June 2022

The importance of Digital Terrestrial Television and Broadcast Radio

Ipsos
on behalf of Arqiva

Contents

1 Introduction

1.1 The importance of broadcast television and radio was brought into sharp focus when services were lost following a mast fire

On 10th August 2021 a fire was reported at the Bilsdale mast operated by Arqiva. The mast suffered serious damage, resulting in a loss of radio and television signals to more than 600,000 households in the North East of England and North Yorkshire.

The loss of services had a significant impact on the lives of the affected communities. The response to losing broadcast television, also known as Freeview, and broadcast radio services highlighted the need to better understand their importance in the current media landscape. There was also a need to further explore the extent to which people were affected and how these audiences could be supported in the future to ensure that they could access the services that many people rely on every day.

As a result, Arqiva partnered with Ipsos, an independent market research agency, to better understand the impact and importance of broadcast television and radio. The research focused on two important areas:

1. **An exploration of the GB population**, providing a nationally representative view of use and importance of Freeview and radio. Within this approach, participants were told to imagine a hypothetical scenario in which they have no Freeview through an aerial or broadcast radio services, with likely reactions, impact and behaviours explored.
2. **A deep dive into households in the affected area in the North East and North Yorkshire** mirroring the above survey in terms of exploring use and importance of Freeview and radio, but exploring the incident, the extent to which they were affected, and what impact this had.

Ipsos interviewed a sample of 3,006 participants aged 18+; 2,005 across GB and a further 1,001 living in postcodes most likely to have been served by the Bilsdale transmitter. Research was conducted via telephone interviews between 26th January and 4th March. For more detail on the research approach please see the appendix.

Arqiva, as the operator of the transmitter, continues to work closely with multiple organisations, charities, and associations to restore services to those impacted. This programme of works is publicly known as Project Restore. Many local radio services were restored relatively quickly, and whilst for some Freeview signals could be picked up by other local transmitters, for many their TV service was disrupted for weeks, if not months. On 13th October 2021, a new temporary mast was switched on, restoring TV services to 95% of households in the affected region. Plans for a new permanent mast are going ahead.

1.2 The majority of UK homes are served by free to air 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 through an aerial, Freeview, broadcast television and TV through an aerial.

DTT, which for UK consumers is best known as Freeview, is the most popular method of accessing TV channels in the UK. Freeview provides access to 70 free-to-air standard channels, 15 HD channels and up to 30 radio services. With 98.5% of UK households able to receive Freeview, the service provides **near universal access** to channels that keep the UK informed and entertained. According to BARB, an **estimated 17.3 million** (61.2%)[1] of UK households **have Freeview** in their household, more than those with digital satellite (35.0%) and cable (14.1%). Furthermore, **11.4 million households (40.4%) use Freeview on their main set with no access to satellite or cable services**.

Radio services are listened to by 89% of those aged 15+ in the UK each week[2]. Radio broadcasting in the UK delivers free and near universal access to a vast range of radio stations, delivering talk, music, news and information. Across the UK there are 306 community radio stations alongside five UK-wide BBC radio networks, three UK-wide commercial networks and 325 radio services for local regions and the nations[3].

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[1] BARB Establishment Survey Annual Data Report Oct 2019 – Sept 2020
[2] RAJAR quarterly listening statistics, September 2021 - https://www.rajar.co.uk/listening/quarterly_listening.php t
[3] Ofcom Media Nations Nation Report 2021 - https://www.ofcom.org.uk/__data/assets/pdf_file/0023/222890/media-nations-report-2021.pdf

2 Summary of Findings

Broadcast television and radio services are heavily relied upon and highly valued across the UK. While today many people have the choice of watching content across a variety of platforms, Freeview via an aerial (broadcast television) and broadcast radio are the most popular methods of accessing essential programming such as news and entertainment for a significant proportion of the population.

Our survey of adults in Great Britain found that, over half (56%) had watched Freeview via an aerial in the past year and 43% choose to watch weekly. Viewers of video on-demand (VOD) services are just as likely as the average adult (41%) to access Freeview via an aerial weekly as those that do not use these online services. Our survey also highlighted that in the past year, 87% of people have listened to radio at home or in the car, with a much smaller group listening online (42%). The majority of adults in Great Britain listen to radio each week (76%).

Audiences in rural areas are heavier users of broadcast services and rely on these more. Broadcast TV and radio are also more highly valued by people who often do not have the means or choice to access alternatives – including the elderly and those living alone, lower social grades and the non-working population. This reflects the vital role played by broadcast services in people's lives – without these services, people suggest they would be angry, frustrated, upset, alone or isolated.

Most people view the continued provision of free-to-view broadcast services into the future as important if not essential, with 73% of adults saying this is true for broadcast TV and 84% for radio. People recognise the importance of broadcast services that are free-to-view and not reliant on superfast internet speeds being available across Great Britain. Affordability and willingness to pay are key barriers to the take-up of alternative services, with 13% of adults saying 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. Notably, 16% who watched Freeview in the past year also consider themselves to have a skill gap which is a barrier to accessing online content.

90% of adults across Great Britain believe that these services should be continually supported. For those affected by the Bilsdale incident the importance of the continued provision of broadcast services was even more pronounced. 95% in Bilsdale suggested these services should continue to be supported, peaking at 97% amongst those who lost TV services and 98% who lost radio. Furthermore, the majority of adults across Great Britain indicate that government and local MPs (85%), and the BBC (83%) should continue to play active roles to support these services, a view more strongly held by those impacted by the loss.

Our research indicates that people believe a hypothetical loss of broadcast services would have a significant impact, but this imagined impact is still underestimated when compared to the experience of an actual loss of services.

Following the Bilsdale mast fire, 83% who lost all TV channels and 73% who lost radio services felt personally affected in some way. There was a stronger, negative emotional reaction than people unaffected across Great Britain would imagine. Just over three quarters (77%) of those who lost all their TV channels stopped or reduced their viewing of TV channels, and 65% of people whose radio services were affected reduced or stopped listening to broadcast radio indicating that many people did not transition their TV and radio consumption over to alternative platforms. Few (13%) of those whose TV services were affected, and who turned to alternative services indicated they were likely to replace Freeview with these alternatives, with 77% indicating they would return to watching Freeview. Over half (56%) would continue with hybrid viewing, using both Freeview and alternatives

New, paid-for alternative services were taken up to a lesser degree than expected. Whilst 47% of people across Great Britain said they would buy new equipment or services to access TV if they lost broadcast services, only 20% of those affected in Bilsdale did. While 20% of people in Great Britain suggested they would sign up to a new music streaming site in the absence of broadcast radio, only 9% in Bilsdale who were affected did.

This research shows the important roles played by broadcast services across Great Britain. They provide a connection to the world, companionship, inform and entertain. As such, these services are highly valued, and it is widely recognised that they should continue to be available to all into the future.

3 State of the Nation

3.1 Key findings

Freeview is an important method of TV access that many rely upon

- **Freeview through an aerial is the most popular form of access to linear TV.** 56% of GB adults had watched in the past year and 43% of GB adults watch weekly
- **Freeview is complemented, not replaced, by streaming services.** Past year viewers of broadcast and subscription VOD services are just as likely to be weekly viewers of Freeview as adults overall (41% amongst BVOD/SVOD viewers vs. 43% overall)
- **Reliance on Freeview is strong.** 41% of adults have watched Freeview on their main set in the past year with just over a quarter (29%) of adults having watched just Freeview, no cable or satellite services
- **Freeview's audience is broad as well as large.** Whilst the audience skews older, Freeview spans all social grades and audiences peak in rural areas with 63% having viewed Freeview in the past year, 48% watch weekly
- **The importance of continued provision of free TV services through an aerial is very high**, 73% of all adults consider it important if not essential, with this sense of importance seen across all demographics
- **Freeview viewers would be greatly impacted by a loss of Freeview services**, 56% of weekly Freeview viewers would reduce or stop their viewing of TV channels if Freeview were not available.

Broadcast radio services remain highly important in today's digital world

- **The majority of those aged 15+ in the UK listen to the radio.** Amongst our sample, whilst 87% had listened in the past year, 76% of adults are weekly listeners and audiences peak in rural areas (92% listened to radio in the past year, whilst 83% listen weekly)
- **Traditional broadcast radio continues to dominate.** Almost twice as many adults (82%) had listened via a traditional set in the home or car in the past year than listening online (42%)
- **The importance of continued provision of broadcast radio is also very high,** 84% of all adults consider it important if not essential, with this sense of importance seen across all demographics
- **Audiences to radio stations would be greatly impacted by a loss of radio.** 62% of weekly listeners would reduce or stop their listening to radio stations rather than use alternative services

Free access provided by broadcast services is extremely important to more vulnerable audiences

- **Television services delivered via an aerial are particularly important for vulnerable audiences,** such as older age groups (68% of 75+ view weekly), single person households and non-workers (50% and 46% respectively view weekly)
- **Some key audiences are still offline or not using online services**. 7% of adults said their current internet connection is not good enough to access TV/radio online. Demographic groups least likely to be online align with those more reliant on DTT, with a skills gap barrier to using online services much higher amongst those 55+ (23%)
- **Affordability is a key barrier to using alternatives to Freeview.** 13% of adults say that they cannot afford monthly services to access TV content, with this particularly affecting lower social grades.

Many react negatively to a hypothetical loss of broadcast services

- **Many would be affected by a loss of broadcast services,** 54% said they would be personally affected in some way (a great deal/fair amount/a little) by a hypothetical loss of Freeview whilst 68% said they would be personally affected in some way (a great deal/fair amount/a little) by a hypothetical loss of broadcast radio services.
- **Loss of broadcast services is likely to evoke negative emotions,** since 30% used negative emotions to describe how they would feel with specific emotions including anger, frustration, sadness, loneliness and isolation

- **Broadcast services play important roles in providing people with companionship and news** – 38% would find it hard to keep up with news and important information and 25% would feel lonely without Freeview services. A similar response was seen for radio with 37% who would find it hard to keep up with news and information whilst 23% would feel lonely without radio services
- **Audiences would stop or reduce viewing rather than seek alternative means if they currently do not have one.** 56% of weekly Freeview viewers would reduce or stop viewing TV channels, if free TV services through an aerial were not available, rising to 67% if they have no current alternative means
- **If free TV services via an aerial were not available many expect the costs of alternatives and the licence fee to be reduced** – 42% would expect costs to drop. The most common expectation is for the TV licence to be cheaper – a total of 36% of adults said they would expect this. Amongst those expecting any costs to drop, the majority expect the TV licence to be cheaper (86%).

The vast majority consider there should be continued support for broadcast services

- **Most indicate continued provision of TV and broadcast radio should continue to be supported.** Given the wide reach and frequent use, 90% of GB adults said continued support is needed
- **Government and local MPs should continue to actively support the continued provision of services through an aerial**, 85% suggest government and local MPs should actively support this
- **The BBC should continue to actively support the continued provision of services through an aerial.** 83% said the BBC should actively support this.

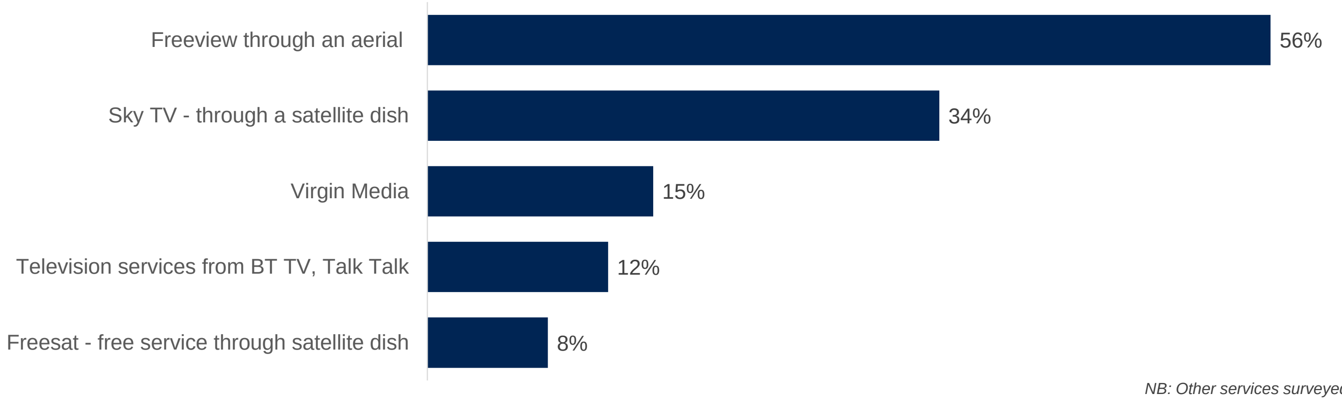
3.2 Huge reliance on Digital Terrestrial Television services exists across the country

Free-to-view TV services through an aerial serve a large and varied audience. Despite many also watching in other ways there is a strong belief that these services should continue to be provided. Any loss of these services is likely to affect a large proportion of the population.

Freeview delivered through a TV aerial provides near universal access, reaching millions of people across the country

Freeview through an aerial is the most popular means of traditional TV access, accessed by over half of all adults. In our survey amongst GB adults 18+, 56% had viewed Freeview through an aerial (from hereon in referred to as Freeview[4]), at home in the past year, (see figure 1)[5], considerably more than had watched through Sky (34%), Virgin Media (15%) or Freesat (8%). These survey findings align with BARB reported household access to TV services, where Freeview takes significant lead over both satellite and cable[6].

Figure 1: Traditional TV services used in the household in the past year



NB: Other services surveyed

Base: All respondents, GB adults 18+, n = 2005

Freeview is a service many use with high regularity. Freeview reaches a very large audience with 43% of adults claiming to watch it at home every week. Three quarters (76%) of those who had watched Freeview at all in the past year watch Freeview every week.

Freeview and other traditional platform viewing such as cable/satellite, is complemented with streaming services – not replaced by them. Whilst 80% had watched BVOD and/or SVOD in the past year, these on-demand viewers are just as likely as the average adult to be weekly viewers of Freeview, (41% vs. 43% seen across GB overall), indicating that they are not just watching these online services in isolation. Considering over half of all adults had watched Freeview in the past year, 39% watched Freeview alongside BVOD/SVOD, indicating the popularity of hybrid viewing but also the continued popularity of traditional TV services and access to live TV channels.

Freeview leads main set viewing with 41% of all adults having watched Freeview via an aerial on the main household TV set in the past year. For others Freeview is viewed alongside other services and may be watched on secondary sets; 18% of all adults watched Freeview on a secondary set in the home in the past year with almost a quarter (23%) claiming to have watched Freeview alongside cable or satellite services at home in the past year.

A significant proportion of households are exclusively reliant on an aerial in order to view TV services. Our survey found that 29% had watched only Freeview and no cable or satellite service at home and 7%, had only watched Freeview at home in the past year, with no viewing of either other traditional or BVOD/SVOD services.

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[4] Further references to 'Freeview' throughout this report in all instances refer to the DTT platform and services delivered through an aerial
[5] Past year refers to past 12 months throughout
[6] BARB data Sept 2019-Sept 2020 reports that 61.2% of all homes have DTT, higher than DSat (35.0%) and Cable (14.1%). Methodology for BARB differs to this study and therefore demographic and regional variations may be different

BARB estimates that 11.4 million households (just over 40% of households) have only Freeview, no satellite or cable services, and so are more reliant on Freeview for access to live TV channels.

Our survey revealed some demographic and regional differences when it came to claimed viewing of Freeview through an aerial. Given the smaller sample, albeit representative of GB overall in design, and the different approach, these findings may well differ to those from the industry currency, BARB.

Freeview serves a very broad audience reaching all corners of society and spanning all age bands.
Whilst Freeview viewing increases with age, a quarter (27%) of 18-34s claimed to watch Freeview every week and around one in ten watch every day (7%), rising to 60% of those 55+ watching every week. Past year and weekly reach show no differences by social grade, although those social grade DE are the most likely to be daily viewers (31%).

Frequent Freeview viewing peaks in rural areas. A fifth (19%) of our sample lived in rural areas amongst whom half watch Freeview weekly (48%), with a third (34%) watching every day – significantly higher than seen in suburban (24%), urban (28%) or metropolitan areas (23%).

Figure 2: Daily reach of Freeview through an aerial amongst adults 18+ by area

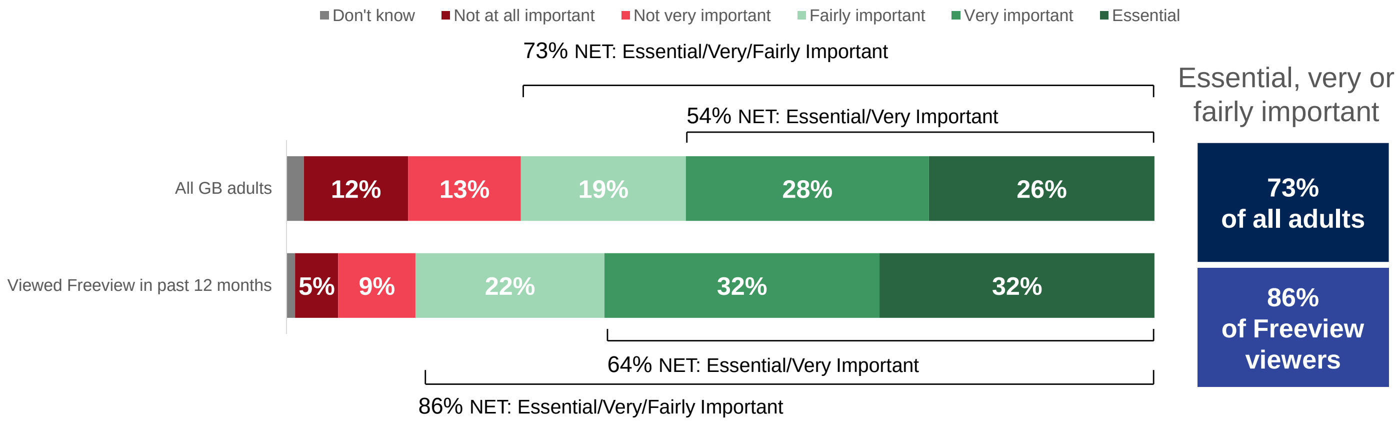
Base: All respondents, GB adults 18+, n = 2005

> *"Freeview plays a big part in my life. My mother is wheelchair bound and so these services keep my mother occupied."* Female, 18-24, South West, DTT viewer

Continued provision of free-to-view services via an aerial is considered essential or very important

Over half (54%) of all adults consider it essential or very important that Freeview through an aerial continues to be provided as a free service, whilst nearly three quarters (73%) rate it essential, very or fairly important. This rises to 86% of past year Freeview viewers. Figure 3 displays the full breakdown of results.

Figure 3: Extent to which continued provision of Freeview service through an aerial, as free services is considered important



Base: All respondents, GB adults 18+, n = 2005

Base: All Freeview viewers in past year, n = 1141

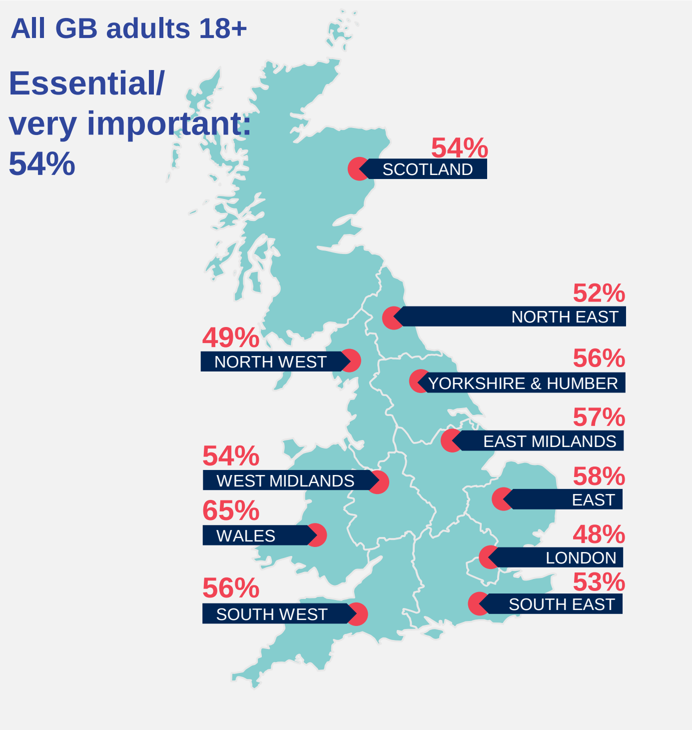
The extent to which these free services are considered essential or very important rises with age, (42% for 18-34s, 52% for 35-54s, 65% for those 55+), peaking at 68% amongst those 55-64. Importantly, whilst daily viewing peaks amongst social grade DE, the highest social grades (AB), are more likely than any other social grade to say these services are essential (31%), and more likely than the average to say they are essential or very important (58%), indicating that whilst they may not be the most regular viewers, they understand the importance of the continued provision of free-to-view TV via an aerial.

Over 50% of people in each region outside of London (48%) and the North West (49%) consider Freeview essential or very important. As seen in figure 4, Wales stands out as a key region in terms of the importance of these services. Wales leads the way in terms of rankings for essential (32%) and essential or very important (65%, as indicated in the figure) as well as being essential, very or fairly important (84%).

"We rely on it [Freeview] quite a lot it's a big part of our family life." Female, 35-44, Wales, DTT viewer

"It's important to us and it's important that we have the TV. It's important if you have children. A lot of parents rely on it for that. It's also essential for the elderly and anybody who is unable to access apps." Female, 45-55, East, DTT viewer

Figure 4: Extent to which continued provision of Freeview service through an aerial, as free services is considered essential or very important by region



Lowest sample size, North East, n = 75, highest = South East n = 295

Even amongst non-viewers of Freeview, there is an understanding of the importance of this free-to-view TV service. A fifth (19%) of those who had not watched Freeview in the past year, still stated that continued provision of these free services is essential. Despite not personally using the service, they understand the important role it plays for others. Whilst less likely than viewers to perceive the importance, nearly six in ten, (57%) non-Freeview viewers indicated continued provision of the services is essential, very or fairly important.

"Freeview is essential for keeping up with current affairs and general family entertainment" Male, 45-55, Eastern, DTT viewer

"It's essential because everyone should have the chance to watch the TV and wider world" Male, 25-34, Scotland, DTT viewer

3.3 The majority of the population tune in to broadcast radio, at home and in the car

Broadcast radio has a large audience who listen very regularly. It remains the most popular way to listen to radio with strong support for the continued provision of the stations transmitted via an aerial. Any loss of broadcast radio services is likely to affect a large proportion of the overall population.

Radio listening through broadcast signals reaches large audiences with a strong lead over internet-based listening

The majority of adults listen to radio, not just occasionally but every week. Nearly nine in ten adults (87%) claim to have listened to radio, in at least one of the ways surveyed in the past year. Whilst radio reaches most adults across the year, half of the respondents in our survey (49%) claimed to listen to live radio in their home or car daily, with **three quarters (76%) listening at least once a wee**k. RAJAR places weekly listening at the higher level of 89%[7], demonstrating that the vast majority of the adult population, (for RAJAR this covers those aged 15+ in the UK) regularly engage with radio. Our survey revealed some demographic and regional differences when it came to claimed radio listening. Given the smaller sample, albeit representative of GB overall in design, and the different approach, these findings may well differ to those from the industry currency, RAJAR.

Radio not only reaches large audiences, but very broad audiences. Within our sample, regular listening is more likely with increased age, (85% of those 55+ listen each week), but still at least half of 18-24s listen to radio every week (52%). Radio listening peaks amongst those in social grades ABC1C2, but still more than two thirds (69%) of those social grade DE claim to listen every week. Weekly radio listening is found to be more likely amongst those living in rural areas (83% vs, 77% sub-urban, 75% urban and 69% metropolitan) and peaks in the North East (86%), with London having fewer weekly listeners than any other region (64%).

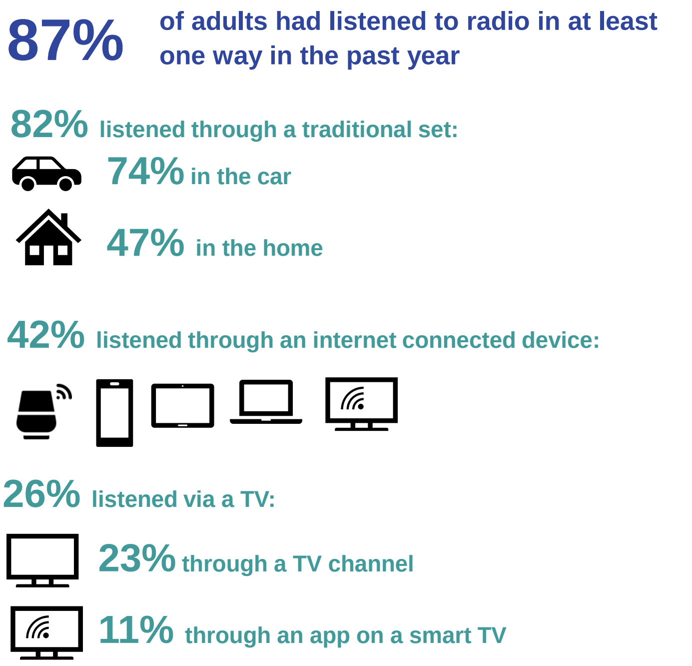
Base: All respondents, GB adults 18+, n = 2005

Listening to radio via a traditional set remains the most popular method of listening. 82% had listened to broadcast radio, and of the methods surveyed, past year radio listening was highest in the car (74%). Nearly half (47%) listened on a radio set at home (AM, FM or DAB) in the past year (see figure 5).

Online methods of listening to the radio only reach around half as many listeners as broadcast radio, (42%). Traditional set listening mirrors overall listening and increases with age, however listening via the internet peaks amongst those 35-54 (53%), falling in the 55+ age group (43%).

Radio listening via the internet is much lower amongst the lowest social grades DE, (31%), compared to a high of 54% amongst ABs. Online listening varies regionally from a low of 30% in the North East to highs of 47% in London and the South East. Whilst radio can also be listened to through channels on a television, and nearly a quarter (23%) did so in the last year, these devices are less popular than radio sets in the home or car.

Figure 5: Past year listening to radio via different methods



Base: All respondents, GB adults 18+, n = 2005

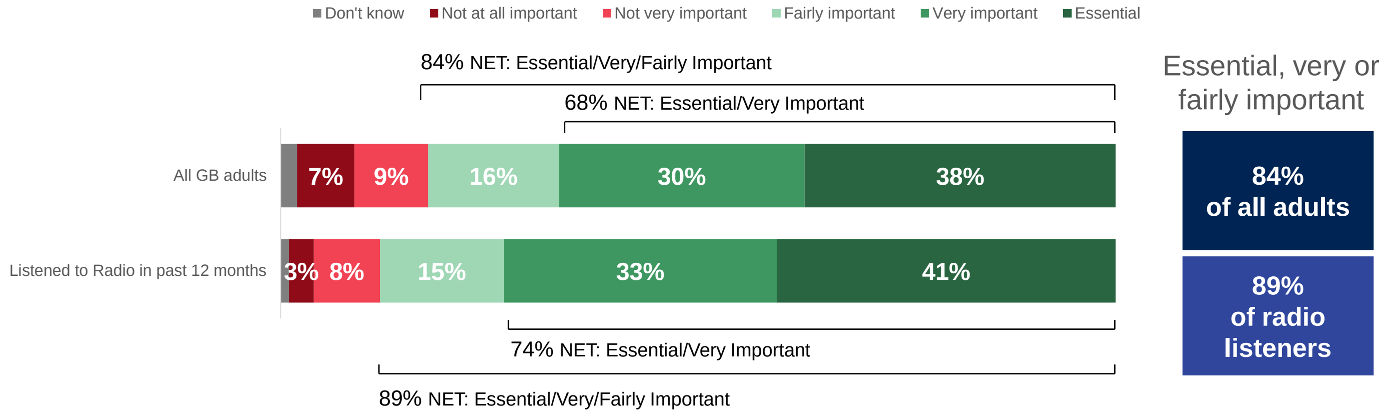
[7] https://www.rajar.co.uk/listening/quarterly_listening.php Methodology for RAJAR differs to this study and therefore demographic and regional variations may be different

Continued provision of free broadcast radio stations is considered to be essential or very important

Just over two thirds (68%) of all adults consider it essential or very important that radio stations broadcast through an aerial continue to be provided as a free service, whilst 84% rate it essential, very or fairly important. Amongst past year radio listeners the importance rises, with three in four indicating it is essential or very important that these continue to be provided for free, see figure 6.

"I Listen to radio a lot. It [losing radio] would affect me lot, it would be terrible", Female, 25-34, Eastern, non-DTT viewer

Figure 6: Extent to which continued provision of radio stations through an aerial, as free services is considered important



Base: All respondents, GB adults 18+, n = 2005

Base: All Freeview viewers in past year, n = 1141

The extent to which these free radio stations delivered through an aerial are considered essential or very important rises with age, (53% for 18-34s, 73% for 35-54s, 76% for those 55+), peaking at 82% for 55-64s, in line with increased listening with age. Also in line with listening trends, the highest social grades (AB), are the most likely to say these services are essential or very important (76%). Whilst this declines with social grade there is little variation by region.

Those not engaging with radio recognise the importance of continued provision of radio via an aerial. Amongst the small group (15%) who had not listened to radio in the past year, a fifth (19%) consider it essential and just over a third (35%) considered it essential or very important that radio continues to be provided for free through an aerial. Whilst not listening themselves, this indicates they recognise the importance of these services to others in society.

3.4 Vulnerable groups are reliant on broadcast television and broadcast radio services

Whilst online based sources for accessing TV and radio content are used, these don't currently reach the entire population. Broadcast services have broad reach and are particularly important for a number of vulnerable groups who may not yet be online or able to use online services. As the cost of living escalates and affordability of services becomes even more of a barrier, reliance on the free services delivered via an aerial may become even stronger than it is now.

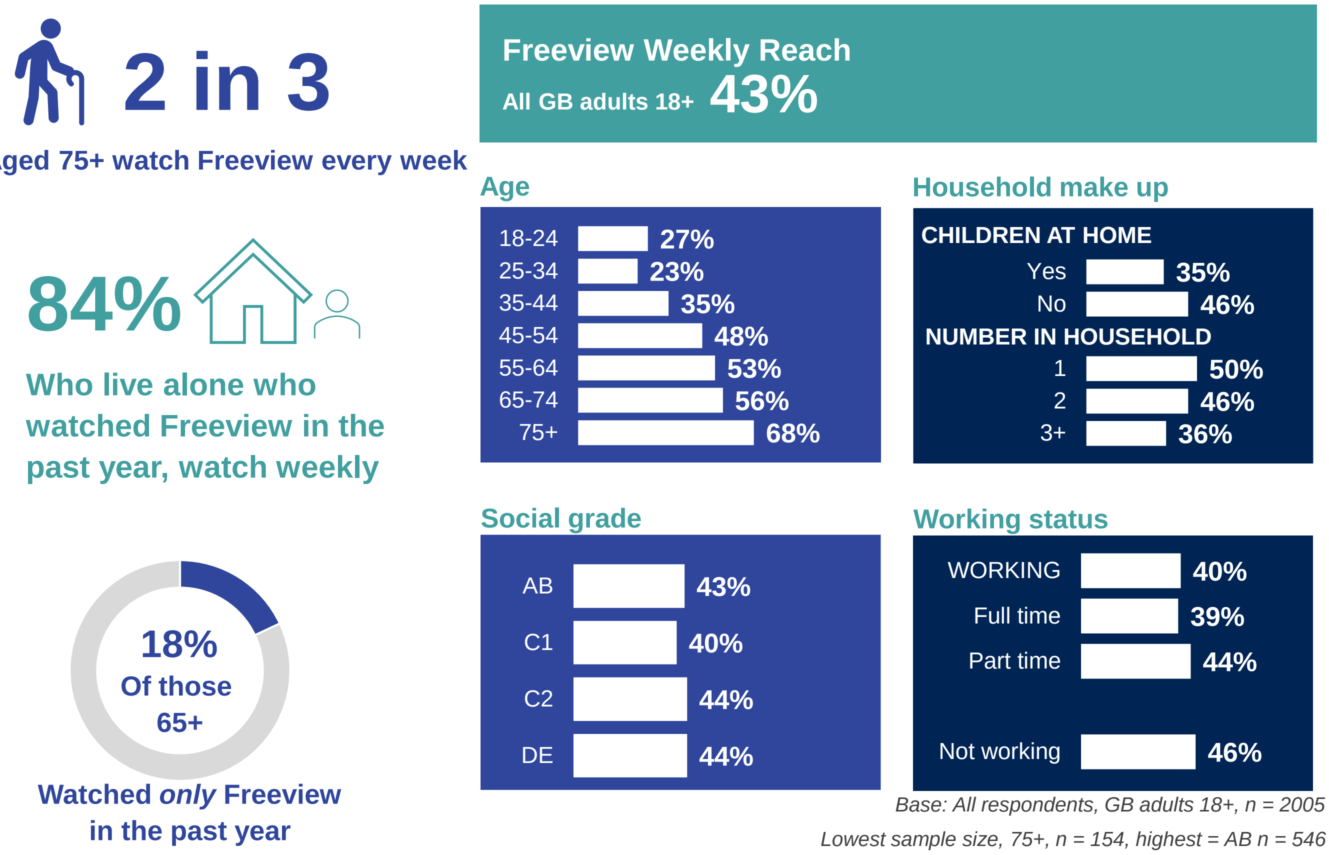
Freeview is an important service for many vulnerable and traditionally under-served audiences

Whilst all corners of society watch Freeview, it plays a particularly important role for older audiences. As seen in figure 7, weekly viewing of Freeview via an aerial increases with age, peaking at two thirds (68%) of all aged 75+. The high use of streaming services seen amongst the population at large shrinks considerably amongst older ages; more than two thirds (69%) of those 65-74 but just 53% of those 75+ claimed to have watched BVOD or SVOD at home in the past year. **Nearly a fifth (18%) of those 65+ watched only Freeview in the past year**. As noted above, demographic differences reported for claimed viewing of Freeview through an aerial may well differ to those from the industry currency, BARB, given the smaller sample, albeit representative of GB overall in design, and the different approach taken.

Freeview provides a critical service to other vulnerable groups including those living alone, non-workers and the lowest social grades. Weekly viewing is particularly high amongst single person households, a group that correlates with older age – 84% of those living alone who watched Freeview at all in the past year said they watch every week.

Non-workers are significantly more likely to be weekly viewers of Freeview than those who work (46% vs. 40%) and whilst weekly reach compares across social grade, as referenced above, lower (DE) social grades are the most likely to watch daily (31%, compared to 27% overall).

Figure 7: Weekly reach of Freeview through an aerial in the home amongst a range of demographic groups



Base: All respondents, GB adults 18+, n = 2005

Lowest sample size, 75+, n = 154, highest = AB n = 546

Barriers to access the internet means key groups rely on an aerial to provide access to TV and radio services

Alternatives to TV and radio services delivered via an aerial are available, but not everyone has an internet connection at home to provide them access. The internet cannot offer universal access to TV and radio services. Ofcom research indicates 6% of households have no access to the internet at home[8], our survey is consistent with this. Ofcom also report that 10% of UK adults only access the internet via a smartphone[8], which would present a challenge for big-screen and shared viewing experiences.

Amongst the oldest age group, those 75+, 14% have no internet access in the home and this is also more likely amongst social grades DE (4%), those in single person homes (6%), and amongst those who only watched Freeview in the past year (17%). Findings align with those from Ofcom, **who report that those 65+ are three times as likely to not have internet access (18%)**[8]**.** Ofcom also identify lower social grade households as facing challenges in this space – 12% of households of social grade DE have no devices available to access the internet, nearly double the average (7%)[8].

[8] Ofcom Online Nation Report 2021 - https://www.ofcom.org.uk/__data/assets/pdf_file/0013/220414/online-nation-2021-report.pdf

These demographic skews for those least likely to have internet access are those most likely to be solely reliant on DTT for TV services as a source of entertainment and education. **With 5% of households struggling to afford their fixed broadband service**[9] and the increasing cost of living in the UK, internet access may be a challenge that even more households face, pointing to the importance of the services DTT provides, with free universal access to all.

With online access not universal, internet-based approaches cannot reach all in society. Whilst many are watching content via the internet, **a quarter (24%) of those 55+ are not weekly viewers of content through internet connected devices**, rising to nearly half (47%) of those 75+. Regional biases can also be seen. In London 90% watch TV or video content through internet connected devices in their home every week, considerably higher than the 81% reported in North East, North West and East Midlands. As noted above, given the smaller sample and different approach, demographic and regional differences reported from our survey may well differ to the industry currency, BARB. **Online radio listening has not yet reached the masses, with under half (42%) having listened through a website or app on any device including a smart speaker in the past year.** This is in line with findings from RAJAR'S MIDAS[10] survey amongst those 15+ in the UK – whilst 55% listen via DAB radio and 40% through AM/FM radio each week, listening via other devices is less than half this (for example 16% through a voice activated speaker, 12% through a mobile phone, 6% through a desktop or laptop). Within our survey, the lowest social grade (DE) are significantly less likely to have listened to radio through online methods, than all other social grades (31%), with fewer non-workers being online listeners (34% vs. 48% of those working). As with online based services for TV content, radio access via online approaches is not universal.

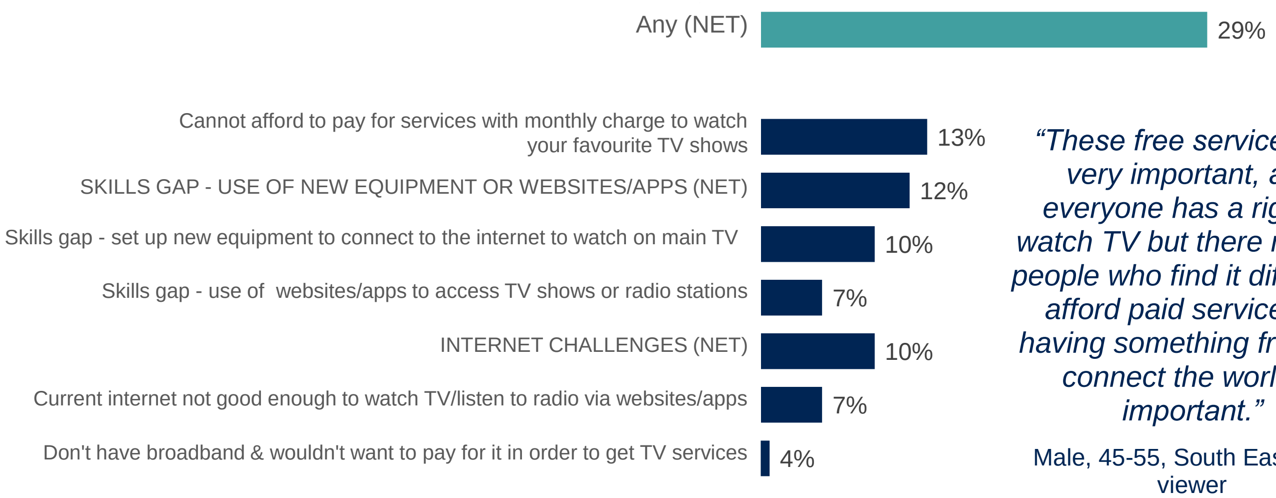
Affordability and willingness to pay are major barriers to taking up alternative non-broadcast services

60% of those who only access Freeview claim they would not pay for other services[11] indicating a strong resistance to alternative paid for services. A further 29% suggested they would pay but not be happy about it.

13% of adults cannot afford paid-for TV services. Affordability challenges extend to the broader population and charges faced for services to access content and get online, see figure 8. The youngest 18-24s were more likely than the average (19% vs. 13% overall) to suggest that they cannot afford to pay for services that charge you each month to watch your favourite TV shows.

13% of GB adults cannot afford to pay for services with monthly charges to watch their favourite TV shows

Figure 8: Challenges personally face when watching TV or listening to radio through the internet



"These free services are very important, and everyone has a right to watch TV but there may be people who find it difficult to afford paid services so having something free and connect the world is important."

Male, 45-55, South East, DTT viewer

Base: All respondents, GB adults 18+, n = 2005

[9] Ofcom Affordability of Communications Service 2021 https://www.ofcom.org.uk/__data/assets/pdf_file/0016/232522/Affordability-of-Communications-Services.pdf
[10] RAJAR MIDAS Winter 2021 https://www.rajar.co.uk/docs/news/MIDAS_Winter_2021.pdf
[11] Those watching only Freeview and not services from cable, satellite, SVOD or BVOD were asked to imagine TV channels and services that they received through an aerial were no longer available. In order to access TV channels they were told they would need to pay to access a service from a company like Sky, Virgin, BT etc. They were advised that they may incur one-off or ongoing costs for extra equipment, installation or a new broadband connection, although details of these costs were not provided

One in five (21%) who are social grade DE already suggest such payments are a barrier. With the well documented increases in the cost of living[12], this financial barrier may become even more evident. In terms of region, those living in the North (North East, Yorkshire and Humberside and North West), are the most likely to say that they cannot afford to pay for services with monthly charges to access their favourite TV shows (18%, compared to 13% overall).

In addition, despite being connected, 7% of adults suggest their current internet connection is not good enough to be able to watch TV shows or listen to the radio online. A challenge that was higher for those in the South West (11%) and those in rural areas (9% vs. 4% living in metropolitan areas). Although a small group[13], those who do not have internet access seem fairly resistant to getting and paying for broadband.

A lack of relevant skills also presents as a challenge for some when thinking about accessing TV or radio content online, with broadcast services reaching those who lack these skills

Those who watch Freeview are more likely to present with some challenges to accessing TV and radio content online than viewers of other services (33% vs. 23% for cable/satellite viewers, 24% for SVOD/BVOD viewers, 29% overall). In line with a viewer profile that skews older, Freeview viewers are more likely than the average to have challenges through a skills gap (16% vs. 12% overall), whilst the challenge of affordability is comparable (15% vs. 13% overall).

16%

Who watched Freeview in the past year, consider they have skills gaps which are barriers to accessing content online

The skills gap that exists is much larger amongst older adults. Just over one in ten (12%) present with at least some skills gap, but this is almost double (23%) amongst those 55+, peaking at 40% for those 75+. This mirrors the larger skills gap in older ages that Lloyds Banking Group document in their Essential Digital Skills work. This estimates around 10 million UK adults, 19%, are unable to access the internet themselves, and lack basic digital skills[14], a group that skews towards those 65 and over. The group reporting they have a skills gap (12%) fell into two categories that lack being able to:

- set up new equipment that would connect to the internet to let you watch through websites or apps on your main TV (10% overall, 20% amongst those 55+, 33% amongst those 75+)
- use websites or apps to access TV shows or radio stations (7% overall, 14% amongst those 55+, 27% amongst those 75+).

"Not everyone is tech-savvy, particularly the elderly who might struggle to get online to access their favourite TV shows".

Female, 18-24, London, non-DTT viewer

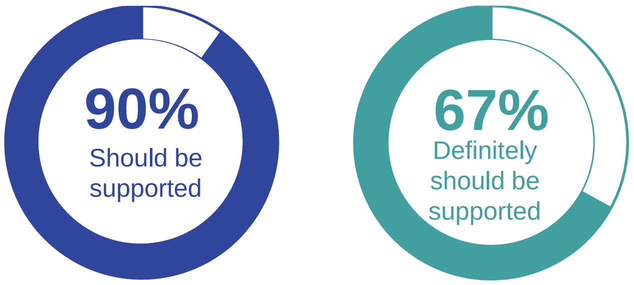
[12] https://www.theguardian.com/business/2022/feb/03/in-numbers-britains-cost-of-living-crisis; https://www.ft.com/content/8d4a29e6-4bef-4c52-92c4-ab588f6af51f
[13] Sample size just 33, data indicative only
[14] Lloyds Essential Digital Skills 2021 https://www.lloydsbank.com/banking-with-us/whats-happening/consumer-digital-index.html

3.5 Looking to the future, free-to-view services via an aerial must continue to be provided and actively supported

Given other feedback gathered from the survey, it is clear that even if consumers are personally using alternative services, the ability for all to be informed and entertained via services that are free to access is considered important and necessary. Further, this survey indicated that consumers believe both government and local MPs and the BBC should actively support continued provision of free broadcast services; a role that has been played in the past.

There is a very strong view that there should be continued support for the provision of DTT Freeview services and radio services, with a need for both MPs and the BBC to be showing active support

The vast majority (90%) indicated continual support of these services is needed with two thirds indicating definite support is required (67%). Given the extent to which both free-to-view TV services and radio through an aerial are considered important if not essential, it is perhaps unsurprising that most consider that the provision of these services should be continually supported.

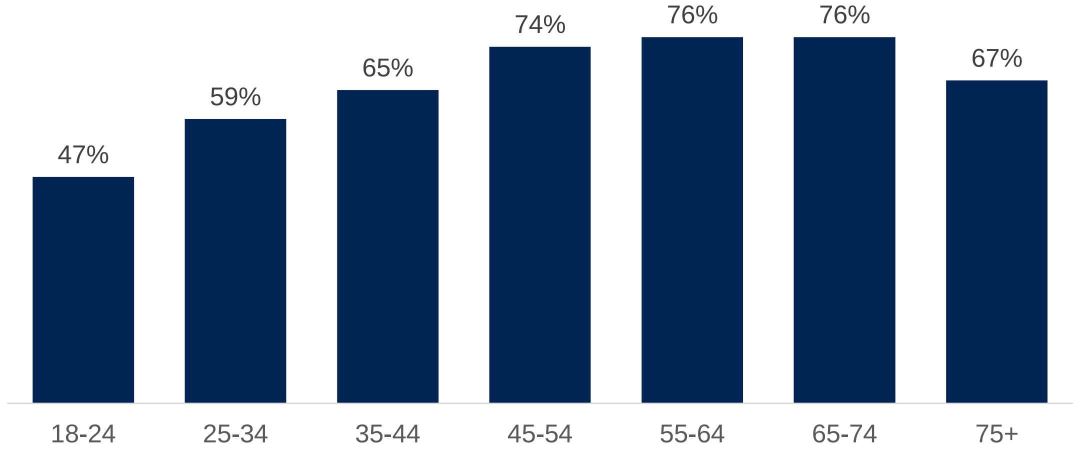


Base: All respondents, GB adults 18+, n = 2005

Amongst those currently engaging with broadcast services, the need for continual support is even higher. Definite support increases slightly to 69% amongst past year radio listeners, with 91% suggesting they should be supported. Amongst those who watched Freeview in the past year even more, 73%, indicated broadcast services should definitely be supported, with 93% indicating support overall is needed.

88% of 18-24s indicate TV and radio services through an aerial should continue to be supported (definitely or probably). Whilst *definite* support increases with age, sitting at around three quarters of those 55+ (74%), 47% of 18-24s say they should definitely be supported, see figure 9. *Definite* support is also found to be stronger amongst social grades ABC1 (70% vs. 64% for C2DEs).

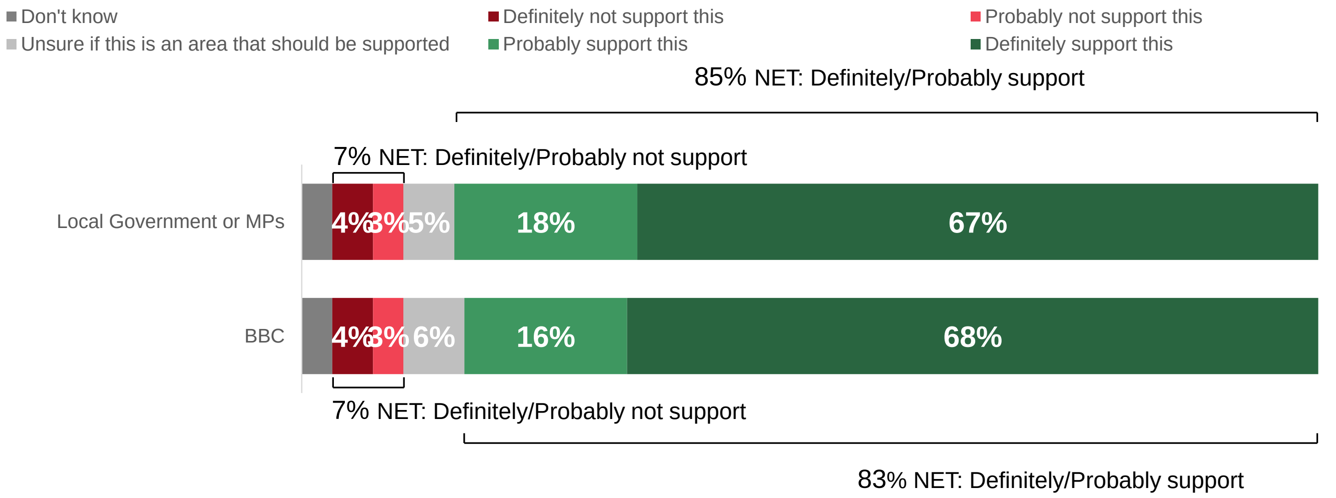
Figure 9: Percentage of adults in each age group indicating that the continued provision of TV and radio services through an aerial should definitely be continually supported



Lowest sample size, 75+, n = 154, highest = 55-64, n = 360

To date, government, and local MPs, as well as the BBC, have shown support for broadcast services. Consumers were asked to consider the extent to which government or local MPs, as well as the BBC, should actively support continued provision of TV and radio services through an aerial. Half the sample were selected to answer on each so that only one aspect was considered. The full split of results is shown in figure 10.

Figure 10: Extent to which they consider that the BBC or local government or MPs should actively support continued provision of TV and radio services through an aerial



Base: GB Adults 18+, n=1025 (Those asked about local government MPs)

Base: GB Adults 18+, n=980 (Those asked about BBC)

85% of GB adults consider government and local MPs should be actively supporting continued provision of broadcast services via an aerial

Consumers expect government or local MPs to actively support the continued provision of broadcast services. The majority, 85%, indicated government or their local MPs should actively support the current provision of TV and radio services (definitely or probably), with two thirds (67%) indicating they should *definitely* actively support this (see figure 10). This expectation for *definitely* actively supporting the cause was higher amongst females (71% vs. 62% for males), social grades ABC1 (70% vs. 64% for C2DEs) and increased amongst older adults (73% amongst those 55+). However, even amongst the youngest 18-24s, just under half (47%) indicated government or local MPs should definitely be actively supporting continued provision of these services. Those living in Wales were the most likely to indicate that government or local MPs should definitely be actively supporting these services (73%).

Consumers also expect the BBC to actively support continued provision of TV and radio services. 83% indicated that BBC should actively support this (definitely or probably), with around two thirds (68%) suggesting the BBC should *definitely* actively support continued provision of TV and radio through an aerial, (see figure 10). As with government and local MPs, a higher proportion of females (72% vs. 64% for males) indicated the BBC should *definitely* actively support this. Again, this expectation increased with age (76% amongst those 55+) and peaked amongst those social grade AB (75%). However, even amongst the youngest (18-24s), 51% considered the BBC should definitely be actively supporting the continued provision of these services.

“People find it difficult to pay for extra services. Free services allow people to educate themselves. If the Government wants to support society, there needs to be these sorts of collective services provided.”
Female, 60-64, Scotland, DTT viewer

83% of GB adults consider the BBC should be actively supporting continued provision of broadcast services via an aerial

Amongst those engaging with broadcast services, more consider there is a role for government and local MPs as well as the BBC to actively support continued provision of these services. Amongst past year Freeview viewers, 89% considered that government or local MPs and 88% considered that the BBC should actively support continued provision of broadcast services (definitely or probably). The results are similar for past year radio listeners – 88% considered government or local MPs and 84% considered that the BBC should actively support continued provision of broadcast services (definitely or probably).

Viewers of streaming services are just as likely as the average to support Freeview

Access to content in other ways does not undermine the importance of Freeview, with past year SVOD/BVOD viewers as likely as adults overall to indicate that continued provision of free TV and radio services through an aerial should definitely be supported. Two thirds (67%) of past year viewers of streaming services, suggested these services should definitely be supported, and that both the government and local MPs (67% definitely support) as well as the BBC (68%) should definitely support continued provision of these services.

3.6 A hypothetical situation considering the potential loss of all Freeview services delivered via an aerial is met with negativity; free access to services is important

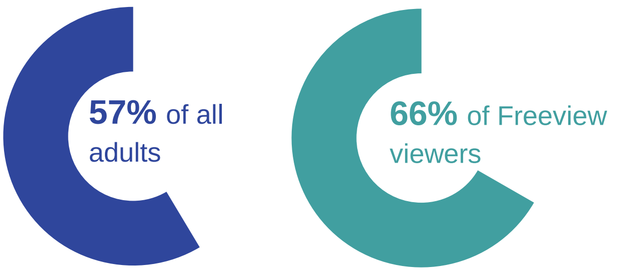
This research indicates a majority expectation of a lower cost TV licence fee if services are no longer provided for free via an aerial, and other costs are required to access content.

Negativity towards potential loss of free TV services via an aerial is seen

57% expressed negativity towards loss of Freeview services[15] via an aerial and the need to switch to alternatives, whilst a third (32%) had no strong feelings either way.

All age groups expressed negativity towards the loss of service. This increased with age, with nearly two thirds (63%) of those 65+ negative towards this scenario, indicating the increased importance of Freeview with age. Alongside 90% of those aged 65+ indicating TV and radio services delivered through an aerial should continue to be supported, the sense for protection of these services is particularly strong amongst the upper age bands.

Expressed negativity towards potential loss of Freeview services via an aerial



Base: GB Adults 18+(half sample), n=968

Base: GB Adults 18+ who had watched Freeview in the past 12 months (half sample), n=563

Even amongst younger adults less likely to watch Freeview, negativity towards loss of Freeview was strong. Whilst the youngest 18-24s were more likely than all other ages to be neutral about this scenario (53% vs. 32% overall), over half in each age band 25 or over were negative towards this hypothetical change. A greater proportion in each age group were *very* negative rather than *fairly* negative. **This strong emotional response seen for the scenario regarding loss of Freeview indicates the importance of the role that Freeview plays.**

Whilst Freeview viewers are more likely to be negative about the potential loss of these services, than non-viewers (66% vs. 46%), non-viewers did not support any loss of these services. Despite not viewing Freeview in the past year, nearly half of non-viewers expressed negativity.

[15] Consumers were presented with a hypothetical scenario in which Freeview services were no longer available through an aerial. In order to receive these channels, consumers were told they would need to have services through cable, satellite or another provider which may incur a fee. To continue to watch for free they were told they would need an internet connection and they may incur one-off or ongoing costs for extra equipment, installation, or a new broadband connection. No further details were provided in terms of these alternative services and the costs that may apply. Consumer reaction to this possible scenario was collected via a five-point positivity scale. Half the sample were asked this question.

Being able to watch TV for free is key to the Freeview service. Negative reactions about a potential loss of this free service stem from the need to pay for what was once free

A key reason for negativity towards the potential loss of free services is the need to pay for alternatives. 54% cited affordability being a key theme that surrounds the provision of free to access services delivered though an aerial. Specifically, 28% stated reasons related to **not needing or wanting another expense and not being able to afford it**, with a sense that this was being forced upon them. Consumers pointed out how they, as well as others, cannot afford this extra level of costs that would apply.

54% of GB adults who expressed negativity towards the loss of TV services via an aerial cited reasons related to having to pay

"I haven't got that much money with everything rising, and radio is free..."
Female,45-55, South West, DTT viewer

"I do know people who only have Freeview. I don't think it would be very fair because there are people [that] cannot afford the equipment to watch these channels if this were to happen."
Female, 60-64, South West, non-DTT viewer

"I just think it would be very bad if those services were removed forcing those people to either pay a subscription to have them or just to be able to access them"
Male, 65+, Scotland, non-DTT viewer

"I think it is a part of being a member of a free society being able to access info without paying for it" Male, 60-64, London, non-DTT viewer

A sense that something that has been free should still be free exists. Almost a quarter (23%) were negative towards the loss of services on the basis that they considered you should not have to pay for something that has been free, and that they perceive should remain free.

Other reasons related to payment refer to the fact that other equipment (3%) or TV services (5%) should not have to be paid for, with **5% spontaneously saying that if you have already paid for the TV licence you should not have to pay more**.

3.7 If there were no free-to-view TV services available through an aerial, people would expect the cost of alternatives and the licence fee to be reduced

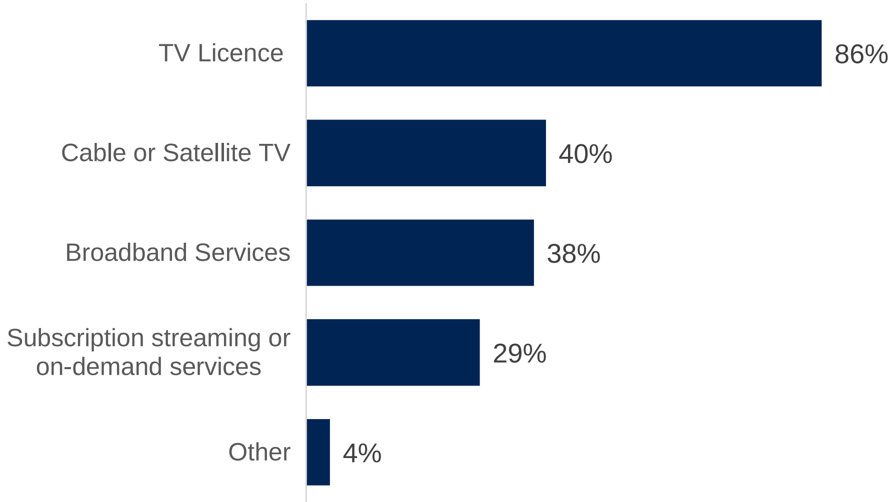
People indicated they would be dissatisfied in a scenario where Freeview TV services via an aerial were removed, with the sense that should this happen, costs to access TV content, in particular those of the TV licence fee, would need to reduce.

If free TV services via an aerial were not available, four in ten would expect the cost of the TV licence or other services to decrease

In a scenario with no free-to-view TV via an aerial, 42% indicated they would expect to pay less for the TV licence or other services[16]. Just over a third (36%) of adults expect the TV licence to be cheaper, and of those who expected to pay less, the majority (86%) expect the TV licence to be cheaper (see figure 11). Fewer than half as many considered that reductions should be applied to other services that would allow them alternative access to TV content. Whether reductions come from companies lowering the prices, or from government subsidies, is a question for the future, should this unlikely removal of services ever happen.

[16] Exploring a potential scenario whereby Freeview services were not available through an aerial, consumers were reminded they don't have to pay to watch Freeview through an aerial but do need a TV licence. If this service were not available, they would need cable or satellite TV or an internet connection to access TV channels. They were reminded they may need new or upgraded equipment, cable or satellite TV services or internet services, depending on their existing set-up at home. Again no further details on the levels of costs were provided.

Figure 11: Elements that are expected to cost less if Freeview through an aerial is no longer available



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

> *"Because we shouldn't have to pay for a TV licence then pay someone else as well to get the channels. You would have to pay the TV licence and whoever you subscribed to for the box and broadband. You shouldn't have to do that; you shouldn't have to pay twice."*
>
> Female, 45-54, South East, DTT

Those living in Wales stood out as the most likely to expect the cost of the TV licence or other services to be less (58%), with this lowest in London and the South East (38%). Little variation was seen by demographic or viewer groups.

3.8 Broadcast services would be really missed by many, leaving audiences lonely and cut off from sources of news and entertainment

A loss of broadcast services would have a massive impact. As a service many rely upon it would leave people disconnected from the world in terms of information, entertainment and importantly companionship.

People would miss TV and radio services through an aerial, describing a range of negative emotional reactions to this hypothetical scenario

When asked in their own words how a loss of broadcast services[17] would make them feel, how it would impact them, and what they would miss, three in ten (30%) adults described a negative emotional reaction. Specific emotions included feeling **angry, annoyed or frustrated**, **upset, sad or depressed**, or **alone, isolated and cut off**. These strong negative emotions typically relate to the important role Freeview plays, particularly to some of the more vulnerable groups and in the recent pandemic when more time has been spent at home.

"It would make me feel angry because we should be able to listen to the news and anything else we wish to watch at any time really" Female, 35-44, Yorkshire and Humberside, non-DTT viewer

"I would be very upset and annoyed if it were taken away" Male, 60-64, London, non-DTT viewer

"I would feel vulnerable and isolated… devastated" Female, 45-55, North East, DTT viewer

"I would probably be annoyed about it I think it's an essential service" Male, 50-59, West Midlands, DTT viewer

"Disappointed possibly angry. I think there should be access to programmes for everybody, they should be available in a capacity regardless of if an individual has the financial means to pay for it"
Male, 35-44, South West, non-DTT viewer

Those engaging with broadcast services were a little more likely to cite a likely negative emotional response in the event of these services being lost. Amongst past year Freeview viewers 34% suggested they would respond to this loss with negative emotions, rising to 36% who watched weekly. Amongst past year radio listeners a third (32%) suggested they would respond to a loss of broadcast services with a negative emotional response.

Negative emotional responses to the loss of services through an aerial increase with age. Those aged 65+ were more likely to cite negative emotions reactions than 18-34s (38% vs. 21%), an age less likely to watch Freeview or listen to radio each week. This older skew again points to some of the more vulnerable groups in society who rely on these services. Females were more likely than males to suggest they would experience negative emotions if they lost these services (35% vs. 25%).

[17] Please see appendix for more detail regarding the hypothetical scenario posed to consumers and that they were told to imagine

Broadcast services, either TV or radio help audiences to unwind, relax and escape, hence loss of these can be detrimental. Many of the negative emotional feelings stem from Freeview offering emotional support, playing a role in helping people to relax, escape and unwind and providing a form of companionship – without Freeview a gap is left.

"I rely on tv for relaxing/escaping for general mental health." Male, 55-59, Scotland, non- DTT viewer

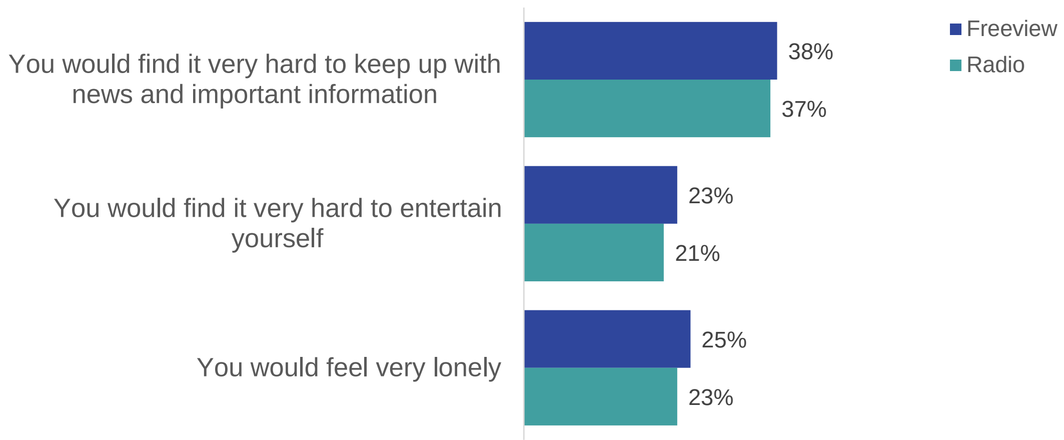
"I immediately thought that it would massively effect mental health. You would feel very isolated lonely probably get quite depressed." Female, 45-55, South East, DTT viewer

"I rely on it to watch the soaps. I don't have to watch it every day, but it is my relaxing time." Female, 60-64, North West, DTT viewer

"The entertainment side is a way of gathering your family together. You can relax and take time off. It may be a big part of someone life and also it's a way of killing time if you suffer with mental health." Female, 18-24, South East, non-DTT viewer

Several key themes arose in people's responses (see figure 12). These are explored below.

Figure 12: Attitudes towards the loss of Freeview or radio services – % agree



Base: All respondents, GB adults 18+, n = 2002

People would feel they have lost their connection with the world through the loss of news and current affairs

Nearly four in ten (38% regarding loss of Freeview, 37% regarding loss of radio), agreed that without these services they would find it very hard to keep up with news and important information, see figure 12. Those who watched Freeview in the past year (46%), in particular weekly Freeview viewers, are more likely than non-viewers to feel this sense of struggling to keep up with the news if it did not exist (51% vs. 28%); and more than half (56%) who have only Freeview as a TV service suggested this would be a challenge. Focusing on radio, 41% of past year radio listeners, and nearly half (45%) of weekly radio listeners consider it would be very hard for them to keep up with news and important information if radio did not exist. **News and current affairs is the most standout content mentioned spontaneously as something they would miss if these broadcast services were lost.** One in ten (11%) made comments about missing news and current affairs, with those 65+ (16%) twice as likely to spontaneously tell us they would miss news/current affairs than younger 18-34 year olds (8%).

"Freeview is essential for keeping up with current affairs and general family entertainment." Male, 45-55, East, DTT viewer

"It [Freeview] does play a big role and we rely on it for news and entertainment and sport. Educational programmes too and it does play an important role as we don't go out much." Female, 65-74, London, DTT viewer

"Generally I watch Freeview for the news so it is what we would go to, to keep up with information. We would not watch that type of information on demand." Female, 25-34, West Midlands, DTT viewer

"It would be greatly missed because I rely a lot on daily news. And the radio is the only access I would have." Male, 35-44, South West, DTT viewer

One in five (20%) talked about specific channels and content that they watched on Freeview. Top mentions included BBC and BBC News (5%), as well as liking specific programmes offered (3%). Some cited Freeview as a means to watch sport (2%) or for entertainment content (5%). BBC content spanning TV and radio was the brand most likely to be spontaneously mentioned (6%).

Top of mind consumer reaction suggests radio is highly likely to be missed if services through an aerial are lost. A fifth (21%) spontaneously told us they would miss listening to the radio, with those who are working (24% vs. 16% amongst non-workers) and those aged 35-64 more likely to comment on how they would miss the radio.

Services delivered through an aerial also help to entertain audiences, an aspect that would be missing if the services were lost

Broadcast TV and radio play an entertaining as well as informing role. Over a fifth (23% for TV, 21% for radio) agreed that without these services they would find it very hard to entertain themselves, see figure 12. Those engaging with the services are most likely to struggle with entertaining themselves:

- Amongst weekly Freeview viewers, 30% agree without Freeview they would find it very hard to entertain themselves, rising to 39% of those who watched only Freeview in the past year.
- Amongst weekly radio listeners, 26% agree without radio they would find it very hard to entertain themselves.

Whilst the **non-working population are more likely than workers to agree that they would find it very hard to entertain themselves without Freeview, the reverse is true for radio, pointing to the important role of radio in the workplace**.

"I would say I am very reliant from an entertainment point of view. I think the quality of the programs are world class. They play a strong part as the other options aren't as good." Male, 25-34, London, DTT viewer

"It would have a catastrophic impact on my life. It would be terrible for everyone who uses these free services… having shared entertainment experiences that everyone can have helps bind people together. There are increasingly few shared national experiences and television can do that." Male, 25-34, North West, DTT viewer

Services delivered via an aerial offer emotional support and companionship, which could render many people very lonely if services were lost

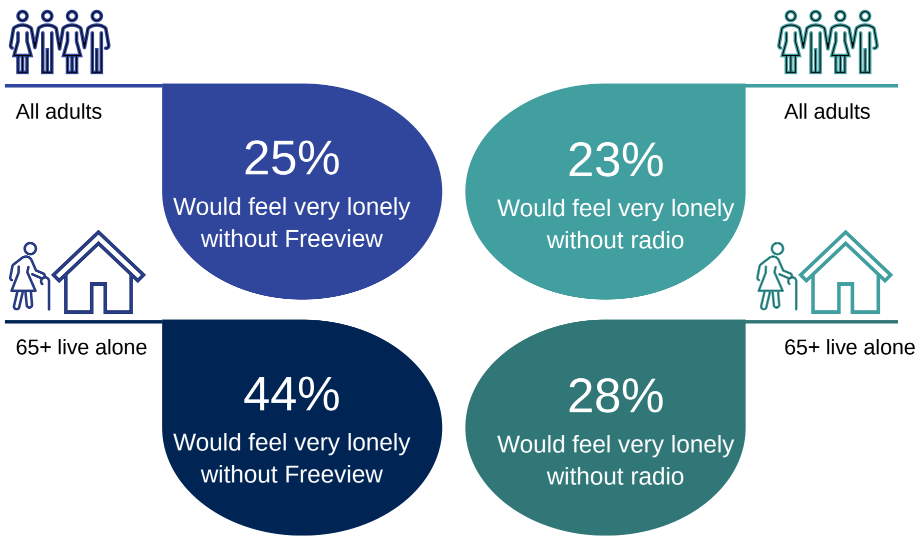
When adults across GB were asked what they would miss if TV and radio services through an aerial were not available, a quarter (25%) agreed they would feel very lonely if Freeview services through an aerial were lost. A similar proportion (23%) agreed they would feel very lonely without radio, see figure 13. In each case the sense of loneliness would be higher for females and increases with age.

Those **65+ and living alone**, a particularly vulnerable group, are most reliant on these services for company. 44% agreed they would feel very lonely without Freeview, whilst 28% agreed they would be very lonely without radio.

"It is very important. So many older people only have Freeview and that is the only way they can watch TV, and the cost of the TV packages from other providers is too high." Female, 45-55, Scotland, DTT viewer

"I think it's important not just for me but for people older than myself. It's the company sometimes. I like to use the radio on my TV as well, also during lockdown in covid it's been a way to keep in touch during the lockdown." Female, 55-59, North West, DTT viewer

Figure 13: Proportion agreeing they would be very lonely if there were no Freeview/Radio services through an aerial



"I would be really annoyed [if these services were lost] I have the radio on all the time for music it gets a bit lonely and being a single mum and not having a large support network it keeps me company" Female, 18-24, North East, non-DTT viewer

"[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, non-DTT viewer

The reliance people have on these currently free services is a key reason why consumers express negativity towards the hypothetical loss of Freeview services through an aerial

When exploring why consumers are negative towards a potential loss of Freeview services through an aerial, reliance that they, as well as others in society, have on the service comes second only to affordability and costs in driving negativity, (30% mentioned reliance on the service vs. 54% who cited cost or affordability). Consumer feedback spans generic comments about it being a service people need or rely upon (10%), as well as calling out the reliance within key groups such as the elderly and disabled (8%). Interestingly this perception was likely to be stronger amongst 18-34s (13%) compared to 6% of those aged 65+. Consumers also point out reliance amongst those who do not have internet connected services (6%), therefore **identifying the role Freeview plays for the vulnerable and under-served and demonstrating an understanding of the greater societal role that it fulfils.**

Whilst many are reliant on services delivered via an aerial, if they were no longer available and asked what impact this would have, very few spontaneously told us that they would attempt to find an alternative service (15%). Only 6% mentioned exploring paid-for services and 4% mentioned online services.

For some, there were **financial concerns around alternative services** (mentioned top of mind by 13%). Financial concerns were dominated by people saying they or others could not afford alternative services (8%), although others mentioned reluctance if not refusal to pay for services (3%). Reactions expressing financial concern were more likely amongst females (16% vs. 10% of males), but at a similar level across social grade and occupation.

30% who expressed negativity towards the loss of TV services via an aerial cited reasons related to the reliance people have on these services

"I watch TV most of the time and it plays a big role in my life." Male, 60-64, North East, DTT viewer

1 in 10 spontaneously call out how various more vulnerable groups would be impacted by a loss of Freeview

"Lots of people in the country can't pay for cable… For instance, families with small children would struggle, the elderly would struggle. Hard enough as it is for everyone." Male, 35-44, Scotland, non-DTT viewer

"A lot of people need it and not everyone can afford or subscribe to these extra services. This will isolate a lot of people. Some people do not have enough money to feed their dogs or heat their house so how will they survive without Freeview. Currently there is no infrastructure to remove Freeview … everyone does not have internet access" Male, 35-44, East, non-DTT viewer

Freeview provides people with choice

"I use it quite a lot, that's my go to for TV. I don't rely on it but don't want it to go". Female, 25-34, South East, DTT viewer

A sense of reliance on Freeview is not felt by all, however their need to protect it was strong. Just over 1 in 5 (22%) indicated they do not rely on the service as such, with a further 7% telling us they only rely on it to a small extent. This is typically because TV is not that important to them, or they have alternative ways to access it. Given nine in ten (90%) adults report these free services should continue to be supported, reliance is perhaps too strong a phrase for a TV service. Even some frequent viewers who would not want to lose the service indeed suggested it was not something they relied upon.

Access to alternative services means Freeview can play an important role in the mix of services accessed by audiences. Just over one in ten viewers (12%) made comments related to the use of other services such as cable and satellite TV, Netflix and Amazon Prime Video, and some noted Freeview was available on secondary sets in their home pointing to hybrid viewing of TV services in their household.

"We do rely on it - if someone is watching Sky downstairs someone can watch Freeview. It's good having a backup."
Male, 45-55, North East, DTT viewer

"I rely on it a lot. I use it when there is a problem with Virgin services and when I lose connection. I feel it is essential."
Male, 65-74, Scotland, DTT viewer

3.9 A loss of Freeview services would reduce audiences that watch TV channels and result in around half of adults facing financial outlay in order to maintain viewing habits

A loss of Freeview services through an aerial would have huge impact on the large weekly audience it reaches. Audiences to linear TV channels are likely to drop and many would face financial outlay in order to continue receiving the channels they have watched historically for no extra charge than the licence fee.

Over half of all adults and more than eight in ten weekly Freeview viewers would be personally affected by a loss of Freeview services, with the effect more likely to be felt amongst older audiences

Loss of Freeview through an aerial is likely to have a considerable affect on just over a third of adults. Although not all adults rely upon or use Freeview, if these services were lost 35% suggested they would personally be affected 'a great deal' or 'a fair amount', and over half (54%) said they would be personally affected in some way (a great deal/fair amount/a little).

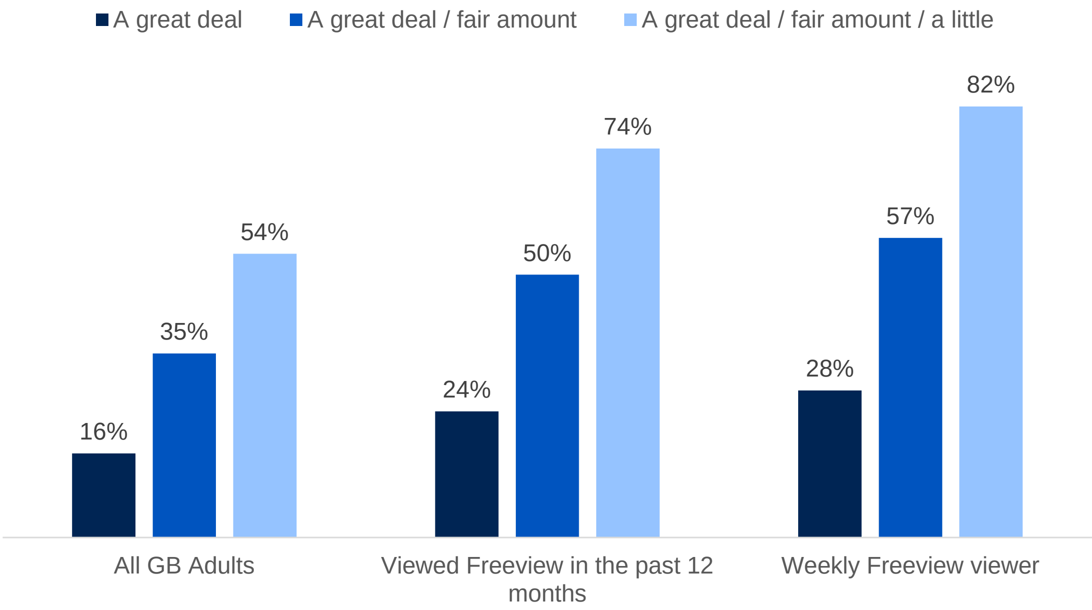
The majority of Freeview viewers would feel their life would be affected if the service were lost. Given not all homes have Freeview, the effect of this loss is higher amongst past year Freeview viewers, see figure 14; half (50%) would personally be affected a great deal or a fair amount; 74% are likely to be affected at least a little.

This effect is more profound amongst:

- Weekly Freeview viewers (57% a great deal/fair amount, 82% when including just a little)
- Those who only watched Freeview in the past year and no other services, (59% a great deal/fair amount, 76% when including just a little).

82% of weekly Freeview viewers would feel personally affected if services were lost

Figure 14: Extent to which they perceive they would be personally affected if they lost Freeview services through an aerial



Base: GB adults 18+, n = 2005

Base: GB adults who watched Freeview in the last year, n= 1141, weekly Freeview viewer, n = 861

Older audiences and those not working are likely to experience greater personal effect of losing Freeview services. The youngest 18-24s are least likely to be affected a great deal or a fair amount, (22% vs. 51% of those aged 75+). The likely effect of the loss of Freeview services is suggested to be higher amongst non-workers (40% vs. 30% for those working full time) – the most likely in terms of working status to watch Freeview daily and as reported above, a group more likely to find it hard to entertain themselves without Freeview.

Whilst not all would personally be affected by a loss of Freeview services, there is an understanding that others within their household or wider society would be. Of those who had not watched Freeview in the past year, seven in ten (70%) indicated that if these services were lost, they would not be personally affected. We know from exploring the role of Freeview, that in some households it is specific household members who use the service, therefore whilst the effect may not be personal, there may be a wider effect at the household level. From verbatim comments we also know that many recognise others in society would be affected if these services were lost.

"I don't rely on it all, or my children, but it's important for my mum and wife". Male, 45-55, East Midlands, DTT viewer

Loss of Freeview services is likely to affect more of those living in rural areas than seen in other parts of Great Britain. The likely personal effect of a loss of Freeview services peaks amongst those living in rural areas (40% a great deal/a fair amount).

"I don't live in the city and there are large areas where there are no data signal and there's also no DAB Radio." Male, 45-55, South East, DTT viewer

"I would feel cut off and isolated because of where I live." Female, 45-55, South West, DTT viewer

Around half of adults imagine they would spend less time or stop watching TV channels in the absence of Freeview services via an aerial

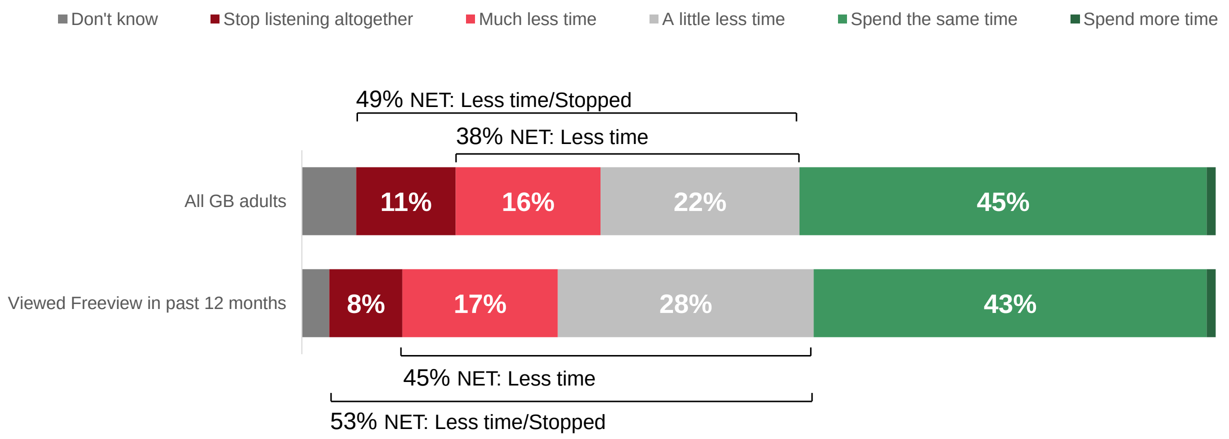
When asked how much the hypothetical loss of Freeview services via an aerial would impact the amount of time they spent watching TV channels, around **half (49%) would either spend less time or would stop watching TV channels altogether.** This splits out as 38% saying they would spend less time and 11% who would stop watching altogether, see figure 15.

The youngest 18-24s are the most likely age to suggest they would stop watching TV channels altogether (16% vs. 11% overall); however, around half (51%) of all aged 45+ suggested that they would spend less time or stop watching TV channels in the absence of Freeview services via an aerial. No strong differences by region are reported.

More than half of weekly Freeview viewers would reduce or stop viewing of TV channels if Freeview were not available. Just over half (53%) who had watched Freeview in the past year indicated that their viewing of TV channels would reduce or stop if Freeview were not available through an aerial, rising to 56% amongst weekly Freeview viewers. The impact on TV channels is more extreme amongst those with no current alternatives, around two thirds (67%) of those who only watch Freeview (no cable, satellite, SVOD or BVOD), suggest this would be the case.

56% of weekly Freeview viewers would be likely to stop or reduce viewing of TV channels if Freeview services via an aerial were lost

Figure 15: Extent to which they imagine viewing of TV channels would be affected by the loss of TV services through an aerial



Base: All respondents, GB adults 18+, n = 1995, Excludes 10 who live in NE and had services affected by the mast fire

Base: GB adults who watched Freeview in the last year, n= 1141

Having access to other services would still result in around half reducing or stopping their watching of TV channels should Freeview services not be available. Despite viewing on cable/satellite or SVOD/BVOD platforms in the past year, likely reduction or stopping watching TV channels is in line with the average (48% for those watching cable/satellite and 45% for those watching SVOD/BVOD). This again points to Freeview existing alongside other services and each playing a unique and complementary role in the household.

Reduction or cessation of viewing of TV channels is more likely amongst those for whom access to streaming services is likely to be a challenge. Those without internet connected TVs and those with a weak broadband connection are more likely than the average to suggest viewing of TV channels would reduce or stop without Freeview (62% and 60% respectively). A strong and stable online connection is essential for access to alternative services and content online, and whilst 89% have a fixed broadband connection at home, 7% find watching TV or listening to radio online a challenge since their current internet connection is not good enough.

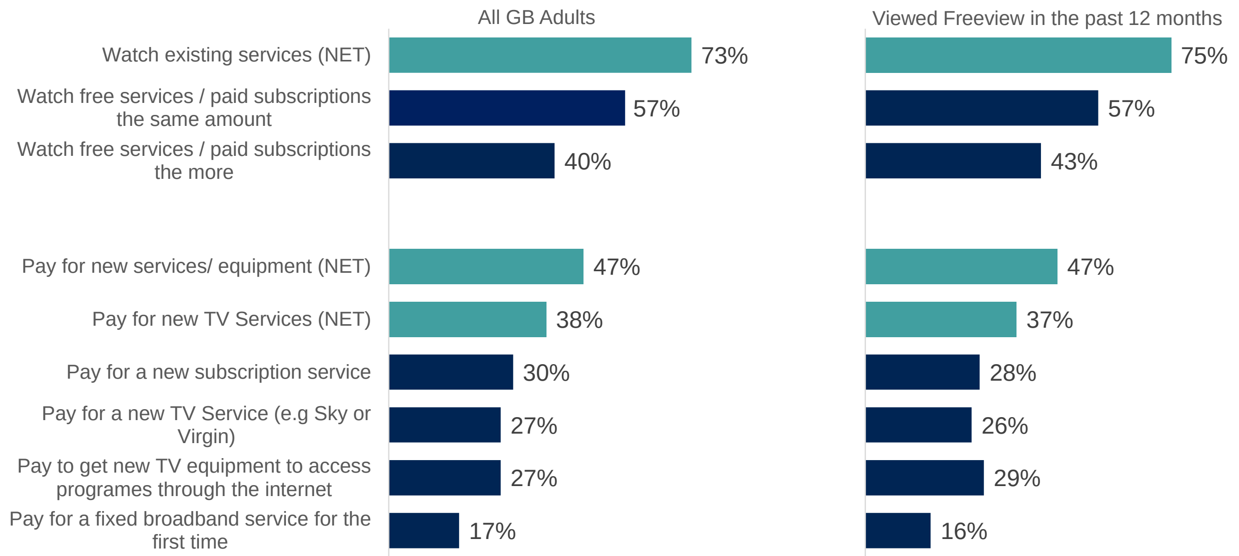
Nearly half of adults would face financial outlay as having to find alternative sources of Freeview services were lost, whilst the majority would turn to existing alternatives in the home

Financial outlay is likely for nearly half of adults in the absence of Freeview services via an aerial. Nearly half (47%) suggested they would be likely to pay for new services or equipment to allow them to access TV services, see figure 16. However, given the challenges with rising living costs, and affordability challenges of these services that we have touched on above, the extent to which this outlay and new service or equipment take-up may actually happen if Freeview were not available is a current unknown.

> **47%** would be likely to have to pay for extra services of equipment if Freeview via an aerial were not available

- Over a third (38%) would be likely to pay for a **new TV service**;
    - 30% suggest they would be likely to pay for a **new subscription streaming service,** with younger adults more likely to choose this option; 18-24s (38%) are twice as likely to suggest they would sign up to a new subscription service compared to 19% aged 65+, although still a sizable group
    - 27% suggest they would be likely to pay for a **new service from someone like Virgin or Sky**
- Just over a quarter (27%) would be likely to pay for a **new box or stick** giving access to TV services online,
- 17% would pay for a **fixed broadband service** for the first time.

Figure 16: Likely behaviours as a result of the loss of TV services through an aerial – % likely to do



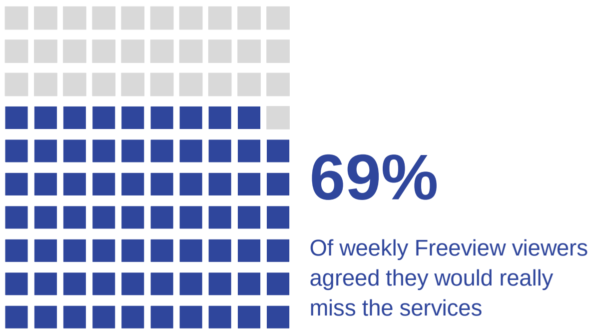
Base: All respondents, GB adults 18+, n = 1995 (not affected by Bilsdale incident)

Base: All Freeview viewers in past year, n = 1133

In the absence of Freeview, three quarters of adults would be likely to make use of other services they have; be they free or paid, rising to 80% of those who had watched SVOD or BVOD in the last year. Four in ten (42%) who had only watched Freeview in the past year would be likely to turn to existing services, indicating that access to these services are available, they just don't personally currently view them.

Given the impact that a loss of Freeview would have on behaviours, as well as how people feel emotionally, seven in ten weekly viewers would really miss Freeview

More than two thirds (69%) of weekly Freeview viewers agree they would really the miss the services if they were not available. Whilst just under half of all adults (48%) agreed they would really miss Freeview if the services were lost, this increases amongst past year viewers of the service (63%) and peaks at 69% amongst weekly Freeview viewers.



With a lack of alternative services, the sense that Freeview will be missed strengthens; nearly three quarters (72%) of those who had only viewed Freeview in the past year, and no other TV or streaming services, suggested that they would really miss Freeview.

Access to other services does not mean Freeview would not be missed. Despite watching in other ways, nearly half (46%) who viewed streaming or on-demand services in the past year agreed they would miss Freeview if it were not available.

"If I couldn't watch the news on the TV or listen to the radio when I'm driving as I do this daily, I would really miss them because they are both valuable sources of news and information as well as entertainment." Female, 25-34, South West, DTT viewer

"I think it would have a big impact, I would really miss the radio, I would miss pretty much everything the BBC produces. It would have a really big impact on my children's education." Male 35-44, Yorkshire and Humber, DTT viewer

3.10 Radio stations would stand to lose many listeners if broadcast radio services were lost, with many turning to other audio content rather than internet-based radio

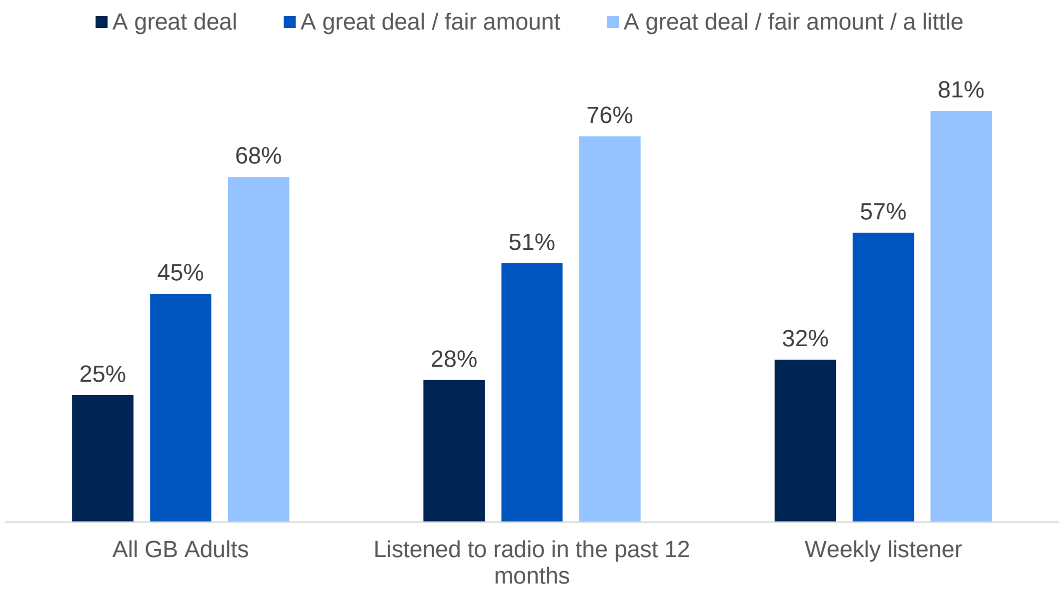
A loss of broadcast radio services would really impact the large audience it reaches. Radio station listening is likely to drop with consumers turning to other audio media, and not all going online to continue their radio listening habits.

Nearly half of adults would be affected by the loss of radio services

Loss of broadcast radio services is likely to affect nearly half of adults; when asked to imagine how they'd be personally affected if they were to lose their radio services through an aerial, 45% of GB adults said they would personally be affected 'a great deal/fair amount'. Just over two thirds (68%) suggested they would be affected in some way (a great deal/fair amount/just a little), see figure 17.

68% of adults would be personally affected by the loss of radio

Figure 17: Extent to which they perceive they would be personally affected if they lost radio services through an aerial



Base: GB adults 18+, n = 2005

Base: GB adults who listen to Radio in the last year, n= 1744, weekly listener, n = 1540

The majority who listen to the radio every week would feel personally affected if the service was lost. The effect of the loss of radio is naturally higher amongst those who listen. Half (51%) of past year radio listeners would personally be affected a great deal or a fair amount; 76% are likely to be affected at least a little.

This effect is more profound amongst:

- Weekly radio listeners (57% a great deal/fair amount, 81% when including just a little)
- Those who listen using a traditional radio set that receives broadcast radio services (53% a great deal/fair amount, 78% when including just a little).

Loss of radio is more likely to affect those 45 and over and those in the workplace. Reflecting the patterns seen for radio listening, 18-24s, who are less likely to listen to the radio, are least likely to say they would be personally affected a great deal or a fair amount (24%). Personal affect (a great deal/a fair amount), peaks amongst those aged 45-54 (57%) and 55-64 (55%), the most likely age groups to comprise frequent listeners.

Half of working adults would be personally affected by the loss of radio a great deal or a fair amount

Those currently employed are significantly more likely to say they would personally be affected by a loss of broadcast radio than those not working (be personal impacted – 49% vs. 41%). This echoes the findings of the working population being more likely to agree they would find it very hard to entertain themselves without radio, and the important role radio plays in the workplace.

"My workplace is pumped by radio, it's like a friend, it's enjoyable", Male, 25-34, North East, non-DTT viewer

"I really would struggle without the radio I listen to the news when working" Male, 45-55, North West, non-DTT viewer

"I'd feel isolated, I use radio while working, it keeps me company during the day" Female, 45-55, South East, DTT viewer

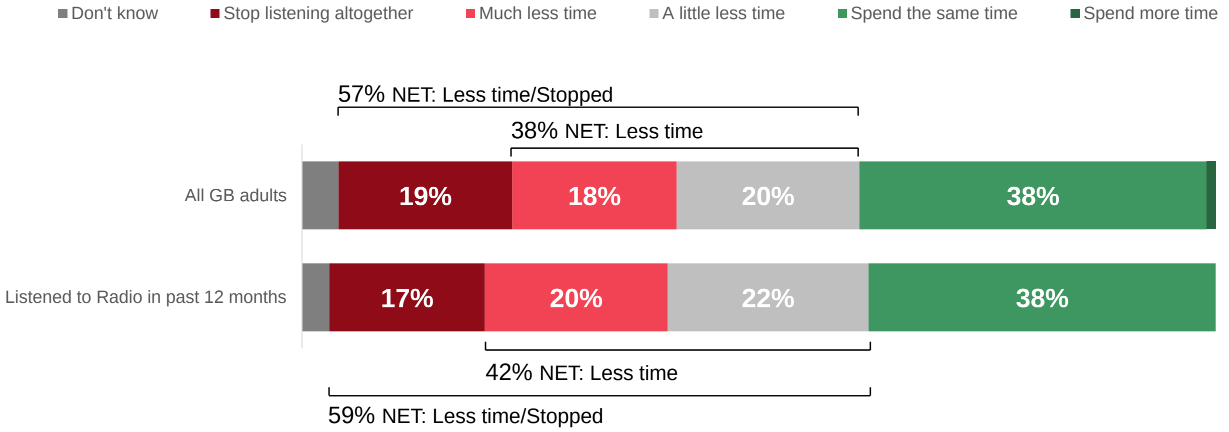
"This would be very bad for me as I rely on the radio to catch up on news also, I listen to music on the way to work I find this very important." Male, 25-34, South East, DTT viewer

Those in the South East are more likely to feel that they would be personally affected by the loss of radio. Half (50%) of adults living in the South East suggest a loss of radio would personally affect them a great deal or a fair amount, compared to a fifth (19%) in the North East, where perceived personal affect is at its lowest.

Whilst radio stations can be accessed online, over half of adults imagine they would spend less time or stop listening to radio stations if broadcast radio did not exist

When asked how much the hypothetical loss of radio services via an aerial would impact the amount of time they spent listening to radio stations, **over half (57%) said they would either spend less time or would stop listening to radio stations altogether.** This splits out as 38% saying they would spend less time and 19% who would stop listening altogether, see figure 18.

Figure 18: Extent to which they imagine listening to radio stations would be affected by the loss of radio services through an aerial



Base: GB adults 18+, n = 2005

Base: GB adults who listen to Radio in the last year, n= 1744

Some listeners in all age groups would stop listening to radio stations, with the youngest 18-24s most likely to stop listening to radio stations, (29% vs. 19% overall). However, a fifth (19%) of those 55+, an age band in which weekly radio listening peaks, also suggest they would stop listening to radio stations altogether. Those living in Wales are the most likely to reduce or stop time spent listening to radio stations in the absence of broadcast radio (68%), higher than any other region.

Six in ten (62%) weekly radio listeners would reduce or stop listening to radio stations if radio through an aerial were not available. Six in ten (59%) who had listened to radio in the past year indicated that their listening of radio stations would reduce or stop if broadcast radio were not available, rising to 62% amongst weekly listeners. The impact on radio stations is lower amongst those already listening via online methods, amongst whom half (48%) would reduce or stop (vs. 60% amongst those listening via radio sets).

Those for whom online listening is likely to be challenging are more likely to reduce or stop listening to radio stations. Those with a weak broadband connection are more likely than the average to suggest their radio station listening would reduce (44% vs. 38% overall), as well as being more likely to say they would stop or reduce listening (72% vs. 57% overall).

19%

of adults would stop listening to radio stations altogether if the free broadcast signal no longer existed

Alternative sources to the radio are not always considered quick and easy to access, hence whilst six in ten listeners would turn to these, others would switch behaviours away from radio

With around six in ten indicating that listening of radio stations would be likely to drop if broadcast radio were not available, it is important to explore access to alternative sources.

Nearly three in ten (29%) disagreed that they could quickly and easily get access to radio stations from other services. This perception spans age and gender, however the lower social grades, C2DEs, are more likely than ABC1s to disagree that these alternatives are quick and easy to get to (33% vs. 25%). This trend is also seen amongst those not working compared to workers (33% vs. 26%).

With no broadcast radio services over half (56%) would turn to online means of accessing radio, with just under half (47%) saying they would be likely to listen to radio online for the first time. Amongst those currently listening to radio every week, 60% suggested they would be likely to turn to internet-based services to continue listening to radio, (see figure 19). **Whilst alternative sources are considered quick and easy to access by some, barriers must be in place given that not all radio listeners would switch to these.**

Loss of broadcast services would drive many to online live listening for the first time. Amongst current radio listeners, half (51%) would be likely to listen live online for the first time. Listening via catch up on radio programmes is also likely to be quite popular (37%). Despite younger groups more likely to be online, it is the older groups who would be more likely to seek out radio online and listen live for the first time, (41% of 18-34s, 54% of 35-54s, 46% of 55+).

Aside from finding alternative ways of listening to the radio, over a third would listen to music streaming services in the absence of broadcast radio. With a gap to fill in the absence of broadcast radio, 39% would be likely to listen to music streaming services; this comprises a third (33%) who would be likely to listen to existing music streaming services they already subscribe to more than they do now, whilst a fifth (20%) would be likely to subscribe to a new music streaming service, although some of course will do both. Younger people are more likely to turn to music streaming services if radio services were no longer available, rising to 64% amongst 18-24s (vs. 39% overall) and declining with age. This trend is seen for both new sign ups (34%), as well as more use of music streaming services they already

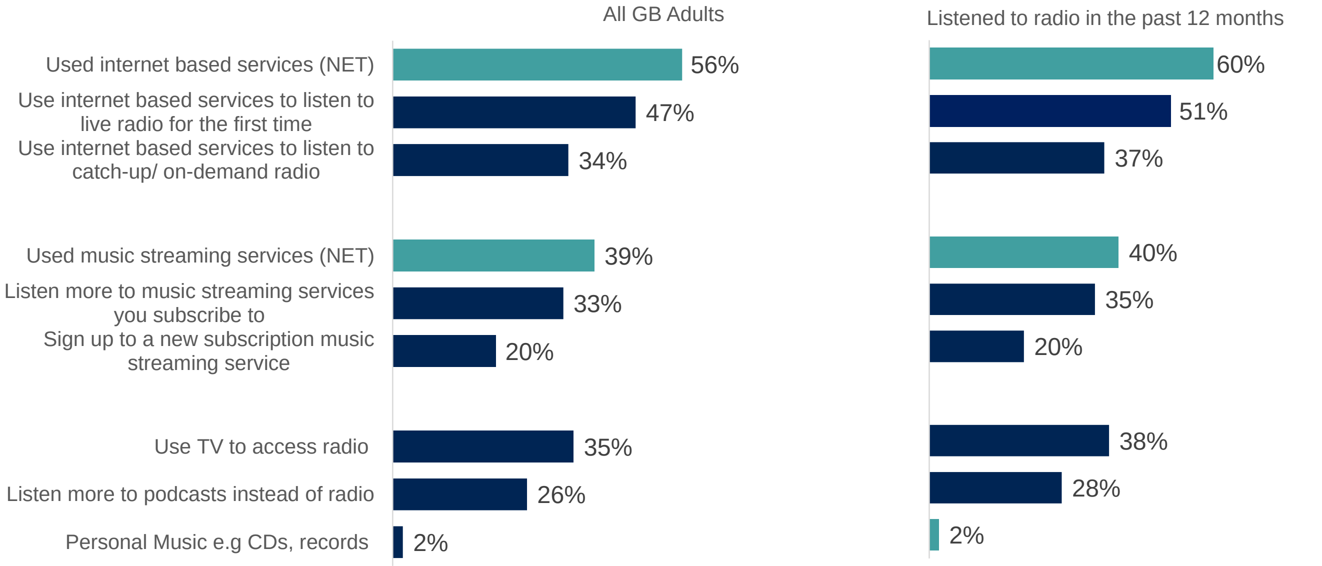
39% would listen to music streaming services if broadcast radio no longer existed

"No radio would be annoying but I would then put on Spotify." Female, 25-34, Scotland, non-DTT viewer
viewer

subscribe to (54%), both of which are around three times more likely amongst 18-24s than those 55+ (11% for new signs ups, 19% for more use of existing services).

As well as music streaming sites, podcasts are another source of audio content people may use. Around a quarter (26%) would be likely to listen to podcasts more instead of the radio, with ABC1s (32% vs. 22% C2DE) and those employed (32% vs. 19% unemployed) the most likely demographics to listen to podcasts as an alternative source if radio through an aerial were not available.

Figure 19: Likely behaviours as a result of the loss of radio services through an aerial – % likely to do



Base: All respondents, GB adults 18+, n = 2002 (not affected by Bilsdale incident)

Base: All radio listeners n past year, n = 1744

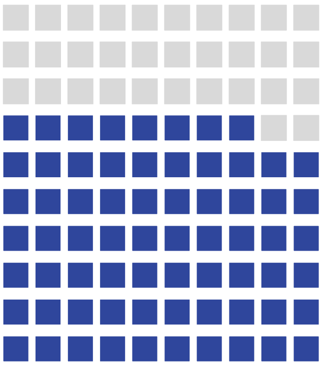
More than half would really miss radio services if this were not available, rising amongst online listeners

Similar to TV, the loss of radio services would have an emotional impact of these services were lost. More than half (56%) of adults agreed they would really miss radio services if this were no longer available, increasing to 63% amongst past year radio listeners and 68% of weekly radio listeners.

Those 35-54s are most likely to agree they would really miss radio (65%), with those social grade ABC1 more likely than C2DEs to really miss radio (59% vs. 53%), and the workforce more likely to miss radio than those currently not working (59% vs. 52%). Little variation is seen by region.

68%

Of weekly radio listeners agreed they would really miss the services



3.11 Deep diving into particular groups

Those living in rural areas are more likely to be affected by a loss of broadcast services than the average adult in the UK

Throughout this report it is apparent that across the GB adult population, use of, reliance on and the importance of free broadcast services through an aerial is high. As seen in figure 2, those living in rural areas are seen to have greater reliance on these services, hence **rural audiences are worth drawing attention to.** Those living in these areas are likely to be impacted more than the average should services be disrupted or lost.

Those living in rural areas

Those living in rural areas are typically more likely in those living in more urban areas (sub-urban, urban or metropolitan) to:

- have watched Freeview in the past year (63%)
- watch Freeview every day (55%)
- say continued provision of Freeview services via an aerial is essential/very important (60%)
- be personally affected by a loss of Freeview services via an aerial a great deal (22%) or a great deal / a fair amount (40%)
- agree they would really miss Freeview services (56%)
- agree without Freeview would find it very hard to keep up with news and information (44%)
- agree without Freeview would feel very lonely (28%)

- have listened to the radio in any way in the past year (92%)
- listen to radio every day (57%) and every week (83%)
- say continued provision of radio services via an aerial is essential/very important (73%)
- be personally affected by a loss of radio services via an aerial a great deal / a fair amount (52%)
- spend less time listening to radio stations or stop listening altogether (64%)
- agree they would really miss radio (61%)
- agree without radio would find it very hard to keep up with news and information (41%)
- agree without radio would feel very lonely (27%)
- spontaneously say they would miss news and current affairs if broadcast services were lost (13%)
- cite negative emotional feelings as a reaction to the hypothetical loss of broadcast services (34%)

Large audiences regularly engage with broadcast services, and these represent key groups who would be more strongly affected by any loss of services

Much of the report on GB overall focused on all adults, or those who had used Freeview at all in the past year. Whilst references were made to weekly viewers throughout, given they regularly engage with the service, views towards service provision and the extent to which they would be affected are stronger within this group. This sizeable group of weekly Freeview viewers comprises over four in ten (43%) of GB adults, with standout points related to this audience summarised below:

Weekly Freeview viewers

- are even more likely to say that continued provision of Freeview services via an aerial is essential (35%, compared to 26% of all GB adults), or that it is essential or very important (68%, compared to 54% of all GB adults)
- they are also even more likely to face challenges trying to watch TV or listen to radio content via the internet (36% compared to 29% of all GB adults)
- when spontaneously telling us how they would react if Freeview services were not available, they are more likely to talk about negative emotions (36% compared to 30% of all GB adults), financial concerns (16% compared to 13% of all GB adults), missing the TV service (16% compared to 13% of all GB adults) and missing news and current affairs (15% compared to 11% of all GB adults)
- when faced with a hypothetical loss of Freeview services, not surprisingly weekly viewers are more likely to say they would personally be affected a great deal (28% compared to 16% of all GB adults) or a great deal/fair amount (57% compared to 35% of all GB adults)
- weekly viewers are much more likely to agree that they would really miss Freeview (69% compared to 48% of all GB adults)
- weekly viewers are also more likely to agree that without Freeview they would find it very hard to keep up with news and important information (51% compared to 38% of all GB adults); feel very lonely (33% compared to 25% of all GB adults) and find it very hard to entertain themselves (30% compared to 23% of all GB adults)
- and with such a loss of Freeview services, the impact on TV audiences would be greater amongst weekly Freeview viewers, both in terms of those likely to spend less time watching TV channels (48% compared to 38% of GB adults overall), or to reduce or stop watching these altogether (56% compared to 48% of all GB adults).

From our survey, three quarters (76%) indicated that they listen to radio every week, a figure which RAJAR estimates to be 89%[18], so by far the majority of the adult population. Whilst the report has focused on all GB adults and has referenced those who listen to radio in the past year and week throughout, some key points regarding this audience are summarised below.

Weekly radio listeners

- are even more likely to say that continued provision of radio via an aerial is essential (43%, compared to 38% of all GB adults), or that it is essential or very important (76%, compared to 68% of all GB adults)
- when faced with a hypothetical loss of radio through an aerial, not surprisingly weekly listeners are more likely to say they would personally be affected a great deal (32% compared to 25% of all GB adults) or a great deal/fair amount (57% compared to 45% of all GB adults)
- weekly listeners are much more likely to agree that they would really miss radio (68% compared to 56% of all GB adults)
- weekly listeners are also more likely to agree that without radio they would find it very hard to keep up with news and important information (45% compared to 37% of all GB adults); feel very lonely (28% compared to 23% of all GB adults) and find it very hard to entertain themselves (26% compared to 21% of all GB adults)
- and with such a loss of radio services, the impact on radio audiences would be greater amongst weekly listeners, both in terms of those likely to spend less time listening to radio stations (45% compared to 38% of GB adults overall), or to reduce or stop watching these altogether (62% compared to 57% of all GB adults).

[18] https://www.rajar.co.uk/listening/quarterly_listening.php

4 Focus on Bilsdale

4.1 Introduction

A fire at the Bilsdale transmitter in North Yorkshire on 10th August 2021 resulted in a loss of broadcast radio and TV signals to households in the North East and North Yorkshire regions. The Bilsdale transmitter served more than 600,000 households.

As part of the research commissioned by Arqiva, Ipsos conducted a deep dive in this region. Telephone sample was purchased for households residing in postcodes most likely to be served by the Bilsdale transmitter. This sample was further stratified into those postcodes most likely to:

1. have had services restored prior to the new temporary mast erected in mid-October
2. have had services restored between erection of the temporary mast and the end of 2021
3. those postcodes still likely to be without a signal by the end of 2021.

Priorities were set on conducting interviews in the postcodes most likely to still be without a signal (3 and 2) to understand the impact of the loss of services.

In the following sections we report on how the Bilsdale region differs or compares to GB overall based on those we spoke to. Whilst we conducted interviews across a broad range of ages in the Bilsdale region, the aim was to collect feedback on those living in the area to identify if they were affected by the fire and how, if at all they reacted rather than to speak to a truly representative sample of the area.

This data *should not* be used to size the number of people who were affected in the region, or at what point services were restored, nor who they are in terms of demographics

The data *should be used* to compare the reactions amongst a region where Freeview and radio services via an aerial were lost, and would have affected many households, to the reactions that the GB population as a whole suggest are how they would think, feel and react should this happen.

4.2 Key findings

The mast incident occurred in a region where there is high reliance on broadcast services

- **Those surveyed in Bilsdale were more likely to engage with Freeview than seen across GB.** 65% had watched in the past year and 53% in the Bilsdale region watched weekly (vs. 43% for GB)
- **Radio listening, particularly broadcast radio listening, is more likely in the Bilsdale region than seen across GB.** 90% in the Bilsdale region had listened to radio in the past year and 81% every week (vs. 76% weekly for GB). Traditional broadcast radio listening was also higher in the Bilsdale region in the past year – 80% in car vs. 74% for GB; 53% at home vs. 47% for GB

The real impact of services being lost provoked a much greater reaction than people could imagine

- **The loss of Freeview affected more than the population anticipate. 40% of those in Bilsdale were personally affected to some degree,** increasing to 83% amongst those who lost all TV channels. This was considerably higher than the 74% of Freeview viewers across GB, who suggested this would be the case when positioned with a hypothetical scenario in which TV services via an aerial were lost
- **The loss of radio services also affected more than the population anticipate. 39% of those in Bilsdale were personally affected to some degree,** increasing to 73% amongst those who lost radio services. This is higher than the 63% living in the North East, Yorkshire and Humberside regions anticipated, although more aligned with what radio listeners across GB expected (76%)
- **A stronger emotional reaction was provoked than might have been expected.** 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%). Negative emotional responses were more pronounced amongst those who felt there was a lack of support or information. Whilst the GB population did hypothesise they would feel negatively about a loss of services, the extent was underestimated (30% suggested a negative emotional reaction, 9% indicated ‘anger, annoyance, frustration and irritation’)
- **The role of companionship played by broadcast services is understood by the population; without these many were left feeling lonely.** 22% who lost all TV channels felt very lonely without Freeview, a reaction that was expected. The companionship role was even stronger for those who live alone; 42% living alone who lost Freeview and 33% living alone who lost radio felt very lonely without these services
- **A loss of broadcast services left many feeling cut off from news.** 43% who lost all TV and 36% with radio affected agreed that without these services it was very hard for them to keep up with news and important information. However, based on the important role these services provide, the broader population recognise that this gap would exist if services were lost
- **Key vulnerable audiences particularly missed broadcast services, with the loss felt even amongst those who were streaming content.** 61% who lost all TV channels agreed they really missed Freeview, with this higher for the lower social grades (62% of DE) and those not working (60%). In line with the companionship role of Freeview, 68% who lived alone and lost TV channels really missed it. Even half (48%) of those whose TV was affected but watched video content online every week really missed Freeview

Media habits were affected in the region; some stopped watching TV or listening to radio at all when services were lost

- **New paid-for alternatives were taken up to a lesser degree than the population anticipated.** Whether due to the variable and often temporary loss of services, fewer paid out for new methods of access. Whilst 47% of GB adults suggested they would buy new equipment or services to access TV content, only 20% in Bilsdale did, and whilst 20% of GB adults suggested they would sign up to a new music streaming site in the absence of broadcast radio, only 9% in Bilsdale did

- **A loss of TV resulted in more people reducing or stopping their viewing of TV channels than the GB population would imagine.** Those whose TV services were affected typically turned to other services they already had. As a result, 64% stopped or reduced their viewing of TV channels, much higher than the 49% of adults who envisaged this would be the case if faced with this scenario.
- **A loss of broadcast radio resulted in more reducing or stopping their listening to radio stations than the population themselves would imagine.** Whilst 57% of adults anticipated their listening to radio stations would reduce or stop if broadcast radio services were lost, in fact this happened to 65% of those whose radio services were affected
- **When faced with a loss of broadcast radio, not all turned to internet-based methods of access, with a perception of barriers to access.** Whilst 55% of those whose radio was affected listened to radio via online services, 45% didn't, with 1 in 3 who lost radio disagreeing that alternative sources are quick and easy to access
- **Whilst alternatives were sought out to fill a gap, few are likely to replace Freeview.** 77% who watched alternatives indicated they would return to watching Freeview, with 56% watching both. Just 13% suggested the alternatives they took up or watched more of would replace Freeview

Experience of a loss of services, personally or in the wider community, makes people realise how important broadcast services are, now and for the future

- **The continued provision of free broadcast services is considered even more important amongst those who have experienced a loss of services**. Compared to GB as a whole, those in the Bilsdale region, and more specifically those whose services were affected, are more likely to consider the continued provision of free TV and radio through an aerial to be important, if not essential
    - Continued provision of free-to-view TV via an aerial is essential or very important: 61% in Bilsdale vs. 54% across GB, with results significantly higher amongst those whose TV was affected (68% vs. 56% of those in Bilsdale that were not affected)
    - Continued provision of free radio via an aerial is essential or very important: 73% in Bilsdale vs. 68% across GB with results significantly higher amongst those whose radio was affected (82% vs. 69% of those in Bilsdale that were not affected)
- **The extent to which continued provision of TV and radio services through an aerial should continue to be supported is higher amongst those who experienced loss.** Support is higher in the Bilsdale region than seen across GB (95% vs. 90%), peaking at 97% amongst those who lost TV services and 98% who lost radio, significantly higher than the support seen in Bilsdale amongst those whose services were unaffected (93%)
- **Experience of a loss of services increases the extent to which government and local MPs should continue to actively support provision of these services.** More living in Bilsdale indicate government or local MPs should actively support this (90% vs. 85% for GB). This is driven by experience of a loss of services since significantly more who lost all TV channels (83%) or who lost radio (88%) versus those who were unaffected (71%) consider they should definitely support this
- **Experience of a loss of services increases the extent to which the BBC should continue to actively support provision of these services.** Those in Bilsdale are also more likely to suggest the BBC should actively support this (85% vs. 83% for GB). Data indicates this is driven by experience of loss although differences are not statistically significant – 77% of those who lost all TV channels, 79% whose radio was affected consider they should definitely support this.

4.3 Many in the Bilsdale region were personally affected by loss of services

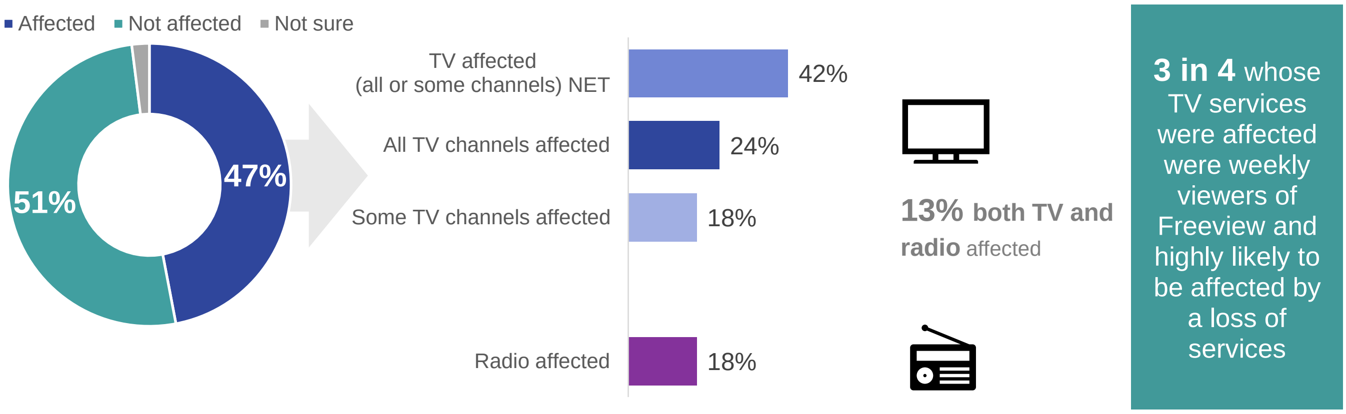
Most people who lost broadcast services were personally affected in some way. The reality was that far more people were affected than those living in the North East, Yorkshire and Humberside envisaged based on a hypothetical scenario posed in our GB survey that asked them to consider the potential loss of broadcast services.

Just under half of those we spoke to in areas served by the mast had services affected, most likely affecting TV, with impact likely to have been high given regular engagement with Freeview

Whilst the survey is not designed to size the number of people or households in the area affected by the incident, it is important to understand how many of those we spoke to were affected.

Just under half were affected by the loss of TV or radio services. 47% of those we spoke to in the Bilsdale region said their services were affected (see figure 20). Both Freeview and radio were impacted by the incident, and within this sample 81% were weekly radio listeners and 53% weekly Freeview viewers. More people recall having a loss of TV services (42%) – more than double those who reported radio being affected (18%), likely due to the relatively quick restoral of some local radio services. Those who experienced an impact to TV services were split quite evenly between all channels (24%) and just some channels (18%) affected. **Over one in ten (13%) had both TV and radio affected, a group likely to have faced more impact**.

Figure 20: Extent to which services were affected by the mast fire incident in Bilsdale



Base: All respondents, those in Bilsdale region, n = 1001

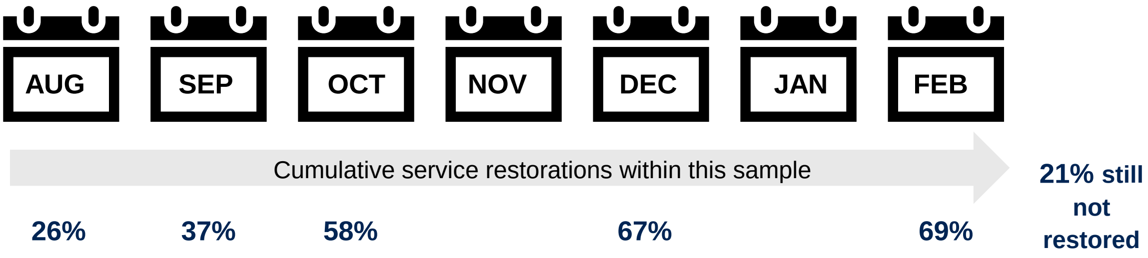
Alternative access to linear TV is not universal and so loss of Freeview services is likely to have had a big impact. Most of those whose TV services were affected watched Freeview every week (73%), and just under half (48%) of those affected had watched Freeview but not cable or satellite in the past year, indicative of a lack of alternative means of accessing linear TV.

A loss of radio services is also likely to have had a big impact since not all listen via non-broadcast signals. Nearly all (98%) who noticed that radio services were affected were weekly radio listeners. Whilst 60% had listened in other ways (e.g. online or via a TV) in the past year, four in ten had not.

"We lost telly. We lost everything we watched, and recordings were lost too. We had no backup and we still had to pay the TV licence. It made me quite angry at the time." Male, 65-74, all TV affected

"We were totally lost to be honest, it was the TV that impacted our household the most" Female, 35-44, radio & some TV affected

Responses are collected from a sample that spans a range of restoration dates. At the time of survey, a fifth were still waiting for their services to be restored. Whilst these findings should not be used to size the number restored at different points in time, it is worth understanding how long these people were without services. Amongst those we spoke to, some had TV services restored within a few days of the fire (15%), such that by the end of August around a quarter (26%) had TV services restored. A temporary mast installed in October resulted in over half of our sample (58%) having services restored by this point. Continual actions from Arqiva ensured that by the time of interviewing, 69% whose TV services were affected were restored, however **a fifth (21%) were still without TV and awaiting restoration**, whilst one in ten were unsure. Importantly our sample was targeted to reach these people who were not restored, those in what became known as 'not-spots' to understand the impact the incident had. Distribution of households affected and restoration dates within the Bilsdale region can be found here[19].



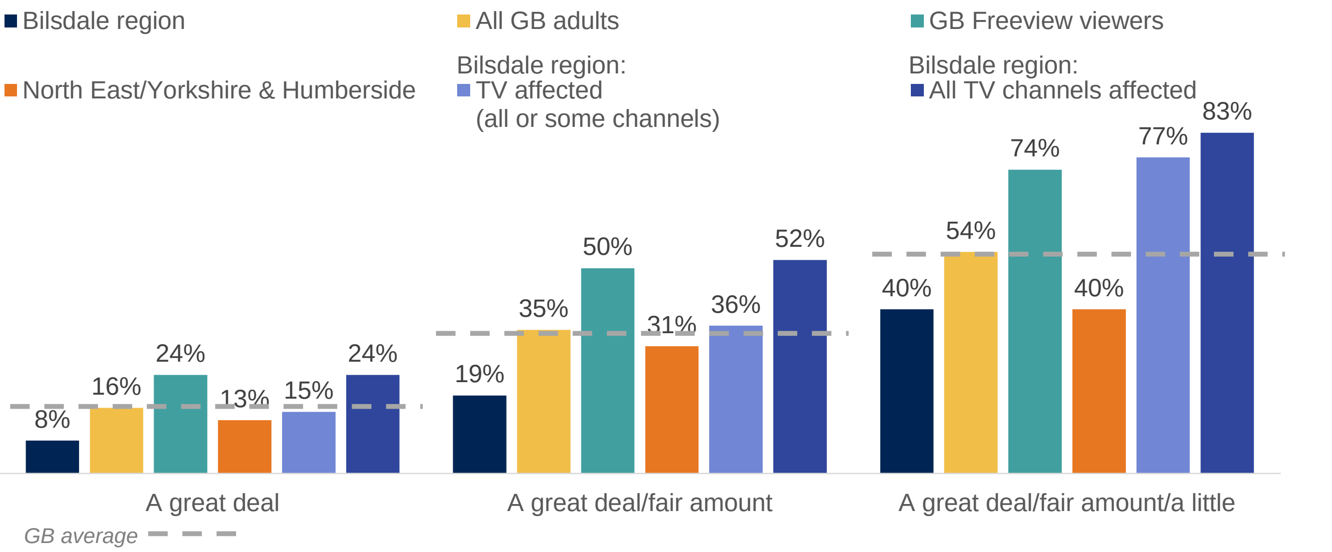
Base: All respondents with TV affected in Bilsdale region, n = 458

The loss of TV services affected the majority, who lost either all or some of their TV channels and the effect was particularly high amongst those with no alternative access

One in four who lost TV services in the Bilsdale region felt they personally had been greatly affected. Amongst those whose TV services were affected just over three quarters (77%) were affected in some way. Unsurprisingly, **impact was stronger amongst those who lost all TV channels** – one in four (24%) considered they had been personally affected a great deal, over half (52%) at least a fair amount, whilst 83% were personally affected to some extent, see figure 21.

77% whose TV services were affected were personally affected to some extent

Figure 21: Extent to which those in Bilsdale were personally affected by the loss of Freeview compared to perceptions of likely personal affect with this hypothetical scenario (GB and NE/Yorkshire and Humberside)



Base: All respondents 18+, in Bilsdale region, n = 1001, GB, n = 2005, in North East/Yorkshire and Humberside n = 238, GB Freeview viewers in past year n = 1141, TV affected (all or some channels) n = 458, all TV channels affected n =266

The GB survey results show that just over half of the GB population (54%) think they would be affected by the loss of broadcast services. The real versus hypothetical impact of a loss of broadcast services could be assumed to be much greater based on our survey results. Interestingly, when presented with a hypothetical scenario regarding the loss of broadcast services, those living in the North East, Yorkshire and Humberside regions were actually less likely than the average GB adult to anticipate that a loss of Freeview services would have any personal affect (40% vs. 54% for GB overall). These views are interesting since we know Freeview use is more popular in these regions than reported overall. Despite this, those living in the area seemed less likely to think a loss of these services would personally affect them when in fact 77% of those who lost TV in the Bilsdale region were affected, **and more than double (83%) who lost all TV channels said they were personally affected compared**

More than 2x as many in the region were affected than they anticipated based on a hypothetical scenario in the GB survey

[19] https://www.bilsdalemast.co.uk/

to what the region anticipated (40%). Only a quarter (24%) who lost all their TV channels were not personally affected at all, a stark contrast to the 70% living in the North East who suggested this would not affect them.

The reality of the loss of services aligns more closely with how Freeview viewers thought they would be affected, but expectations are still underestimated. Not all of course are Freeview viewers; isolating the affect that Freeview viewers across GB anticipated, one in four (24%) suggested they would be personally affected a great deal (24%), and half (50%) at least a fair amount. However, **significantly more who lost all TV channels were personally affected to at least some degree (83%), than was anticipated by Freeview viewers based on a hypothetical scenario (74%)**. Exploring further those whose TV services were affected, amongst those who were daily Freeview viewers, two thirds (67%) were personally affected a great deal or a fair amount.

Viewers who lacked access to alternative sources were more likely to be personally affected by the loss of TV services. Amongst those whose TV services were affected in any way, the effect on individuals was stronger if they were not also cable or satellite viewers and hence likely to struggle to access linear TV channels; (20% were affected a great deal, 46% a great deal or fair amount). The affect was even stronger amongst Freeview viewers who did not watch any of cable, satellite, BVOD or SVOD (32% were affected a great deal, 63% a great deal or fair amount). However, **even those who also watched alternative services were affected by the loss of Freeview**; a quarter (26%) of cable or satellite viewers and a third (33%) who viewed streaming services, were personally affected a great deal or a fair amount when their Freeview services was disrupted.

1 in 3
whose TV services were disrupted were personally affected at least a fair amount, even though they also watched streaming services

Older audiences and those not at work, were most likely to be personally affected by the loss of TV services. Amongst those who lost TV services, older age groups were more likely to be personally affected than the younger age groups; whilst a fifth (20%) of 18-34s who lost services indicated they had been personally affected a great deal or fair amount, this more than doubled for those 55+ (42% affected a great deal or fair amount). Another audience shown to be more regular viewers of Freeview, the non-working population, were also more likely to be affected (45% were affected a great deal or fair amount vs. 28% who were working).

Restoration of services is closely related to the extent to which people were personally affected. Whilst just over 1 in 5 (22%) whose services were restored by the end of August were impacted a great deal/fair amount, this more than doubled amongst those restored after the temporary mast installation in October (50%), and those still not restored (46%).

"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

"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, radio & all TV affected

"It impacted us greatly because the children love 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

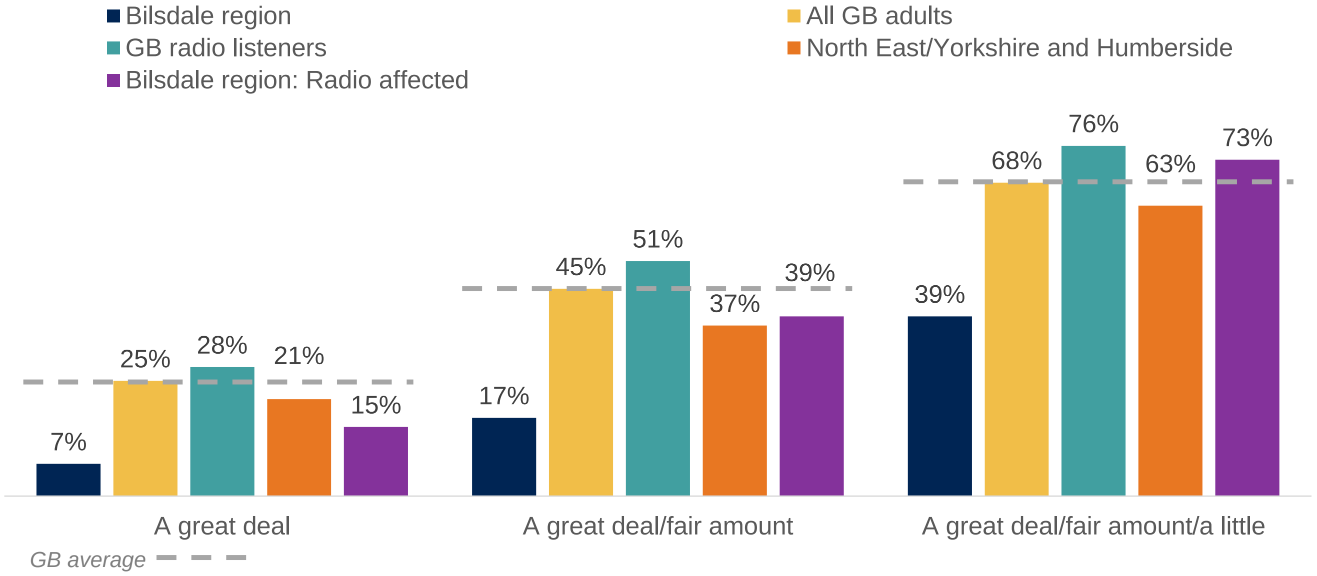
"We were let down because we had just been going through Covid and you think you take the telly for granted and you try to switch the telly on and there is nothing on when you want to watch." Male, 60-64, some TV affected

Radio reflects a similar response to TV, where the impact of actually losing services was greater than those in the region envisaged

Four in ten who experienced a loss of radio were affected personally at least a fair amount, with three quarters indicating this had some effect on them. The loss of radio services affected fewer people, likely due to a much shorter outage. Just under a fifth (17%) of those in the Bilsdale region were personally affected by the loss of radio services (a great deal/fair amount). Focusing on those whose radio services were impacted, 15% were personally affected a great deal, 39% at least a fair amount, whilst nearly three quarters (73%) were personally affected in some way, see figure 22. Even amongst **those who listen to radio online at least some of the time, 38% were personally affected,** a great deal or a fair amount, by the loss of broadcast radio.

73% whose radio services were affected were personally affected to some extent

Figure 22: Extent to which those in Bilsdale were personally affected by the loss of radio compared to perceptions of likely personal affect with this hypothetical scenario (GB and NE/Yorkshire and Humberside)



Base: All respondents 18+, in Bilsdale region, n = 1001, GB, n = 2005, in North East/Yorkshire and Humberside n = 238, GB radio listeners in past year n = 1744, radio affected n = 182

The GB survey results indicates that more than two thirds of the GB population (68%) think they would be affected by the loss of broadcast services. The real versus hypothetical impact of a loss of broadcast services could be assumed to be much greater based on our survey results. As seen with TV, those living in the North East, Yorkshire and Humberside regions were significantly less likely than the average GB adult to anticipate a loss of radio would personally affect them a great deal or a fair amount (37% vs. 45%). These views are again interesting since we know radio listening is more popular in these regions than reported overall.

Their perceptions were under-estimated – whilst 63% suggested they would be personally affected, in reality 73% who lost radio services were personally affected. Whilst those affected a great deal or a fair amount is more in line with what people predicted, those affected to a lesser degree is underestimated. The extent of any affect is, however, in line with what radio listeners suggested. When asked to predict this affect based on the hypothetical scenario, an extended time period of loss was suggested. In reality, most local radio services were restored relatively quickly. Potentially with a longer time period of loss, the actual affect experienced would be greater.

"I did miss local radio – local football is only available on FM so lost that." Male, 45-54, radio and all TV affected

"I was upset about the kitchen radio not working as I spend a lot of time in the kitchen listening to the radio. I had to use the TV to listen to the radio but I had to put the sound very high to get it through to the kitchen. The radio in my kitchen was very static and so I could not listen to it properly… I tried to retune it but it did not work. It took about a month for the radio to be repaired" Female, 35-44, radio affected

With just under a fifth of the sample suggesting their radio services had been affected, sub-group analysis has small sample sizes; however, data is indicative of the youngest 18-34s being less likely to be personally affected by this service disruption, whilst those who work were more personally affected than non-workers. This mirrors overall listening habits and reliance on radio.

4.4 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

A loss of broadcast services left many emotionally affected with a range of negative emotions experienced. Many were left feeling disconnected from news and current affairs, with others missing the companionship broadcast services provide and were left feeling lonely. Losing media that they rely on and use to entertain themselves as well as keep informed meant that many really missed these services.

A negative emotional response was triggered in many who lost broadcast services, particularly those losing all TV channels or those who felt uninformed and unsupported

A strong negative emotional response is provoked by a loss of broadcast services. Amongst those whose TV services were affected we explored how they felt and what they missed. Over four in ten (43%) who lost all TV channels told us about a range of negative emotions that they felt (see figure 23). This spanned sadness, upset, disappointment, and more. The most **common negative emotions were a sense of feeling angry, annoyed, frustrated or irritated** by the situation – a fifth (21%) with some TV channels lost spontaneously told us about feeling this way, which rose to nearly a third (31%) who lost all TV channels. A quarter (25%) whose radio services were affected cited this sense of anger and frustration. Whilst 30% of the overall GB population anticipated they would feel negative emotions (see figure 24) and even the sense of anger and frustration (9%), the actual reality was significantly more people felt this way.

Figure 23: Word cloud of negative emotions mentioned when asked how they felt, how they were impacted and what they missed about broadcast services

"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

"Made me feel bored, angry frustrated and couldn't rely on TV as there were no channels" Female, 35-44, radio & all TV affected

"Depressed, nothing to talk about, missed the noise" *Female 65-74, some TV affected*

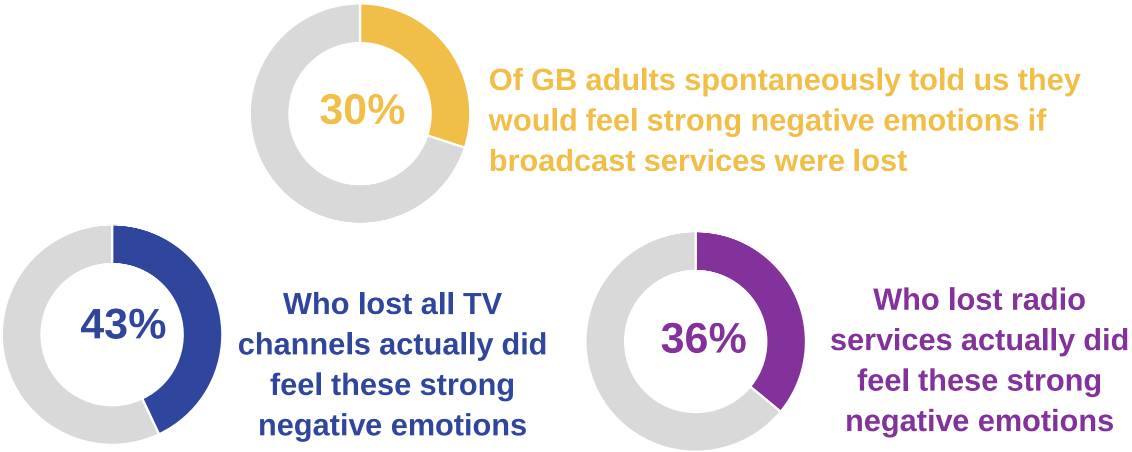
"Made me feel disconnected from the world in some ways. I usually follow the news everyday for a couple of hours wasn't able to do this felt less informed. I was bored without it and frustrated." Male 45-54, all TV affected

"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

"Loss of service made me feel frustrated. I relied on it. It disappeared overnight and took a while to come back. There was no advice on when to retry or retune it. I had to look on the internet instead." Male, 25-34, all TV affected

"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

Figure 24: Extent to which negative emotions were mentioned when asked how they felt, how they were impacted and what they missed about broadcast services



Base: All respondents, those in Bilsdale region, n = 1001, all TV channels affected n =266 , radio affected n = 182

Amongst those waiting longer or feeling uninformed about the loss of services, negative emotions ran higher. Negative emotions were much more likely amongst those who had to wait until after the temporary mast to be restored (44%), and those in the not spots and not restored by end of January 2022 (42%). They were also more likely amongst those who did not feel well informed about the situation (46%) or who did not feel well supported in terms of finding other ways to watch TV (44%).

6 in 10
who were personally affected by the loss of TV services told us about the negative emotions this made them experience

Amongst those whose services were affected, negative emotional feelings increased with age (mentioned by 40% of those 55 and older), were higher amongst the lower social grades (41% of C2DEs compared to 34% of ABC1s) and peaked amongst those who live alone (44%). Of course, not all whose services were disrupted were personally affected, as many could access other services. However, amongst those personally affected by the loss of TV services, 60% told us about the negative emotional reaction this provoked, nearly double the level expected from the response to the hypothetical scenario from Freeview viewers across GB (34%).

When exploring the role that Freeview plays, responses from those in Bilsdale also suggest a greater sense of reliance on the service; whilst 22% of Freeview viewers across GB indicated it was not something they relied on, this was significantly lower in the Bilsdale region amongst those Freeview viewers who had TV services affected (16%). Echoing this stronger reliance, **those in Bilsdale who had TV services affected were more likely to spontaneously tell us these services were important or essential to them (26%) than those Freeview viewers across GB (18%).**

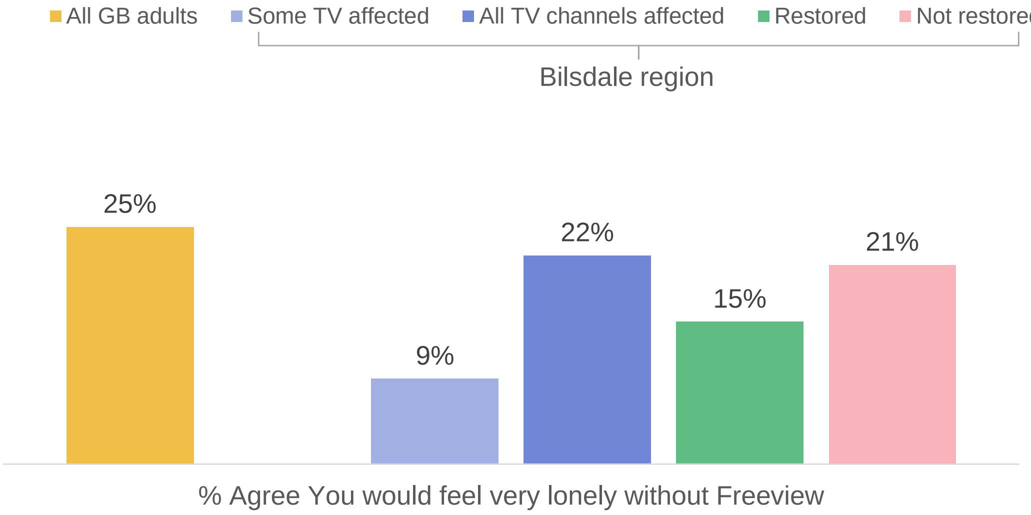
Feelings of loneliness and isolation experienced with a loss of broadcast services stem from the companionship they provide and access to news and current affairs

Feelings of loneliness often resulted following the loss of broadcast services. One in ten (10%) of those affected spontaneously told us the loss of services left them feeling alone, isolated, lonely or cut off. When prompted, **just over a fifth (22%) who lost all their TV channels said they felt very lonely without Freeview,** a similar proportion not yet restored also felt very lonely without Freeview. Fewer felt this sense of loneliness where TV services were only partially affected (9%) or restored (15%), see figure 25. This sense of loneliness peaked in those 65-74 (21%), social grades C2DE (23% vs. just 11% of those ABC1) and those not working (23% vs. just 11% of those working). Importantly, highlighting the **sense of companionship that TV provides, 42% living alone felt very lonely without Freeview, compared to just 9% in households with two or more.**

The GB population understands the role of companionship that Freeview plays and anticipates the sense of loneliness that a loss of services would produce. When asked to imagine the hypothetical loss of Freeview, a quarter (25%) of GB adults agreed this would be likely to make them feel very lonely. This level of anticipated loneliness is very similar to what was experienced by those who lost all of their TV channels.

"I suffer from agoraphobia and anxiety being stuck in the house and not being able to go out had an impact on my life. Even having it on as background noise helps and we watch things when the kids come in from school. Without it we are stuck upstairs. Makes me feel isolated even more" Female, 25-34, all TV affected

Figure 25: Percentage who agree that without Freeview they would feel very lonely (GB adults) / they did feel very lonely (those affected in the Bilsdale region)



"Living on my own made the house a bit more lonely, even if I didn't watch the TV it just plays what it plays I have it in as background noise." Male 25-34, all TV affected

Base: All respondents, GB adults 18+, n = 2005,

some TV channels affected n = 192, all TV channels affected n =266 , restored n = 314, not restored n = 94

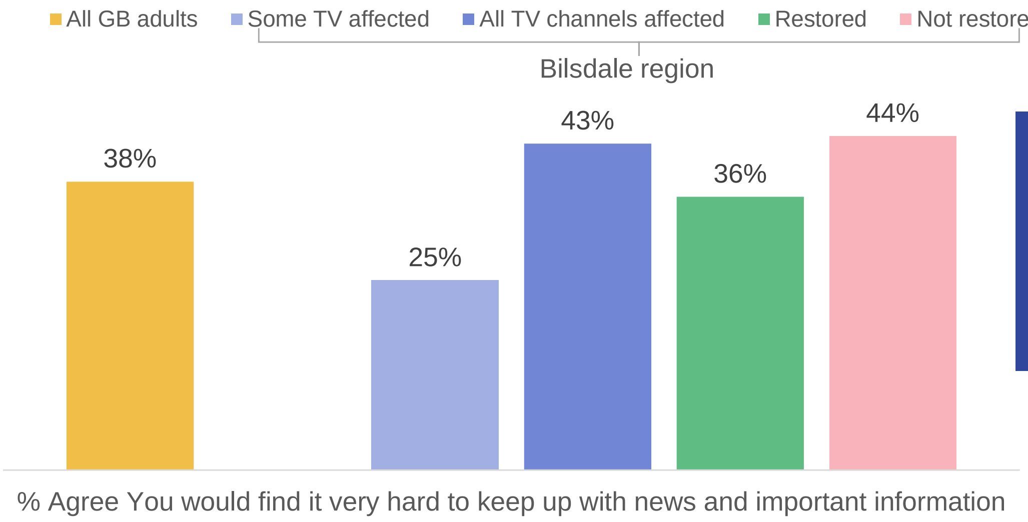
Radio services also play a role in delivering companionship, with the loss of radio particularly affecting those who live alone. Amongst those whose radio services were affected, 15% agreed they felt very lonely without radio; however, this was significantly lower than what the overall GB population expected (23%). The more temporary nature of the loss of radio is likely to be having some affect here. This sense of loneliness without radio came most from those 35 and over, and as seen with TV peaked in single person households – **33% with radio affected who lived alone agreed they felt very lonely without radio.**

A sense of isolation from the world also came from a lack of access to news and current affairs, a key area that was missed during the loss of services. Amongst those who lost all their TV channels, a fifth (21%) spontaneously told us they had missed news and current affairs. Whilst 11% of GB adults spontaneously suggested this is something that they would miss from a loss of broadcast services, the reality was significantly higher. Furthermore, whilst 38% of GB adults agreed that without Freeview they would find it very hard to keep up with news and important information, the reality was **43% actually found it very hard to keep up to date with the world when they lost all their TV channels**, see figure 26. The GB population clearly have a good understanding of the role that Freeview plays in delivering news and current affairs, and how a loss of services can result in a lack of information reaching audiences.

"The thing we missed the most was the news and general info. We felt out of touch with that. Where do we go for info? It was difficult to know nothing" Male 55-59, radio & all TV affected

"I had no visual contact with the news or anything like that. I missed the news the most" Male, 45-54, radio & all TV affected

Figure 26: Percentage who agree that without Freeview they would find it very hard to keep up with news and important information (GB adults) / they did find it very hard to keep up with news and important information (those affected in the Bilsdale region)



43% who lost all TV channels agreed they found it very hard to keep up with news and important information when they lost Freeview

Base: All respondents, GB adults 18+, n = 2005,

some TV channels affected n = 192, all TV channels affected n =266 , restored n = 314, not restored n = 94

Key audiences struggled to keep up to date with what was happening in the world when they lost Freeview. Amongst those whose TV services were affected in the Bilsdale area, females (40% vs. 30% of males) were more likely to agree they found it hard to keep up with news and important information, with this rising with age (41% of those 65+ agreed). Nearly half of those in single person households (46%) or of the lowest social grades DE (47%) also agreed that the loss of Freeview left them detached from news and current affairs.

A loss of Freeview removed access to news content even if other services were still available. Even amongst those who watched streaming services in the past year, a third (32%) agreed that they found it very hard to keep up with news and important information when they lost Freeview. Whilst other services can deliver a means of entertainment, news and current affairs, this is a key role for Freeview.

Without broadcast radio over a third found it very hard to keep up to date. Across GB, 37% suggested that a lack of broadcast radio would hinder keeping up with news and current affairs. Anticipated impact was very accurate with 36% who suffered disruption to radio services agreeing they found it very hard to keep up with news and important information.

"It did affect me because it can be part of your life (listening to news etc) even watching news on TV is an important way to find out what's happening in the world" Female, 45-54, some 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

Agreed they would find/did find it very hard to keep up with news and important information without radio

Base: All respondents, GB adults 18+, n = 2002, radio affected n = 182

Many struggled to entertain themselves when they lost broadcast services, particularly those from the lower social grades

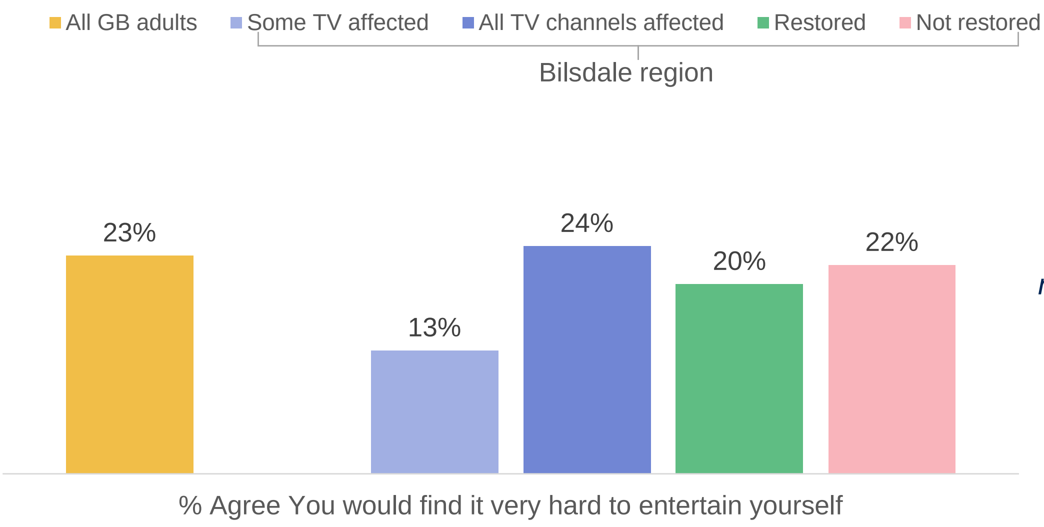
A quarter who lost all TV channels found it hard to entertain themselves. Whilst the loss felt in terms of lacking news and information is greater than the loss losing a source of entertainment, 24% who lost all TV channels agreed that they found it very hard to entertain themselves without Freeview. This is very much in line with what GB adults expected (23%), see figure 27.

Lower social grades were most likely to experience this entertainment gap. Across all ages who lost TV services, there was a similar perception that it had been very hard to entertain themselves. However, this was most prominent amongst C2DEs (30% compared to 11% of ABC1s), in particular the lowest grades DE (37%).

37% of social grade DE who lost all TV channels agreed that they found it very hard to entertain themselves when they lost Freeview

The entertainment gap was more likely amongst those with no other services to turn to. Those who had just some TV channels affected were less likely to find it hard to entertain themselves when they lost Freeview (13%), given they were able to watch other channels. Amongst those who never watch video content online, the impact was greater – 37% agreed without Freeview they found it very hard to entertain themselves. Even amongst those who viewed other services, a loss of Freeview impacted the extent to which they could be entertained – 17% who viewed streaming services in the past year agreed that they found it very hard to entertain themselves when their Freeview services were affected.

Figure 27: Percentage who agree that without Freeview they would find it very hard to entertain themself (GB adults) / they did find it very hard to entertain themself (those affected in the Bilsdale region)



"Felt cut off because you didn't have local news and there was a lack of entertainment options" Female, 55-59, all TV affected

Base: All respondents, GB adults 18+, n = 2005,

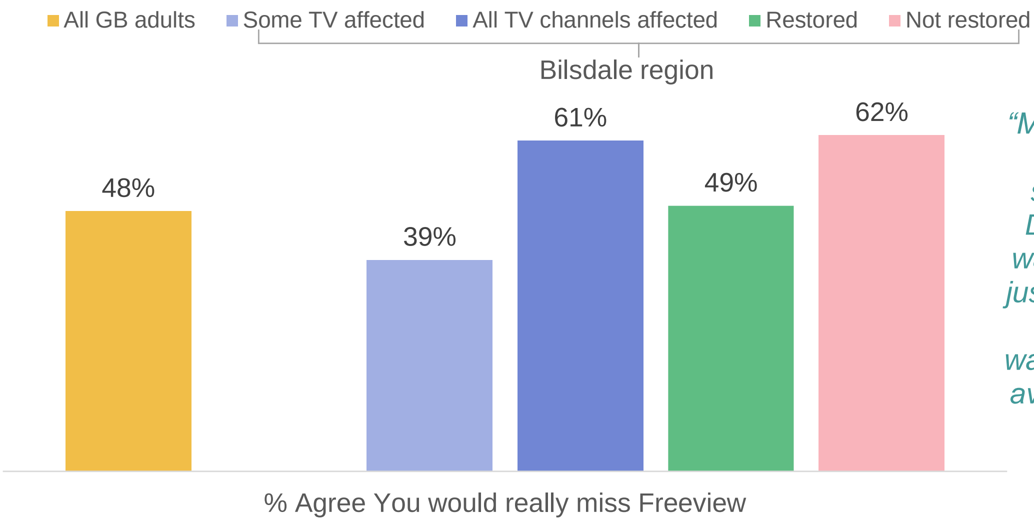
some TV channels affected n = 192, all TV channels affected n =266 , restored n = 314, not restored n = 94

A loss of radio resulted in around a fifth finding it very hard to entertain themselves. As seen with TV, a loss of radio resulted in more finding it hard to stay up to date with the world rather than lacking a source of entertainment. However, the service disruption did impact the extent to which audiences could be entertained. Just under a fifth (18%) whose radio services were affected agreed they found it very hard to entertain themselves without radio. These results were very much in line with what the GB population expected in this hypothetical scenario (21%).

Given the impact on behaviours and emotional toll faced, broadcast services were greatly missed

Six in ten who lost all their TV channels agreed they really missed Freeview. Half (52%) who had TV services affected agreed they really missed Freeview. This peaked at six in ten (61%) who lost all TV, see figure 28. Amongst those whose TV services were affected, and who watched Freeview daily, 74% agreed they really missed Freeview.

Figure 28: Percentage who agree that they would really miss Freeview (GB adults) / they did really miss Freeview (those affected in the Bilsdale region)

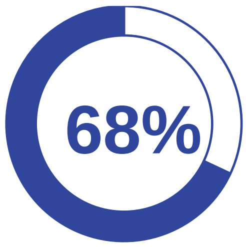


"Miss it [TV] being there and just finding something to watch. Disappointing when I want to relax but it was just one of those things. I had to adapt and watch anything that was available." Female, 45-54, some TV affected

Base: All respondents, GB adults 18+, n = 2005,

some TV channels affected n = 192, all TV channels affected n =266 , restored n = 314, not restored n = 94

Key audiences particularly lower social grades, non-workers and those living alone were the most likely to miss Freeview. Those 35 and over were more likely to agree they really missed Freeview with at least half in each age group who had their TV services affected agreeing they missed it, and the younger 18-34s being less likely to have missed the service (25%). Those social grade DE were more likely than ABC1s to have missed Freeview (62% vs. 47% of ABC1s), as were the non-working population, who are more likely to be regular Freeview viewers than workers (60% vs. 45% of those working). However, it was single person households who were affected that missed Freeview the most – over two thirds (68%) agreed they really missed it, and amongst this group, 72% who watched Freeview every month agreed they really missed Freeview.



Living alone who had TV services affected agree they really missed Freeview

Freeview was really missed even when audiences had access to other services. Exploring further the reaction amongst those whose TV services were affected, those who were Freeview viewers but not viewers of cable or satellite TV (and so potentially lacking ways to access linear TV channels) were more likely to really miss Freeview (60% agreed). However, even amongst those who watch video content online every week, 48% who had services affected agreed they really missed Freeview, indicating the very complementary role that streaming services play alongside TV services delivered through an aerial.

48%
of those who had services but were watching video content online every week, agreed they really missed Freeview

Just under six in ten who experienced a loss of radio services agreed they really missed radio. The imagined scenario with a loss of radio resulted in 56% of GB adults suggesting they would really miss radio. The reality amongst those whose services were disrupted the results was very similar – 58% agreed they really missed radio. Amongst those who had radio services affected, **41% indicated that the time spent without radio made them realise how important the role of radio is to them.**

"I rely on it for news, travel, roadworks and weather. I missed knowing how long my travel time would be." 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

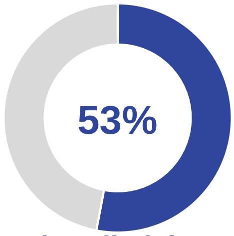
4.5 Higher engagement with broadcast services is seen in the Bilsdale region

Data points from the Bilsdale region suggest this area is likely to be more dependent on Freeview than seen across GB overall, with higher radio listening as well, particularly broadcast radio. As such, the proportion affected by a loss of services is high, as the local population engages with these services regularly.

Freeview engagement is higher in the Bilsdale region, so those in the area are more likely to have been affected than the average

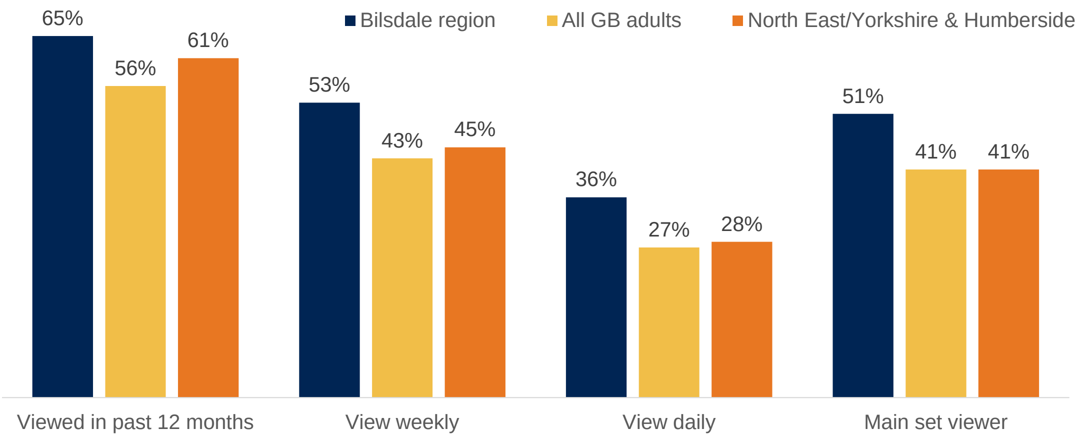
Those in Bilsdale were more likely to be Freeview viewers than seen across GB overall. Across GB we had identified Freeview as the most popular traditional form of watching TV at home in the past year (56%). Past year reach was higher in the North East, Yorkshire and Humberside regions (61%) within the representative survey, although weekly reach within these regions compared with GB overall[20]. **Freeview was also the most popular form of access to TV channels amongst those we spoke to in the Bilsdale region** – nearly two thirds watched in the past year (65%), see figure 29, higher than reported across GB or the relevant regions.

Regular engagement with Freeview was also higher in the Bilsdale region. Those in Bilsdale were also more likely to be weekly (53%), daily (36%) and main set viewers of Freeview (51%). Conversion from past year to weekly Freeview viewers is also significantly stronger in the Bilsdale region than in GB overall, with 82% going onto view weekly (vs. 76% overall). **Data therefore points to the stronger use of Freeview in the Bilsdale region**.



In the Bilsdale area watched Freeview every week

Figure 29: Key metrics related to Freeview viewing in the home across different samples of adults 18+



NB: Other services surveyed

Base: All respondents, GB adults 18+, n = 2005, those in North East/Yorkshire and Humberside n = 238, those in Bilsdale region, n = 1001

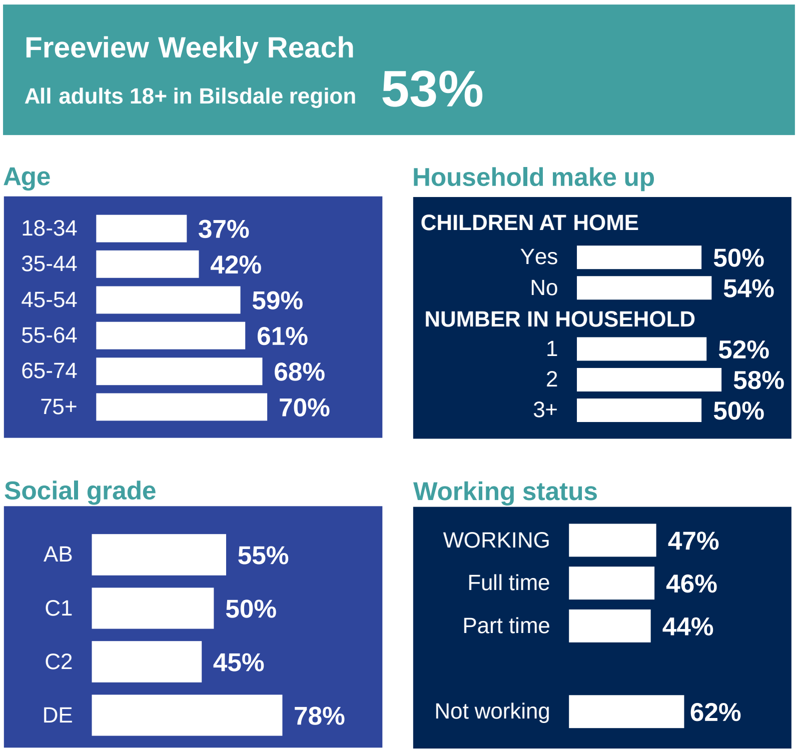
The broad reach of Freeview seen across the country is mirrored in the Bilsdale region with older audiences and non-workers most likely to view every week. Whilst just over a third (37%) of 18-34s we spoke to in the Bilsdale region were weekly viewers of Freeview, this increased through the age groups – 69% of those 65+ in the Bilsdale region watched Freeview every week, see figure 30. This older skew mirrors the Freeview audience across GB. Overall country trends of higher weekly viewing amongst non-workers (62% vs. 47% of workers in the Bilsdale region), are also seen in the Bilsdale region, although higher reach amongst social grades DE is reported in the Bilsdale region.

"I watch Freeview daily – mainly main BBC, ITV, Channel 4 and Channel 5. Switch on for breakfast TV - BBC or ITV, go to work, come in 6 o'clock and an hour of TV on later if we fancy something on". Male, 45-54, unaffected

Freeview viewing is just as, if not more likely, amongst multi-person homes in Bilsdale. Within the Bilsdale region, Freeview reach is higher amongst those with children in the home than reported at the GB level (50% in Bilsdale, 35% for GB overall), in turn linked to higher reach amongst households with multiple people in the Bilsdale region than reported across GB overall, (58% for 2 person households vs. 46% for GB; 50% for households with 3+ people vs. 36% for GB).

[20] As noted above, regional differences reported in our survey may well differ to BARB, the industry currency, which has a much larger sample and measures actual behaviours rather than claimed behaviours

Figure 30: Weekly reach of Freeview through an aerial in the home amongst a range of demographic groups in the Bilsdale region



Base: those in Bilsdale region, n = 1001

Lowest sample size, C2, n = 82, highest = no kids n = 788

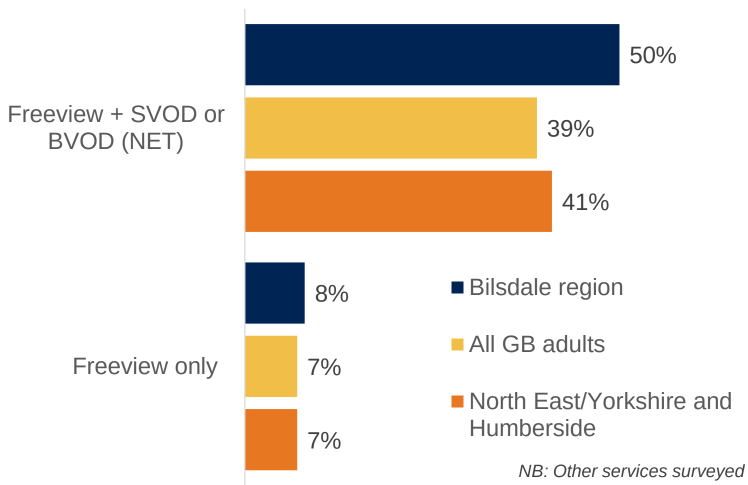
"I rely heavily sometimes on Freeview after work to relax…it's a main connection with the outside"
Male, 45-54, radio & all TV affected

"Rely on it [Freeview] quite considerably and the only television that I watch." Female, 65-74, radio & all TV affected

"We do use it [Freeview] fairly regularly, but we are not dependent on it. This is because we have streaming services like Netflix as well as the Sky box. I do think the Freeview service is important as we do get our news from there."
Female, 18-24, some TV affected

Although presenting with more Freeview viewers, those in the Bilsdale region were also more likely to watch video content online every week. Whilst those in the Bilsdale region were just as likely to have watched BVOD/SVOD services in the past year (82% vs. 80% for GB), **those in Bilsdale were more likely to have viewed BVOD in the past year** (65% vs. 54% for GB). As a result, half (50%) in Bilsdale had watched Freeview plus BVOD/SVOD services in the past year, significantly higher than the GB average (39%), although Freeview only viewing was in line, (8% vs. 7% for GB), see figure 31. With the survey collecting past year viewing, **what is unknown is whether this higher likelihood to watch BVOD existed before the incident or came about because of the service disruption and the need to watch TV in other ways.**

Figure 31: Past 12 month viewing of Freeview only or alongside streaming services, across different samples of adults 18+



Base: All respondents, GB adults 18+, n = 2005, those in North East/Yorkshire and Humberside n = 238, those in Bilsdale region, n = 1001

A small minority of participants in the Bilsdale region had no home internet access and whilst many had internet connected TVs, one in five didn't. In line with the GB average a small minority of participants, **2%, had no home internet access[21].** In the absence of cable or satellite services this will have presented a challenge for continued access to TV content for those who lost TV channels. Access to internet-connected devices is comparable across the Bilsdale region and GB overall (83% vs. 80% for GB) with comparability also seen for smart TVs in the home (71% vs. 70% for GB). This does, however, mean three in ten do not have smart TVs which allow quick and easy access to internet delivered content on the big screen.

[21] Ofcom states 6% of households with no home internet access
https://www.ofcom.org.uk/__data/assets/pdf_file/0013/220414/online-nation-2021-report.pdf

Streaming sticks and boxes are more likely to be owned in the Bilsdale region than across GB overall, (54% vs. 48% for GB). Vouchers for the retailer Currys were provided to many households without a signal through Arqiva's Project Restore programme. These aimed to act as a financial contribution towards equipment to allow them to access internet-based TV services, such as through a media stick or box. Separate research conducted by Drummond Central amongst a sample invited to download the Currys e-voucher indicated 76% had redeemed this voucher. Amongst this group, 72% had purchased a streaming device. This supplementary data suggests that the uplift in ownership of such devices in the Bilsdale region is due to the voucher scheme. Though many (39%) said they are unlikely to use it once services were restored.

54% in the Bilsdale region have a stick or box to connect to the internet to stream TV content

"It [the incident] didn't really impact us, we just bought a firestick instead"
Female, 18-24, radio & all TV affected

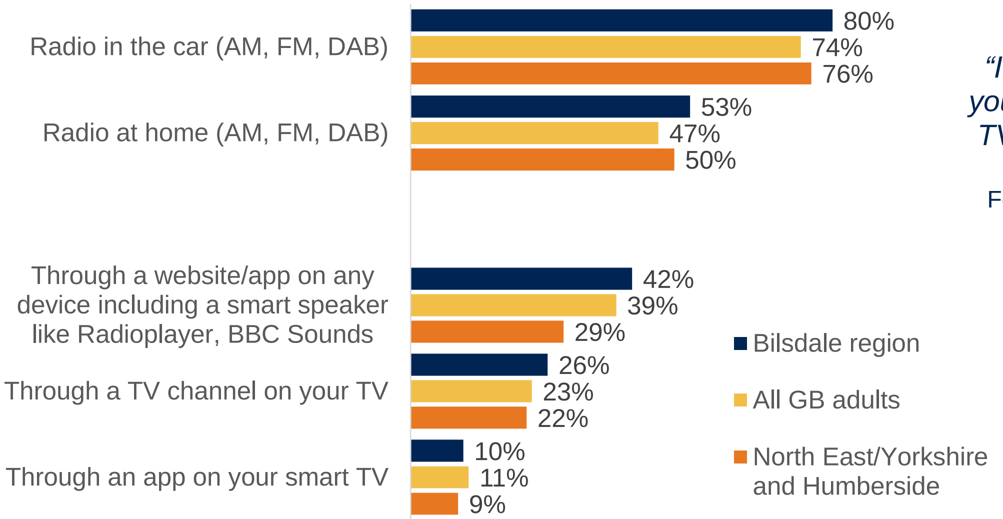
Radio listening, particularly broadcast radio, is higher in the Bilsdale region, so those in the area are more likely to have been affected than the average

Significantly more of those living in the Bilsdale region are radio listeners who listen every week. Those in the broader North East, Yorkshire and Humberside region (92%) and those in Bilsdale (90%), are more likely than GB adults overall (87%) to be past year listeners[22]. In particular, **those in the Bilsdale region are more likely to be weekly listeners of radio** (81% vs. 76% for GB, 77% for NE, Yorkshire and Humber).

81% in the Bilsdale region are weekly radio listeners

Traditional broadcast radio listening is higher in Bilsdale than seen overall. Listeners of AM, FM and DAB signals in both the car and at home are more prevalent in the Bilsdale region than across GB overall (80% in car vs. 74% for GB; 53% at home vs. 47% for GB). The broader view of the North East, Yorkshire and Humberside regions suggests this may be a regional trend rather than specific to the Bilsdale incident. Nevertheless, data suggest **those living in the Bilsdale region are more likely to have been affected by loss of broadcast radio given the larger proportion listening to broadcast radio than seen in GB overall** (see figure 32).

Figure 32: Proportion listening to radio in a range of different methods in the past 12 months



"I do listen to the radio as you can listen to that on the TV now, I don't often, but I do listen on my iPad."
Female, 65-74, all TV affected

"I like to listen to the news in the car." Male, 45-54, radio affected

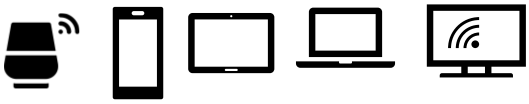
NB: Other services surveyed

Base: All respondents, GB adults 18+, n = 2005, those in North East/Yorkshire and Humberside n = 238, those in Bilsdale region, n = 1001

[22] As noted above, regional differences reported in our survey may well differ to RAJAR, the industry currency, which has a much larger sample and measures behaviours in a different way

Internet-based listening is significantly higher in the Bilsdale region. Nearly half (46%) listened to radio through an internet connected device, including a smart speaker or through an app on a TV, in the past year. This is slightly higher than seen across GB overall (42%), and significantly higher than reported in the broader region of North East, Yorkshire and Humberside (32%). This is seen alongside a higher proportion of people in the Bilsdale region listening to broadcast radio in the past year than seen across GB overall, pointing to greater engagement with and perhaps dependency on radio in the region. This data indicates **loss of broadcast radio services could have impacted listening behaviours and drove some online. However, whether these differences were apparent before the incident is unknown.**

46% listened to radio through an internet connected device in the past year



4.6 Alternative ways of viewing TV were sought after to replace the loss of Freeview services, but many spent less time watching TV channels

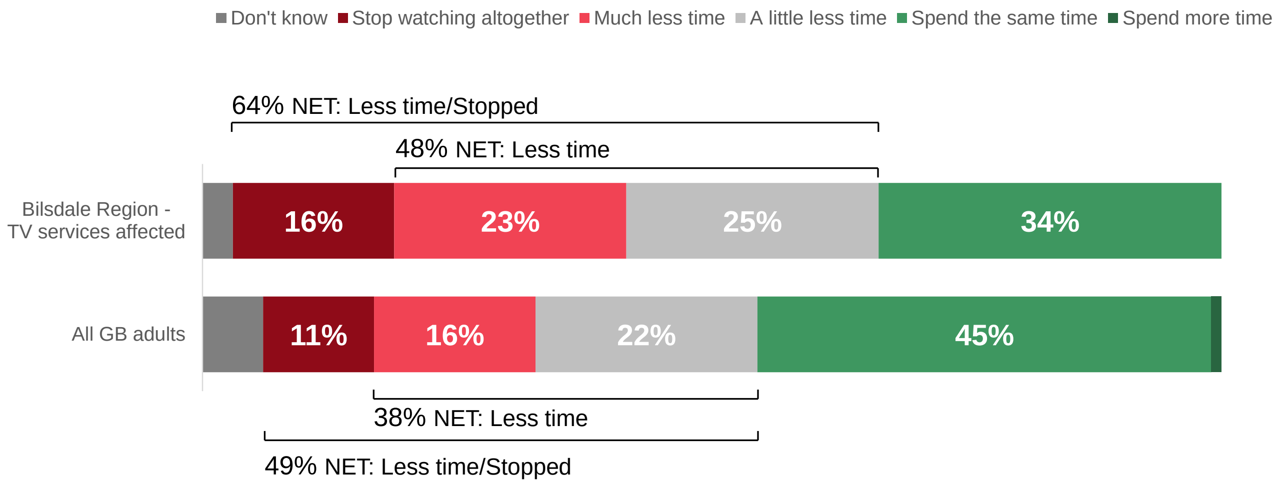
When faced with a loss of Freeview services through an aerial, many stopped or reduced viewing TV channels than the GB population anticipated. Whilst this was more likely amongst those who did not have alternative ways to access TV content, a reduction was seen even when they viewed other sources. There was a strong reliance on use of other existing services with fewer paying out for new services or equipment than was envisaged in such a scenario. Alternatives, whether new or just used more, are likely to play a continued role in their lives, however this is typically alongside Freeview services rather than instead of them.

Most of those whose TV services were affected spent less time watching TV channels or stopped watching TV channels altogether

As a result of the loss of Freeview services, nearly two thirds affected reduced or stopped viewing TV channels. Nearly two thirds (64%) whose TV services were affected in any way spent less time or stopped watching TV channels. Whilst around half (48%) spent less time watching TV channels, around one in six (16%) stopped watching TV channels altogether, which showed little variation across demographic groups, see figure 33. A quarter (26%) who lost all TV channels through Freeview indicated that this resulted in TV channel viewing stopping altogether, with 77% who lost all channels having stopped or reduced their viewing of TV channels.

1 in 6
whose TV services were affected stopped watching TV channels altogether

Figure 33: Extent to which they were impacted by the loss of TV channels



Base: All respondents, GB adults 18+, n = 1995 (not affected by Bilsdale incident)

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

Whilst not significantly different, data patterns suggest females (67% vs. 60% of males) and older age groups were more likely to stop or reduce their viewing, (67% of those 55+ compared to 60% of under 55s). Those who lived alone were more likely to stop or reduce their TV channel viewing (73%). Data showed little variation by working status, social grade or presence of children.

"I lost all channels. I stopped watching TV." Female, 35-44, Radio & all TV affected

When the hypothetical loss of Freeview scenario was presented, one in ten (11%) GB adults suggested they would stop watching TV channels – in fact **significantly more stopped watching when their Freeview service was affected (16%), more than double when they lost all TV channels (26%).** The broader GB population was also more optimistic in terms of reduced TV channel viewing – whilst 38% said they would spend less time watching, the reality was significantly more did (48%).

More than 2x
as many stopped watching TV channels altogether when all TV channels were affected than anticipated from a hypothetical scenario

Where alternative means of access to linear TV were not easily available, more viewers stopped watching TV channels. A fifth (20%) of Freeview viewers whose services were disrupted but who did not watch cable or satellite TV services said they stopped watching TV channels, whilst 73% stopped or reduced this viewing. Cessation of TV channel viewing was also more likely amongst those without a smart TV (25% vs. 14% of those with a smart TV), and those who were not online viewers (39%). A third who had only watched Freeview in the past year indicated that when their TV services were affected, they stopped watching TV channels, whilst 78% reduced or stopped this viewing. Even amongst those whose Freeview services were affected but they had viewed BVOD or SVOD in the last year, 13% stopped and 51% reduced viewing of TV channels, indicative of the supplementary rather than replacement role these services played.

Some viewers reduced or stopped their viewing to linear TV even if they had other means of access available. Amongst those whose services were affected, but they watched cable or satellite TV, far fewer stopped watching TV channels (9% compared to 16% of all affected), however it was still the case that just over half (54%) reduced or stopped their TV viewing, perhaps due to lack of Freeview on particular sets in the home.

The majority of those with affected TV services turned to existing services for alternative ways to watch content, although a fifth faced financial outlay

Four in ten watched alternative services, much as they did prior to the incident, with habits largely unchanged. 27% who had TV services disrupted spontaneously told us about finding alternative ways to consume content when they lost TV services. In exploring the actual impact on viewing habits, three quarters (74%) with TV services affected turned to other services they already had, see figure 34. For 42%, alternative but existing services were watched just as they were prior to the loss of Freeview. In essence they were largely unaffected by the service disruption. Most of these (90%) were BVOD or SVOD viewers, and whilst they acknowledged services had been affected, 20% had not watched Freeview in the past year, in effect their viewing habits continued as normal.

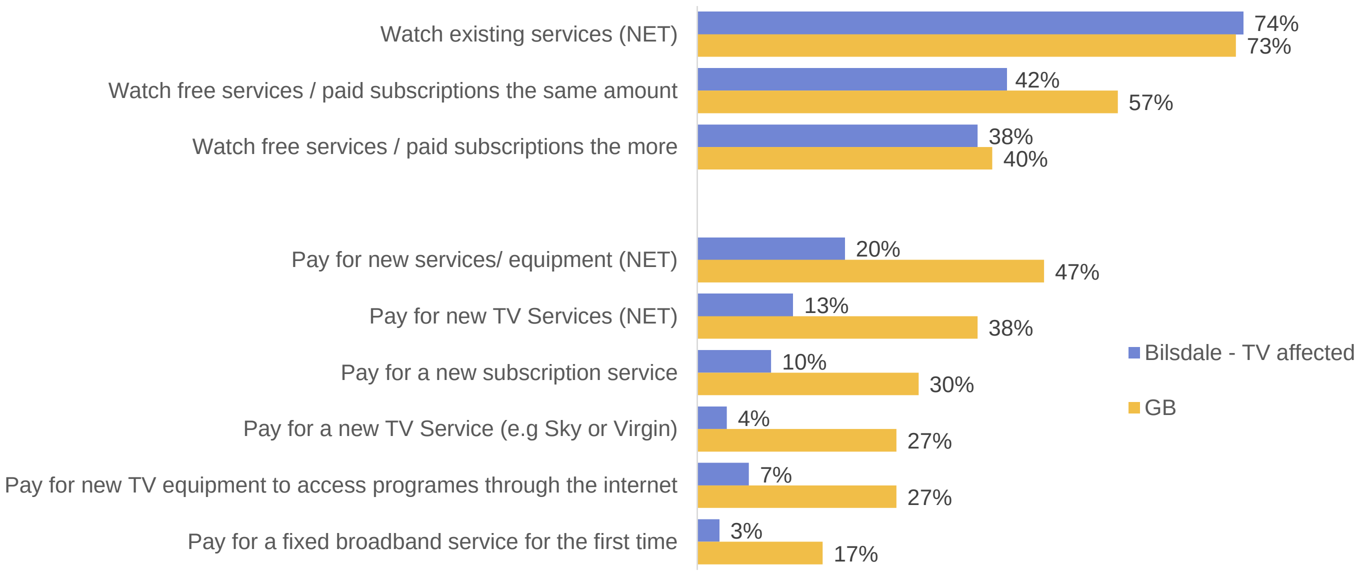
Increased use of alternative services was a popular replacement for the loss of Freeview, particularly amongst younger audiences. Increased viewing of other services they already had access to, both free and paid for, was reported by 38% whose TV services had been affected. This was more likely amongst younger ages (48% of 18-34s compared to 32% of those 55+ watched other services they already had more than they did before).

The reality was very similar to expectations in terms of reliance on existing but alternative services when faced with a loss of Freeview. Three quarters (73%) of GB adults suggested if put in this situation, they would rely on existing services, almost identical to what happened amongst those who lost TV in the Bilsdale region. More GB adults anticipated watching existing services the same amount than was reported by those affected, (57% vs. 42% of those affected in the Bilsdale region). This is indicative of more people affected in Bilsdale than may be seen elsewhere, likely due to the higher prevalence of regular Freeview viewers.

"I probably then used a few more apps to watch TV like Amazon Prime and Netflix. I felt it was a nuisance." Female, 65-74, all TV affected

"I personally just changed my behaviour and moved to more internet-based services radio or TV. However, people round me, I had to support them. They adopted new ways of working so they could watch TV". Male, 45-54, Radio & some TV affected

Figure 34: Behaviours as a result of the loss of TV services

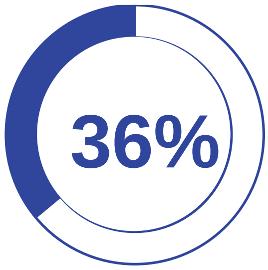


Base: All respondents, GB adults 18+, n = 1995 (not affected by Bilsdale incident)

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

A fifth paid for new means to access content, rising to more than a third in those living in not spot areas and still without Freeview at the end of January. A fifth (20%) of those whose TV services were affected, paid out for new services of equipment, which showed no demographic skews, spanning all ages, social grade and working status. Those who lost all TV channels were more likely than those who only lost some to pay out for new ways to access content (23% vs. 15%). More paid out the longer it took for services to be restored, with those still not restored perhaps more indicative of what may happen with a more permanent loss:

- 11% who were restored by the end of August paid for alternative access
- Almost double, 20%, restored after the temporary mast paid for alternative access
- 36% of those still not restored at the end of January paid for alternative access.



In not spots paid for access in others ways

"We went for months and months but we paid for a man to come out and install a booster with BT. Cost £100, it's not a good picture, it breaks up and it's terrible. Female 45-54, all TV affected

"I was very annoyed disappointed there was no proper back up forced to use paid systems like Sky." Male 75+, radio & all TV affected

New subscription streaming services were the most likely paid-for alternative to Freeview. One in ten (10%) paid for a new subscription streaming service, double those paying for more traditional ways to access linear TV such as through cable or satellite (4%). Fewer than one in ten (7%) paid for new equipment such as a box or stick to allow them to access TV content through the internet. The loss of TV services was a reason for 3% to get a fixed broadband connection for the first time.

The reality, in terms of paying for alternative services when faced with a loss of Freeview is much lower than the GB population suggest. When presented with a hypothetical scenario, almost half (47%) of GB adults indicated they would be likely to pay for alternative services. In reality, less than half as many did (20%). Of course, an unknown as to when services were being restored would have been at play in the Bilsdale region, with potentially a perception that there is no need to pay for something new if Freeview is soon coming back. Even amongst those still not restored in January, whilst 36% had paid for other ways to access content, affordability is a key barrier in the take up of other services, as this is considerably lower than what people think hypothetically they may do.

Only 20% of those who were affected by the loss of TV services paid for alternatives **vs 47%** who thought they would in a hypothetical scenario

When faced with a loss of channels more than a quarter turned to those that they could watch, even if they were not part of their standard channel repertoire. One in ten (12%) watched channels they had access to but would not usually have watched. Over a quarter (27%) of those who only lost some TV channels opted for this approach. This behaviour change was most likely with the youngest 18-34s – 26% who watched channels available through their aerial that they don't usually watch. Trialling new channels they always had access to was also found to be popular in households with children (19%) at home.

27% who lost just some of their TV channels started watching other channels they had access to but didn't usually watch

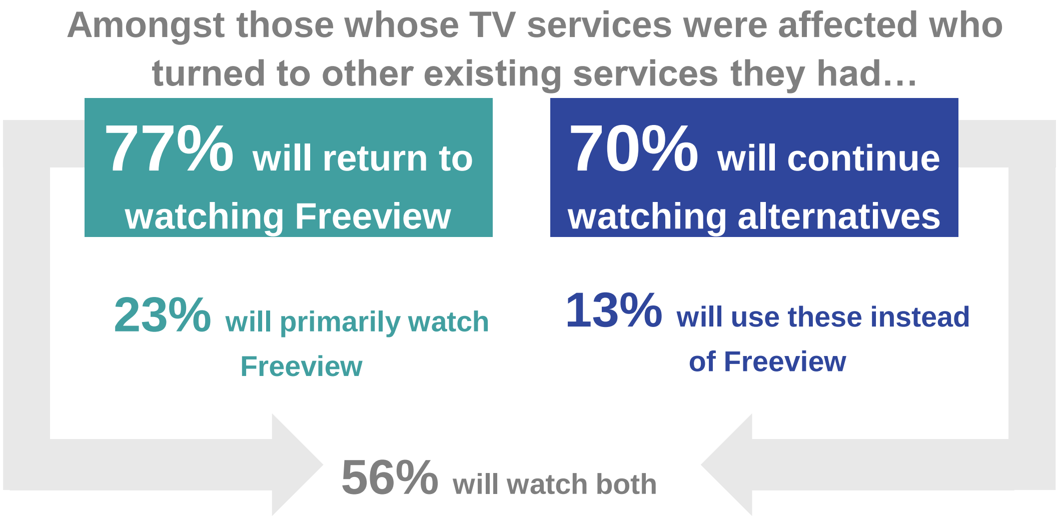
"A bit frustrated at not having access to what you want to watch. I used different channels so it didn't impact much but I missed having the variation of picking what you want." Female, 35-44, some TV affected

"It was not the end of the world we just had to get on without it… we had other options for other channels and ways to watch." Male, 25-34, some TV affected

Making more use of existing services helped whilst Freeview services were missing, however few will replace Freeview with these, with most returning to Freeview

Few will replace Freeview with the alternative services they turned to. With three in four (74%) turning to existing services as an alternative source in the absence of Freeview, the role of Freeview once restored was explored. As seen in figure 35, over half (56%) said they would continue to use these existing services as well as Freeview. However, nearly a quarter (23%) would go back to primarily watching Freeview services, indicating that use of these alternatives would drop if not stop altogether. **With a return of Freeview services, data suggest that over three quarters (77%) of the Freeview audience would return**, whilst seven in ten would stay using the alternatives. Just 13% suggested that the existing services that they already had, and relied on more when Freeview was disrupted, will be used instead of Freeview.

Figure 35: Amongst those who watched existing services more in the absence of Freeview, actual habits now Freeview is restored/expected habits once Freeview is restored



Base: All Bilsdale adults with affected TV services who watched existing services more than they did before, n=127

NB some did not know how they would behave

Whilst new alternatives sought out when Freeview services were lost play a role, most will return to Freeview

Whilst most relied on existing services and a relatively small sample bought new equipment or a new service (n=63), it is worth exploring this group a little more[23].

Whilst many were happy with alternatives, ease of use and content offer do not satisfy all. At a top level, many who paid out for new services appeared quite happy; 43% suggested they were happy with this new service or equipment as a long-term solution. However, a quarter (23%) indicated that they did not provide them with the channels they wanted, a likely reference to the linear TV channels they regularly viewed through Freeview that aren't available through media sticks or boxes. Furthermore, these were considered costly (15%) and hard to use (12%).

"It is not as quick and easy to use – it is not straight forward, there is no guide, and has buffering - which is annoying" Female, 55-59, all TV affected

"I couldn't get all the channels I wanted to watch. I could find something to watch, but not the channels I wanted to watch" Female, 45-54, Radio & all TV affected

Whilst most look likely to continue with their new sources of content, this will not replace Freeview. Most (79%) who opted for new services or equipment suggested they would continue to use them. However, for the majority this would be as well as Freeview (69%), with just one in ten (12%) suggesting that this would replace Freeview. A fifth indicated that they would primarily switch to watching Freeview, such that overall 82% did, or would return to watching Freeview once services were restored.

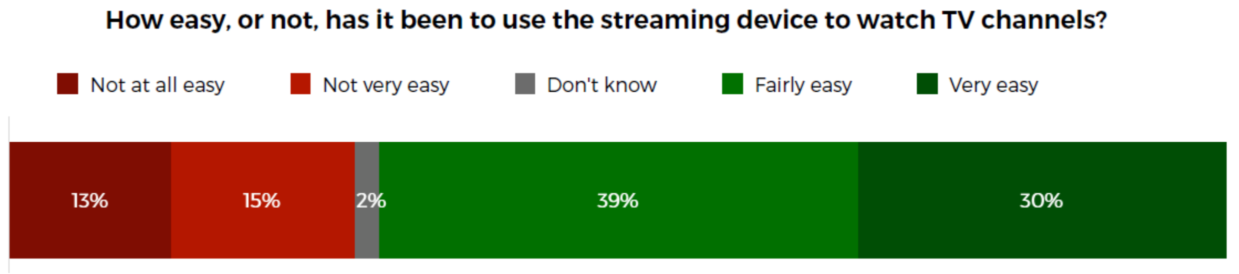
[23] Caution should be taken due to the small sample size of 63

Supplementary research was conducted by Drummond Central. A survey was emailed to people in the areas where the temporary mast could not provide coverage. The survey focused on the voucher scheme which involved a £50 Currys e-voucher being mailed to households in affected areas to purchase a streaming device to use as an alternative way to way TV. Fieldwork was conducted between 1-8 February 2022 and comprised a sample of 1,022, with data unweighted.

Of those surveyed 76% had redeemed their Currys voucher. Amongst voucher claimants (n = 777), 72% purchased a TV streaming device. Further questions were asked of this group who bought a streaming device.

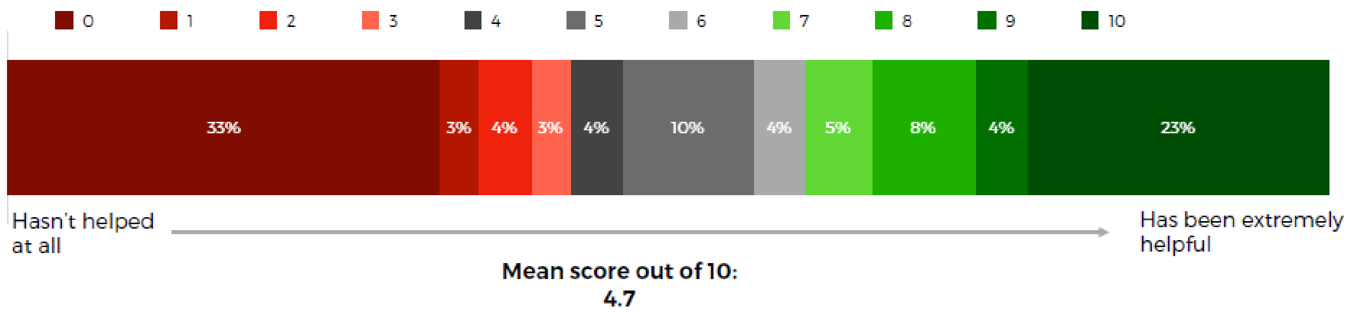
Most, but not all found the streaming device easy to use. Amongst those who bought a new streaming device, around 7 in 10 (69%) found it easy to use. Older ages particularly found it difficult to use.

Figure 36: Extent to which it was easy, or not, to use the streaming device to watch TV channels



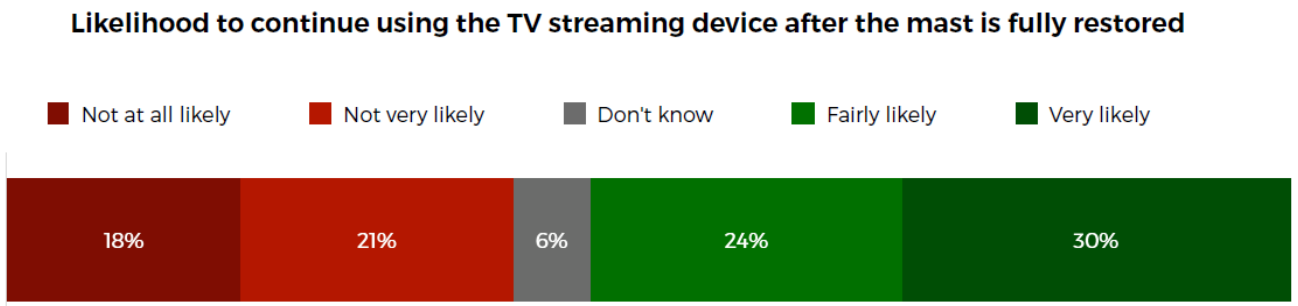
With an average score of 4.7 out of 10, the helpfulness of the voucher scheme is polarising. The streaming device was polarising in terms of how helpful it was to provide a means of accessing TV. 40% said the voucher scheme was helpful (7-10 out of 10), with reasons given such as being able to access more channels than they could previously and at the least restored their key channels. For the 43% who said the voucher scheme was unhelpful (0-3 out of 10), it was due to difficulty with accessing the channels they used to watch with many still unavailable via the device.

Figure 37: Extent to which the voucher scheme has been helpful with providing a means of accessing the main TV channels



In-line with perceived helpfulness of the voucher scheme, continued use of streaming device is uncertain. Continued use of the streaming device is fairly split with over half (54%) saying they would be likely to continue using the streaming device once the mast is fully restored. However four in ten (39%) see it as a more temporary solution, with around a fifth (18%), not at all likely to keep using this alternative method of TV access.

Figure 38: Extent to which they are likely to continue using the TV streaming device after the mast is fully restored



Source: Drummond Central, all with a streaming device bought through voucher scheme, n = 557

4.7 Whilst some turned to online listening when broadcast radio services were affected, many stopped or reduced radio listening

When faced with a loss of broadcast radio many stopped or reduced their listening to radio stations. Whilst some used other audio channels as a replacement, not everyone did, indicative of the loss in radio audiences that would be experienced if broadcast radio services ceased.

Radio listening habits reduced when broadcast radio services were affected to a greater extent than the GB population would predict in such a scenario

Around two thirds who had radio services affected spent less time or stopped listening to radio stations. Amongst those whose radio services were affected we explored how listening habits had changed. When faced with disrupted broadcast radio, **65% spent less time or stopped listening to radio stations.** Half (50%) said they spent less time listening, whilst 15% stopped listening to radio stations, see figure 39. Females were more than twice as likely to stop listening as males (22% vs. 9%), with a fifth (20%) of ABC1s also stopping their radio station listening when services were affected.

Those experiencing a loss of radio services were more likely to stop or reduce their radio station listening than the GB population envisaged they would do in this situation. Comparing actual impact to the predictions amongst GB adults, more who lived through the loss of radio reduced their listening (50% compared to 38% of GB adults expecting they would reduce radio listening). More of those who actually experienced a loss of radio also stopped or reduced radio station listening (65% compared to an expected level of 57%). Given the loss of radio services was quite temporary, a longer time period of loss may well have resulted with even more reducing their listening.

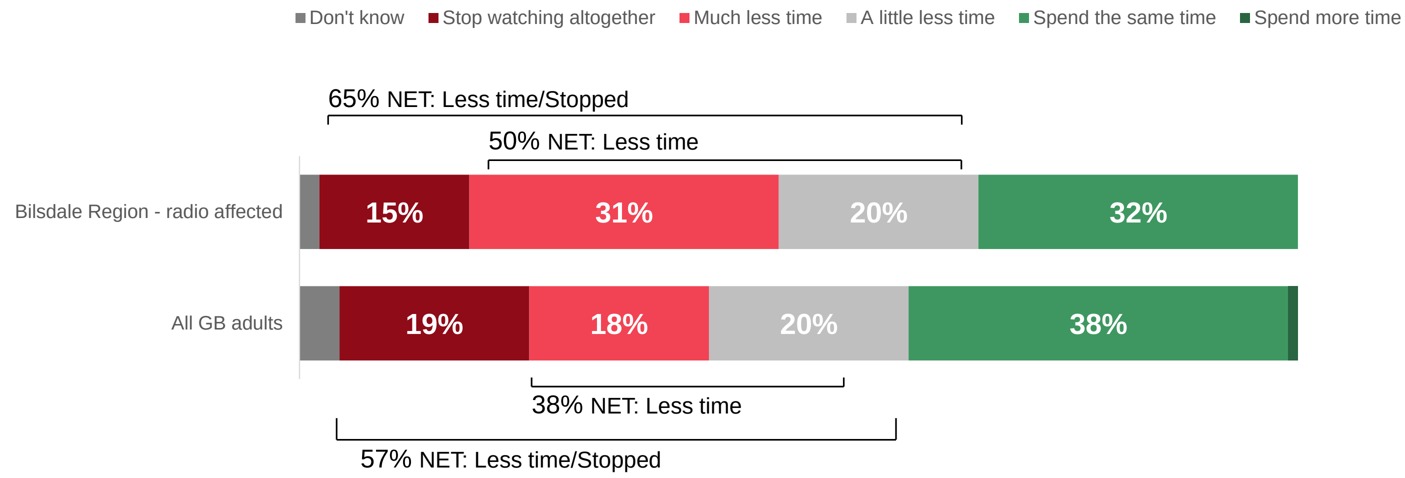
15% stopped listening

when they lost radio services

A significant uplift of +8 percentage points

is seen amongst those whose radio services were affected, who reduced or stopped listening to radio stations compared to what the GB population anticipate they would do

Figure 39: Extent to which they were impacted by the loss of radio services



Whilst not significantly different, data patterns suggest females (74% vs. 59% of males) were more likely to stop or reduce their listening to radio stations. Other sub-groups were too small to look at.

Radio listening was more likely to stop amongst those who were not online listeners. Whilst 15% of those whose services were affected claimed they stopped listening to radio, this rose to 24% who were not online listeners.

24%
who were not online listeners, and whose radio services were affected stopped listening to radio

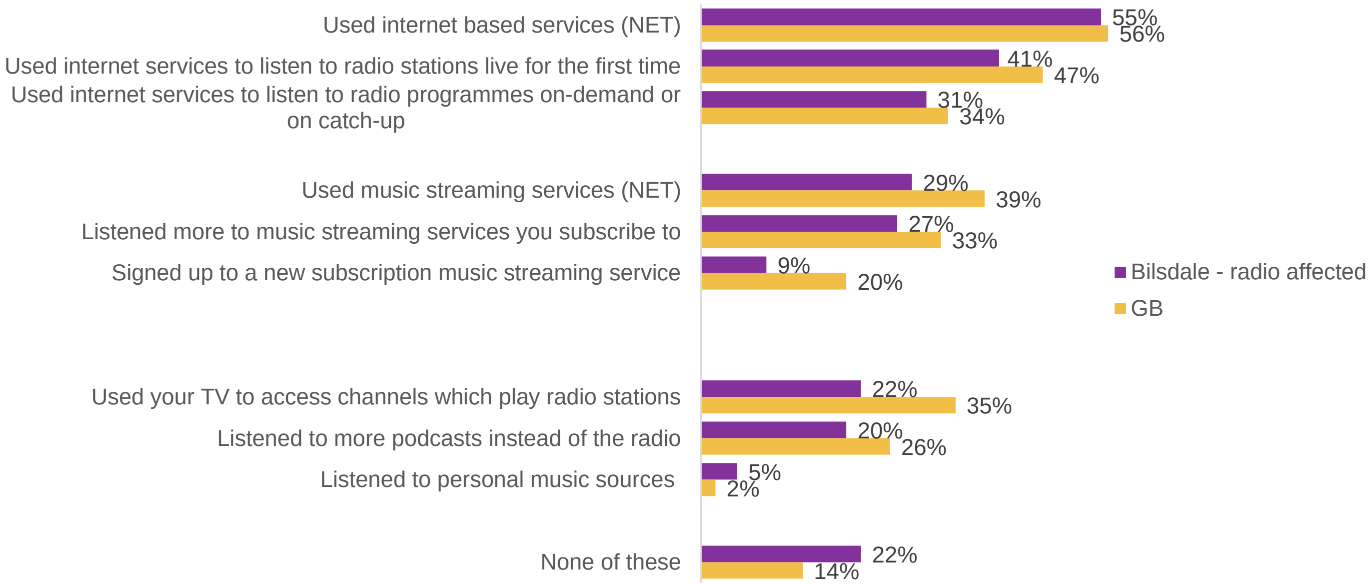
A loss of broadcast radio services drove some to listen online, however others moved away from radio to other audio sources or not listening at all

A third whose radio services were affected did not consider it quick and easy to access radio in other ways. Nearly six in ten (57%) who had radio services affected agreed they could quickly and easily switch to getting access to radio stations from other services. However, a third (33%), disagreed, indicating that barriers to alternatives are in place.

1 in 3
whose radio services were affected disagreed that it is quick and easy to access other ways of listening to radio

Faced with a loss of broadcast radio, just over half turned to online methods of listening, however nearly half didn't. When broadcast radio services were lost, over half of those affected turned to internet-based services to access radio (55%); 41% turned to online live listening for the first time, whilst three in ten (31%) used catch-up or on-demand online services for radio programming. The extent to which affected listeners turned to online sources was very much in line with what the overall GB population suggested they may do if broadcast radio services were lost, see figure 40.

Figure 40: Behaviours as a result of the loss of radio services



Base: All respondents, GB adults 18+, n = 2002

Base: All Bilsdale adults with affected radio services, n=182

Music streaming services benefited when broadcast radio signals were lost, but fewer signed up to new services than the GB population suggest. Three in ten (29%) said that when they were without broadcast radio, they used music streaming services. Whilst these services may well have benefited, this was significantly lower than what the GB population predicted may happen (39%). Whilst greater listening of services they were already signed up to was similar to expectations (27% whose radio was affected did this whilst 33% predicted this is what they would do), the difference comes from new sign ups. Whilst one in five (20%) GB adults suggested they would sign up to a new music streaming service in the absence of broadcast radio, only 9% did. Potentially if service loss had been more permanent more sign ups may well have happened.

Just 9%
signed up to new music streaming services in the absence of broadcast radio

"I had radio through the Amazon app, so I just listened that way" the Male, 45-54, radio affected

Whilst some turned to other forms of audio entertainment, a fifth said they were not listening in any way. Other audio services also benefited when broadcast radio signals were lost. A fifth (20%) who had radio affected said they increased their listening of podcasts, whilst 22% used their TV to access radio stations. Instead of listening to radio, 5% turned to their personal music collection. Actual behaviours were fairly aligned with predicted behaviours, however significantly more listened in none of these ways, (22% vs. 14% for GB overall), indicating a total change in listening habits.

"I'm a football supporter, when the mast was down I couldn't hear on radio but then [I was] able to stream for free through the football club"
Male, 25-34, radio affected

More than two thirds have returned to their previous listening habits with the remainder choosing to complement their radio listening with new services. The loss of radio stations for most had a temporary effect, with two thirds (67%) claiming their radio listening habits have returned to what they were prior to the incident. Just over a third (37%) indicated they would continue using new services they accessed whilst broadcast radio was unavailable. However, just 11% said other ways to listen to music or radio shows are much better than live listening to AM, FM or DAB digital radio stations, indicating that there is some way to go with alternative methods of access to live up to what live radio offers.

4.8 Many felt more information and support was needed to help find new ways to access TV and radio content

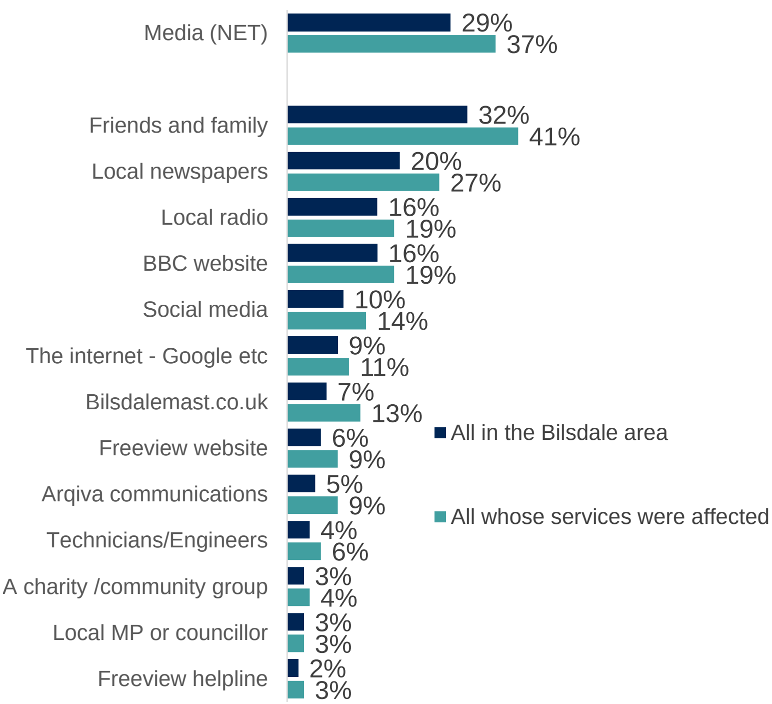
Those living in the Bilsdale area, particularly those whose services were affected, believe that they could have been better informed about what was going on, with a reliance on word of mouth. A feeling that they could have received more support to find new ways to access TV and radio content was felt, particularly amongst those still waiting to have services restored.

Word of mouth was the key source of information with most feeling the level of information and support available was not sufficient

Word of mouth was the top source for information about the incident and played a key role, across all ages, helping the community stay up to date and informed. Amongst those living in the area, particularly those whose services were affected, there would have been a need for information and updates about the incident and progress on restoration of services. Over half (58%) found some form of information or support about the Bilsdale incident, rising to 76% of those who had services affected. Word of mouth from family and friends (32% amongst all in the region, 41% amongst those who were affected), was the most popular source and used equally across all age groups, see figure 41.

Secondary sources came from local newspapers. A fifth in the Bilsdale region (20%) turned to local newspapers, a source most popular for those age 45 and over. Fewer, 16%, sourced information and updates from local radio or the BBC website. Local radio was more popular with older age groups, with 21% of those 65+ using this medium compared to just 13% of the younger 18-34s. Those who sourced information from the BBC website were equally spread across all ages.

Figure 41: Sources of information and support used



Base: All respondents, those in Bilsdale region, n = 1001

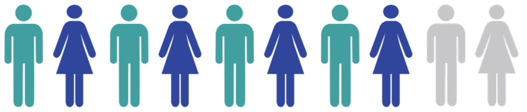
Base: All Bilsdale adults with affected services, n=501

Word of mouth was the most popular source of information and support

Other online sources such as social media were also used to find out information. Whilst presented with a range of options, one in ten (10%) spontaneously mentioned social media sites as a source of information, with 18-34s (12%) twice as likely to use this source compared to those aged 55+ (6%). Far fewer sourced information and support from the Bilsdale website (7%) or Freeview website (6%), whilst just 5% used communications from Arqiva for information and support.

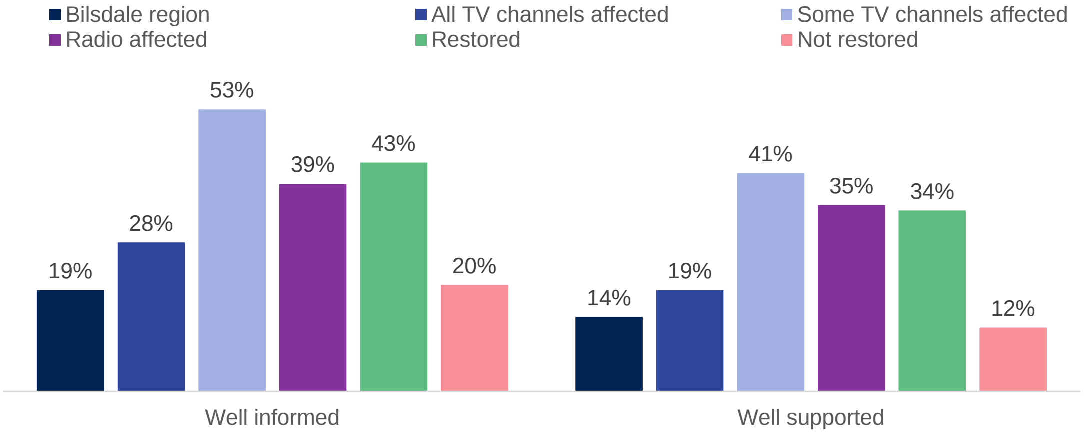
Regardless of their sources of information, most felt information and communication available regarding the incident was lacking, particularly the key groups needing this information. Considering the high level of information and communication available, only 4% in the Bilsdale region felt very informed, with a fifth (19%) very or fairly well informed, see figure 42. Amongst those whose services were affected, the groups most likely to be looking for updates, this increased. However, **significant numbers affected by the incident, did not feel well informed**. Seven in ten of those who lost all TV channels did not feel informed (not that well or not at all informed), whilst amongst the key households still not restored by the end of January 2022, 79% did not feel informed.

Nearly 8 in 10 adults living in 'not spots' and are still without services at the end of January felt they were not that well or not at all informed whilst services have been out



"It was slow to reconnect and there was little information about why the services weren't there" Male, 25-34, affected some TV channels

Figure 42: Extent to which those in the Bilsdale region felt well informed or well supported (very/fairly)



Well net reported – very/fairly

Base: All respondents, those in Bllsdale region, n = 1001, all TV channels affected n =266 , some TV channels affected n = 192, radio affected n = 182, restored, n=314, not restored, n=94

"It was a frustration mainly because I didn't have any idea when it was going to come back on and there was no information about the progress unless I went searching for it" Female, 65-74, affected all TV channels

A sense of not feeling informed particularly peaked amongst key audiences likely to be highly reliant on Freeview. Those aged 65 and over (34%) and those who only watched Freeview in the past year (40%), were more likely than those in the Bilsdale region overall (27%) to not feel informed during this period. Both are key audiences identified as reliant on Freeview, and as detailed above are more likely to have been personally affected by the loss of services and in need of information.

Many did not feel supported with help to find alternative ways to access TV or radio. Thinking about the level of support available to help people find new ways to watch TV and listen to radio services they could no longer access, just 14% in the Bilsdale region felt supported (very or fairly), with just 3% feeling very supported, see figure 42. As seen with the extent to which they felt informed, **many who lost services felt support was lacking,** with just one in ten (12%) of those still not restored suggesting that they were well supported.

Only 1 in 5 who lost all TV channels felt supported in terms of finding new ways to access content

Older age groups and those who only viewed Freeview were the most likely to feel support was lacking. Aligned with a perception of lack of information, those 65 and over (38%) and those who only watched Freeview in the past year (42%), were more likely than those in the region overall (28%) to feel unsupported in terms of finding new ways to watch content.

"I was quite fortunate as I had Sky TV but my 80-year-old mother did not who lives on her own relies on terrestrial TV for her whole entertainment and information and not once did we receive a letter or a phone call from the TV/Aerial issue (who ever should have resolved it) did not send any information on". Male, 45-54, affected some TV channels

"Lack of information was very frustrating. No information about channel restoration time was a real pain. There was a lot of trouble having to tune in the TV, I still don't think I have all channels. It disrupted my usual evening routine and I missed the Olympics. It was disappointing and frustrating as it went on so long. Also we weren't able to keep up with local news from watching daily evening news". Female, 35-44, affected all TV channels

4.9 Stronger perceptions of the importance of broadcast are seen in Bilsdale driven by experience of a loss of service

Within the GB survey, high support was seen for the continued provision of Freeview and broadcast radio. This was even higher amongst those we spoke to in the Bilsdale region. Data indicates experience of a loss of services results in a stronger importance placed on the continued provision of such services. This is backed up with greater importance placed on continued provision amongst those who lost services compared to those in the region who were unaffected.

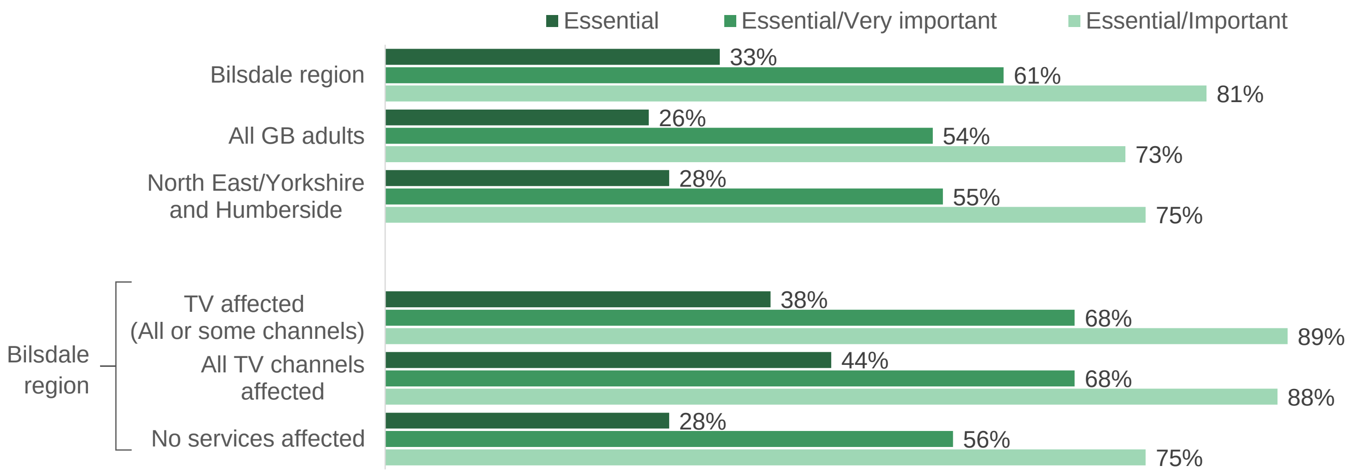
Exposure to a loss of Freeview results in even higher importance placed on the continued provision of free-to-view services via an aerial

The majority living in the Bilsdale region consider it essential or very important that free-to-view services continue to be provided. Adults across GB rated continued provision of free-to-view services via an aerial highly. From the representative survey, those in the North East, Yorkshire and Humberside compared with GB overall. However, **amongst those in the Bilsdale region there is an even stronger perception that it is essential these free-to-view services via an aerial continue to be provided,** (33% vs. 26% for GB), see figure 43. Amongst those living in this area where Freeview services have been lost, for some for many months, a greater proportion also indicate continued provision is essential or very important (61% vs. 54% for GB).

A significant uplift of +7 percentage points

is seen in the Bilsdale region in terms of those who consider it very important, if not essential that these free-to-view TV services continue to be provided through an aerial (vs. GB)

Figure 43: Extent to which continued provision of Freeview services through an aerial, as free services is considered essential/important



Base: All respondents, GB adults 18+, n = 2005, those in North East/Yorkshire and Humberside n = 238, those in Bilsdale region, n = 1001, TV affected n = 458, all TV channels affected n =266, no services affected n = 500

"I have two small kids and so it is essential to have this [Freeview] service for them." Female, 35-44, radio & some TV affected

"It's essential as without it we wouldn't get anything through the TV, it plays an important role for catching up with the news." Male, 35-44, radio & all TV affected

"Essential. Very important I have access to BBC and Channel 4 through a medium that I don't have to pay for". Male, 45-54, radio & some TV affected

"It's [Freeview] essential for me, because I use it all the time and I would miss it if I did not have it". Female, 75+, some TV affected

Amongst those who experienced a loss of TV services, even more consider it important that these free-to-view TV services via an aerial continue to be provided. Those who had TV services affected were more likely than those in the Bilsdale region overall to indicate continued provision of these services is essential (38% vs. 33% for Bilsdale region); this further increased amongst those who had lost all TV channels (44%). Overall, more than two thirds (68%) who had TV channels affected in any way, consider it very important, if not essential that these free-to-view TV services continue to be provided through an aerial. This is much higher than the 54% found in the GB population overall who fairly accurately perceived the high impact the loss of services could have. This indicates that a loss of services is linked to a stronger perception of the services being seen as important to retain. This is further evidenced by results from those in the region who had no services affected – their responses were more in line with the broader region of North East, Yorkshire and Humberside. **Those whose services were affected were significantly more likely than those in the Bilsdale region who were unaffected to indicate continued provision of free-to-view services is essential or important.**

68% **whose TV services were affected consider it essential or very important that free-to-view TV via an aerial continue to be provided**

Experience of a loss of radio results in even higher importance placed on the continued provision of free radio services via an aerial

Nearly three quarters living in the Bilsdale region consider it essential or very important that free radio services through an aerial continue to be provided. Amongst GB adults overall there was a very strong sense that radio services through an aerial should continue to be provided. Those in the North East, Yorkshire and Humberside were in line with GB overall. However, **amongst those residing in the Bilsdale region, significantly more consider it essential that these free radio services via an aerial continue to be provided,** (42% vs. 38% for GB), see figure 44. Within the Bilsdale region, where many lost broadcast radio services, even if for a very short time, a greater proportion also indicate continued provision is essential or very important (73% vs. 68% for GB).

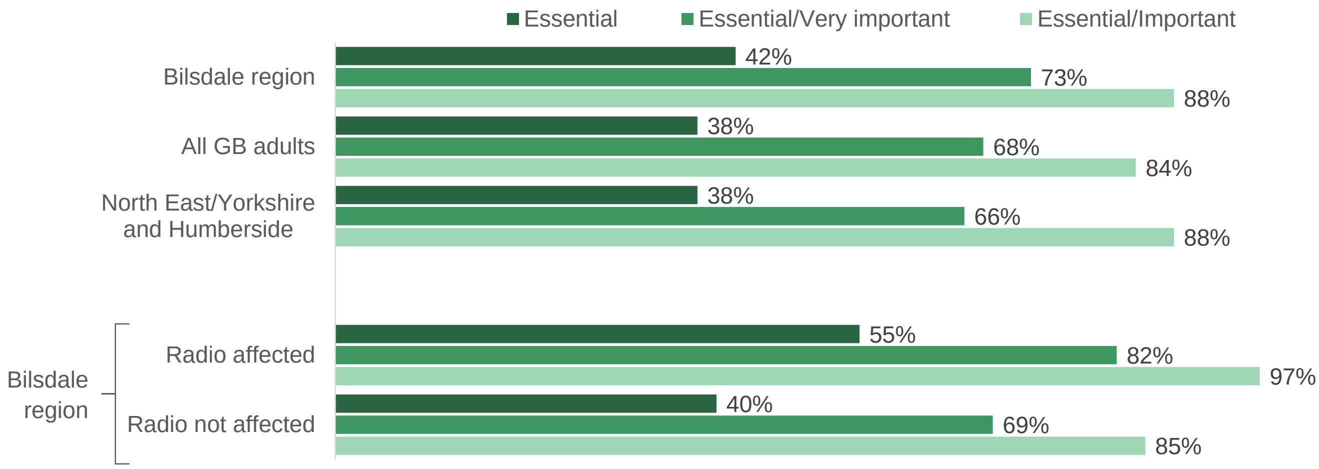
A significant uplift of +5 percentage points

is seen in the Bilsdale region in terms of those who consider it very important, if not essential that free radio services continue to be provided through an aerial (vs. GB)

"I would just feel disconnected from the world from not having the radio." Female, 35-44, Unaffected

"I live alone and have done for a lot of years, so I rely on the radio for a pseudo company. So yeah, I do kind of rely on it for that it does get lonely a little bit." Male, 55-59, Unaffected

Figure 44: Extent to which continued provision of radio stations through an aerial, as free services is considered essential/important



Base: All respondents, GB adults 18+, n = 2005, those in North East/Yorkshire and Humberside n = 238, those in Bilsdale region, n = 1001, Radio affected n = 182, Radio not affected n =500,

Amongst those who experienced a loss of radio services, the extent to which it is considered very important, as well as essential that these free services via an aerial continue to be provided, increases to over 8 in 10. Those whose radio services had been affected were significantly more likely than those in the Bilsdale region whose radio was unaffected to indicate continued provision of these services is essential (55% vs. 40%). This trend was also seen for the continued provision of free radio via an aerial being considered very important or essential (83% vs. 77%).

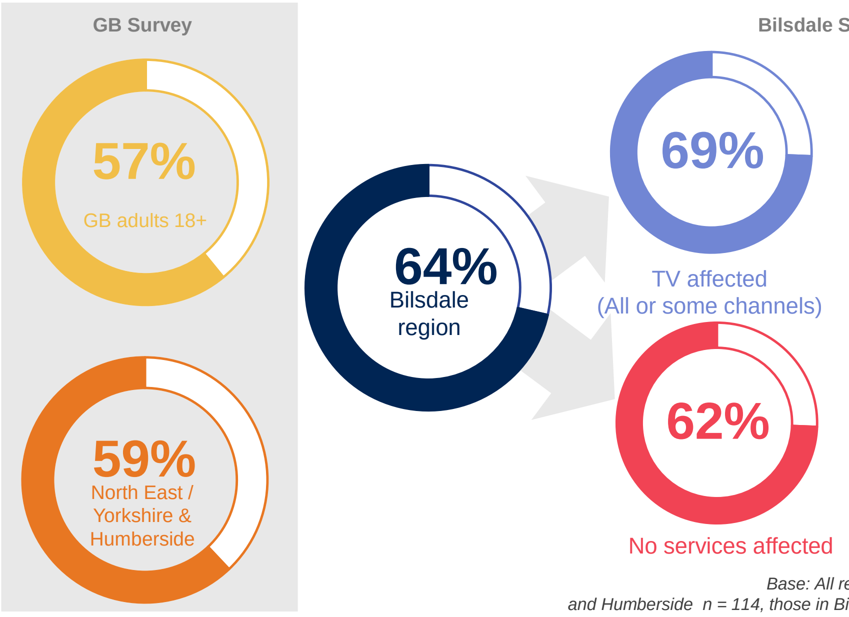
4.10 Experience of a loss of broadcast services fuels a stronger sense of continued support for broadcast services

The greater negativity towards a loss of Freeview, and even stronger support for continued provision of broadcast services seen in the Bilsdale region, especially amongst those affected, suggests the temporary loss of services made people realise how important such services are. Government and local MPs, plus the BBC are perceived as key stakeholders who need to continue to actively support and protect these services. There is an increased sense amongst those in the Bilsdale region who have lived through such an experience. that government and local MPs should definitely continue to actively support these services

Even greater negativity towards a hypothetical loss of free-to-view TV services is seen in the Bilsdale region, peaking amongst those who lived through a loss of all TV channels through an aerial

Negativity towards a potential loss of Freeview via an aerial is significantly higher amongst those who experienced a loss of all TV channels through their aerial. Negativity towards a potential loss of Freeview is higher in the Bilsdale region than reported across GB overall (64% vs. 57%, see figure 45). Those who lost all TV channels are even more likely to be negative towards the hypothetical loss of Freeview services via an aerial than those in Bilsdale overall (73% vs. 64%), or across GB overall (57%) or those in the North East, Yorkshire and Humberside regions (59%), see figure 45. Whilst still higher than the GB average, negativity weakens for those who only lost some TV channels (64%). Negativity is weaker still for those in the Bilsdale region who were unaffected by the incident, (62%), but this remains stronger than reported by the GB population based on a hypothetical scenario, which was actually very similar to what those in the Bilsdale region faced after the incident in August 2021. The significantly higher negativity amongst those who lost all TV channels in the Bilsdale region compared to the broader region is indicative that through a loss of services can impact overall perceptions and make you realise how important they are.

Figure 45: Extent to which they are negative about the loss of free-to-view TV services through an aerial



Base: All respondents, GB adults 18+, n = 980, those in North East/Yorkshire and Humberside n = 114, those in Bilsdale region, n = 494, TV affected (all or some channels) n = 215, all TV channels affected n = 129, some TV channels affected n = 86, no service affected n = 259

A significant uplift of +7 percentage points

is seen in the Bilsdale region in terms of negativity towards a proposed loss of free-to-view TV services through an aerial (vs. GB)

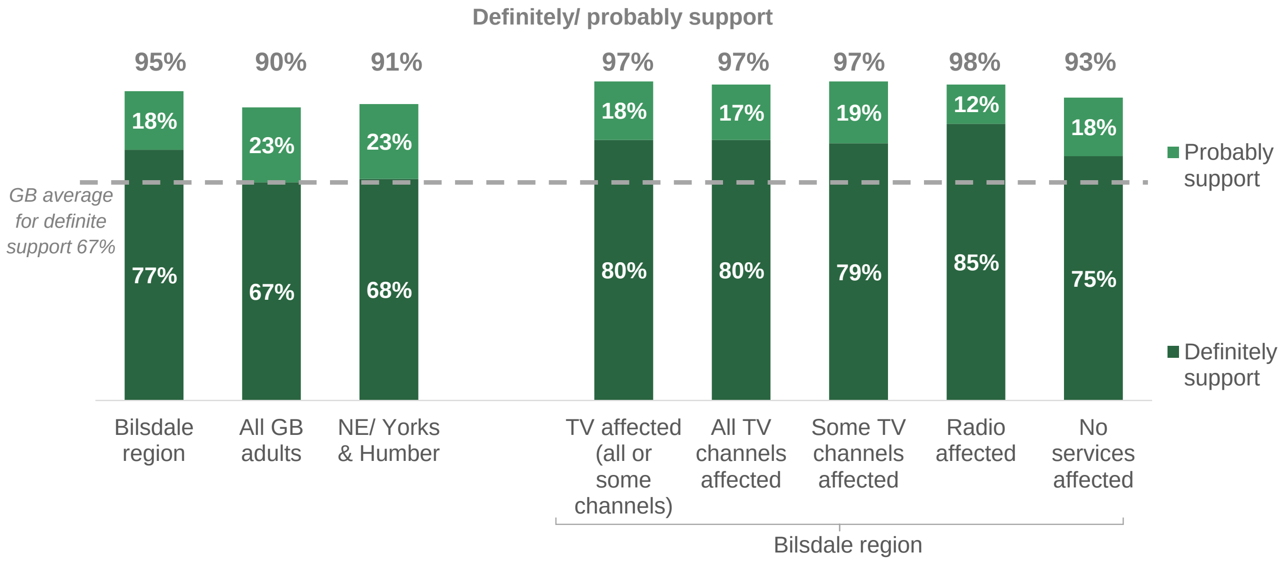
A significant uplift of +16 percentage points

is seen amongst those who lost all TV channels in terms of negativity towards a proposed loss of free-to-view TV services through an aerial (vs. GB)

There is a stronger sense in Bilsdale than seen across the country, for continued support for the provision of broadcast services

The need for continual support for provision of TV and radio via an aerial is strong; more so amongst those who have lived in an area where services have been lost. Those in the North East, Yorkshire and Humberside are very much in line with GB overall in terms of the extent to which they feel there should be continual support for the provision of TV and radio services (68% say they should *definitely* be supported, 91% definitely or probably supported). However, **support is stronger amongst those in the Bilsdale region**, an area that lived through weeks if not months with a lack of services and the ongoing impact that this had, see figure 46. **More than three quarters (77%) in the Bilsdale region indicate continued provision of TV and radio services through an aerial should *definitely* be continually supported**, an increase of ten percentage points on the GB average. Data for those who feel (either definitely or probably) that support should be given is also significantly higher in the Bilsdale region (95% vs. 90% for GB). This view is even stronger amongst those whose TV services were affected by the fire (97% vs. 93% of those not affected but living in the Bilsdale region).

Figure 46: Extent to which provision of TV and radio services through an aerial should continue to be supported – definitely, definitely/probably



Base: All respondents, GB adults 18+, n = 2005, NE/Yorks & Humber n = 238, Bilsdale n = 1001, TV affected n = 458, all TV channels affected n =266 , some TV channels affected n = 192, radio affected n = 182, no services affected n = 500

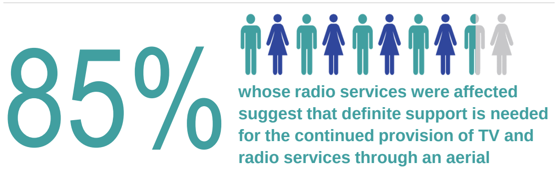
A significant uplift of +13 percentage points

is seen amongst those whose *TV* services were affected in the Bilsdale region, in terms of the definite support needed for continual provision of broadcast services through an aerial (vs. GB)

A significant uplift of +8 percentage points

is seen amongst those whose *radio* services were affected in the Bilsdale region, in terms of the definite support needed for continual provision of broadcast services through an aerial (vs. GB)

Personal experience of a loss of services, particularly radio, drives stronger perceptions of the need for continual support of broadcast services. The need for these services to be *definitely* supported increases from 75% of those in Bilsdale who were not affected, to 80% who had TV services affected and 85% who had radio affected. Overall support is significantly higher amongst those who lost any services than seen in either Bilsdale overall (95%), or across GB (90%). Whilst still the vast majority, those in the Bilsdale region who were unaffected are significantly less likely than those affected in any way, to indicate that these services should definitely or probably be continually supported (75%). However, these people have lived amongst a community affected, and as such support is higher than that reported in the broader North East, Yorkshire and Humberside regions (68%) or across GB overall (67%).

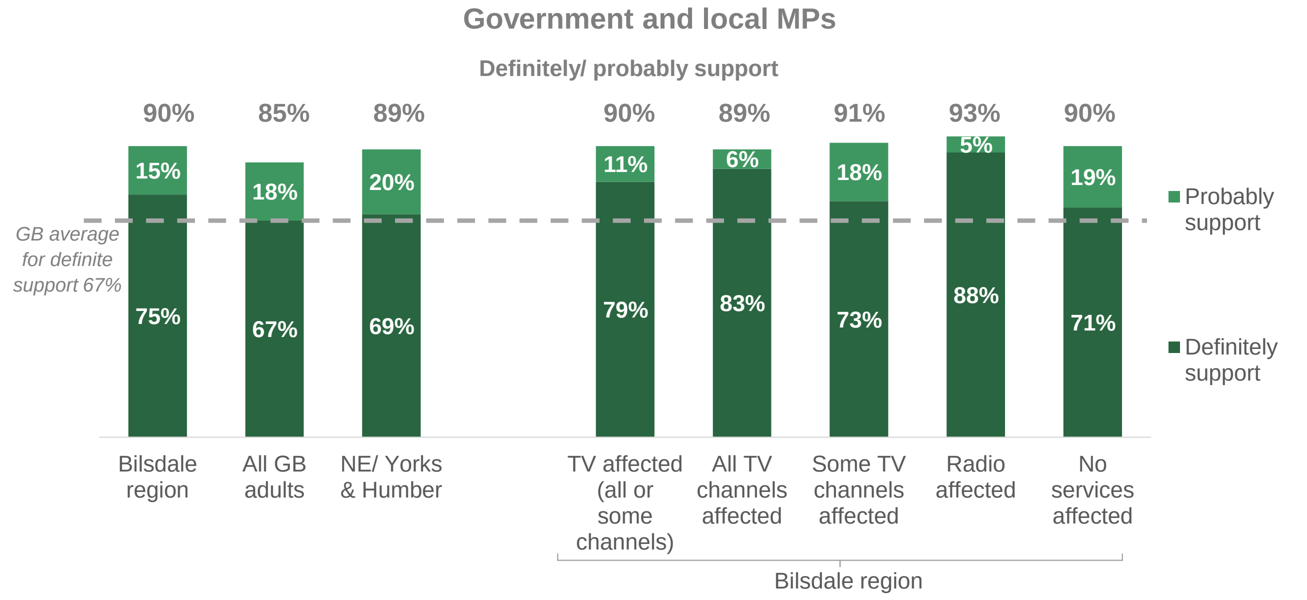


A clear role is seen for government or local MPs to continue to actively support broadcast services, with this even more prominent amongst those who lived in the Bilsdale region or were personally affected

The extent to which consumers considered government or local MPs, as well as the BBC, should actively support continued provision of TV and radio services through an aerial was examined; half the sample answered for each.

Living in a community where many lost services created a stronger sense that government or local MPs should definitely continue to actively support continued provision of broadcast services. Those in the North East, Yorkshire and Humberside compared to GB overall in terms of government or local MPs *definitely* being seen to need to actively support continued provision of broadcast services (69% vs. 67%). **In the Bilsdale region, significantly more indicated government and local MPs should *definitely* actively support the continued provision of broadcast services** (75%) than seen across GB, with this ahead of (although not significantly so) the broader region, see figure 47.

Figure 47: Extent to which government or local MPs should actively support continued provision of TV and radio services through an aerial



Base: All respondents, GB adults 18+, n = 1025, those in North East/Yorkshire and Humberside n = 124, those in Bilsdale region, n = 507
TV affected n = 243, all TV channels affected n =137 , some TV channels affected n = 106, radio affected n = 94, no services affected n = 241

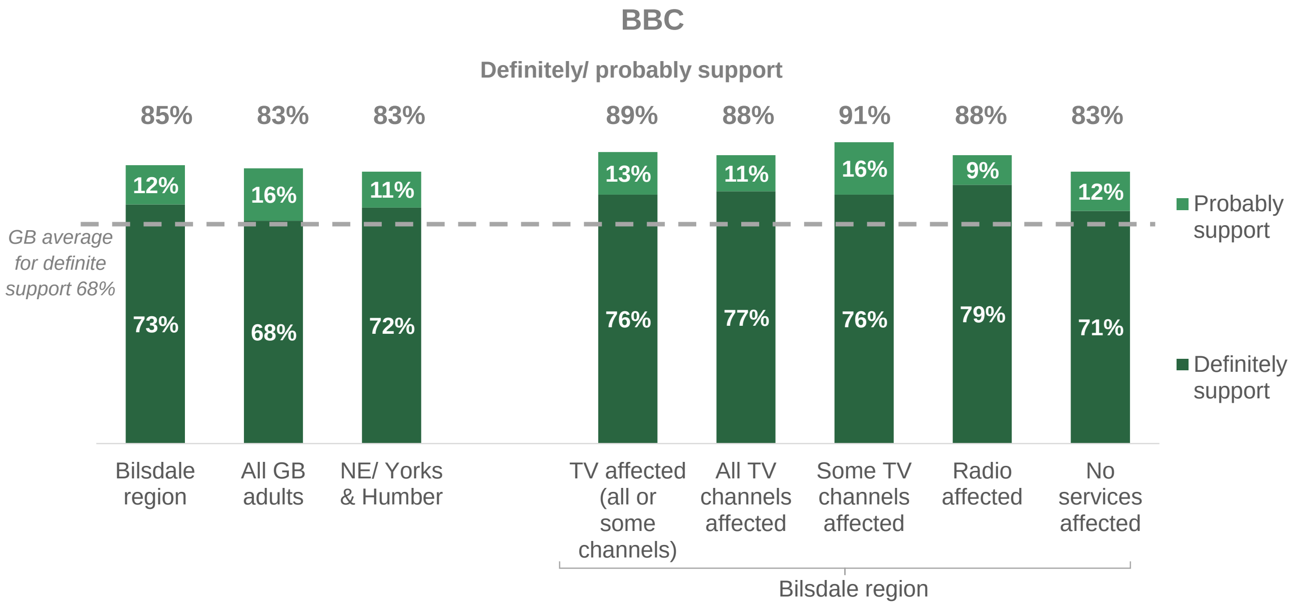
Personally experiencing a loss of services creates an even stronger sense that government or local MPs should definitely actively support continued provision of these services. Ratings for *definitely* needing to actively support continued provision of these services amongst those not affected in Bilsdale is similar to what is reported across GB (19% vs. 18%). However, the Bilsdale results are driven up by those who were affected by the incident, in particular those whose radio services were affected (88%) and who lost all TV channels (83%) are significantly more likely than those in Bilsdale who were unaffected (71%) to suggest government or local MPs should definitely actively support continued provision of broadcast services.

A significant uplift of +21 percentage points is seen amongst those whose *radio* services were affected with **a significant uplift of +16 percentage points** is seen amongst those who lost *all TV channels* in terms of the definite active support needed from government and local MPs for continual provision of broadcast services through an aerial (vs. GB)

A clear role is seen for the BBC to continue to actively support broadcast services, with this more prominent amongst those who lived in the Bilsdale region or were personally affected

There is a clear role seen for the BBC to continue to actively support these services, however this does not appear to be impacted as significantly by the incident in the same way support from government and local MPs is. Whilst the extent to which the BBC should *definitely* be actively supporting continued provision of services via an aerial is significantly higher in the Bilsdale region than GB overall (73% vs. 68%), this is in line with responses in the region from the representative survey (72%, see figure 48). Unlike the role expected from government and local MPs, the extent to which definite support from the BBC is expected is not significantly higher if they were affected, however data is indicative that this trend is the case.

Figure 48: Extent to which the BBC should actively support continued provision of TV and radio services through an aerial



Base: All respondents, GB adults 18+, n = 980, those in North East/Yorkshire and Humberside n = 114, those in Bilsdale region, n = 494
TV affected n = 215, all TV channels affected n =129 , some TV channels affected n = 86, radio affected n = 88, no services affected n = 259

5 Appendices

Technical note

This research had a two stranded approach to understand the impact and importance Freeview TV and broadcast radio has within British society.

An exploration of the population in Great Britain

Ipsos interviewed 2,005 participants aged 18+ years in Great Britain via their telephone Omnibus, (also known as CATIBUS). CATIBUS interviews a nationally representative sample of those aged 18+ in Great Britain. CATIBUS uses telephone interviewing to ensure no online bias, with responses entered directly into an electronic questionnaire by the interviewer conducting the interview.

The sample design incorporates a range of variables to ensure a robust, representative and consistent sample is achieved each week of fieldwork. CATIBUS uses a rigorous sampling method – robust samples of telephone leads are purchased from specialist sample providers as well as Random Digit Dialling, and consumer sample lists of over 10 million people in Great Britain which can be targeted locally and nationally. Approximately 60% of interviews are conducted on a mobile and 40% via landline.

Only a limited amount of corrective weighting is needed to adjust the results on the Omnibus survey so that they are in line with the national demographic profile.

For the GB survey quotas were set by age, gender, working status and region. Data are weighted to represent the GB population in terms of age, social grade, region and working status within the gender variable and additional profiles on tenure and ethnicity using PAMCo data.

A deep dive into households in the affected area in the Bilsdale area

For the Bilsdale sample, an ad hoc CATI (Computer Assisted Telephone Interviewing) approach was used. Ipsos interviewed via telephone an additional 1,001 participants aged 18+ living in postcodes most likely to have been served by the Bilsdale transmitter. This was to delve further into understanding concerns of individuals affected by the Bilsdale mast incident. North East deep dive interviews were left to fall out naturally with priorities set in order of the following groups:

1. Those whose services are still not restored
2. Those who were restored after the temporary mast
3. Those who were restored by the time the temporary mast was installed in October 2021

Quotas were set by age and gender based on ONS estimates. Detail of those we spoke to in this region can be found below.

Group:	Male	Female	18-34	35-54	55+	ABC1	C2DE
Number of interviews	493	500	273	303	425	394	259

The data for the Bilsdale sample are weighted to represent the population of the area in terms of age and gender based on ONS estimates.

Fieldwork dates

26th January – 9th February 2022 (Nationally Representative GB)

26th January – 1st March 2022 (Bilsdale deep dive)

Loss of services, hypothetical scenario

A hypothetical situation was posed to all adults in the GB survey asking them to imagine that Freeview and radio services delivered by masts to an aerial were no longer available, either temporarily or permanently closed. They were reminded that this would mean they would not be able to watch any TV channels through their aerial and Freeview service and that they would not be able to listen to any radio stations through radio sets either in your home or a car. They were also reminded that they would only be able to watch TV through another provider, like Sky or Virgin or through catch up services like BBC iPlayer or ITV Hub. This was positioned as a hypothetical situation, not something that was planned.

A small number of respondents were identified as living in the region affected by the Bilsdale mast and with their service affected therefore they were not presented with this hypothetical question.

About Ipsos

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.

About Arqiva

Arqiva is at the heart of the broadcast and utilities sectors in the UK and beyond, providing critical communications infrastructure and media services. Arqiva is the only national provider of terrestrial television and radio broadcasting and provides a machine-to-machine connectivity network for smart metering within the utilities sector.

Arqiva's history can be traced back to 1922 when it broadcast the world's first national radio service. In 1936 it carried the BBC's first television broadcast. In 1978 it enabled Europe's first satellite TV test. In the 1990s we also launched the UK's national DAB radio and Digital Terrestrial Television networks.

Arqiva was a founder member of Digital UK (DUK), Freeview, YouView and Digital Radio UK (DRUK). Freeview is the largest TV platform in the UK delivering over 100 TV and Radio channels to the UK public. Arqiva owns and operates the networks for all of the Freeview multiplex licence holders and is the licence holder for two of the national DTT multiplexes as well as the DVB-T2 multiplex Com 7.

We are a shareholder and operator for both commercial national DAB radio multiplexes and transmission provider for the BBC national DAB radio multiplex. We also provide end-to-end transmission services for analogue and digital radio networks. Through our wholly owned subsidiaries, Now Digital Ltd and Now Digital (Southern) Ltd, and our joint ventures Now Digital (East Midlands) and South West Digital Radio, Arqiva operates 25 local DAB digital radio multiplexes. These multiplexes cover a number of regions of the UK, predominantly in the Midlands, South West and the south of England.

Arqiva has its headquarters in Hampshire, with major UK offices in London, Buckinghamshire and Yorkshire and operational centres in the West Midlands and Scotland.

Ipsos standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.

ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates IQCS (Interviewer Quality Control Scheme). It covers the five stages of a Market Research project. Ipsos was the first company in the world to gain this accreditation.

Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos endorses and supports the core MRS brand values of professionalism, research excellence and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation. We were the first company to sign up to the requirements and self-regulation of the MRS Code. More than 350 companies have followed our lead.

ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.

ISO 27001

This is the international standard for information security, designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.

The UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA) 2018

Ipsos is required to comply with the UK GDPR and the UK DPA. It covers the processing of personal data and the protection of privacy.

HMG Cyber Essentials

This is a government-backed scheme and a key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment-validated for Cyber Essentials certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.

Fair Data

Ipsos is signed up as a "Fair Data" company, agreeing to adhere to 10 core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

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About Ipsos Public Affairs

Ipsos Public Affairs works closely with national governments, local public services and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. Combined with our methods and communications expertise, this helps ensure that our research makes a difference for decision makers and communities.