CONSUMER PANEL

Going digital: supporting consumers through digital switchover

A qualitative research study

Publication date: December 2007

Ofcom
OFFICE OF COMMUNICATIONS

The Ofcom Consumer Panel was established under the Communications Act 2003 as the independent research and policy advisory body on consumer interests in the communications market (with the exception of content issues).

Working from a firm evidence base, we advise Ofcom, the communications regulator, and others on how to achieve a communications marketplace in which all consumers can confidently choose and use products and services that suit their needs.

The Consumer Panel sets its own agenda but works constructively with the Ofcom Board. This enables us to give strategic advice on policies early on in their development – before they are consulted on – so as to build consumer interests into Ofcom's decision-making from the outset.

The Consumer Panel is made up of part-time members with a balance of expertise in consumer issues in the electronic communications sector. There are members representing the interests of consumers in Scotland, Wales, Northern Ireland and England.

Consumer Panel Members are appointed by Ofcom, subject to approval by the relevant Secretaries of State. They are appointed in accordance with Nolan principles and are eligible for re-appointment. The Consumer Panel is assisted by a small support team.

Contents

Section		Page
	Foreword	5
1	**Executive summary**	6
2	**Background and objectives**	10
3	**Methodology and sample**	12
4	**Experiences at the different stages of going digital**	14
	Knowledge and availability of digital television	14
	Affordability	19
	Buying the equipment	21
	Installing the equipment	24
	Using the equipment	28
5	**Help and assistance required**	32
6	**Conclusions**	40
7	**Ofcom Consumer Panel recommendations**	43
	Annex: Glossary	46

Foreword

From the outset, the Ofcom Consumer Panel has supported the principle of digital switchover, with the caveat that its full value will only be realised if the route to switchover is managed in such a way as to minimise the risk of detriment to vulnerable people. The Panel has strongly expressed its concerns that those who will be most challenged by digital switchover are those that are socially isolated. These are people who have difficulty in accessing information and support to deal with switchover, and, further, are without strong networks of support from friends, family, neighbours or carers and will be particularly vulnerable in making the transition to digital TV.

As we get closer to the first UK region to have its analogue signal switched off, the Consumer Panel has commissioned a study from Opinion Leader Research, to help us understand the experience of vulnerable consumers as they ‘go digital’. As a piece of qualitative research, the report goes into valuable depth, but it must be treated as indicative, rather than representative, of the barriers and problems that people face as they convert to digital television.

In the context of the June 2007 research by Ofcom’s Advisory Committee for Older and Disabled People (ACOD) and Digital UK, setting out the needs of those thinking of going digital, our research takes an important extra step in tracking the experiences of consumers as they actually undertake the process of converting to digital TV.

We sympathise with Digital UK’s warning that people converting late would run the risk of difficulties in getting the equipment they need and the support required, due to the heavy pressure of demand on schemes such as the Digital Switchover Help Scheme. It is therefore critical that those people who are already heeding the message to go digital are receiving the information and the support that they require. Unfortunately, our Going Digital research suggests that neither the information nor support is filtering down to those that need it most.

This research raises a number of practical issues which need to be addressed. These practical issues also need to be tackled in the planning already being undertaken for switchover in the Borders and Granada region, the first two full regions to switch. Our intention in publishing this research now is to make a practical contribution to the work that Digital UK and others are doing to remove the barriers that are preventing those in most need from receiving the support they require.

Colette Bowe
Chairman, Ofcom Consumer Panel
December 2007

Executive Summary

Experiences at the different stages of going digital

Knowledge and availability of digital

1. Understanding of Digital Switchover (DSO) - the different options available in going digital, equipment, installation and use - is very varied.

2. Across all the different types of consumers included in this study, two groups are evident – the 'technically confident' and the 'technically unsupported'. Being in these groups has a major impact on participants' ability to make informed decisions between the different types of digital TV available, as well as on the different products within each type.

3. The technically confident tend to have a much clearer sense of what DSO is and what the process of going digital entails for them. Equipped with information, or at least the knowledge of where to access it, the process of buying is more straightforward and less daunting.

4. Those who are technically unsupported and lacking in personal technological confidence are those who start the digital conversion process with low levels of understanding, no-one to ask for help with technical problems, and a lack of knowledge about where to go for information. For these participants, buying the equipment is therefore more difficult.

Affordability

5. Overall, participants do not expect going digital to be overly expensive. Expectations of the cost do, however, vary to some extent by participant type and by whether participants plan to get Freeview or pay TV.

6. Some participant groups, in particular participants over the age of 75 or with disabilities, find it harder to make cost-based decisions as they are likely to be less well-informed.

7. After going through the process of converting, only participants on low incomes with restricted digital options - either due to the geographical area

they live in or because of their personal technical ability - question whether going digital represents good value for money.

Buying the equipment

8. The ease with which different participants purchase their new digital equipment varies by: participant group; knowledge of the going digital process; knowledge of the different options available to them; and accessibility to the range of different digital options in their local area.

9. 'Mainstream' participants, residents of Multiple-dwelling units (MDU), low-income participants and participants aged 65-74 find buying an easy part of the process. They are more likely to make multiple trips to retailers before purchasing, and build a higher general level of knowledge about the different options available to them than other participant groups. They therefore feel more confident and able to make an informed decision.

10. Older participants (75+), those with disabilities, or those who are technically unsupported find the buying process quite daunting. This is because they generally have lower levels of knowledge of the different options available to them and this limits their confidence and their ability to make informed decisions in purchasing digital equipment.

Installing the equipment

11. Experiences of installing digital television varies by the type of digital TV option selected, given that Freeview must be set up at home by consumers themselves, while pay TV (i.e. Sky or Cable TV) is installed by engineers.

12. Participants' expectations of the experience of pay TV being installed are generally met - the experience is as hassle-free as anticipated.

13. In contrast, the experience of installing Freeview is more problematic for some participants.

14. Physical installation of Freeview (getting the set top box correctly plugged in) presents problems for participants who are over 75 or who have physical or cognitive impairments. Help with connecting the box is required in all cases, either because of mobility or dexterity issues, or because the instructions are difficult to understand. These participant groups are

therefore highly dependent on help and support when physically installing Freeview.

15. However, participants who anticipated that tuning and setting up their Freeview boxes would be difficult overall found it to be straightforward. Participants with impaired vision report specific personal problems at this stage, but had pre-emptively sought help in advance, being used to encountering such problems.

Using the equipment

16. In most cases the experience of using their new digital equipment exceeds participants' expectations. Initial worries about tuning and set-up are not realised and participants report that they enjoy having access to a wide range of channels. They also notice improvements in picture quality and quickly familiarise themselves with their new equipment, encountering few technological problems.

17. The exception to this is among over-75s and technically unsupported participants. Experiences for these participants are disappointing and their expectations are not met. This is for one or a combination of the following reasons:

- Because they are unable to access the range of channels they believed that they would be able to
- Because they struggle to familiarise themselves with their new equipment
- Because they experience ongoing technological problems they are unable to solve

Help and assistance required

18. Help and assistance in the form of independent advice and information at the front end of the going digital process is key.

19. There is a desire among all participants for more readily available and easy-to-understand information on Freeview options. Raising the profile of Freeview vis-à-vis pay TV is centrally important here.

20. Overall, most people would like to receive free assistance and advice rather than financial support to help them in going digital. These help needs are centred on provision of advice and information at the front end of the conversion process.

21. Older, disabled and multiply disadvantaged participants, however, have a need for specific targeted and face-to-face help with installation and use.

Key implications and conclusions

22. The research suggests that a priority is the provision of easily accessible help for all. Key to this is making the profile and availability of information on Freeview more equal to that of pay TV than it currently is. Participants suggest that in most cases a telephone helpline will meet this need.

23. Although a helpline would provide information for mainstream and some minority groups, older, disabled and technically unsupported participants also need to receive more specifically targeted information.

24. For example, for those with mobility or dexterity problems the provision of physical help is essential as they are unable to install equipment on their own. As well as help with moving equipment and plugging things in, these groups are also more likely to need a detailed, face-to-face explanation of how to use their new equipment properly. Furthermore, they are much more likely to require help *after* installation, in order to fix problems that might arise in future.

25. Participants felt that those who are currently receiving support to watch TV - either in the form of free licences to the over 75s or half price licences for those registered as visually impaired - should qualify for this extra assistance should it be required. It was felt that disabled people should also qualify, particularly those with mobility or dexterity impairments.

Background and objectives

26. In its 2004 report entitled *Supporting the most vulnerable consumers through digital switchover*[1], the Ofcom Consumer Panel made the case that social isolation is a key factor in an individual's ability to convert to digital, and that this had been underplayed in the preparations for switchover to date. Key factors identified by the report relating to social isolation were disability, age and lower levels of English literacy.

27. The Consumer Panel report identified potential for barriers to arise at each stage of going digital. These barriers can be summarized as:

    1. Information: "I don't know about it", "I can't understand it"
    2. Buying the equipment and installing it: "I can't do this by myself"
    3. Use: "I can't use this equipment"
    4. Access: "I can't receive a digital signal"
    5. Affordability: "I can't afford it"

28. The Consumer Panel wanted further in-depth qualitative research into the digital switchover experience of these 'vulnerable' consumers in order to build a deeper understanding of the barriers and problems they may face.

Objectives

Primary objectives

29. To understand the detailed experiences, both positive and negative, of people who have either:

- Recently converted to digital, or
- Are planning to convert to digital in the next few months

30. To identify barriers or problem areas that have the potential to be resolved or reduced through support or communication prior to switchover.

[1] www.ofcomconsumerpanel.org.uk/files/information/digitalswitchover/Supporting_the_most_vulnerable_consumers_etc.pdf

Specific objectives

31. These were to:

- explore how people evaluate the digital options available to them when they make and / or evaluate their digital choices
- establish how well people understand the options available and associated costs and benefits
- establish who played a role in the decision-making process (advice from friends/family/word of mouth, retailer advice, advertising etc.)
- identify gaps where further support is required
- understand how easy or difficult the conversion process is and who consumers use for support, if required

Methodology and sample

Methodology

32. Stage One involved exploratory research with consumers who had recently converted their main TV set to digital TV. Interviews were conducted in participants' homes with participants across a range of different vulnerable audience types and with a control group of mainstream consumers (see Sample section below). These interviews were conducted in March 2007.

33. Stage Two involved qualitative tracking of people about to convert their main TV set to digital. 41 participants were tracked in total, with participants across a range of different vulnerable audience types and a control group of mainstream consumers (see Sample section below).

34. The precise number of contacts with each participant varied depending on their individual conversion journey. However, an initial in-home face-to-face interview was conducted with every participant, and then between one and three telephone interviews during the conversion process, and a final in-home face-to-face interview once the participant had converted.

Sample

Stage One

35. Twenty face-to-face interviews with consumers who had converted from analogue to either Sky, cable or Freeview digital in the previous four months.

36. Ten interviews were conducted in the Borders and 10 in the Granada ITV regions - as the first areas to switch - as detailed below.

Mainstream consumers		Aged under 45		Aged 45-65		
Male		2 interviews		2 interviews		
Female		2 interviews		2 interviews		
Vulnerable consumers		*12 interviews:* 3 with older people (1 aged 65-74 years; 2 aged over 75 years) 3 with people with disabilities (1 physical impairment; 1 visual impairment; 1 learning disability) 3 with people on low incomes 3 with people who are technically unsupported				

Stage Two

37. Forty-one tracking interviews with consumers planning to convert to digital in the next month, again split evenly between Borders and Granada and a range of different digital options available – Sky, Cable and Freeview.

Mainstream consumers 8 interviews		Under 45		45-65		
Male		2 interviews		2 interviews		
Female		2 interviews		2 interviews		
'Vulnerable' consumers 33 interviews: 10 with consumers who were technically unsupported[2]		*33 interviews:* 8 with older people (2 aged 65-74 years; 3 aged over 75 years) 5 with people with disabilities 5 with people on low incomes 10 with people who are multiply disadvantaged 5 with people living in multiple dwelling units				

38. Throughout this report the findings from Stages One and Two are presented jointly. Any noticeable differences by participant type have been drawn out where they exist. Where differences are not highlighted this is because the views expressed are largely universal.

[2] People who said they had low technical knowledge and no-one to ask for help with technical problems.

Section 4

Experiences at the different stages of going digital

Introduction

39. The structure of this section follows the different stages of going digital set out in the Consumer Panel's 2004 report. These are:

- Knowledge and availability of digital television
- Affordability
- Buying the equipment
- Installing the equipment
- Using the equipment

Knowledge and availability of digital television

- Understanding of Digital Switchover and the different options available in going digital is very varied.
- Across all the different consumers included in this study, two groups are evident – the technically confident and the technically unsupported.
- The already technically confident tend to have a much clearer sense of what DSO is and what the going digital process entails for them. Equipped with information, or at least the knowledge of where to go to get it, the process of buying is more straightforward and less daunting.
- Those who are technically unsupported and lacking in personal technological confidence start the DSO process with low levels of understanding and a lack of knowledge about where to go for information. For these participants buying the equipment is therefore more difficult.

Sally

Sally was living on her own with all her grown-up children living in another part of the country. Her children had advised her that DSO was happening and that she should start to think about getting a set top box. Sally was still confused about DSO, what it meant she had to do and when it was happening in her area.

Sally already had an HD-Ready TV and thought that this was the same as digital TV. She seemed surprised that converting over to digital entailed another piece of electrical equipment. She had seen a few advertisements on the TV about Digital TV.

Her main concern was knowing how to choose the right option for her – she was not interested in having additional channels and had little interest in 'going digital'. At the start of the process Sally was quite worried and did not seem confident about being able to do it 'on her own'. She was also concerned about paying too much for the equipment.

Sally chose to buy her set top box at a high street retailer at a time when her daughter was visiting. She said that she would not have been confident about knowing what to choose in the shop without advice, but was unwilling to ask staff. Sally's daughter installed the new equipment for her mother – who was surprised at how easy it was. She also showed her how to use the remote control, labelling the channel change and volume controls with sticky labels at Sally's request.

She encountered few problems once her set top box was installed and found that she enjoyed having access to additional channels.

Sally thought that older and disabled people living on their own would really struggle with switchover, and she thought that there should be practical help for them.

Levels of knowledge and expectations

40. Prior to starting the process of going digital, and beyond a general understanding that 'something is happening', participants' knowledge about going digital is varied. This variance cuts across the different participant groups included in this study.

41. An individual's level of knowledge and understanding of DSO, going digital, and of the different digital options available to them, clearly affects their ability to make informed purchasing decisions. Those who are better informed (mainstream participants, MDU residents, low income participants and those between 65 and 74 years old) are better able to weigh up the options available to them before deciding between pay TV and Freeview, selecting the equipment, making a purchase, installing and using their equipment.

42. Conversely, participants with lower levels of knowledge and understanding of going digital, and of the different digital options available to them are unsure about what Digital Switchover means for them and are less likely to be able to make informed purchasing decisions. Specific queries raised during research were whether a new TV was required for going digital, whether digital and High Definition TV are the same thing, when DSO will take place and how much time they have to think about their decision.

43. Different levels of knowledge and understanding, and information of varying quality, have a clear impact on participants' expectations, which in turn affects experiences of the process of going digital.

44. Mainstream participants, MDU residents, low-income participants and older participants between the ages of 65 and 74, all with more detailed knowledge and understanding of going digital, tend to have experiences which meet their expectations. Those choosing pay TV are aware of the costs and are able to budget accordingly. Along with those choosing Freeview, they have installation and user experiences which meet their expectations. These participant groups are most likely to believe they are "getting the best" out of their new services.

45. Participants who are over 75, those with physical or cognitive impairments participants and those who are technically unsupported have varied expectations of the process. These range from feeling anxious and unconfident to feeling wholly resigned to "having to sort something out". Lack of knowledge leads to greater levels of concern and confusion over how difficult and costly the process will be. As outlined in later sections of this report, in practice, several participants in this group found that installing and using their new digital equipment was in fact much easier than expected.

46. A perhaps surprising research finding was that better-informed participants tended to know less about digitally trained advisors and digital logos than vulnerable, less well-informed participant groups, such as older and disabled people. In practice it tends to be the latter groups who actively seek 'official' advice.

Information sources

47. Direct sources of information on digital switchover and going digital are word-of-mouth, the media, press and TV advertising, and the internet. Seeing and / or using equipment *in situ* outside their own homes, at friends, family or neighbours or in shops is another source of practical information.

48. Except where they are socially isolated, word-of-mouth tends to be the most relied upon source of information. Word-of-mouth is seen as very effective in communicating locale-specific information, for example, in Borders where there are highly regionalised issues with Freeview reception. However, word-of-mouth can lack reliability and accuracy.

49. Some participant groups are out of the loop in terms of access to particular sources of information. For example, information on the internet tends not to be accessed by over-75s, the multiply disadvantaged and other participants who have limited or no internet access. Participants over 75 tend to notice media coverage and advertising material less than younger participants, and, along with the less physically mobile, older participants are less likely to have seen digital equipment outside the home. These groups in particular rely on support groups, local day centres or care homes, and word-of-mouth as their main sources of information.

Levels of knowledge of the different digital options available

50. Levels of knowledge about pay TV are generally higher than Freeview. This is due to widespread advertising, both in the form of poster, cross-media advertising and direct marketing. As such, people have a much clearer idea about where to go for more information on pay TV than on Freeview. Personally targeted advertising and sign-up deals in the two areas where research was conducted have also helped to raise knowledge about pay TV. Promotional rates being offered by Sky in the Borders and Granada regions (which include a free set top box and installation) provide participants with information and access to digital equipment that is unavailable elsewhere.

51. Information sources for Freeview have a much lower profile and people tend to have much lower awareness of Freeview in comparison to pay TV. Participants in vulnerable groups tend to be far less aware of information published in newspapers and magazines and notice less of the information provided in Freeview TV advertising. Unsurprisingly, these participants say that there has been a lack of visible media or poster advertising about

Freeview and also that there are fewer TV advertisements / infomercials for Freeview in comparison with pay TV.

52. This has a significant impact on participants' knowledge and understanding of the options available to them in going digital. Although people are conscious that they are being marketed to, the effect of plentiful information and advertising on pay TV has the effect of tempting the less informed who are reassured by feeling that they "know more" about pay TV.

53. As outlined in later sections of this report, the fact that the pay TV companies will provide aftercare and customer service is also a major pulling point for elderly and technically unsupported participants. With Freeview you are "on your own" as you do not have a contract with a service provider.

54. The lower profile of sources of information on Freeview does little to allay latent concerns that they risk having a bad experience in going digital. Being "ripped off" or buying the wrong equipment and being unable to install and use equipment are the most common worries for these groups of participants.

Establishing sources of information

55. Regardless of whether participants are trying to find out information about pay TV or Freeview, a key theme which emerges is that establishing a clear source of good, reliable and impartial advice and information is difficult. As such, participants tend to trust word-of-mouth over other sources of information, especially advertising.

56. The fact that sources of information about pay TV and Freeview are sometimes contradictory is a key reason for this. This problem is compounded by the fact that different retailers also offer different information, which again, is sometimes contradictory. Indeed, in finding out about going digital participants say that they accessed a variety of information sources which said different things, expressed things differently, and ultimately confused them.

57. Examples of differences in information include:

- Information provided by retailers in-store and at point-of-purchase. This ranges from simply having the selection of products highlighted to having the differences between the products carefully, and fully, explained.

- Variability in the quality and depth of information provided by retailers. This was dependent on highly individual factors such as the member of staff in question, the consumer's own knowledge, and the individual consumer's ability to ask the "right" questions.

- Use of different terms to mean the same thing, for example talking about set top boxes as opposed to digi-boxes or Switchover as opposed to going digital.

58. Participants believe that independent specialist retailers tend to give better face-to-face information than supermarkets or catalogue stores.

59. A risk here is that in the absence of clear alternative sources of impartial information, participants in vulnerable groups, such as older or disabled people, find little alternative to marketing material as a source of information.

Affordability

- Overall, participants do not expect going digital to be overly expensive. Expectations of the cost do however vary to some extent by participant type and whether participants plan to get Freeview or pay TV.
- Some participant groups, in particular those over-75s and disabled participants, find it harder to make cost-based decisions as they are likely to be less well-informed.
- After going through the process of converting, only participants on low incomes with restricted digital options - either due to the geographical area they live in or because of their personal technical ability - question whether going digital represents good value for money.

Initial expectations

60. Initial expectations about the costs associated with the different digital options available vary by participant group. Mainstream participants, MDU residents, low-income participants and those participants between the ages of 65 and 74 feel confident about making informed decisions based on cost. They display good knowledge of the different options available to them, and some know that there are a range of different prices for Freeview boxes and that this is linked to the quality of the product. These participant groups are also more likely to have good levels of knowledge of the different pay TV packages and what is included within them. Low-income participants are particularly likely to have done their own research into the costs of the different digital options.

Difficulties in making cost-based decisions

61. Participants who are over 75, have a physical or cognitive impairment, or who are technically unsupported find it difficult to make informed decisions based on cost as they are less likely to possess this information. Within these groups a key theme is that they are uncertain about where to get information. These participants distrust pay TV advertising material and are less likely to be able to research the differences between differently priced set top boxes. These participants also express uncertainty about how much Freeview boxes cost and have an equally poor knowledge of different pay TV packages and what is included within them.

Value for money in the going digital process

62. Overall, after going through the digital conversion process participants believe that the benefits of going digital justify the financial outlay. Freeview in particular is thought to provide good value for money.

63. Only participants on low incomes with restricted digital options question whether going digital represents good value for money. These restrictions are due to the number of digital options available in particular geographical areas, or participants' personal technical ability.

64. A particular issue for participants in this study is that, in parts of Cumbria and the Borders, Freeview is largely inaccessible. In this instance participants believe they are being "forced" into opting for more expensive digital options. This is a particular problem for participants on low incomes.

65. Participants over 75 and those with physical impairments say they will consider choosing more expensive options than they would like in order to secure installation and aftercare. They also consider paying for additional help with installation where this is offered. This is again a particular problem for participants on low incomes.

Buying the equipment

- Mainstream participants, MDU residents, low income participants and participants aged 65-74 find buying an easy part of the process. They are more likely to make multiple trips to retailers before purchasing, and build a higher general level of knowledge about the different options available to them than other participant groups. They therefore feel more confident and able to make an informed decision.
- Older participants (75+) and those who are disabled or technically unsupported find the buying process quite daunting. This is because they generally have lower levels of knowledge of the different options available to them. This limits their confidence, and their ability to make informed decisions in purchasing new digital equipment.

Expectations and decision making

66. For the most part, participants expect that buying new digital equipment will be a relatively hassle-free part of the process.

67. However, participants aged over 75, disabled participants, technically unsupported participants, and those living in rural areas do have mobility and access concerns. These participants say that pay TV options seem appealing to them as they remove delivery and installation worries. Equally, local independent retailers, who often offer a full service, are appealing for the same reasons.

68. In general, participants make the decision about what type of digital equipment to buy, before reaching the point-of-purchase, based on the following criteria:

- Relative cost and affordability of a given digital option

- Perceptions about ease of installation
- Perceptions about ease of use
- Perceptions of availability of a particular digital option in a particular locale
- Service provided by a particular digital option in a particular locale

69. Further purchasing decisions are informed by individual expectations of the pros and cons of the different digital options, word-of-mouth recommendations and advice from retailers at the point-of-purchase.

70. The over-75s, those with physical impairments and those who are technically unsupported are often less able to make purchasing decisions, in part because they are less able to make multiple trips before purchase and are less likely to shop around. They feel worried about buying equipment, and are more likely to put it off until sometime in the future.

71. Specific factors that deter these participant groups from buying are fear of purchasing the "wrong thing" or of encountering hidden costs, concern that equipment may not work properly or will go wrong, and worries that it will be difficult to install and use. These concerns are due to the lack of knowledge and awareness addressed in the previous section and identified by previous Consumer Panel research as a barrier in that "I can't do this by myself".

Decision making and purchasing

72. Having made multiple trips before purchasing their equipment and usually having shopped around for the best deal, mainstream participants, MDU residents, low-income participants and participants aged under 75 are able to make informed buying decisions to suit their individual needs. They are most likely to buy off-the-shelf at a supermarket or high street retailer, or second-hand from friends or family.

73. Based on their knowledge, these participants prioritise: relative cost and affordability; convenience of purchase and installation; knowledge of the most appropriate digital option to suit their needs and for their particular locale; and knowledge from previous experience with digital TV in the homes of neighbours, friends or family.

74. In general, this group are less likely to rely on advice from staff at point-of-purchase. They doubt the impartiality of retailers and the expertise of staff and also feel confident about their own knowledge levels. Buying

experiences for this group tend to be straightforward and meet initial expectations.

75. Due to combinations of financial constraints, mobility and access issues, busy and chaotic lives, and expectations limiting decision-making, buying equipment is difficult for some.

76. For these reasons, older participants, in particular those over the age of 75, are likely to seek out a “friendly local retailer” where available. They often know these retailers personally and know that they will provide them with installation help. They are also likely to choose to buy from an independent retailer in order to support local businesses. Older and physically disabled participants who do not have access to a local retailer can also see pay TV as a more appealing option, despite the added expense it entails.

Eddy

Eddy lived in social housing in a small town in the Borders.

Eddy had strong opinions about switchover - not all of them positive - and a good knowledge of what it entailed for him and when it was happening.

Eddy was keen not to buy from mainstream providers, including supermarket chains who he thought would not be able to give him any advice, or from a pay TV provider who he disliked due to what he considered “hard-sell tactics” being used in the area.

Eddy had had some questions about the implications for his aerial connection living in an MDU. He had directed these to his local social housing office who had been able to advise him accordingly.

Having arranged to buy a second-hand set top box and TV from a friend, Eddy sought help with installing them from the same friend. Eddy had heard that some friends and family living locally had had reception and service problems including not being able to receive local Scottish broadcasts. Eddy was disappointed that this was also his experience. In an attempt to overcome this, he had retained his old TV and aerial connections and swapped between the two in order to be able to watch the local news.

Having bought his new equipment second-hand Eddy was aware that he had no troubleshooting route. His equipment lacked both a guarantee and instruction manual. Eddy felt frustrated by this situation but unable to make other choices due to financial considerations.

Edna

Edna was an elderly and disabled lady living alone in a small town in the Borders. She had been retired for some years. Edna was active and regularly attended a local Day Care Centre. Edna had some awareness of DSO at the start of the research and it was clear throughout that she greatly appreciated being asked her opinion.

Edna had heard a local radio phone-in about going digital and read a few articles in magazines about it, both of which she had found useful sources of information.

However, a self-confessed technophobe, at the start of the process Edna was quite anxious about choosing what option to buy, as well as physically installing and using the equipment.

Edna had decided early on to buy from a local electrical store. For her this was the most convenient way to address her concerns. She felt that a 'friendly local retailer' would be more likely to be concerned with customer service, and would be able to help her with installation, which she would not be able to manage alone. In practice this was the case.

Once installed, Edna was surprised at how easy the new remote control for her set top box was to use, although she did not use menus, preferring instead to scroll up and down in search of channels. A week after having her box installed Edna had had new carpets fitted which meant that the box had to be unconnected. Unable to reconnect it she contacted the local shop again and someone came out to reconnect it for her.

Edna recognised that not all elderly people would be as proactive as herself with regards to going digital, and worried that they could be taken advantage of by unscrupulous electrical stores. Any future troubleshooting for her would involve calling the local shop.

Taking part in the process spurred Edna to suggest an advice session on DSO at her local Day Centre.

Installing the equipment

- Experiences of installing digital TV varies by the type of digital TV option selected, given that Freeview must be set up at home by consumers themselves, while pay TV is installed by engineers.
- Participants' expectations of the experience of installing pay TV are generally met – the experience is as hassle-free as anticipated.
- In contrast, the experience of installing Freeview is more problematic for some participants.
- Physical installation of Freeview (getting the set top box correctly plugged in) presents problems for participants who are over 75 or physically or cognitively disabled. Help with connecting the box is required in all cases, either because of mobility or dexterity issues, or because the instructions are difficult to understand. These participant

groups are therefore highly dependent on help and support when physically installing Freeview.

- However, participants anticipating that tuning and setting up their Freeview boxes will be difficult generally find, in practice, that it is straightforward. Participants with impaired vision report specific personal problems at this stage, but had pre-emptively sought help in advance being used to encountering such problems.

General expectations of installation

77. Expectations of digital TV installation vary primarily by the type of digital TV selected. While Freeview must be set up at home by consumers themselves, pay TV is installed by engineers.

Expectations and experiences of installing pay TV

78. Participants say that part of the appeal of pay TV is the fact that purchasing it removes any problems associated with installation.

79. Except in the few cases in rural areas where pay TV installation took longer than had been initially promised, participants' initial expectations of installing pay TV were generally met.

Jane

Jane was a young mum of three on a low income. She lived with her children and her partner on an estate in a small village with few amenities in rural Cumbria.

Jane and her family had had Freeview in the past but had given up using it because of poor reception in the area. Although they had tried using multiple boosters they had had little luck with getting a more reliable service.

Jane and her partner had a good knowledge of the various digital options available and although they did not want to have to opt for pay TV, they felt forced into this option in order to secure a better and more reliable service. Although their main concerns were financial, Jane and her family had decided to opt for the most expensive Sky package. Aside from the financial cost Jane found the whole process hassle-free.

Jane had delegated her partner to arrange Sky over the phone. They had to wait some time for it to be installed due to their rural location. Once installed, Jane and partner had had few problems using Sky and received a more reliable service.

Jane had not wanted to have to choose an expensive pay TV option but, because of poor Freeview service in her area, she and her family felt that they were left with little choice.

Expectations and experiences of installing Freeview

80. Participants identify two distinct stages in the installation of Freeview: physical installation of the box, and tuning and set up once it is connected.

Physical installation of Freeview

81. Physical installation was not a concern for participants without mobility or dexterity issues. They were happy that they would be able to gain access to the rear of the TV and are also familiar in the vast majority of cases with SCART cables.

82. Confidence comes from experience. Reflecting the fact that participants without mobility or dexterity issues are used to performing tasks like this, they expected that installation would be something that could be "figured out", in most cases without recourse to the instruction manual. If instructions are necessary, moreover, these participants are confident that they will be able to use them with ease, in most cases referring only to the 'Quick start' guide. They are also confident that help will be available in the event that it is required as they have sought help in similar technical instances before. Sources of information and assistance used are variously word-of-mouth (often from those who have already installed Freeview themselves), the media and the internet.

83. For participants who are over 75 or who are physically or cognitively impaired, however, physical installation is a major and, in most cases, insurmountable obstacle. These participants are very often unable to move TV equipment or gain access to the rear of the TV *in situ*. All are also nervous about causing damage even if they were able to try.

84. Participants over 75, and those who have physical or cognitive impairments, do not expect to receive much assistance from the printed instructions. This is because they expect the writing will be too small, because they believe they will not understand the language and jargon, or because they do not expect to be able to overcome language and clarity problems caused by poor translations.

85. The expectations of participants without mobility or dexterity issues are almost universally met by their experiences. The box proves easy to install and the process is intuitive for most. In the few occasions where help is

required, for example where problems are encountered with connecting a video recorder, it is easily available either from the instructions or outside sources of information.

86. Expectations for participants who are over 75 or who have physical or cognitive impairments are also met by experience of the installation process. Help with connecting the box was required in all cases, and the instructions proved hard to read. Moreover, a lack of confidence that they will be able to “figure things out” compounds participants’ expectation that physical installation will not be achievable and makes them even more dependent on others.

87. For those participants who are over 75 or have physical or cognitive impairments and who are *also* technically unsupported, physical installation appears a very daunting prospect. It can even become a kind of “self-fulfilling prophecy”, where even those who are otherwise physically active do not believe that they will be able to manage.

Tuning and set up of Freeview

88. Participants expect that tuning their new channels will be among the biggest problems they will encounter during the process of going digital. Even those who expect physical installation to be easy imagine that they will encounter some kind of problem. It is at this point that they believe the instruction booklet will be required. For those who are already expecting problems with physical installation, this means yet another problem with which they will need help.

89. Contrary to their expectations, however, experience of the tuning process was not problematic for participants. The auto-tuning facility offered by the vast majority of set top boxes came as a pleasant surprise in most cases. Once the box was connected, the automated on-screen prompts were found to be straightforward to follow, and even where auto-tuning had been known about, the function was easier to use and worked better than expected.

90. Set-up was, for most, also more straightforward and intuitive than had been expected. Although most had believed that they would require the instruction manual in order to use these functions, in fact they were able to work it out simply through use.

91. A small minority of participants did experience some problems at this stage. For example, those with impaired vision found controlling the tuning and set-up process more difficult. However, these participants had expected this to be the case and had pre-emptively sought help in advance, being used to encountering such problems.

92. Those participants who were technically unsupported and did not hear from others about the ease of the process tended to fear that it would be very complicated. In many cases this impaired their ability to benefit fully from their new equipment. Even when physical installation had been achieved, some participants were loathe to attempt tuning and set-up for fear of causing any problems that they would be unable to fix. These participants did not explore the extra functions and advantages of their equipment, preferring instead to use it in the simplest way possible.

Using the equipment

- In most cases the experience of using their new digital equipment exceeded participants' expectations. Initial worries about tuning and set-up were not realised and participants reported that they enjoyed having access to a wide range of channels. They also noticed improvements in picture quality and quickly familiarised themselves with their new equipment, encountering few technological problems.
- The exception to this was among over-75s and technically unsupported participants. Experiences for these participants were disappointing and their expectations were not met. This is for one, or a combination, of the following reasons:
  - Because they were unable to access the range of changes they believed that they would be able to
  - Because they struggled to familiarise themselves with their new equipment
  - Because they experienced ongoing technological problems they were unable to solve

Problems by type of digital television option chosen

93. Participants encountered a number of different problems in using their new digital equipment.

94. Some of these problems were common across each of the different digital options. These were:

- Getting used to having multiple remote controls for different equipment
- Learning and remembering to switch on to ‘AV’ before use
- Finding the channels that they are interested in / using menus effectively
- Using an existing VCR in conjunction with the new digital equipment

95. Beyond these common problems, a number of specific problems were evident, depending on the form of digital television chosen.

96. In two cases participants who purchased pay TV reported delays in the signal coming on after installation. They also reported instances of the signal “switching itself off”.

97. Participants who purchased Freeview boxes experienced a different set of usage problems and issues. The freezing of menus and channels was a widespread problem experienced by many at some point during the research. In a few cases participants also had to re-scan for channels as they went “missing”, whilst in some instances the Programme Guide stopped working for a period of time. Furthermore, a particular concern voiced by participants in the Borders region was that they were unable to access regional news channels on Freeview.

98. In two cases participants’ set top boxes turned out to be faulty and needed replacing.

Approach to problem solving

99. Mainstream participants, low-income participants, under-75s, MDU residents and those with physical impairments were most likely to find the transition to their new equipment easy, believing that the menus and remotes were intuitive. Many of these participants had used digital TV equipment previously (i.e. at the house of a friend or family member), and

they were used to, and confident about, learning how new technology works.

100. As such, these participants were generally unfazed by any technological issues they experienced. They were usually able to rectify any technological issues personally, or they were able to take the necessary steps to get help or advice to resolve them. This might be by looking on the internet, speaking to friends or family or, for those who have purchased pay TV, by speaking to their supplier.

101. In contrast, over-75s and those participants who have cognitive impairments struggled more in using their new digital equipment and were less likely to be able to rectify any issues they encountered.

102. In most cases this is the first time that these participant groups had encountered digital TV. They also lacked confidence when using new technology in general. As a result, many did not make the most of their equipment (i.e. not using the menus to find channels) and did not gain maximum value from it (i.e. sticking to channels 1-5).

103. These participants were also less likely to be able to resolve any issues that arose and relied heavily on their existing informal support networks – friends, family and neighbours. Some participants within these groups said that if a problem has arisen, they have reverted back to using analogue TV until a friend or relative can provide them with the necessary assistance. Others reported simply turning off their TV and “waiting for the problem to pass”.

104. Across all participant groups, technically unsupported participants struggled to solve problems that arose in using their new equipment. Being technically unsupported did not mean that they found adapting to their new equipment more difficult. However, when problems did arise they lacked the support networks to allow them to rectify any that they could not solve by themselves. Many technically supported participants therefore opted for pay TV because they felt a need to buy into readily available support systems.

Ongoing issues and problems

105. Ongoing problems in using equipment (those that continued to be an issue after six weeks of usage) were a matrix between the form of digital TV chosen and participants’ ability to solve problems.

106. Personal usage problems existed in all choices of digital TV for those who struggled to adapt to their new equipment even after the six weeks “settling-in period”. The groups who experienced these problems were:

- Older participants (over 75 years old)
- Participants with cognitive impairments
- The technically unsupported

107. Technical usage problems were only an issue for:

- Freeview users. (Pay TV users had “bought in” to an ongoing support network from the company to help them deal with technical issues).
- Technically unsupported participants who lacked the technical ability to rectify any problems personally *or* those who had naturally low expectations of digital and therefore accepted technical problems as “normal”.

108. All other participants had existing support networks in place to help them tackle technical issues.

Help and assistance required

- Overall, participants were looking for help and support at the beginning of the going digital process – primarily the provision of additional advice and information to improve their knowledge and understanding of the actions that were necessary and of the options that were available to them.
- Additional advice and information around Freeview was highlighted as a particular priority by participants in order to counter what was perceived as a predominance of information and advertising on pay TV options. Raising the profile of Freeview is key.
- Most people were looking for free assistance and advice, rather than financial support, to help them in the conversion process. Crudely, people favour free advice to a free set top box.
- Participants said that ideally there should be a single source of independent advice to aid consumers in deciding which digital option to go for, and which particular piece of equipment to buy. They also would like clear indications on the relative ease of installation and use, provided at the beginning of the going digital process.
- Some vulnerable participants - in particular the over-75s, multiply disadvantaged and disabled participants - have a need for specific targeted and face-to-face help with installation and use.

Introduction

109. This section details the help needs of participants and the additional assistance that they are looking for. In the Stage Two interviews participants were asked spontaneously to suggest what additional help and support they would have appreciated at each stage of the going digital process. They were then presented with a range of potential help and assistance as follows:

110. Knowledge and availability of digital

- Receive a leaflet through the door
- See an advert in their local press telling them about the options
- See an advert on TV
- Receive personally targeted information
- Be able to make a phone call to an independent advisory digital helpline

111. Installation

- Have access to a freephone helpline
- Be given more comprehensive on-screen prompts
- Have a box that self-installs
- Be given money to trade up to a more expensive box that would have been easier to install

112. Using

- Have a TV Channel which constantly runs through demonstrations of how to use equipment
- Receive a laminated card providing clear usage instructions, with a self-complete section to write numbers of favourite channels
- Receive a one-off technical demonstration in home

Knowledge and availability of digital

113. All participants were keen to be able to make informed choices between the different digital options available to them. However, not all felt that they had sufficient knowledge to do so.

114. In this context the key challenge is to address the lower profile of Freeview compared to pay TV. Due to its commercial nature and abundant marketing material, the profile of pay TV is currently much higher than that of Freeview. Crucially, this difference in levels of profile translates into a

difference in levels of understanding about the various options available in going digital. In particular, this means that not only is it less likely that people will find out about Freeview passively in the course of their daily lives, but it also impacts on their ability to get information when they are actively researching going digital.

115. The lower profile of Freeview with regard to pay TV means that even those retailers, suppliers and companies who are actively providing information about their particular Freeview offer face an uphill struggle in getting themselves noticed alongside the widely available information about pay TV. As a result, people from vulnerable groups who tend to be less well connected with the issues and sources of information can feel that their ability to choose between forms of digital TV is limited.

116. Participants spontaneously suggested the following potential means of communicating about Freeview:

- More coverage on TV or in the press.
- More information at the point of purchase, with information on Freeview being provided in larger electrical goods stores and supermarkets. Ideally this information should have a clear ‘brand,’ independent of the retailer or source where it is found.
- Targeted letters, phone calls and face-to-face visits in the case of particularly vulnerable audiences are favoured. There was little knowledge among these groups of the Digital Switchover Help Scheme aimed at the over-75s and people with disabilities.
- Word-of-mouth is the most widely available and trusted source of information. Encouraging people to share accurate information gained from reliable sources, such as those outlined above, would be a positive step.

117. When presented with the potential help and assistance initiatives, adverts on TV and an independent advisory helpline were the most favoured suggestions.

118. Adverts on TV were seen as useful, although they must be high-profile enough to be noticed by all types of consumers. In particular, they must engage those people not otherwise engaged in going digital, and should provide facts and clear information on “where next”. In the Borders region, many participants recalled and praised a phone-in organised as part of local news services where people can get their questions answered.

119. Information provided by an independent advisory digital switchover helpline would be welcomed by all participants, providing it was possible to speak to someone directly and that it was free or the price of a local call. Such a service is seen to provide unbiased and easily accessible help and support in terms of up-front advice and information. It was also suggested that such a phone line could act as a technical support line.

120. Personally targeted information is seen as necessary for vulnerable consumers. It would address the risk of general communications not being noticed and would provide high quality assistance to those who need it most. There are concerns that such a service is likely to be very expensive, and about whether targeting could be done fairly. Some also question whether information in a letter would suffice because of the lack of interactivity. These participants suggested that provision must be made for phone calls or face-to-face home visits.

121. Generic information leaflets and information adverts in the local press were less favoured due to concerns about them not being noticed, or simply being dismissed as either junk mail or advertising.

Affordability

122. Overall, participants did not see the cost of going digital as a particular issue. Freeview, in particular, was seen to offer value for money. Affordability was, however, a key pinch point for a small minority of low-income participants across age brackets.

123. Affordability is also an issue where Freeview services are poor and people are forced to choose more expensive pay TV options. There is some suggestion that targeted financial support is needed for some low income consumers and for those who already receive free TV licences.

Jim

Jim was a middle-aged man living alone on a small estate in an isolated village in Cumbria. He was on benefits and was multiply disadvantaged, with cognitive disabilities and ongoing illness. Jim didn't know much about DSO apart from the fact that it was happening quite soon. He mistakenly thought that it was happening in the summer.

Jim's main concerns about DSO were financial and logistical. He was concerned that he would not be able to afford a Freeview box, having recently had to pay for his TV to be repaired. He was relying on the same friend-of-a-friend who had repaired his TV to "find" him a Freeview box. Jim encountered several hurdles during the research process including illness and waiting for his TV to be repaired.

He finally get a second-hand set top box and had a neighbour come round to install and tune it for him and show him how to use the remote control. Once his friend had shown him how to connect the box and do the self-tuning Jim felt confident that he would be able to do it himself if need be in the future.

Jim was surprised at how easy it was to use the new Freeview box, and although he had some reception problems - which he had heard was a particular problem in his area – he was happy to have additional channels to watch.

Buying the equipment

124. Help and assistance with buying equipment, in the form of accurate and unbiased advice at the point of purchase, was valued by all participants. Efforts to standardise and reduce the amount of information given by different providers and retailers would be welcomed.

125. Overcoming technical jargon at the buying stage was considered important and people considered face-to-face help to be the most useful way to achieve this. At point-of-purchase, people wanted: information about which digital options are the easiest to install and use; the pros and cons of different options; the most suitable option for good service in a particular area or region; and clarification of technical issues around aerials, HDTV and VCRs. There was little awareness of the Digital Tick Logo or the existence of digitally trained advisors.

126. Older participants (75 years+), physically disabled participants and multiply disadvantaged participants required targeted help and assistance in the form of physical help with buying equipment. This included physical assistance getting to retailers and someone to install their new digital equipment at home for them.

127. Targeted advice, information and demonstrations available at the point of purchase were also identified as useful for these participant groups. Older participants, particularly the over-75s, said that they would ideally prefer face-to-face help and assistance at all stages of the process of going digital but that they particularly required help at the buying and installation stages.

Installing the equipment

128. For those participants with physical impairments which limit their ability to carry out physical installation, only face-to-face support in the home would be of help.

129. In general, these participants said that they are used to requiring extra physical help with a multitude of tasks, and that in the cases where this cannot be obtained from family members, friends or neighbours, they expected to have to pay something for it. Providing the cost associated with any assistance is reasonable – it was suggested that this should be less than half the price of the box – this was not seen as unfair, more just as "'the way it is".

130. Some vulnerable participants said that they chose to buy their new digital equipment from local independent retailers who they knew would be able to help them with installation as well as tuning and set-up. This was seen as a tempting option because these participants knew that they would also be able to get aftercare if equipment should malfunction.

131. Participants across all groups suggested that a similar service might be offered by larger chain retailers such as Dixons or Currys. A standard rate could be charged for installation and set-up, with discounts for some, such as those who receive free or discounted TV licences.

132. In terms of the specific help and support options that were suggested to participants, by far the most popular was the provision of a freephone helpline. It was felt that this helpline would go some way to allaying concerns that the tuning and set-up would be difficult parts of the process of going digital, providing it was able to give detailed guidance in using all kinds of set top boxes.

133. A few participants did argue that the helpline would not be of much help to them, especially those with physical impairments who require face-to-face support. In particular, some felt that they would struggle to understand

advice given over the phone because of hearing difficulties, or would be unlikely to be able to "ask the right questions".

134. The other suggested forms of help and assistance were seen as far less likely to be useful.

135. Offering financial support to allow participants to trade up to a more expensive box was not seen as useful, since it would be of no use to those encountering problems with physical installation. Moreover, even the cheaper set top boxes were generally found to be easier to tune and set-up than had been expected.

136. Likewise, providing more comprehensive on-screen prompts was not seen as a good use of resources. Participants said that their set top box would need to be working properly before any prompts were viewable, and in any case the prompts that are currently provided are already considered largely effective.

137. The suggestion that a box might be provided that self-installs was met with some confusion by participants, many of whom felt that this was already the case. Providing they were able to undertake physical installation, set top boxes are seen as providing clear prompts and reasonably easy to follow instructions.

Using the equipment

138. Participants believed that additional support was necessary for Freeview users who they feared would experience technical difficulties and be unable to rectify them personally. A generic customer support helpline set up by a consumer body and similar to the service provided by pay TV providers would reassure people. Other participants suggested that retailers or manufacturers could set up a centralised national helpline to answer questions about their specific products. It was also suggested that more targeted help could be provided by local councils.

139. Participants believed that the provision of ongoing support was more useful than the provision of one-off help. The idea of a rolling TV channel running through practical demonstrations was well received. Participants believed that this would allow them to digest the relevant information in their own time, at their own pace, and in a cost-effective way that would successfully reach the necessary people. Participants believe the idea of a rolling TV

channel has the added advantage of being accessible by more mainstream consumers who may also benefit from this reminder.

140. The idea of providing a one-off in-home demonstration of how to use the digital equipment was seen to have several flaws. Firstly, it lacked the ongoing nature that participants were looking for in terms the provision of help and support. While recognising that this initiative may be initially helpful, participants believed that the information would be forgotten or misremembered over time. Secondly, this initiative was not considered a cost-effective solution in relation to other targeted help options. And thirdly, some participants were worried (and believed that others would also be worried) about the safety of letting a stranger into their home.

141. A laminated card for participants to fill in their favourite channels was seen as a good solution to a niche problem - that some participants are not comfortable using menus. However, it had limited appeal as it was not seen to tackle enough of the issues that emerged at this stage. This initiative was seen as an additional help idea, rather than a solution to the difficulties encountered in using the new equipment.

Summary of participants' help needs

	Physically buying equipment	*Advice at point of purchase*	*Physically installing Freeview*	*Freeview set up / tuning*	*Using equipment*	*Ongoing technical support*	*Financial help*
Mainstream	X	✓	X	X	X	X	X
Older (65-74)	X	✓	X	X	X	X	X
Older (75+)	✓	✓	✓	X	✓	X	✓
Physical impairment	✓	✓	✓	✓	X	X	X
Cognitive impairment	✓	✓	✓	X	✓	X	X
MDU residents	X	✓	X	X	X	X	X
Low income	X	✓	X	X	X	X	✓
Technically unsupported	X	✓	✓	✓	✓	✓	X

Conclusions

Key help

142. The research suggests that a key priority should be the provision of easily accessible help for all. Central to this is making information on support for Freeview as high-profile and available as information about pay TV. Participants believed that in most cases a telephone helpline would meet this need.

143. This helpline must provide a “full support” service to consumers. This means that it must be able to provide information relevant to participants both at the stage of planning to go digital as well as to those who have already done so. Support is identified as necessary, not only at the stage of choosing, but also in helping to deal with any problems encountered during installation and subsequent use.

144. The helpline must also be able to provide detailed, accurate and up-to-date advice on choosing between the different digital options, subscription packages and equipment.

145. Key markers outlined by participants in order for the helpline to be seen as successful are:

    - That it be (and be seen to be) truly independent
    - That it make information easily and quickly available
    - That it be well publicised to all audiences

146. Participants in the mainstream, low-income, MDU-resident and under-75 groups mainly require information, and the helpline would therefore meet their needs. The over-75s, disabled people and technically unsupported participants need to receive more specifically targeted information, and therefore require face-to-face support.

147. For example, for those with mobility or dexterity problems the provision of physical help is essential as they are unable to install equipment on their own. These audiences are also more likely to need a detailed, face-to-face explanation of how to use their new equipment properly. They are also

much more likely to require support *after* installation, in order to fix problems that might arise in the future.

148. Participants felt that those who currently receive support to watch TV, either in the form of free licences to the over-75s or half price licences for those registered as visually impaired, should qualify for this extra assistance should it be required. It was felt that those people with physical disabilities should also qualify.

149. Moreover, a strong sense came through from the research that existing social networks and support groups should be used to supplement the proposed helpline as a means to establish contact with vulnerable consumers. This might include care and support groups, home help or clubs and social groups.

150. A programme to encourage friends, family or carers to check on and help vulnerable consumers would also be effective. Information could be provided to these groups in a form that ensured that people were not only checking on those more vulnerable, but also had the support and information they needed to help others. To take just one example, information and examples could be provided to help people explain things to others who are less technically confident or aware than them.

151. Throughout the research a number of other forms of help that could be provided were suggested, relating to different stages of the process.

152. For example, it was suggested that help with information, knowledge and access could be provided through the media and on leaflets. However, simply “putting this information out there” is not enough. Rather, this must be done in such a way as to ensure that the profile and general levels of awareness about Freeview, as compared to pay TV, are raised. This will allow participants to make much more informed and balanced decisions. It is also vital that this material be designed and produced so as to be able to engage technically disengaged participants such as older people, and should not “scare them off”.

153. In general, help with affordability is seen as less of a priority by participants but would be beneficial for some participant groups, in particular those who are already receiving financial support for TV. However, this help will only be effective if combined with provision of targeted advice and, in many cases, physical assistance.

154. Help at the buying stage could be provided with more standardised information on Freeview at the point of purchase. This might include a clearer, higher profile proprietary “brand” for leaflets or other forms of information on Freeview, which would make it easier to identify and access the “right” sources. This would also give participants more confidence in using material, as they would know that language, terminology and tone will be consistent, meaning they only have to “get used to” one information provider. It would also raise the profile of Freeview and make it easier for participants to compare it with pay TV options.

155. Help needed with the installation process could be met by the provision of the independent helpline and physical help for a minority. It must be stressed, however, that it is also important to explain the tuning and set-up process in detail to allay the widespread expectation that this will be among the most difficult elements of the process.

156. Help with using Freeview could also be provided through a rolling TV channel which explains clearly how different equipment should be used. This could be divided up into blocks, so that different elements such as help with using the Electronic Programme Guide, selecting favourites, or blocking certain channels could be broadcast at fixed times of the day.

Ofcom Consumer Panel recommendations

157. While the Consumer Panel notes that some people are aware of the help and information that is being made available to help them through the switchover process, our research shows that information about what is happening on the ground is not filtering through to those that need it most.

158. According to the latest data from Digital UK and Ofcom: 40% of people aged 75+ and 61% of those who need assistance with switchover have not converted to digital TV. This is in stark contrast to the 84% percent of UK households that have already gone digital, or conversely the 16% of households who have not yet switched to digital TV.

159. This suggests that more needs to be done to target information to vulnerable groups, in particular the technically-unsupported, in order to raise awareness of switchover and provide the information and support that is appropriate to help them overcome the difficulties of going digital - especially if they decide to go digital before the Digital Switchover Help Scheme (DSHS) is available in their region.

160. Whilst we recognise the work Digital UK and others are undertaking to help people through the switchover process, the following are recommendations to Digital UK that are based on this research to help it provide the support and information to people as they make the switch to digital television.

Recommendation 1: To deliver a targeted national information campaign to those people eligible for the DSHS

161. Our research shows that people are going digital now but are finding the process complicated and confusing – particularly vulnerable groups. Their concerns centre on which platform they should purchase, and a belief that the physical installation of Freeview may be too difficult for them.

162. To alleviate these concerns we think Digital UK should arrange with DSHS for all those households within the DSHS criteria to be sent its Helping Hand Pack now. This pack would provide the clear and concise information needed to enable this group to understand what they need to do to go digital if they decide to make the change now. In particular, it would provide information on how to make the correct purchasing decisions for their needs

such as platform choice. Also, it would ensure that people would know when switchover is occurring in their region, and what support will be made available to them at that time.

163. The dissemination of this information through formal channels will also feed through to informal networks, further helping to raise switchover awareness in this hard to reach group.

Recommendation 2: Better promotion of the Digital UK helpline

164. Digital UK's telephone helpline can play a crucial role in providing the needed on-going support and information that people require in the first few weeks of their equipment purchase, as they become accustomed to its workings. Also, the helpline can help resolve immediate installation problems or whether a person will require an aerial upgrade. However, while we know that the Digital UK helpline already provides this support, our research shows that many people simply do not know that it exists – in fact, the participants of the research call for its existence.

165. To remedy this situation we think that advertising material should promote this helpline more prominently and that Digital UK should think about producing a helpline advertising campaign.

Recommendation 3: A rolling information channel on Freeview that provides switchover information

166. The research reveals that people would welcome a rolling TV channel on Freeview. This channel would provide another avenue of information and support for people as they go through the switchover process. It is envisioned that the channel would mirror those support channels found on the Pay TV networks. The rolling-channel could thus: run through practical demonstrations of what to do if your picture freezes; help explain and how to use the Electronic Programme Guide (EPG); how to select your favourite channels; how to block channels; help promote the Digital UK helpline number; and importantly help provide information on switchover in general, e.g. the regional dates for analogue switch-off.

167. An added benefit of the rolling-channel is that it could help disseminate switchover information to the hard to reach group through informal networks by increasing switchover knowledge across the population as a whole.

168. We understand that there may not be space on the Freeview platform to deliver such a channel or that it may be too costly to do so, but we do think that the feasibility of this recommendation should be looked into.

Recommendation 4: 'Power Questions' to be available at retail outlets to inform people of their choices at the point of purchase

169. The Consumer Panel's research suggests that a particular problem for consumers converting to digital television is navigating their way through an often confusing retail experience. We therefore support the recent Ofcom Advisory Committee on Older and Disabled People / Digital UK research that called for a set of 'Power Questions' and answers in laminate or leaflet form, and we note that these are already included in the Digital UK Helping Hand packs.

170. These 'Power Questions' should also be made available in retail outlets. They would help guide people through the buying process and to purchase equipment that is suitable to their needs. People should also be reminded to have a postcode check to ensure they are not restricted from receiving a digital signal due to where they live.

Glossary

DSO – Digital Switchover, the point at which the analogue signal is switched off in a given TV region

Going Digital – the process undertaken by a consumer of converting from analogue to digital television

Freeview – The free-to-air digital terrestrial TV service operated by the BBC, BSkyB, Channel 4, ITV and National Grid Wireless

Free-to-air – services that can be received without subscription

HDTV – High Definition television

iDTV – Integrated Digital Television, a TV with a built-in digital receiver which receives Freeview channels

MDU – Multiple-dwelling unit

SCART – A type of connection and cabling used to carry video signals and used to connect a television with a video or digital box

Technically unsupported – people who said they had low technical knowledge and no-one to ask for help with technical problems