

# The Future of Broadcast TV & Radio

## Public attitudes towards aerial-based TV & radio services

A crucial service that must be safeguarded:  
Digital Terrestrial Television and broadcast radio  
continue to play a critical role in British society.



# Introduction

**What role do broadcast services play in people's lives today? How would people feel if they were gone?**

When a fire broke out at the Bilsdale mast on 10<sup>th</sup> August 2021, more than 600,000 households in the North East of England and North Yorkshire lost access to broadcast radio and television.

To understand more about the impact of that outage – and to answer the questions raised – Arqiva commissioned two interlinking studies. Charting both the views of Great Britain towards broadcast services, as well as the perspective of those affected by the Bilsdale fire, this report provides insight into public sentiment towards the future of broadcast TV and radio.



## What are broadcast services?

For the purposes of this survey, we focus on free-to-air broadcast services that are received via an aerial. This includes Digital Terrestrial Television services (DTT) received on a TV set in the home, and AM, FM or DAB radio stations received via radio sets. Throughout this report, we refer to DTT as Freeview and broadcast TV.





# Key findings

For millions of people across Great Britain, free-to-air broadcast TV services and radio play a crucial role in their daily lives. In this report, we seek to quantify their impact – and explore the consequences of both hypothetical and actual interruptions in service.

**90%**  
of people believe broadcast services should continue to be supported

- ▶ **Despite the proliferation of other services, broadcast remains one of the most popular ways for people to access TV and radio content.** More than half (56%) of British adults aged 18+ have watched TV via an aerial in the past year, while well over three-quarters (87%) have tuned in to broadcast radio services over the same period.
- ▶ **People living in rural areas tend to watch and listen to broadcast services more often than those who live closer to urban centres.** More than half (55%) of those who live in rural areas watch Freeview daily. More than four fifths (83%) listen to broadcast radio each week.
- ▶ **People feel strongly about the importance of broadcast services via an aerial.** Around three-quarters (73%) say that free TV through an aerial is important if not essential, with an even greater number (84%) saying the same of radio.
- ▶ **90% of people believe broadcast services should continue to be supported,** with 85% stating that the government and local MPs should continue to actively support broadcast services and 83% stating the BBC should continue to actively support these services.
- ▶ **An actual loss of broadcast services has a greater impact than people imagine it will.** 83% of those who lost access to Freeview via an aerial as a result of the Bilsdale mast fire were “personally affected”. This compares to the significant proportion of people – 40% – across Yorkshire and the Humber and the North East of England who believe they would be affected in a hypothetical scenario.
- ▶ **Whilst all demographics watch Freeview via an aerial, it is particularly important for vulnerable groups including older audiences, those living alone and the lowest social grades.** Weekly viewing peaks at two thirds (68%) of all people aged 75+, a group less likely to use streaming services. Almost one in five (18%) people aged 65+ have only watched Freeview in the past year. Lower (DE) social grades are the most likely to watch daily (31% compared to 27% overall).
- ▶ **The loss of broadcast services would have a significant impact on wellbeing.** A quarter of people (25%) said they would feel very lonely if Freeview services through an aerial were lost and a similar proportion (23%) agreed they would be very lonely without radio. Vulnerable audiences would be impacted to a greater extent – 44% of people aged 65+ and living alone agreed they would feel very lonely without Freeview.
- ▶ **Broadcast services are also recognised as important sources of news and entertainment across all demographic groups.** Nearly four in ten (38% regarding loss of Freeview, 37% regarding loss of radio) agreed that without these services they would find it hard to keep up with news and important information.
- ▶ **Many people would cut down – or cut out – their viewing or listening of TV channels and radio stations if services through an aerial weren’t available.** 56% of weekly Freeview viewers would reduce or stop watching TV channels if Freeview wasn’t available. If broadcast radio wasn’t available, 62% of weekly broadcast radio listeners would reduce or stop listening to radio stations rather than use alternative services.
- ▶ **Affordability and willingness to pay are key barriers to the take-up of alternative services to Freeview and broadcast radio.** 13% of adults say they cannot afford paid-for TV services. Despite improvements in connectivity, 7% of adults suggested their internet connection is not good enough to watch TV shows or listen to the radio online.



# Broadcast services: Britain's go-to choice

Data from BARB and RAJAR tells us that millions of households across the country access Freeview and broadcast radio through an aerial. Through this study, we wanted to find out more about the role these services play and how people engage with them.

The findings are clear: despite growth in the availability and uptake of cable and satellite TV, subscription-based video and digital radio streaming services, **broadcast services remain Britain's "go-to" choice for viewing and listening.**

## Freeview through an aerial: the most popular choice for traditional TV

In the past year, more than half (56%) of British adults have watched Freeview through an aerial – significantly more than those who have done so using Sky (34%) or Virgin Media (15%). We found that 7% of people had only watched Freeview at home in the past year, with no viewing of either other traditional services, or broadcast or subscription video-on-demand services.

Those who do watch Freeview do so on a regular basis. Three quarters (76%) of adults who have watched Freeview in the past year say that they do so every week.

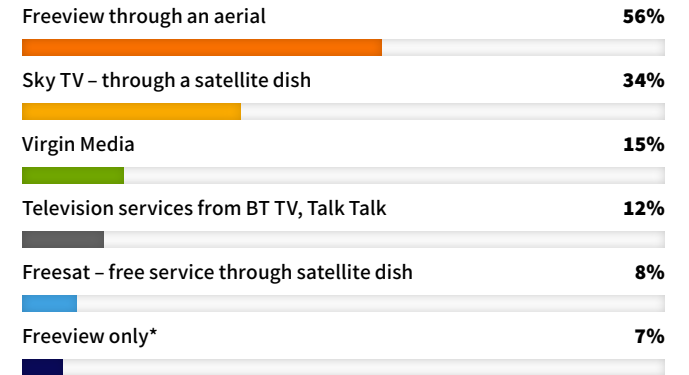
## Broadcast radio: Britain's number one way of listening

Listening on a traditional set remains the primary choice for adults from Great Britain when it comes to radio; four in five (82%) say that they've listened to broadcast radio over the past year. The majority of adults listen in the car (74%) – though many continue to listen on sets when they're at home as well (47%). Three-quarters (76%) of people listen to the radio every week.

Only half as many people (42%) listen to the radio online as do via a traditional set (82%). This is in line with findings from RAJAR's MIDAS survey amongst those 15+ in the UK where 55% listen via DAB radio and 40% through AM/FM radio each week. Listening via other devices remains less than half of this (for example, 16% using a voice-activated speaker, 12% using a mobile phone, 6% using a desktop or laptop). Usage of online radio is particularly low amongst the DE social grades (31%).<sup>1</sup>

<sup>1</sup> RAJAR MIDAS Winter 2021 [https://www.rajar.co.uk/docs/news/MIDAS\\_Winter\\_2021.pdf](https://www.rajar.co.uk/docs/news/MIDAS_Winter_2021.pdf)

Figure 1. Use of traditional TV services in the past year



\*In the past year watched Freeview through an aerial at home but none of Sky, Virgin, Freesat or on-demand services offered via BVOD/SVOD

Base: All participants, Great Britain adults 18+, n = 2005

## Broadcast for all

Both Freeview via an aerial and broadcast radio serve very broad audiences. While viewers and listeners tend to skew older, younger generations remain heavily engaged with both services. We do see slight variations depending on social grades and geographies, however access to broadcast services is broadly seen as critical across all communities.



## An essential service

For many, broadcast services are something that they've come to see as a necessity. Just over half (54%) say the continued provision of Freeview through an aerial is either "essential" or "very important". Two-thirds (68%) say the same about broadcast radio. Crucially, even those who haven't used those services in the past year believe this to be the case (57% among non-Freeview viewers and 35% non-radio listeners).

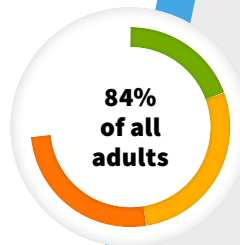
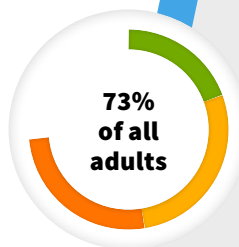
Sentiment here tends to become stronger with age. Just over two-thirds (68%) of those aged 55-64 see Freeview as an essential or very important service, compared with two in five (42%) of those aged 18-34. Older participants are similarly vocal about the importance of broadcast radio.

### Continued support is expected

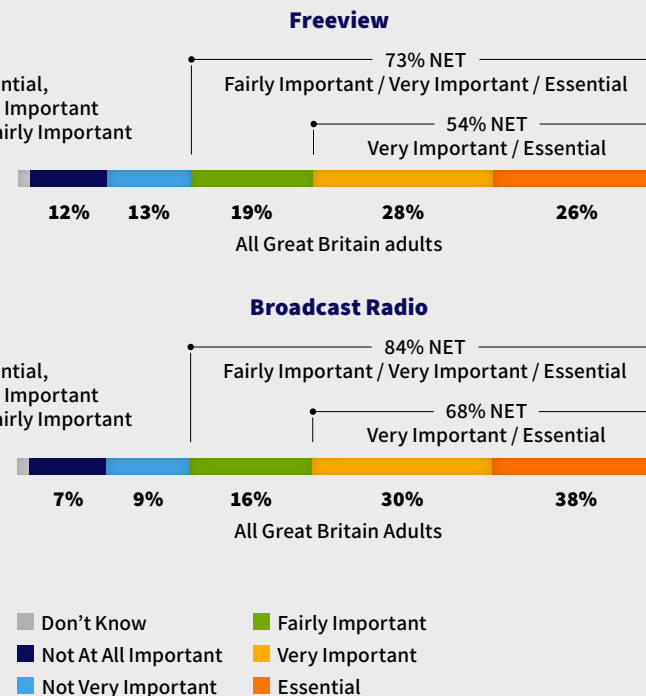
In line with the results above, people are adamant **that free-to-air broadcast services via an aerial must continue to be supported**: 9 out of 10 participants said that Freeview and broadcast radio need ongoing backing.

Furthermore, the majority of people that we spoke to believe that the government, local MPs and the BBC should continue to actively support these services.

Asked whether they felt the government as a whole and their local Members of Parliament should support the provision of broadcast through an aerial, more than four in five (85%) agreed that they should. An almost identical number (83%) said the BBC must do the same. Again, older people are more likely to agree with those statements, however about half of 18-24 year olds also agreed with these statements.



**Figure 2. The importance of Freeview and broadcast radio via an aerial**



Base: All participants, Great Britain adults 18+, n = 2005.

**90% of participants** said that Freeview and broadcast radio must continue to be supported.

# Regional reliance on broadcast TV and radio

While Freeview and broadcast radio serve a large audience across the country, reliance on those services does tend to differ from region to region. More than half of those in each region outside of London and the North West say that the continued provision of Freeview as a free service is either essential or very important, for instance, with those in Wales (65%), the East of England (58%), and the East Midlands (57%) being particularly attached.

At a broad level, we also see a notable distinction between rural and urban areas. Those living in the former are typically more likely to have watched Freeview in the past year (63%), watch it every day (55%), and believe that the continued provision of those services via an aerial is of crucial importance (60%).

Rural residents would also be more likely to really miss Freeview services (56%) than their urban counterparts.

This trend also carries through to radio. Not only are rural residents significantly more likely to listen to broadcast radio every week (83% vs 69% metropolitan), they also have stronger attitudes towards its continued provision. Three quarters (73%) of rural dwellers believe that radio via an aerial must be protected, and half say that they would be personally affected by the loss of those services (52%).

One reason for this is continued concern about internet quality in rural locations. Those in rural areas (9%) are twice as likely as those in metropolitan areas (4%) to say that the quality of their current internet connection isn't good enough to watch TV or listen to radio online.

## A capital concern

While regional and rural attitudes towards Freeview and broadcast radio may be particularly strong, that doesn't mean to say that those living in the capital don't care about those services. Half (48%) of those living in London say that the continued availability of broadcast services via an aerial is essential or very important.

**54% Essential / Very Important**  
All Great Britain adults 18+

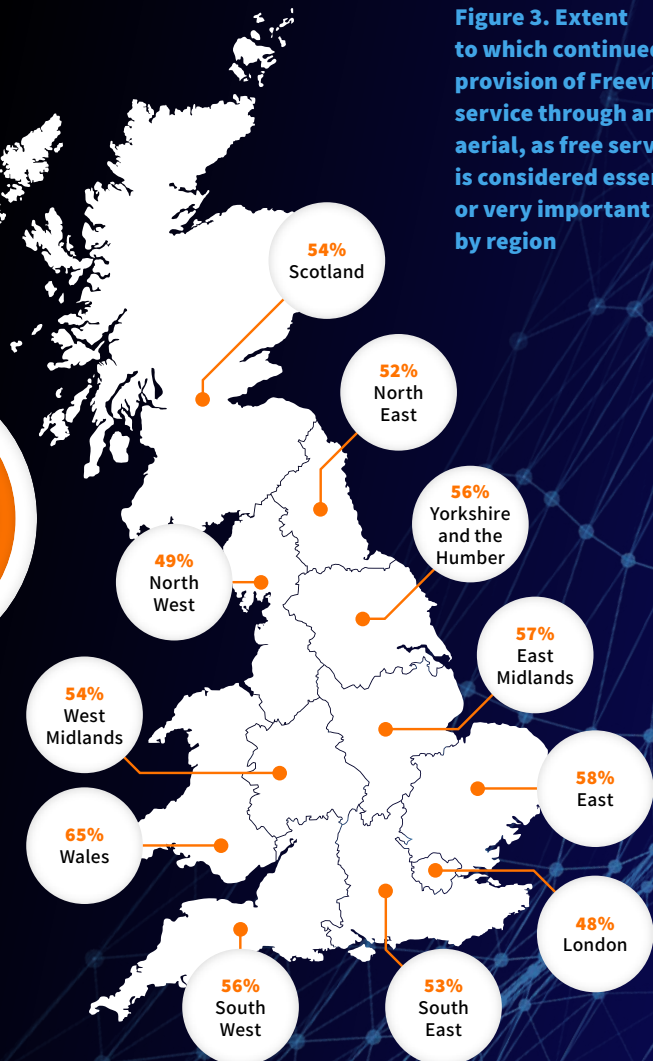


Figure 3. Extent to which continued provision of Freeview service through an aerial, as free services is considered essential or very important by region



# Barriers to entry for broadcast alternatives

Many of the people that we spoke to say that broadcast services are complementary to other methods of viewing and listening. Two-fifths (41%) of those who have access to broadcast- or subscription-based video-on-demand services also watch Freeview on a weekly basis, for instance. At the same time, a significant number of people still struggle to access online TV and radio services.

## The digital skills gap

One of the major issues here is a continuing digital skills gap. About one in 10 people (12%) have a skills gap, saying they are unable to set up new equipment to receive internet services on their TV, or use websites or apps to access TV or radio. A similar number (7%) say that their internet connection isn't good enough to use those services, while a small (4%) but still important group say that they simply don't have broadband.

## Financial barriers

Cost is also a significant barrier. Six in ten (60%) of those who only watch television via Freeview say they would not pay for other services. Around a tenth (13%) of all adults say that they cannot afford to pay for monthly TV subscriptions. Financial issues are more common amongst younger participants and those from the lowest social grades.

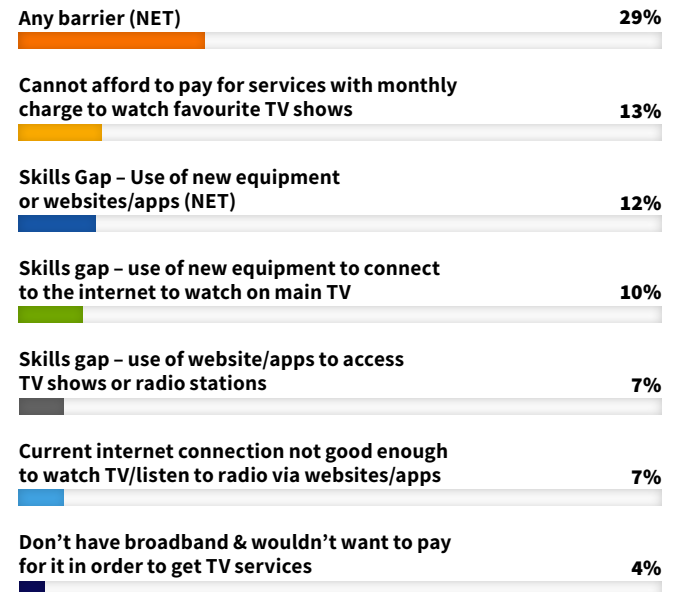


## The impact of streaming struggles

For those with barriers to accessing streaming services, the loss of Freeview services via an aerial would have a greater impact. Well over half of those who say they do not have an internet-enabled TV or have poor quality internet claim they would stop watching television channels altogether if Freeview were no longer available (62% and 60% respectively). This loss would have a tangible emotional impact on those audiences.

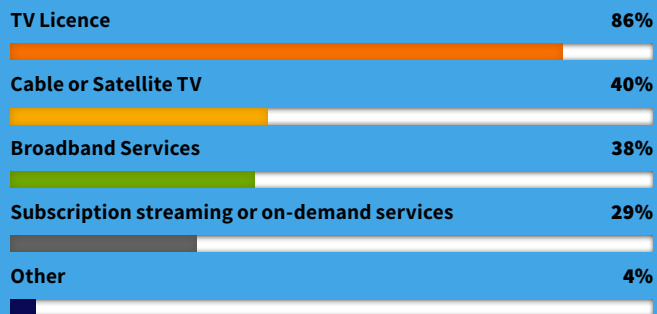
## Figure 4. Barriers to watching and listening online

Challenges faced when accessing services through the internet



Base: All respondents, Great Britain adults 18+, n=2005

**Figure 5. Services people would expect to cost less if Freeview through an aerial were no longer available**

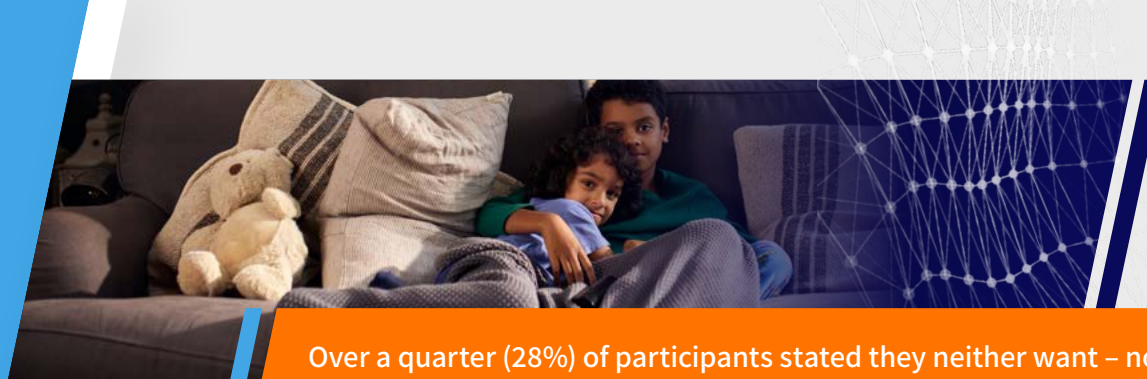


Base: Great Britain adults 18+, who would expect services to cost less if free-to-view TV via an aerial was not available n = 408

### Service closures would come at a cost

Nearly half (47%) of people say they would likely pay for new services or equipment to continue accessing TV services if Freeview via an aerial was not available. For many, this outlay would go towards a new TV service – whether a subscription to a streaming service (30%) or broadcast service (27%). Others (27%) would likely invest in new equipment, such as a new box or stick, to watch TV services online. 17% said they would pay for a fixed broadband service for the first time.

Asked how their TV habits would change were Freeview to be removed, around half (49%) said that they would either spend less time or just stop watching television channels altogether.



Over a quarter (28%) of participants stated they neither want – nor can afford – another cost when it comes to alternative TV services.

## The importance of free

As well as their thoughts about broadcast TV as a whole, we also wanted to understand how people would feel about its hypothetical absence. The response was clear: access to broadcast TV via an aerial must be protected.

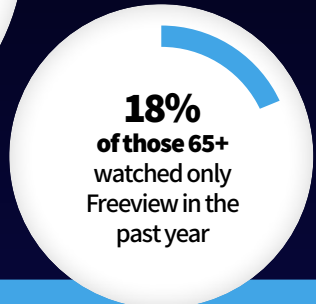
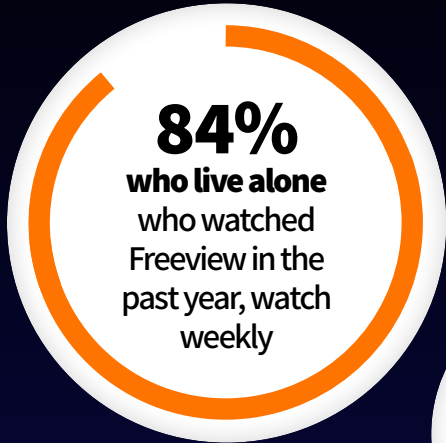
Asked whether they would be personally affected if Freeview services via an aerial were lost, more than half (54%) of all participants believed that they would. Amongst weekly Freeview watchers, well over three-quarters (82%) said the same.

One of the key factors at play here is the issue of having to pay for alternative TV services. Of those who had a negative reaction to the loss of Freeview services, more than half (54%) mentioned the affordability of alternatives,

with just over one quarter (28%) stating specifically that they neither want – nor can afford – another cost.

Ultimately, this sentiment raises subsequent concerns about the TV licence fee. If no television was available via an aerial, a significant number (42%) state that they would expect a reduction in the price of either the licence fee or other TV services. Of this group, the majority (86%) are focused on the TV licence fee.





## Broadcast services play a critical role for vulnerable members of society

As could be expected from some of the results discussed earlier in this report, older viewers are significantly more likely to rely on Freeview. More than two in three of those aged 75+ (68%) use the service at least once a week. Weekly viewing is also particularly high amongst single person households – many of which are likely to be elderly. Of those who live alone and have watched Freeview at all in the past year, over four in five (84%) said they watch every week.

Correlated with this is the fact that older audiences are much less likely to use streaming services. While two thirds (69%) of those aged 65-74 have watched broadcast or subscription-video on demand (BVOD and SVOD) in the past year, this figure falls sharply amongst those aged 75+ to 53%. In total, about a fifth (18%) of those aged 65+ only watched Freeview in the past year.

One of the potential causes for this is that older viewers are also less likely to have access to online services as a whole; more than a tenth of those aged 75+ (14%) say that they have no home internet. We see the same pattern in lower social grade households (4%), single person households (6%), and those who are wholly reliant on Freeview for TV (7%).

Compounding this issue are the digital skills and affordability barriers discussed earlier in this report. While a tenth of the general population (12%) acknowledge some level of digital skills shortfall, this issue doubles amongst the 55+ audience (23%) and quadruples amongst those aged 75+ (40%). From a financial perspective, one in five (21%) of those in social grade DE say that they cannot afford paid-for alternatives to Freeview.

### Geographic differences

Age and social background aren't the only factors at play when it comes to accessing alternatives to broadcast TV. Those in Yorkshire and the Humber and the North East of England (18%) are all more likely than average (13%) to struggle with the cost of monthly streaming services. In the South West, internet quality issues play a larger role (11%) than the average (7%).

# The emotional impact

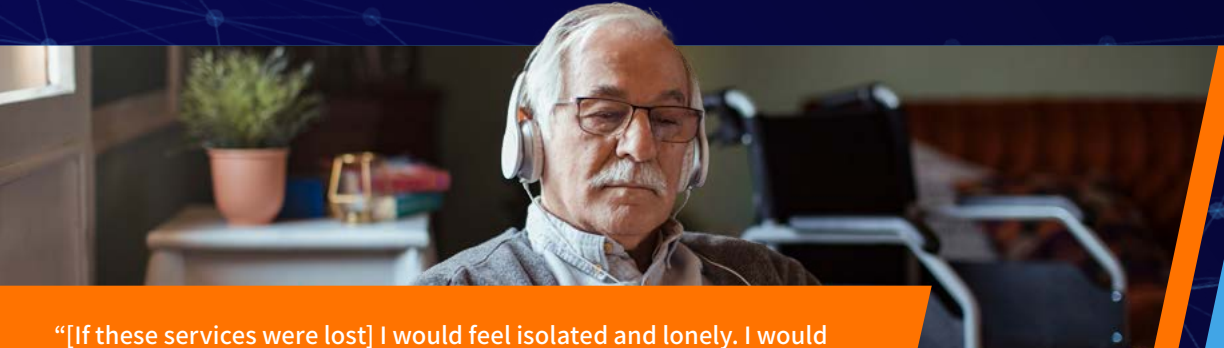
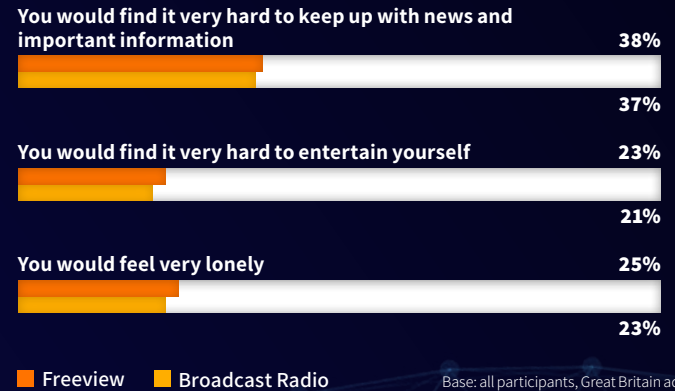
Cost isn't the only issue that people are concerned about in relation to the availability of broadcast services. Presented with the thought of losing access to broadcast TV and radio, three in ten (30%) responded with a negative reaction – saying that they would be angry, annoyed, upset, or depressed.

The reasons for these responses vary, but are primarily the result of worries about emotional and mental wellbeing. More than a third of people believe they would find it “very hard” to keep up with news and important information without these services (38% if without Freeview via an aerial, 37% if without broadcast radio).

Just over one in five say they would struggle to entertain themselves without these services (23% if without Freeview, 21% if without broadcast radio).

About a quarter would feel very lonely (25% if without Freeview, 23% if without broadcast radio). The threat of loneliness rises for those living alone aged 65+, 44% agreed they would feel very lonely without Freeview via an aerial, whilst 28% agreed they would be very lonely without broadcast radio.

Figure 7. Reactions to the prospect of losing free-to-air services



“[If these services were lost] I would feel isolated and lonely. I would miss the music and background noise because that would keep me stimulated and would keep me happy and at peace.”

Female, 55-59, London

## A service people rely on

For many, Freeview isn't just a “nice-to-have” – it's a service that they've come to depend on. Three in ten (30%) of those who had a negative reaction to the hypothetical loss of Freeview said that they rely on the service, with many others pointing out its importance to key groups such as the elderly and the disabled.

# Bilsdale: a case in point

**The findings for Great Britain tell us much about how people believe they would respond in the event that broadcast services received via an aerial were unavailable. But what would be the actual impact?**

To learn more, a supplementary research project was conducted. This focused solely on people in the Bilsdale region, where more than 600,000 households lost access to broadcast radio and television in August 2021 due to a fire at the Bilsdale mast. What we found was that real life reactions to the absence of broadcast TV and radio are often stronger than people expect they would be.

In total, just under half (47%) of the people interviewed for this secondary study were affected by the Bilsdale mast incident. Of those who lost all TV channels, four-fifths (83%) said that they felt “personally affected”. 73% of people who lost radio services said they were personally affected.

Bilsdale viewers were much more likely to stop watching TV channels where alternative means of access were not readily available. Those without cable or satellite (20%), smart TVs (25%), and those who don't watch television over the internet (39%) were all significantly more likely to switch off for the duration of the outage. Notably, however, even many of those who did have an alternative in the form of cable and satellite still chose to reduce or cease their TV channel viewing (54%).

Further, whilst 57% of adults in the Great Britain study anticipated they would reduce or stop listening to broadcast radio if there was an outage, this happened to 65% of people in the Bilsdale region whose radio services were affected.

New paid-for alternative services were taken up to a lesser degree than could have been anticipated by people's responses to a hypothetical loss of services. Whilst 47% of adults in Great Britain suggested they would buy new equipment or services to access TV content, only 20% of those affected in the Bilsdale region did, and whilst 20% of adults in Great Britain suggested they would sign up to a new music streaming site in the absence of broadcast radio, only 9% of those affected in the Bilsdale region did.

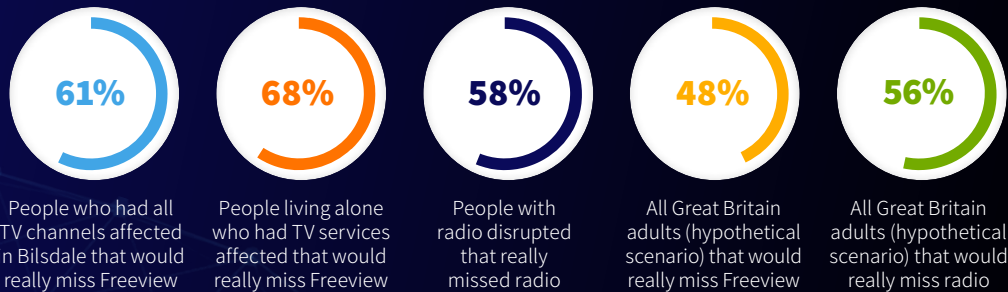
The outage caused a stronger emotional reaction than might have been expected based on the results of people's responses to a hypothetical loss of services. Amongst those losing all TV channels, 43% used negative emotions to describe how they felt, the most dominating comprising ‘anger, annoyance, frustration and irritation’ (31%). For others (22% who lost all TV channels) – particularly those living on their own (42%) – loneliness was the driving concern. Many (43% who lost all TV and 36% with radio affected) agreed it was very hard to keep up with news and important information without these services.





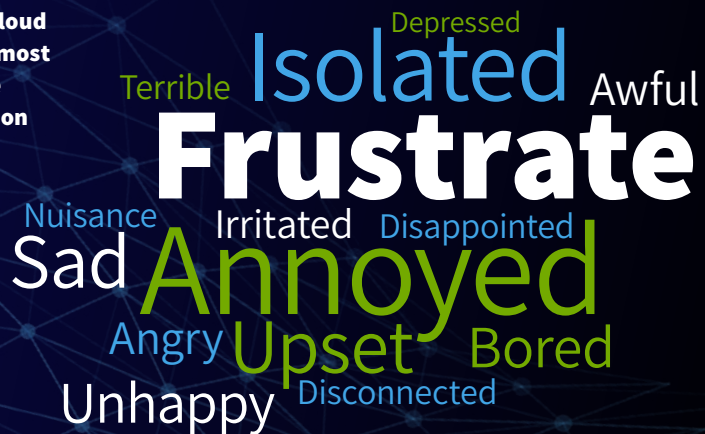
# Bilsdale: A greater impact on all audiences

Figure 8. Hypothetical reactions to the loss of broadcast services received through an aerial vs. actual responses from Bilsdale



Base: All respondents, Great Britain adults 18+, n=2005, all TV channels affected n=266, all living alone with affected TV services n=110, radio affected n=94

Figure 9. A word cloud representing the most common negative emotions in relation to the outage



**A strong negative emotional response was provoked by the loss of broadcast services, for various reasons.**

Many who lost all TV channels (43%) agreed they found it very hard to keep up with news and important information when they lost Freeview. Over a third (36%) said the same about disruption to radio services. About a quarter (24%) who lost all TV channels agreed they found it very hard to entertain themselves without broadcast TV.

People also reported impacts to their wellbeing. Just over a fifth (22%) who lost all their TV channels said they felt very lonely without Freeview.

For residents from vulnerable backgrounds, the impact of the mast fire was greater. The sense of loneliness peaked in those aged 65-74 (21%), social grades C2DE (23% vs just 11% of those ABC1) and those not working (23% vs just 11% of those working). Nearly half of those in single person households (46%) or people within the lowest social grades DE (47%) also agreed that the loss of Freeview left them detached from news and current affairs. More than a third (37%) of those from social grades DE agreed that they found it very hard to entertain themselves with Freeview gone.

# Bilsdale: the voice of the viewer and listener

The loss of broadcast services left many angry and with a gap in access to news and entertainment; importantly many felt lonely without TV and radio. Here is just a snapshot of some of the comments from participants:

*"I was quite sad that my two TVs weren't working but I felt very sad for my mother-in-law who is 84 and had no one to talk to. She had no TV or radio and no newspaper. She was on her own ..."*

Female, 60-64, all TV affected

*"Made me feel bored, angry frustrated and couldn't rely on TV as there were no channels."*

Female, 35-44, radio & all TV affected

*"It was not great because I was 7-8 months pregnant so spending a lot of time trying to chill and relax and you rely on your TV, and I was still working so I wanted to put the TV on and get some rest so I couldn't do that."*

Female, 35-44, radio & all TV affected

*"I missed all the programmes as I do like TV. I had to find other things to do. I get information from the TV and without it felt isolated. I missed all my soaps, news and quiz programmes that make me shout at the telly and keeps my mind alert."*

Female, 75+, all TV affected

*"Depressed, nothing to talk about, missed the noise."*

Female 65-74, some TV affected

*"It impacted us greatly because the children loved access to all television and I was also recuperating after an operation so I had to rely upon the internet."*

Female, 45-54, radio & all TV affected

*"Made me feel disconnected from the world in some ways. I usually follow the news everyday for a couple of hours wasn't able to do this felt less informed. I was bored without it and frustrated."*

Male 45-54, all TV affected

*"Made me feel cut off from the world, angry, lonely, miserable - I missed having the company from the television."*

Female 65-74, all TV affected

*"From a local perspective I wasn't able to get local news and radio which was a bit disappointing. It does show how reliant we are on things like that in terms of communicating."*

Female, 45-54, radio & all TV affected

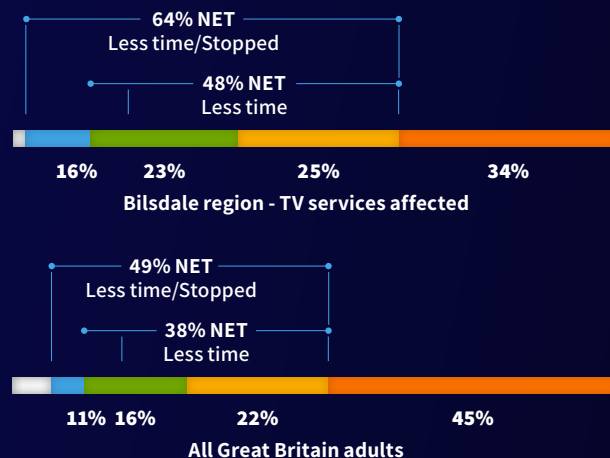
*"I mainly missed the radio in the car. It was hard to listen to any news in regard to the traffic. I found it frustrating as we had to rely on social media to get any traffic news."*

Female, 35-44, radio affected





**Figure 10. Hypothetical changes in viewing behaviour vs. actual changes in the Bilsdale region**



Base: all participants, Great Britain adults 18+, n = 1995 (not affected by Bilsdale incident)  
 Base: All Bilsdale adults with affected TV services, n = 458

## Responses to the outage

For many residents in the Bilsdale region, the reaction to the loss of broadcast services wasn't just an emotional one; it resulted in real behavioural changes as well.

One of the clearest examples of this can be seen in the number of Bilsdale region residents who adjusted their habits as a result of the outage. Almost two-thirds (64%) of residents stopped or reduced the amount of TV they watched in the aftermath of the mast fire, significantly higher than those who believe they would do the same across Great Britain in a hypothetical scenario. In total, one in six (16%) stopped watching altogether. Notably, even many of those who did have an alternative in the form of cable and satellite (54%) still chose to reduce or cease their TV viewing.

When faced with disrupted broadcast radio, 65% spent less time or stopped listening to radio stations; 15% didn't listen to radio stations at all.

### National optimism may be misplaced

The impact of a broadcast services outage seems to be much more severe than many people think that it will be. When we look specifically at those Bilsdale region residents whose TV services were affected, 64% spent less time or stopped watching TV altogether, compared to 49% of adults in Great Britain who believe they would reduce or stop viewing in a similar situation.

- Don't Know
- Stop listening altogether
- Much less time
- A little less time
- Spend the same time

***"It impacted [me] severely; it meant I was having to spend a significant amount of money on my daily routine. I felt disconnected from the outside."***

Male, 45-54



# Counting the cost – alternative TV services

As could be expected from the results of our study, many residents in the Bilsdale region used their existing services when an outage occurred. A few invested in new alternatives to access television; however, many saw this as a short-term alternative, returning to Freeview when it became available again.

We asked people in the Bilsdale region whose services were affected whether they sought alternatives to Freeview via an aerial. Some people had services restored quickly while others experienced a longer outage, which would impact whether they sought out alternatives. Participants across Great Britain were asked to imagine a loss of services that was either temporary or permanent, and whether they would access alternatives.

Of those who saw their TV services impacted by the Bilsdale mast fire, one fifth (20%) bought new services or equipment. Again, we see a pronounced difference between the number of people who believe they would take that step (47% in our Great Britain study) and those who actually do.

While there was little difference in the demographic background of those residents who invested in new technology or services, those who lost all television channels (23%) were more likely to do so than those who did not lose all channels (15%). Moreover, the longer that it took for access to be restored within different parts of the Bilsdale community, the more likely it was that people decided to pay for alternative methods of viewing.

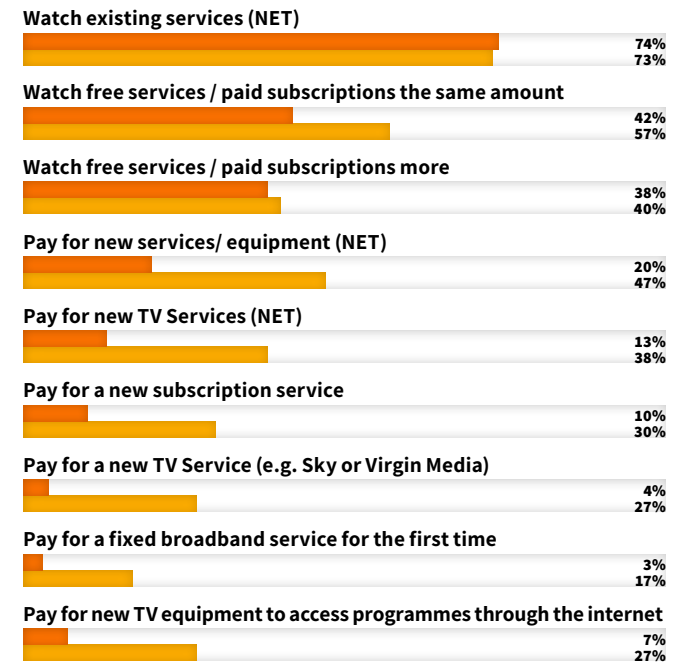
Of the alternatives, subscription services proved to be the most popular solution amongst residents in the Bilsdale region. However, only one in 10 (10%) of those interviewed signed up for a new TV subscription, much less than the expectation of Great Britain survey participants (30%), with only 4% moving to a new TV service such as Sky or Virgin Media, again much lower than the expectation of Great Britain survey participants (27%). Enthusiasm for new, internet-ready TV equipment (7%) and fixed broadband (3%) was similarly muted.

## Short-term shifts are unlikely to remain

While some residents in the Bilsdale region accessed alternatives during the outage, these are unlikely to substitute Freeview. More than three quarters (77%) of those who shifted to alternative viewing habits when their service was lost expect to return to Freeview. 56% will watch both Freeview and alternative services; only about 1 in 10 (13%) will use an alternative service instead of Freeview.



**Figure 11. Behaviours as a result of the loss of broadcast TV services**



■ Bilsdale – TV affected  
■ Great Britain

Base: all participants, Great Britain adults 18+, n = 1995 (not affected by Bilsdale incident)

Base: All Bilsdale adults with affected TV services, n=458

# Conclusions and recommendations

In combination, our two pieces of research lead us to the following observations and recommendations:

- ▶ **Free-to-air broadcasting through an aerial remains an integral part of the British media landscape, and citizens say it must be protected.** Broadcast TV and radio services play an important role across all demographics, and the vast majority of people recognise that it is important these services continue to be available to all. As a result, the policy and regulatory environment must continue to support the continued delivery of these services to all audiences into the future.
- ▶ **The continued provision of broadcast TV through an aerial and broadcast radio is critical for the most vulnerable members of society, including older audiences and those from lower social grades, as well as rural audiences.** Care must be taken to ensure that these communities are not cut off from what a substantial number of people perceive to be an essential service.
- ▶ **Issues of age, digital skills, and financial wellbeing play an acute role in how easily people can access digital alternatives.** The universality of Freeview and broadcast radio services make it critical for communities for which digital alternatives are not easily obtained.



# About the authors



In our world of rapid change, the need for reliable information to make confident decisions has never been greater. At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth. This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide a true understanding of society, markets and people.

To do this, we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do. So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: You act better when you are sure.

Commissioned by:



Arqiva is a communications infrastructure and media services company, operating at the heart of the broadcast and utilities industries in Great Britain.

From the earliest days of radio and television, through the birth of digital broadcasting to the emergence of video over the internet, Arqiva has been at the heart of the industry for nearly 100 years, trusted by broadcast and media brands across the globe. Now, in today's ever-evolving world, that experience combines with a proven portfolio of broadcast infrastructure, end-to-end networks, next generation media processing and connectivity solutions to help our customers innovate, compete and grow.



## Methodology

Ipsos interviewed a sample of 3,006 participants aged 18+; 2,005 across Great Britain and a further 1,001 living in postcodes most likely to have been served by the Biltsdale transmitter. Research was conducted via telephone interviews between 26<sup>th</sup> January and 4<sup>th</sup> March 2022.

**For more detail on the research approach, please see the appendix of the full report [www.arqiva.com/Importance\\_of\\_Broadcast.pdf](http://www.arqiva.com/Importance_of_Broadcast.pdf).**





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