I uploaded the apps, I was quite surprised by how easy it was.”

Aileen, 48, London, D/E, DTT only

Ivana, 70, had delayed downloading an app to keep track of her pensions because she was worried about not doing it correctly, however she was surprised at how straightforward she found it.

“I think I’m better [with technology] than I give myself credit for... Yesterday I just downloaded [the app], and got on top of everything without problems. So I’m not as bad as I thought I was – I just procrastinate because I think, oh God, the fear of failure.”

Ivana, 70, London, C2, DTT only

Low digital skills led some participants to rely on others for technology support

Many who lacked confidence in using new technology depended on support to set up devices. They often turned to family, friends, or neighbours for help, but also sought assistance from company staff responsible for the technology.

For some participants, they relied on help because it was more convenient and easier than trying to figure things out for themselves.

“I can do the basics but if it’s something more complicated I like asking the younger generation, like my son or my daughter, to deal with it... It’s their job to set up the TV.”

Maria, 47, Scotland, D/E, Hybrid

“If anything goes wrong [with technology]...I’ll get one of the kids to come round and sort it out for me... I don’t regard myself as particularly thick, but I think things have got too difficult for people these days. You know, this technology is running away with us all.”

Jim, 74, West Midlands, A/B, DTT only

Some participants relied heavily on support to use technology and would struggle without it. Setting up a new TV or distribution system felt overwhelming and unmanageable without assistance.

“When Stuart came and set it up for me when I bought it, he took me through all of it and I’d say ‘Hang on a sec, would you show me that again?’ And then he showed me again, but the trouble is my brain doesn’t take in trick-nology, that’s what I call it [technology] because to me it’s a trick.”

Nelly, 88, South East England, D/E, DTT only

“I’m not stupid, but I just can’t work the technology. And also it worries me and then I get stressed and start panicking. That’s why with renting the television, each time they change it, I make them send somebody round who can explain to me what to do... Technology I can’t do.”

Audrey, 81, South East England, C2, DTT only

“I’ll have to have my girls sit here and we go through [a new TV] together. No way can I do that by myself. No way.”

Britney, 46, London, D/E, DTT only

Josie struggled to set up and use DTT

Josie, 65, North England, D/E, DTT only

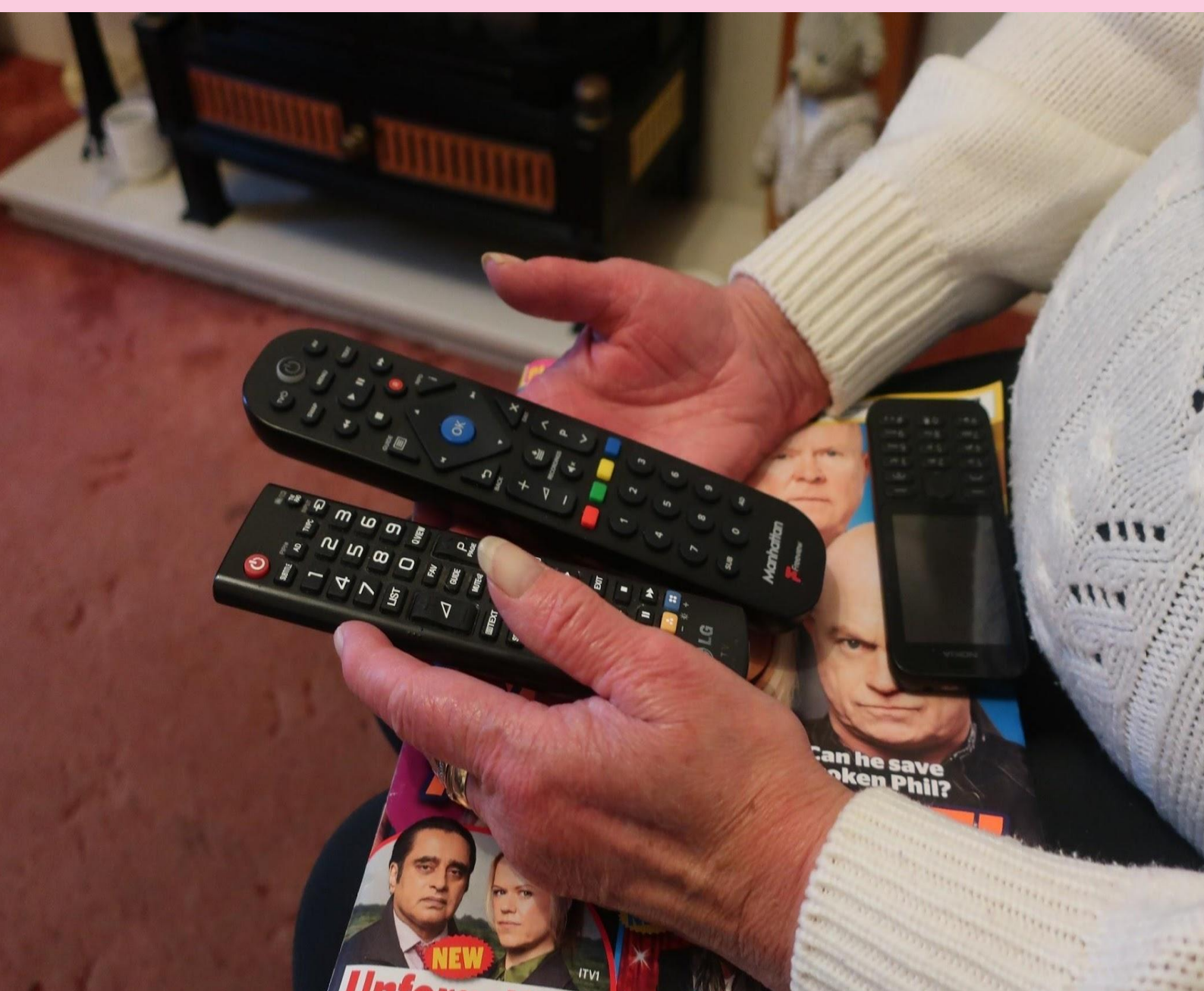
Josie currently lives alone in Doncaster, and spends a lot of time at home since being on sick leave from work four months ago. She has faced several challenges adapting to technology since the passing of her husband in 2021.

With a shift in her financial situation after her husband's passing, she decided to cancel her Virgin package and rely solely on DTT. However, setting up the new system proved difficult, as she was unfamiliar with the process.

To get started, Josie turned to her neighbour for help. While he assisted her in setting up DTT, she carefully wrote down instructions on how to change the channel and navigate the system. Despite these notes, she still finds it confusing at times and often makes mistakes.

“He had to [set up the TV] because I couldn’t do it. Well, I tried, but each time I was doing whatever, nothing happened. So that’s me, I’m afraid. Not very good with technology.”

One recent incident highlights the difficulties she faces. After pressing a button on her remote, Josie found herself stuck on an unfamiliar screen and was unable to return to live TV. Frustrated and unsure of how to resolve the issue, she eventually sought help from her neighbour's son, who managed to fix the problem within seconds.



A small number of participants were reluctant to get help with technology

A few participants struggled with technology but did not receive help. Some were reluctant to ask, fearing they might inconvenience others, while others were unsure who to turn to or whether anyone had the necessary skills to assist them.

"My neighbours, they would help.... But I don't like using people's time because I know how precious our off-work time was and I respect the fact that when they have time to themselves, they want to be by themselves."

Nelly, 88, South East England, D/E, DTT only

"I mean I could ask my daughter but she hasn't got time and it's whether she would even know anyways."

Lola, 73, North England, CI, DTT only

While most participants' concerns about technology centred on their own abilities, one participant was hesitant to switch to IPTV due to concerns about supporting another household member through the transition.

Connor lives with his mum, and his main concern with switching to IPTV is having to support her in learning to use a new setup.

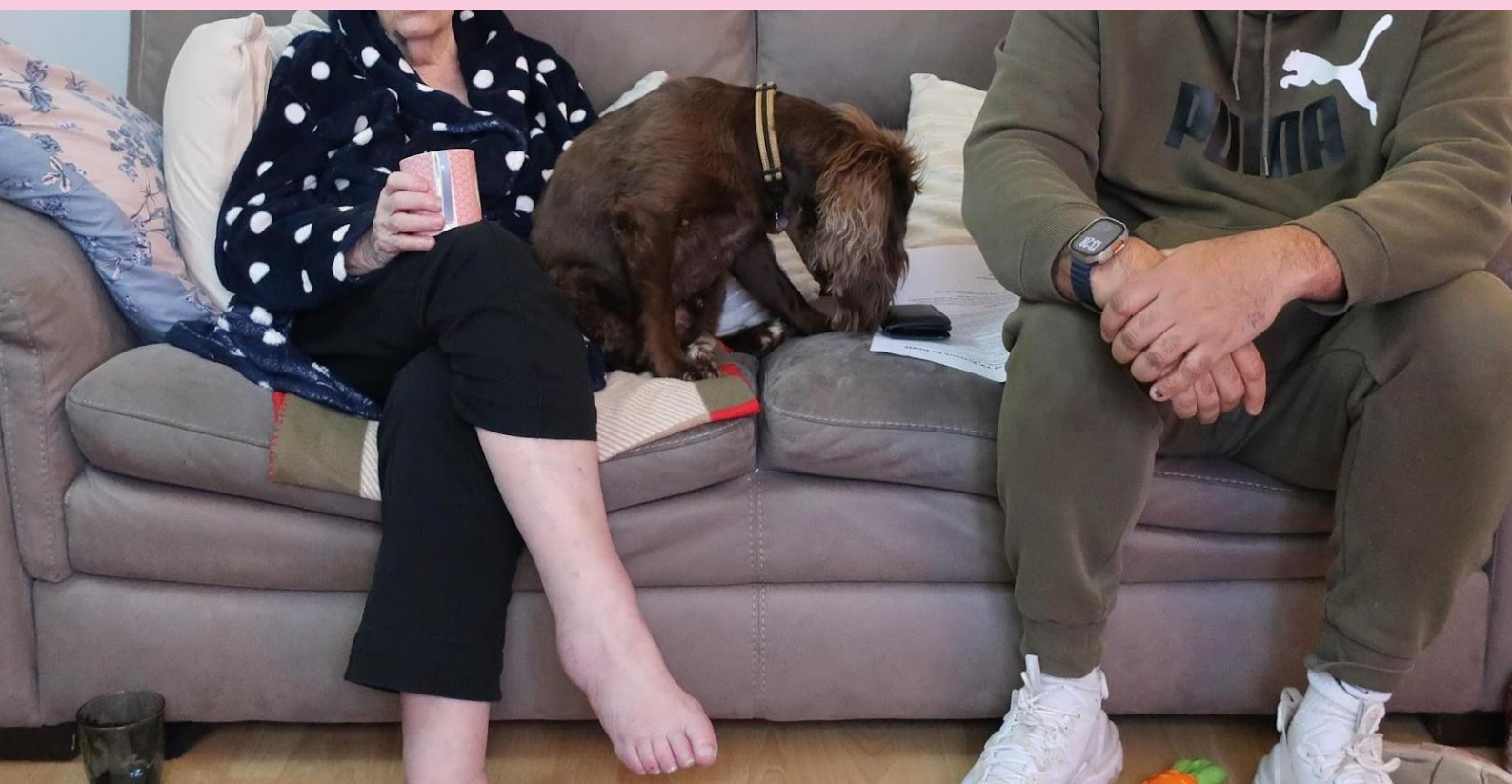
Connor, 45, London, CI, DTT only

"My Mum's only got a basic mobile phone so no internet, so to try to like get her to then suddenly start using loads of different channels and apps, it would be a nightmare... I don't want phone calls at work that the TV's not working."

Connor is very confident with technology. He has a smartphone, a ring doorbell and uses computers every day for work. His mum, however, is not. She is in her 80s and is happy with what she knows now: *"I think I'm too old to start to change now."*

For Connor, IPTV was not an option he wanted to consider not because of the technical setup itself, but because he knew it would require him to teach his mum how to use it, which he thought would be a "nightmare".

He was conscious of the effort and patience it would take to upskill his mum, and didn't want to be interrupted at work with phone calls from her asking how to use the TV.



Financial situation

Financial considerations influenced decision-making around IPTV for some participants, but the extent varied. For some, cost was a perceived barrier - they assumed IPTV would be too expensive and dismissed it as an option without exploring it further. For others, finances were an actual constraint, making it difficult to afford IPTV and the associated ongoing costs.

Some were hesitant because they assumed IPTV would be too expensive

Some participants were reluctant to consider IPTV as an option because they believed it would be too costly. Without looking into specific pricing, they assumed it required high upfront costs, such as needing a new TV or additional devices, or came with unavoidable video-on-demand platform subscription fees. This perception was particularly common among those who had little awareness of the range of IPTV options available.

For a few, their concerns were based on partial information. They had looked into switching to IPTV but had only considered one option - such as a provider package from Virgin - without realising there were lower-cost alternatives available. These participants were unaware that options like a streaming device (e.g. a Firestick) or other one-off purchases could provide IPTV access without the need for an expensive subscription.

"The price? That would be expensive...it'll have to be thousands."

Britney, 46, London, D/E, DTT only

"I think it's a little bit on the expensive side, the internet-based one...but it just depends on if you've got the money...if you've got the money to afford to pay that, if it's a monthly subscription. I want to know yearly; would I be able to afford that?"

Aileen, 48, London, D/E, DTT only

"I've not looked into it [the cost of IPTV]...probably £60-70 per month."

Lekshmy, 43, West Midlands, D/E, DTT only

Gelli had overestimated the cost of IPTV based on partial research

Gelli, 40, North England, C2, DTT only

Gelli is a single mother living with her eight-year-old daughter. She is British Bengali and wants her daughter to stay connected to their cultural heritage. She ensures her daughter attends Arabic lessons and is also trying to teach her Bengali. She has considered subscribing to Sky to access Bengali channels that some of her friends and family watch but has been waiting for a good deal. She has also thought about getting a smart TV, as she currently watches some of these channels on her phone, but from her brief research thought the costs would be "easily a thousand or more". Although she has heard of streaming devices like the Firestick, she has never looked into the details of their cost or what they could offer her and her daughter.

"Firesticks ... where do you get them? ... is it like a licence you get for 1 or 2 years or how does it work? ... I don't know much about them and I think I've never bothered to find out more."



Many were surprised by how affordable IPTV options actually were

For many of these participants, learning more about IPTV options during the interview changed their perceptions of affordability. Those who had assumed IPTV would be expensive were often surprised to find that there were low-cost ways to access it. In particular, participants were unaware that they could use a streaming device for a one-off payment, that a new TV wasn't always necessary, and that IPTV could be accessed without committing to an ongoing subscription package.

"I didn't realise you could buy the Firestick for so much less and then that's it, off you go!"

Gelli, 40, North England, C2, DTT only

"If it's a one-off price, then, you know, it's up to me whether I'd get any additional packages on top. But it would give me a bit more variability [in the TV that I could watch]."

Robert, 66, London, C1, DTT only

This was also the case for a few participants who had already connected to IPTV, with low awareness of alternative IPTV options.

"What does surprise me is that I could get a smart TV for £150. I already assumed that they were probably, I don't know, £600 plus. So I think, next time [I buy a TV]...I could afford that."

Annie, 60, South West England, C1, Hybrid

"I didn't know the Firestick would do that particular job. Because someone else had the Apple box and was singing its praises, we didn't consider [the Firestick]. If we knew about it, we would've done."

Peter, 71, South West England, A/B, IPTV only

Despite affordability, some were still reluctant to pay to switch to IPTV

Even after learning that IPTV could be accessed affordably, some participants remained hesitant to make the change. While cost was no longer a perceived barrier, they still questioned whether it was worth spending money on a new setup. Their reluctance was driven by two key factors - either they felt no need to upgrade while their current TV setup was still working, or they were unwilling to pay for internet connection solely for TV access.

For a few, their existing DTT setup provided everything they needed, making the cost of moving to IPTV feel unnecessary. They saw no reason to invest in new devices or packages if their current system continued to work well.

"There's no point having a smart TV if you're not gonna make use of it...is it worthwhile for me to even spend so much money?"

Aileen, 48, London, D/E, DTT only

"My aunt gave this to me 14 years ago and I've never changed it. There are certain things that I don't feel comfortable spending money on, and one of them is technology. I don't feel like it's worth its weight in terms of how much time I spend [watching TV]."

Lara, 32, London, C1, DTT only

"I just think for me, it's a bit of an extravagance. I can't really justify it."

Robert, 66, London, C1, DTT only

Others were put off by the need for an internet connection to access IPTV. While they could afford to pay for a broadband subscription, they did not see enough value in doing so just for television. They were content without home internet or relied on mobile data, making a broadband subscription feel like an unnecessary expense.

"I'm already using my savings to live and enjoy myself up to a point, but eventually I'm going to run out of money. So it's just one more drain on my resources."

Audrey, 81, South East England, C2, DTT only

"For me, it's how much it would cost, whether it's worthwhile for me and in my budget."

Aileen, 48, London, D/E, DTT only

However, a small proportion of the sample couldn't afford IPTV

For some participants, financial constraints meant that IPTV was not a viable option. Unlike those who were reluctant to spend money on a service they did not feel they needed, this group could not afford the upfront or ongoing costs required to adopt IPTV.

This was particularly true for participants with low or precarious incomes, who were concerned not just about the initial cost of getting IPTV but also about the ongoing expense of maintaining an internet connection.

Dolly previously connected to IPTV but was unable to keep up with payments

Dolly, 49, London, D/E, DTT only

“We [cancelled the broadband package] because of money and my Mum was worried about managing it whilst I was in hospital... she just preferred to go back to digital TV and landline.”

Dolly lives with her mum in a council flat. Neither of them work, and they rely on her mum's state pension and ESA as their main sources of income. Financially, they struggle to cover essential costs, making additional expenses like broadband difficult to maintain.

At one point, Dolly decided to get home internet after being gifted a smart TV. However, after six months, they found the monthly costs too difficult to manage, alongside her mum struggling to use it. To ease financial pressure, they cancelled the internet subscription and sold the smart TV. Now, they rely on DTT only.

Although Dolly would like to have IPTV again, she is unsure whether it is a realistic option. She worries not only about the upfront cost of a new smart TV but also about whether they could afford to sustain the ongoing cost of internet access. Their current TV, which they use for DTT, is very old and cannot be adapted for IPTV with a streaming device, limiting their options.



Of the participants who assumed they could not afford to connect to the Internet, none appeared to be aware of low cost or subsidised options they might be entitled to.

Sally did not think she would be able connect to a broadband network due to her poor credit score

Sally, 42, North England, D/E, DTT only

Sally lives alone in a council flat and has faced financial difficulties, exacerbated by previously being homeless. Sally wants to move to IPTV, but has not been able to because she has no internet connection at home.

“We’re the only council tenants that haven’t got Wi-Fi, every other block of high rise flats have Wi-Fi fitted.”

Right now, her workaround is paying her neighbour £10 a month to use his Wi-Fi. But the connection is weak and only works in the corridor between their flats. If she wants to watch something online, she has to stand outside.

She said that she has tried to connect to broadband providers, but each time has been rejected, which she believes is due to her poor credit score.

“For me, to try and even get broadband Wi-Fi in my property is difficult because my credit rating is so [rubbish].”

She has been trying to find a provider that will accept her and she assumes her credit score is an unfixable barrier - she was unaware that some broadband providers don’t require credit checks.



What prompted participants to connect to IPTV?

Some IPTV and hybrid users encountered barriers when connecting to IPTV, but specific circumstances helped them overcome these challenges. As discussed in the attitudes and awareness section, some participants were already open to IPTV but lacked motivation or a reason to switch.

For others, external factors provided a push – whether practical support from others, changes in internet access, or life events that prompted an upgrade. Some were also motivated by the desire to access a wider range of channels or to watch TV on demand, which they saw as a key benefit of IPTV.

Support from others helped those with lower technical confidence

Some IPTV users who lacked confidence with technology were able to connect with help from friends, family, or professional support. This support helped participants overcome technical barriers, whether by setting up devices for them or guiding them through the process.

“One of my nephews came over and he set it all up for me.”

Alisha, 40, North England, C2, Hybrid

“[Switching] was ok, my son-in-law helped us set it up, and I think we’ve had more pleasure out of [the TV] because we’ve been able to access things a bit easier.”

Wendy, 64, North England, C2, Hybrid

Angela’s children enabled her to connect to IPTV

Angela, 61, London, C1, Hybrid

Angela initially described herself as not being very tech-savvy and hadn't considered changing her TV setup until her son suggested getting a TV with streaming options. He took her to Argos, where they chose one together, and he set it up and connected it to the Wi-Fi.

“My son took me around Argos and we had a look online ... and he said you know, have you thought about getting Netflix?”

Since then, her daughter has helped her a few times to set up apps like BBC iPlayer. While she still primarily uses Freeview, she occasionally watches iPlayer to catch up on missed shows, a feature she's come to appreciate.

“I use iPlayer and I use ITVX ... [my daughter] set it up for me.”

At first, Angela was convinced she wouldn't be able to understand IPTV options and felt unsure about using them. However, by the end of the interview, she reflected that she'd likely be okay switching to an entirely online TV setup. She acknowledged her knowledge gap with technology but was open to learning more, confident that her children would be there to support her. Having already adjusted to the new features with their help, she was more optimistic about fully switching to IPTV.



A few participants expected to seek professional support when connecting to IPTV. Some assumed installation assistance would be included when purchasing an IPTV device or package, while others expected to arrange and pay for setup separately.

"I mean I would presume if I was buying the smart TV then there'd be technical support. So there's a process you go through over the phone or a process on the Internet. Then if you can't do it, then help will come out."

Samuel, 56, West Midlands, A/B, DTT only

"They would have to come in and do it for me. I've got absolutely no idea. And it's no good them doing it over the phone... I would need somebody to come in and set it up for me completely."

Audrey, 81, South East England, C2, DTT only

Improved internet reliability enabled some to switch to IPTV

For some participants, switching broadband providers or upgrading their setup encouraged them to explore IPTV, while some hybrid users found that it allowed them to rely more on IPTV for their viewing needs.

"So I was looking at hot deals UK and on there they had a sim with 5G or 4G and then you can use it to power your whole house."

Kalib, 46, North England, C2, IPTV only

"We actually used to use our neighbour's Wi-Fi but as time went on we really needed to have our own... And then I got this email from Three for a really good deal with Wi-Fi. It said you could pay £20-23 a month but for the first 6 months you get it half price and then we got a free 32-inch smart TV with it as well."

Becky, 29, North England, C2, Hybrid

"We definitely have had problems with [the Wi-Fi being unreliable], but I have a SIM router if necessary. It's not a great signal here...but it's definitely more stable now than it was."

Harold, 74, South East England, C1, Hybrid

Felix previously lived in a student house with seven people, where the internet connection struggled under heavy usage, leading him to believe IPTV would not have worked reliably. After moving to a smaller flat with only two other people, he found the connection more stable and was able to switch to IPTV without issues.

"I live with two other people now, I used to live with like six other people and we were all trying to use the Internet. [The internet connection] was bad then, [but] now I guess relative to that, no complaints about the connection."

Felix, 26, London, C1, Hybrid

Financial changes made IPTV more accessible for several participants

A small number of participants upgraded to IPTV after experiencing financial changes, such as securing a new job or salary increase.

"We were like, okay, we now can afford a few things. So we were just like, we might as well get like a smart TV... I was getting really bored of having to, like, connect my laptop to the TV all the time."

Felix, 26, London, C1, Hybrid

After his divorce, Paul moved into a new flat and initially wanted to get a smart TV. However, due to financial pressures he delayed the purchase and only connected to IPTV a few months later, once his expenses had stabilised.

"[DTT was] restrictive. Because it was only basically Freeview...but I had a lot of expenses at the time, so I was just putting up with it...I wanted to get a better TV and change my internet to BT as well. So I thought I'd do it all in one and get BT Sport and everything."

Paul, 64, London, C1, Hybrid

Other external factors prompted participants to move to IPTV

Desire for more channels and on-demand access

Some participants said their main reason for adopting IPTV was to access a wider range of content, including additional channels and on-demand services. In many cases, this decision was influenced by recommendations

from friends, family, or advertising. Several had already been watching on-demand content on their phones or tablets and wanted a more convenient way to access it on a larger screen.

“Until I got my TV ... the tablet was the only method I had for watching Netflix ... it was something that I'd been thinking about for a couple of months.”

Richard, 59, North England, C2, Hybrid

“Just knowing that you could watch a whole series ... you don't need to buy all the DVDs, you don't need a box set. You can just watch it as it's coming out ... you can stream it.”

Viv, 39, Scotland, D/E, IPTV only

“[The Firestick] gives us access to YouTube and Netflix, and there are obviously other options ... now if we want to watch something, we don't have to watch it on our mobile.”

Arshnoor, 43, North England, C1, IPTV only

While some participants actively sought out IPTV, others only made the switch when a specific event or life change prompted them to reconsider their TV setup. These individuals had not necessarily planned to connect, but external factors - such as moving home, receiving a new device as a gift, or a TV breaking - provided a natural opportunity for participants to upgrade their setup or explore IPTV for the first time.

Moving into a new home

For some, moving home created an opportunity to change their TV setup. In some cases, this transition was linked to financial or technical changes, such as improved broadband access or a change in household income. However, for many, it was simply a practical time to upgrade, as they were already purchasing new items for their home.

“I knew I wanted to buy a house and when I buy a house I'll need to get a telly. I thought I might as well wait until I get the house to be able to make sure it's the right TV for the house.”

Carson, 29, Wales, C1, IPTV only

“The time that we got this television was around the time I moved in...we decided that I'd be able to make use of it far more than the old television.”

Martin, 55, West Midlands, C1, Hybrid

“We had a TV in the old house which was really tiny and in the kitchen.... [Getting a new TV] wasn't the main part of moving but it was definitely a bonus.”

Katie, 30, London, C1, IPTV only

“I knew I wanted to move and I didn't want to spend 300 quid on [a TV] and think right next year I'm going to buy a house and the TV's not suitable for whatever reason, I'm gonna just have to buy another one.”

Carson, 29, Wales, C1, IPTV only

Being gifted a new device

A few participants were introduced to IPTV after being gifted a smart TV or streaming device by family or friends – in some cases due to family and friends being surprised they were still only using DTT.

“His sister got us a Firestick; she came from Australia [to stay] and she'd bought the Firestick because their family is much more gadget-y and up to date with it all.”

Julie, 65, South West England, D/E, Hybrid

“A family member got [a Firestick] for me because she couldn't believe I didn't have Sky or something.”

Annie, 60, South West England, C1, Hybrid

Connecting for children

A number of parents decided to connect to IPTV primarily for their children, as they felt DTT did not offer enough choice and wanted access to more services such as YouTube.

“I don't really know how important it is. I think it's more important to the kids than it is [to] myself... They're of an age now where they're going to school, and all their friends have got all of these things [technology].”

Tilly, 45, South East England, D/E, Hybrid

“We didn’t have a smart TV before and it was a thing that, like, obviously everyone around us was like, you know, watching YouTube videos on TV... And then the kids were like, why don’t we have a smart TV?”

Maria, 47, Scotland, D/E, Hybrid

TV setups breaking

For some participants, TV setups breaking or becoming outdated pushed them to adopt IPTV. In some cases, participants were experiencing issues with their TV or aerial signal, so IPTV was considered the most practical replacement.

“So my old TV died – wouldn’t turn on again so I had to get a new one.”

Sophie, 46, London, A/B, IPTV only

“After Covid, my TV broke and I thought, you know, that this is an opportunity to get out and about and then I started watching Netflix on my phone as well.”

Arshnoor, 43, North England, C1, IPTV only

Many participants who were prompted to buy a new TV explained that IPTV was often the default option, as most new TVs available were smart TVs or came with built-in IPTV functionality.

“My TV just went bad. I didn’t specifically want a different TV but things have moved on since the old fashioned types of TV, and I guess it was a chance to upgrade.”

Alisha, 40, North England, C2, Hybrid

“The old one started glitching and within the price range and the size of the TV it just came with it, I don’t think there was a bog-standard TV unless it was a very small one.”

Sumaya, 34, Scotland, C2, Hybrid

A few participants had previously used IPTV but returned to DTT

A small number of participants had previously used IPTV but had since gone back to using DTT either due to financial reasons or because their IPTV set up was no longer working.

Most made the switch back to DTT for financial reasons. Some, like Luis, made a conscious decision to reduce household spending by cancelling their broadband service:

“I don’t have Wi-Fi ... originally, we had internet here, but because I was back and forth so many times, I decided to cut down my bills. So that was one of the areas, the Internet.”

Luis, 34, North England, A/B, DTT only

For others, like Dolly, the decision was less about budgeting and more about necessity. She explained that she could no longer afford the cost of broadband and also sold her smart TV to help manage her finances:

“Last year we had to stop having the Internet ... because we couldn’t really afford it.”

Dolly, 49, London, DE, DTT only

A few participants had previously used IPTV but stopped when their devices stopped working. They didn’t feel the need to repair or replace the equipment and were comfortable returning to DTT. Some, like Lisa, had alternative devices they could use for streaming if needed:

“I connected it at one point [but] it’s in a little alcove and the signal just doesn’t get there. ... Because I’ve got other streaming devices I can use, it doesn’t really worry me whether I’ve got [IPTV] or not ... I would be able to watch the same stuff.”

Lisa, 49, South East England, D/E, DTT only

“The Internet stopped working, I couldn’t get YouTube and internet categories on my TV ... but I don’t see much difference really ... I quite like live TV actually.”

Ivana, 70, London, C2, DTT only

Impact of a hypothetical DTT switch-off

Towards the end of the interview, participants were asked how they would feel if DTT were switched off. This helped to understand their initial reactions and how such a change might affect them.

Responses varied. Many were unconcerned, either because they had already considered moving to IPTV or felt confident they could adapt if they needed to. A few had reservations - some of those were wary about relying entirely on the Internet for TV, while others disliked the idea of DTT being discontinued for broader reasons. A few participants felt that, due to financial, technical, or infrastructural barriers, they would struggle if DTT were no longer available.

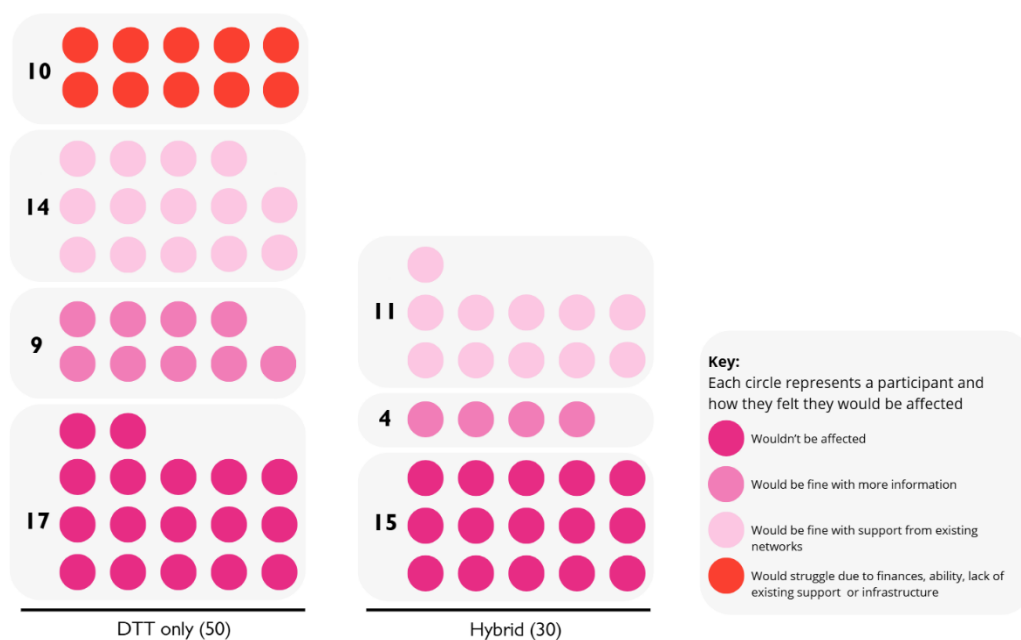


Diagram: Participants' reflections on the impact of a hypothetical DTT switch-off. Note: This is a qualitative diagram. The numbers included are used to give a sense of the relative scale of views within the sample and should not be interpreted as representative or used to extrapolate to the wider population.

Many DTT users were unconcerned about a potential DTT switch-off and believed they could adapt

For many DTT users, the idea of DTT hypothetically being switched off was not a cause for concern. Some had already considered moving to IPTV, while others felt confident they could adapt if needed. In most cases, the main reason they had not yet moved to IPTV was simply that it had not been a priority, which they felt would change if DTT were switched off.

"I just haven't got round to it [switching to IPTV]. But I think most people, especially my age, if the aerial just stopped working, then they just get the next easiest thing."

Harry, 29, West Midlands, C1, DTT only

"We're not in a desperate rush. There's other priorities. But if I had no TV at all, that would obviously become a number one priority because everyone needs a TV."

Letitia, 27, North England, C2, DTT only

"If it stops working then I will have to transition. I'm reasonably intelligent, I'll work it out."

Jemima, 61, South East England, A/B, DTT only

“Well, then [if DTT switched off] it would exacerbate the decision to deal with the options... I would probably then go down the option of Wi-Fi connection or a satellite dish.”

Martha, 62, London, A/B, DTT only

“I’m just a creature of habit and never really gone and done it or felt the need to do it. But certainly if there were changes I would do it because I had to do it. And actually, I have already been thinking about whether to do it. As I said, my sisters and friends are always harping on about things.”

Nina, 60, South East England, A/B, DTT only

A few had concerns about the idea of DTT switching off but still felt they would be able to connect to IPTV

While many participants were unconcerned about a hypothetical DTT switch-off, a few had reservations. These concerns were not about their ability to move to IPTV, but rather about what losing DTT might mean in practice. Their concerns fell into two key areas - reliance on the Internet and broader resistance to the idea of a DTT switch-off.

Concerns about reliance on the Internet

Some of these participants were hesitant about moving entirely to an internet-based TV setup. For a few, this was due to experiences with “patchy Wi-Fi”, which made them nervous about depending solely on IPTV. However, many of these participants had not explored ways to improve their internet connection, such as using an ethernet cable, switching providers, or installing a booster.

“With [the Wi-Fi] it’s intermittent. I’m gonna say at least every other day it slows, every other day.”

Joy, 44, London, C2, DTT only

“[The Wi-Fi] is rubbish, just the connection is rubbish. It’s all of this area.”

Julie, 65, South West England, D/E, Hybrid

Others had stable internet connection but were still uneasy about relying on it completely. These participants were not worried about the immediate adoption of IPTV but disliked the idea of losing DTT as a backup in case something went wrong.

“I am concerned about everything being dependent on my internet. I’m not a technophobe, but I don’t like this one-stop shop in life generally.”

Minah, 56, London, A/B, Hybrid

“I’m just a bit hesitant sometimes though; you know, say if the internet router goes down or there’s a blackout or something and then you know, you want to go back to aerial, if aerial don’t work, it’s like ‘oh no.’”

Kalib, 46, North England, C2, IPTV only

Broader resistance to the idea of hypothetical DTT switch-off

A few participants resisted the idea of a hypothetical DTT switch-off for broader societal reasons. Some of these felt that free-to-air TV should always be available and did not like the idea that they would have to move to IPTV, even if this included the free options that were available. It was also clear that some participants were conflating “free TV” with “free DTT” – assuming that if DTT were switched off, all TV would require payment.

“Why should we pay to watch TV? That’s just somebody making money for their own pocket... I just think that’s horrible!”

Britney, 46, London, D/E, DTT only

“This is why I get really peeved about having to pay the TV licence as well, because if you pay your licence, internet connection, all the channels and apps you have to download. It’s just that added cost I don’t agree with because of all the other costs just to watch TV.”

Maureen, 58, North England, D/E, Hybrid

Others linked their concerns to a wider resistance to the increasing reliance on digital services. They felt that technological change was happening too quickly, requiring people to upgrade devices or sign up for new services at a pace they could not keep up with.

“I don’t need any gadgets at all... I still think that the more fancy stuff you’ve got, the more things that can go wrong... I hate changing stuff.”

Audrey, 81, Southeast England, C2, DTT only

A small number of participants, although technically able to switch, said they would choose not to adopt IPTV even if DTT were switched off.

"I would probably do without TV. It's not so essential to my daily life as air, food and water that I would want to do something other. I mean, I might watch a few things on my computer every now and again, but I would probably just say 'ah, I've had enough'... I do not like being railroaded into doing something that I don't want to do."

Beatrice, 67, West Midlands, A/B, DTT only

"I've got everything on the tablet... [I would] do something else instead. Fill the gap with reading or going out more."

Ivana, 70, London, C2, DTT only

A few DTT users were not concerned about a hypothetical DTT switch-off once they had more information

In addition to the many DTT users who were already unconcerned, there were a few who initially felt unsure but became more comfortable with the idea of moving to IPTV once they had more information. Their early concerns were often based on misconceptions - such as assuming IPTV required expensive devices, complex setup, or ongoing subscription costs. After learning more during the interview, these participants felt reassured and more confident that they could adapt if needed.

"Freely? ... I'm writing that down now ... until you asked me to talk about it I hadn't considered not using [DTT], but obviously it wouldn't make any difference."

Maureen, 58, North England, D/E, Hybrid

The key pieces of information that changed these participants' minds were:

There are free or low-cost IPTV options available – Many believed switching would require a costly subscription or upfront costs, but learning about other services (e.g. Freely, low-cost streaming devices) reassured them.

Continued access to live TV – Some had assumed IPTV only provided on-demand content, but realising they could continue watching scheduled TV made the move to IPTV more appealing.

It is easy to set up – Some had imagined IPTV would be complicated to install or require significant technical knowledge, but understanding that it could be as simple as plugging in a device changed their perspective.

"Having looked at this now, I think it would be quite easy to get a subscription to one of these internet-based options."

Chloe, 49, South East England, CI, DTT only

"Well clearly there's much other options that I didn't know about, in terms of Freely, that sounds quite good."

Connor, 45, London, CI, DTT only

Some would be able to adopt IPTV with support from existing networks

For some, the main barrier to connecting to IPTV was not cost or willingness, but a lack of confidence in setting up and using IPTV independently. While they felt they might struggle with the technical aspects of making the transition, many of these participants believed they would be able to move to IPTV with help from others.

Participants frequently mentioned that they already relied on friends, family members, or others in their community for help with technology. Some said they would turn to these same people if they needed support in setting up IPTV.

"My son works in computers ... so I say 'can you come and help with xyz?' And then he's there."

Lola, 73, North England, CI, DTT only

"[IPTV] looks a bit complicated...setting up and going into it... But then again I could get help with that. And if you do get help, and once you look at something, then you tend to pick things up."

Lekshmy, 43, West Midlands, D/E, DTT only

For this group, the availability of informal support meant that, although they were not entirely confident in connecting to IPTV alone, they were not overly concerned about a hypothetical DTT switch-off. As long as they had someone to guide them through the setup process, they felt IPTV would be manageable.

However, the level of support required varied. Some only needed help getting started, while others expected to need ongoing assistance with navigating new features or troubleshooting issues.

“I'm frightened of pressing the wrong button and not knowing how to get back to square one. I know it sounds daft, but that's the way I feel.”

Nelly, 88, South East England, D/E, DTT only

“[When I got my Freeview box] I kept doing it wrong ... even sometimes now I can press the wrong thing.”

Josie, 65, North England, D/E, DTT only

A few DTT users would struggle if DTT were switched off due to financial, ability or technical infrastructure barriers

While most participants felt they would be fine if DTT were hypothetically switched off - either independently, with existing support networks, or after receiving the right information - a few reported that they would struggle. Their concerns were linked to three key barriers: financial constraints, technical ability, and issues with technical infrastructure.

Financial barriers

For a few, the cost of switching to IPTV - both the upfront expense of new equipment and the ongoing cost of broadband— was a significant barrier. Some of these participants could not afford to pay for broadband at all, while others were concerned about their ability to sustain the costs in the long term due to unstable financial situations.

Alan did not think he could afford to pay for broadband or the new devices required to set up IPTV

Alan, 56, North England, D/E, DTT only

Alan lives alone in a council flat, where he's been for 25 years since separating from his ex-partner. He previously worked in a warehouse but left due to health issues, including COPD, anxiety, and depression. He now receives £150 a week in employment and support allowance and isn't looking to return to work. He lives within his means but has no spare income or savings to spend beyond the essentials.

"I'm on ESA but I think they're going to change it and I'm dreading it ... I used to have Virgin Media years ago, I got rid of it because it was getting expensive, they kept putting the prices up."

Alan watches TV every evening and plans his days around his favourite shows. His children don't visit him very much anymore, and he doesn't have much of a support network. He is an aviation enthusiast so goes to watch planes sometimes, where he occasionally sees friends, but says that there is less of a community there than there used to be. For Alan, TV plays a key role in providing him comfort and company.

"[TV] comforts me ... It's like my best friend really. My kids always say to me, 'don't you get lonely living on your own?' But I say, 'no, I'm used to it now' ... I like to close myself in, put the TV on and just watch till I go to bed."

At one point, he had a Virgin cable package for when his children visited, as part of a broadband bundle. However, after they grew up, he cancelled it because prices kept rising and he could no longer afford it. Since then, he has relied on mobile data and hasn't considered getting home broadband again. The cost of IPTV – both setup and ongoing broadband – feels out of reach for him.



Technical ability barriers

A small number of participants felt they would be unable to set up or use IPTV due to their limited technical skills. For those who were more isolated, this was particularly challenging, as they did not have a support network to help them.

In a few cases, physical disabilities further compounded these difficulties, making it harder for participants to interact with technology or troubleshoot issues independently. However, some of these participants were willing to pay for help if needed.

Rosemary's visual impairment makes it difficult for her to set up and learn to use new devices

Rosemary, 82, London, D/E, DTT only

Rosemary relies on television as her main source of information, and in some ways companionship. Living alone and with a visual impairment caused by congenital cataracts and glaucoma, she has developed a strong set of habits around how she watches TV. She relies heavily on audio description, a feature that allows her to follow programmes by providing spoken narration of on-screen action and has memorised where each of the buttons are on the remote control.

“I know what I’m doing with my TV now, but I wouldn’t know where to start with a new one.”

Her late partner had always been the one to set up and manage their TV, ensuring the settings worked for her needs. Since his passing, Rosemary has continued using the same setup - TV with Freeview - because it is familiar and works well for her. While she occasionally faces issues, she has been able to manage with what she knows.

When discussing internet-based TV, Rosemary recognised that IPTV could offer her more options but was unsure about how it differed from her current Freeview setup. The idea of navigating new technology – particularly smart TV menus and streaming apps— concerned her.

Unlike some participants, Rosemary was financially able to pay for help if she needed it. However, she didn’t have a large social network and was reluctant to ask for assistance from friends. Instead, she felt she would need to hire someone to set up and show her how to use IPTV, which she was willing to do.

“I wouldn’t want to bother anyone. If I had to, I’d pay someone to set it up properly for me.”



Technical infrastructure barriers

No participants in the sample reported they were unable to connect to the Internet due to infrastructure issues, such as lack of broadband availability in their area. However, from those that did have internet connection, a small number were concerned about whether their internet connection would be stable enough for IPTV. Some had experienced unreliable broadband in the past and were worried that if DTT were switched off, they would lose access to TV entirely during outages.

However, these participants had not always explored options to improve their internet stability, such as switching providers, using ethernet cables, or installing Wi-Fi boosters. This suggests that while infrastructure concerns were real, they were often linked to a lack of awareness about potential solutions.

Julie did not feel confident that her internet connection would allow her to rely on IPTV

Julie, 65, South West England, D/E, Hybrid

Julie enjoys watching TV, particularly documentaries and films – currently using Freeview. Recently, she was gifted a Firestick, which she found straightforward to set up. While initially sceptical, she gave it a try over Christmas and found it useful for watching films, but she hasn't used it since.

“If the Internet went down, I can't watch television. Right now, I've got the option if the Internet goes down.”

Her biggest hesitation about switching to an IPTV setup is her unreliable internet connection. Since moving to a more rural location three years ago, she has been frustrated with poor signal quality, particularly when multiple people in her household are online. Despite these issues, she has not explored alternative broadband options or looked into ways to improve her connection, such as Wi-Fi boosters or using an ethernet cable.

When considering the possibility of DTT being switched off, Julie's main concern was having no backup if her internet went down. While she is open to IPTV, and already has a Firestick, she is not confident her connection would be stable enough to rely on it fully.



Those who experienced a combination of the barriers above faced the steepest challenge in connecting to IPTV.

Maggie experiences several barriers she would have to overcome in order to connect to IPTV

Maggie, 87, North England, C2

Maggie lives with her husband in a bungalow rented from a housing association. She has a relatively low income, mostly relying on her state pension and carer's allowance. The carer's allowance is for her husband, who is her full-time carer. Maggie has had mobility issues for the last 12 years, made worse by a series of failed knee and hip replacements, which limit her ability to leave the home. As a result, Maggie has become increasingly reliant on television for both entertainment and information.

“What is Wi-Fi? I don't even know what that means ... I've heard of it but I've never been aware of what it is.”

Maggie's awareness of technology is very limited. She doesn't fully understand what Wi-Fi means or what apps are. New technology takes her a while to get used to, and she finds it overwhelming. She doesn't have broadband at home and feels she can't afford the expense. Instead, she gets by with only a landline phone and relies on her TV and radio for news and entertainment.

Maggie found the idea of IPTV options intimidating. While she isn't opposed to learning about them, she feels that she would need significant support to understand and adjust to a new system on her own. A hypothetical switch-off of DTT would be challenging for Maggie, both financially and in terms of her lack of technical support at home. Although she has a son and two nieces who could help, they live far away, and Maggie feels they wouldn't be able to offer the ongoing support she would need to adopt IPTV.

“We've got a pension and if we're very careful, no technology, no modern stuff ... then we can manage alright.”



Conclusion

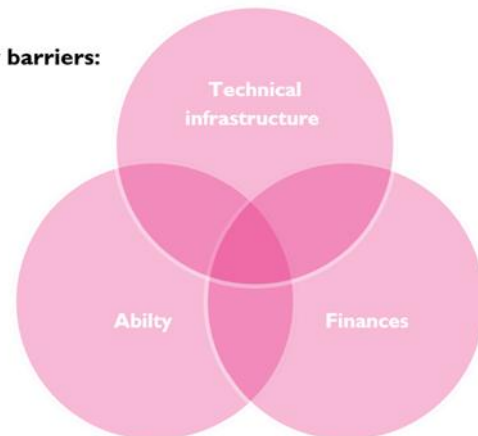
Summary

Most participants were unconcerned about a hypothetical DTT switch-off, or felt they would be able to manage after more information or with support from their existing networks. While some had initial reservations, these were often based on misconceptions - such as assuming IPTV required a paid subscription - rather than insurmountable barriers. Many were already open to IPTV but had lacked the motivation or need to make the switch.

However, for a few, the adoption of IPTV would be more challenging. The most significant barriers were technical ability, financial constraints, and technical infrastructure. These did not exist in isolation – some participants faced just one of these challenges, while others experienced a combination that made switching significantly harder.

Our findings suggest that the more these barriers overlap, the more difficult they are to overcome. For example, a participant with low digital confidence might still be able to move to IPTV if they could afford to pay for support. However, for those with both financial constraints and limited technical ability, particularly those without support networks, the adoption of IPTV would be far more difficult.

Key barriers:



Recommendations

While most participants would be able to adopt IPTV independently or with existing support, a small number may require targeted interventions to prevent exclusion. Addressing these challenges effectively will require a mix of clearer communication, practical support, and policy measures to ensure IPTV is accessible to all.

- **Improving understanding of IPTV** – Many participants misunderstood IPTV's cost, requirements, and ease of setup. Clearer communication is needed about free or low-cost IPTV options, how to access live TV, and simple ways to set up IPTV.
- **Ensuring access to support for those without informal help** – Some participants, particularly those who were more isolated or could not rely on family and friends, would need structured support to adopt IPTV. Practical, hands-on guidance should be available to help people not only set up IPTV, but also learn how to use it confidently over time. This could include in-person assistance, online information or tutorials, helplines, or community-based initiatives.
- **Tackling financial barriers** – Some participants assumed any IPTV option would be expensive or unaffordable, while others genuinely struggled with the ongoing costs required for IPTV. Increasing awareness of free IPTV services and existing financial support schemes, as well as exploring subsidised broadband options for low-income households, could help make IPTV more accessible.
- **Addressing concerns about internet reliability** – Some participants worried about losing TV access if their internet was unstable, often without exploring simple solutions. Greater awareness of alternative broadband providers, wired connections (such as ethernet cables), or Wi-Fi boosters could help alleviate these concerns.
- **Ensuring broadband access** – While improving national broadband infrastructure is already underway in some areas, ensuring affordable and reliable broadband coverage remains a key factor in supporting IPTV adoption.

Annex

Full sample breakdown

The sample specification was designed based on set quotas established at the start of the project. These quotas ensured a diverse representation of participants, with weighting applied to include characteristics that were more likely to be impacted by a hypothetical DTT switch-off. The sample included:

- 50 x DTT only users
- 30 x Hybrid users
- 20 x IPTV only users

See below for a full breakdown of the sample.

Note: The sample design, including age ranges and regional distribution, was informed by previous research on the future of TV distribution commissioned by DCMS and delivered by the University of Exeter.⁵

N=100		
Criteria		Number of participants in the sample
Location	North East/Yorkshire, North West, and Midlands	37
	London	28
	Rest of England	24
	Scotland	4
	Wales	6
	Northern Ireland	1
	Rural	14
	Suburban	38
	Urban	48
Age	18-34	19
	35-54	28
	55-64	26
	65+	27
Gender	Female	63
	Male	37
SEG (socioeconomic grade)	AB	24
	C1	31
	C2	16
	DE	29
Additional needs	Cognitive impairment or mental health condition	12
	Physical disability	29

⁵ Department for Culture, Media and Sport (2022). Future of TV distribution. Available at: <https://www.gov.uk/government/publications/future-of-tv-distribution>

Housing situation	Homeowners	57
	Private renters	21
	Social housing renters	21
	Supported living	1
Ethnicity	White	77
	Asian	15
	Black	8
Additional criteria	Participants who were previously IPTV users but moved back to DTT . <i>These sit within the 50 DTT only sample.</i>	10
	Participants who had moved home , which had impacted their decision making around adopting IPTV.	9