

Bilsdale Transmitter Research 2022

To assess the impact of the
transmitter fire within the coverage
area

Julie Soulsby/Hugo Nelson - Kantar

JN.45123609

March 2022



Contents

1	Introduction	3
2	Impact of Bilsdale Transmitter Fire	11
2.1	General Findings by Demographic profile	12
2.2	Deep Dive – Core Bilsdale Transmitter area	25
2.3	Deep Dive – Overlap area (Emley Moor)	36
2.4	Deep Dive – ‘Not Spot’ area	47

1

Introduction

Introduction

- Ofcom commissioned research in the Bilsdale Transmitter area following the fire in August 2021 in order to understand the impact of the loss of TV services on households.
- In particular, they wish to understand if there are particular issues for households which have moved to broadband only delivery of TV and to assess whether it is an adequate replacement for broadcast TV.
- The study has focussed on 3 geographical areas and will focus on the impact in each separately – The Core Bilsdale area, the area of overlap with the Emley Moor Transmitter and the ‘Not Spots’ areas. Each are distinct in terms of coverage.



Who did we talk to?

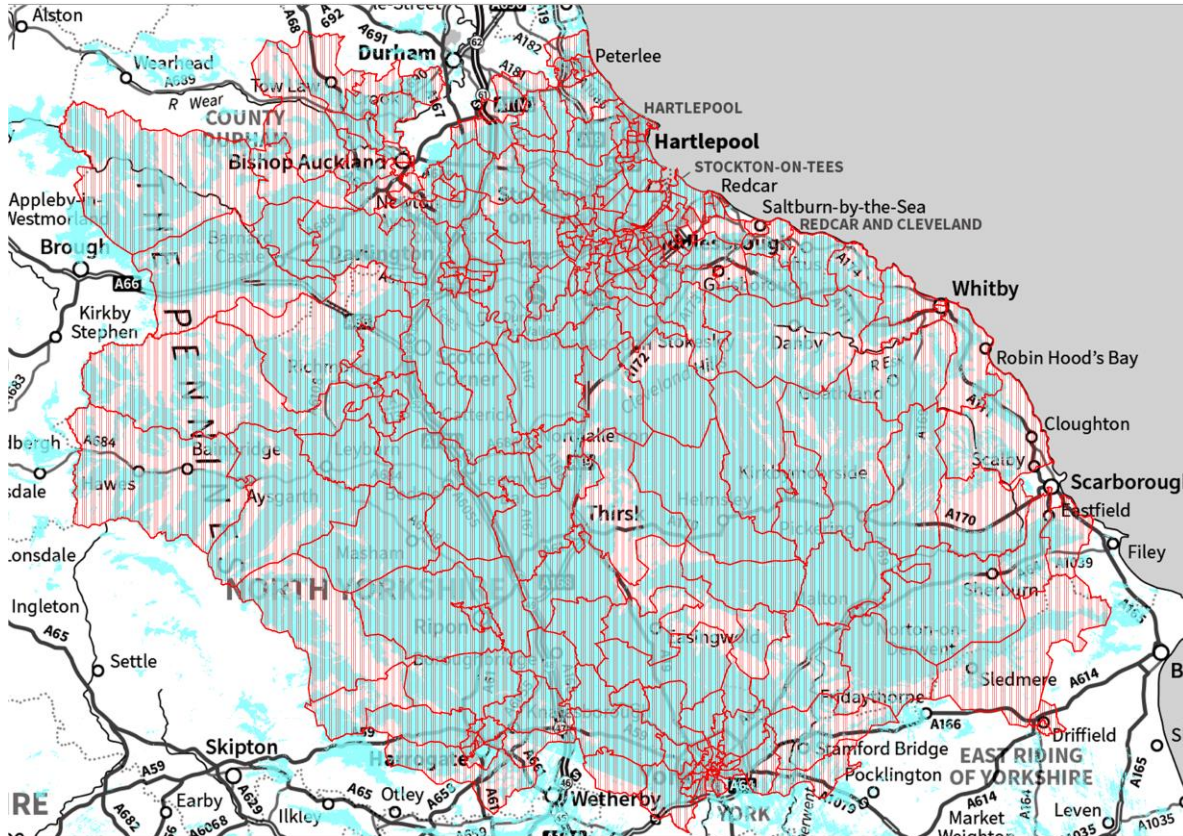
Methodological Implications

- In order to provide as much opportunity to gain opinions from all households within the 3 Bilsdale areas, Kantar conducted an online and paper survey, using the Address Based Online Survey (ABOS) methodology. As such, samples for each area were drawn using the Postcode database and invites were sent in the post.
- The bulk of respondents were encouraged to conduct the survey by following a link to an online survey. However, for those postcodes identified as having a higher likelihood of including older and lower IMDs, a paper questionnaire was also included with the invitation letter.
- The response rate overall was 9%. No incentives were provided to encourage response.
- Important considerations to note in terms of the sample interviewed:
 - All respondents had lost service after the fire in August in all areas.
 - They self-selected to take part in the survey
 - The survey therefore, cannot be used to size the population within each area who were affected by the loss of service

	Total (1757)	Core Bilsdale area (898)	Brown Overlap area (180)	Red Not Spots (679)
Age:				
16-39 years	6%	6%	8%	6%
40-69 years	52%	53%	46%	51%
70+ years	41%	40%	46%	42%
Av. H'hold size	2.1	2.1	2.0	2.1
Vulnerable person in H'hold	36%	36%	33%	35%

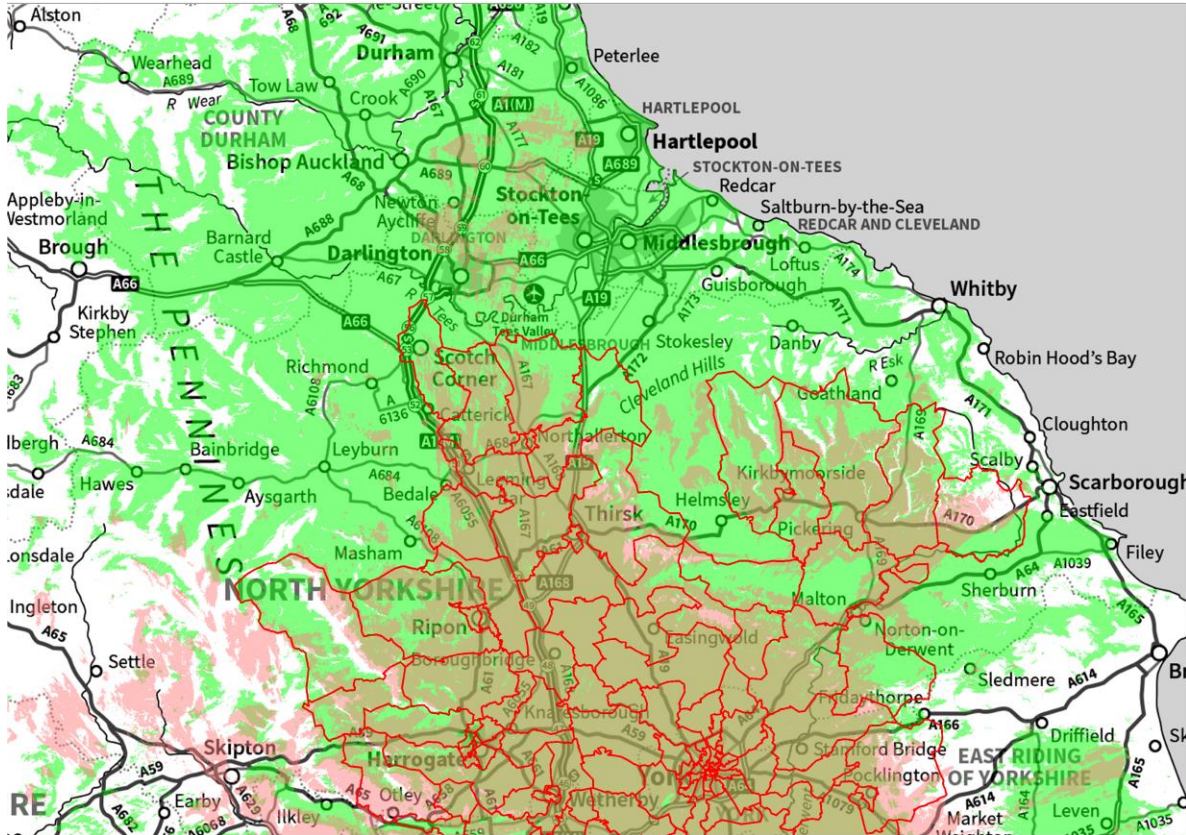
*Census data 2011, showed c.20% Vulnerable for Yorkshire area.
Average household size = 2.4*

The Rest – Core Bilisdale Transmitter area



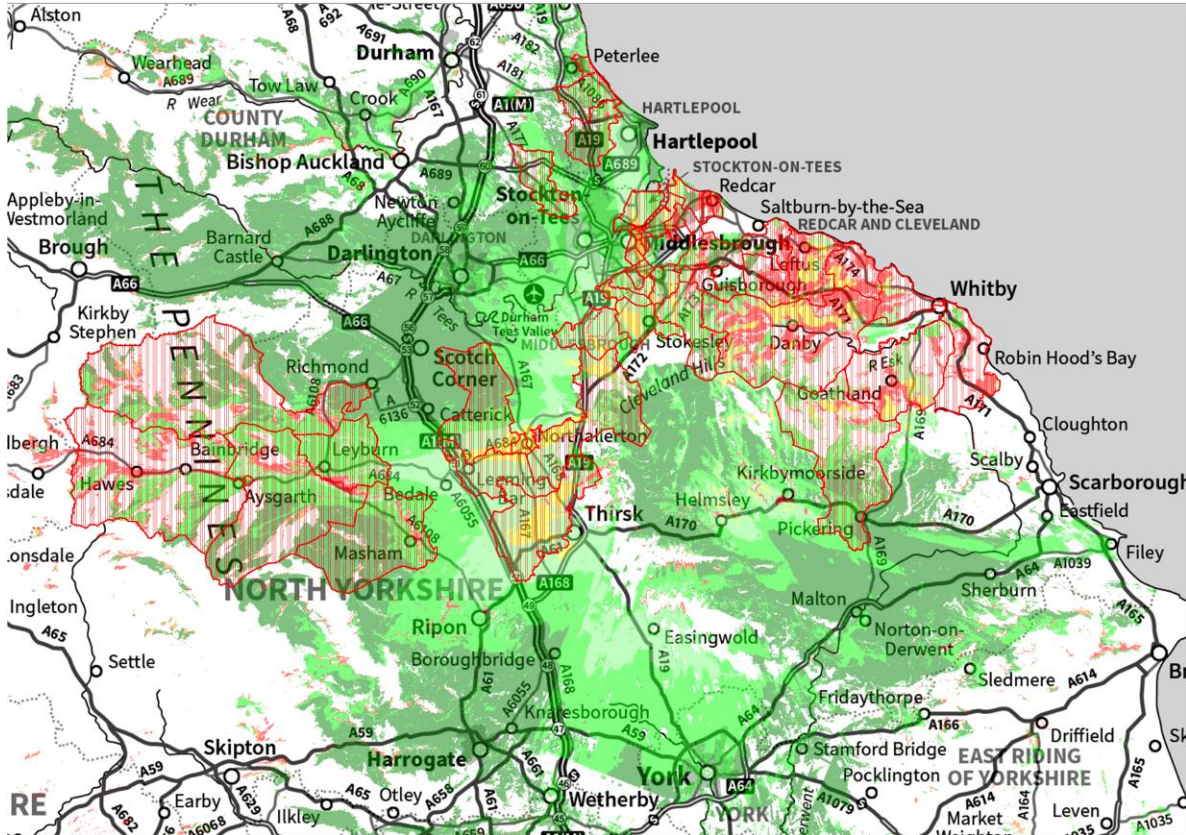
	Mail Out	Achieved
	(10,931)	(899)
STOCKTON-ON-TEES	17%	21%
DARLINGTON	13%	16%
HARTLEPOOL	10%	9%
MIDDLESBROUGH	12%	7%
BILLINGHAM	4%	5%
CROOK	3%	4%
NEWTON AYCLIFFE	3%	4%
RICHMOND	1%	4%
BISHOP AUCKLAND	5%	3%
PETERLEE	3%	3%
BARNARD CASTLE	2%	2%
MALTON	1%	2%
YARM	1%	2%
THIRSK	1%	2%
DURHAM	3%	2%
FERRYHILL	2%	2%

The Brown group – Overlap area with Emley Moor Transmitter



	Mail Out	Achieved
	(2,490)	(180)
YORK	60%	33%
RIPON	6%	18%
HARROGATE	16%	16%
NORTHALLERTON	3%	12%
MALTON	3%	7%
PICKERING	2%	3%
BEDALE	1%	3%
KNARESBOROUGH	5%	3%
THIRSK	2%	3%
RICHMOND	1%	1%

The Red group – ‘Not Spots’



	Mail Out	Achieved
	(6,579)	(679)
MIDDLESBROUGH	35%	36%
NORTHALLERTON	7%	13%
WHITBY	8%	8%
LEYBURN	4%	7%
SALTBURN-BY-THE-SEA	11%	7%
REDCAR	13%	6%
HARTLEPOOL	5%	5%
PICKERING	2%	3%
GUISBOROUGH	5%	3%
YARM	1%	2%
PETERLEE	3%	2%
THIRSK	1%	2%
RIPON	1%	1%
HAWES	1%	1%
STOCKTON-ON-TEES	1%	1%
RICHMOND	1%	1%

Summary – General Learnings

- At time of interview (January/February 2022) approximately 5 months after the fire, the majority of households in each area are using Freeview TV service only. And around a quarter are using a broadband service only.
- Age has a bearing on how households have responded to the problem. For those aged 70+, there is a greater reliance on Freeview services – 2/3 use Freeview alone, and 1/10 use a mix of Freeview and broadband service.
- And in younger households, over a third are using Freeview solus, and another third are using broadband services only. And indeed, approaching 20% of these households claim to have no service at all.
- Where broadband services are being used on their own, then levels of satisfaction with the TV service available are weaker – and the level of dissatisfaction among younger households is strongest. Kantar believe size of household and presence of children may accentuate the problem for this age group.
- And for older households, using Broadband services only, there appears to be a sense of uncertainty – a greater percentage claim to ‘not know’ whether the Freeview service has yet been restored.



Summary – Differences by area

- Usage of Broadband services only are highest in the Not Spots area. However, across all areas the majority of households are currently using Freeview services only.
- In the Not Spots area, 6% of households claim to have no service at all.
- In all areas, if broadband services are used alone, then the levels of dissatisfaction with service quality is greater.
- And it is in the Not Spots area where we see the greatest level of dissatisfaction due to the limited availability of channels and frustrations with broadband, such as not being able to view live TV or not being able to view specific regional programming.
- In all areas, those using broadband only services have spent more to try to rectify the problem than those using Freeview only – around double in our cost estimations.
- Householders feel let down by official communications and believe friends and family have generally provided the best support, followed by local press and radio.
- And there is a sense through verbatim comments that communication has been particularly frustrating in the Overlap area – the use of another transmitter has created additional problems – set up, continuous retuning, lack of regional programming. It is in this region where there has been greatest claimed installation of broadband services.



2

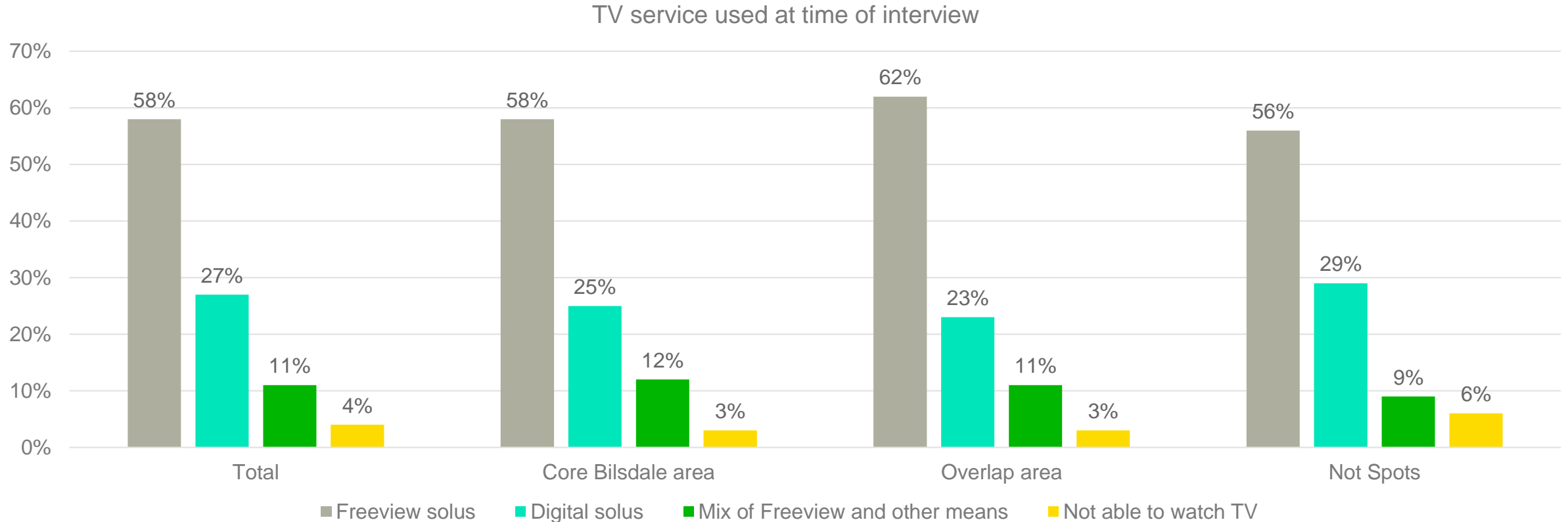
Impact of Bilsdale Transmitter Fire

2.1

General Findings by Demographic profile

TV Service used – at time of interview January/February 2022

Generally a similar split of TV services used across region. 4% claim they have no access to TV currently.

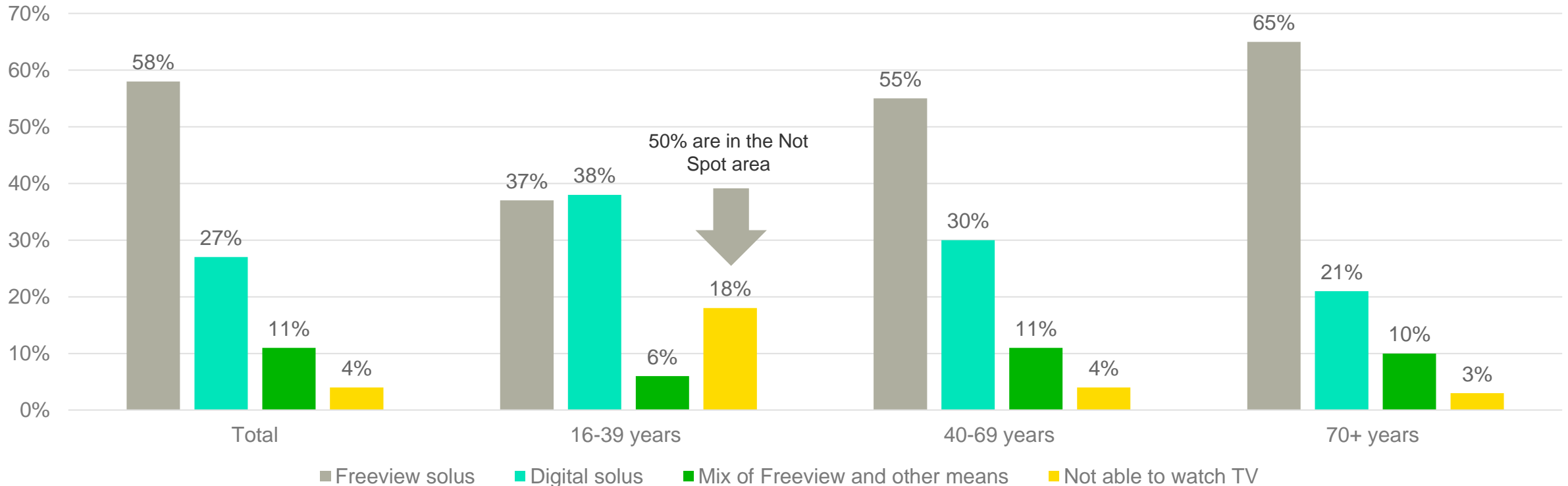


Q13. And as of today, are you and your household able to watch TV, either by using Freeview or by using other means?
 Base: Total 1757, Core Bilsdale Area 898, Overlap 180, Not Spot 679
 Freeview solus = All using Freeview currently AND NOT other means.
 Digital solus = All using Other means currently AND NOT Freeview.

TV Service used – at time of interview January/February 2022 – Age Profile

Older households are more likely to be solus Freeview users. As such, solus Freeview use increases by age of householder. And solus digital use decreases by age of householder. Around a fifth of younger householders claim to not be able to watch TV at all.

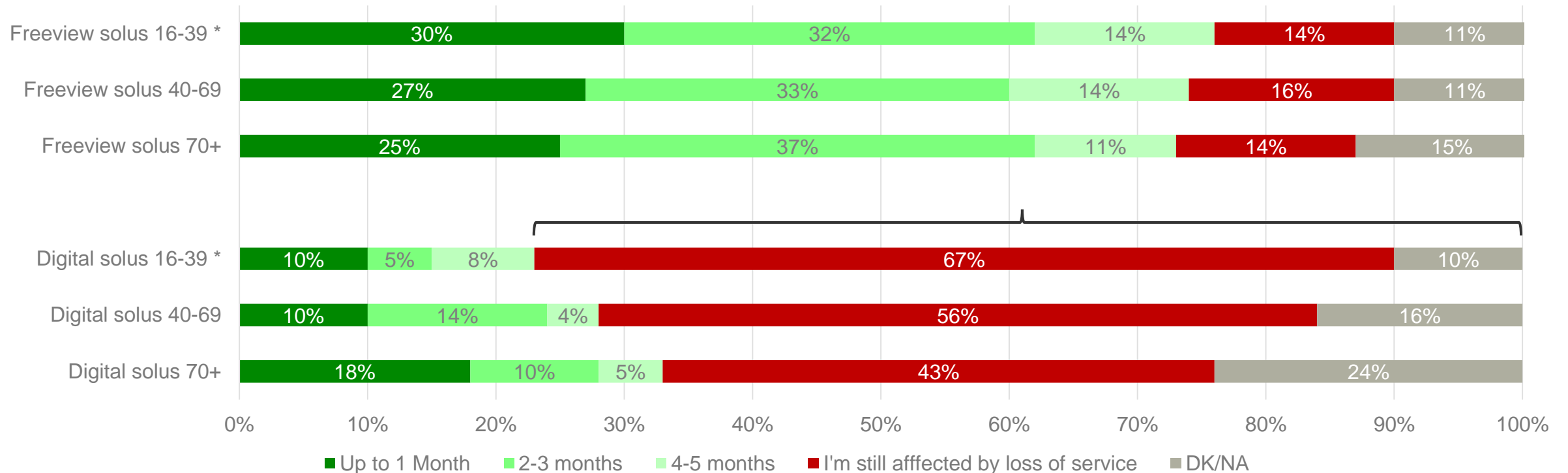
TV service used at time of interview



Resumption of Freeview service – By age

When households are using digital services only, they claim they are not able to access Freeview. Younger householders appear most certain of this. For older householders using digital services, there is perhaps greater uncertainty on the services available to them currently – around a quarter claim to not know or are unable to answer.

Freeview available on Main TV set



* Caution Small base – indicative only

Q11. And when did you get the Freeview service back on your Main TV set, if at all?

Base: All losing service on Main TV set – Freeview solus 16-39 37*, 40-69 461, 70+ 428, Digital solus 16-39 39*, 40-69 210, 70+ 107

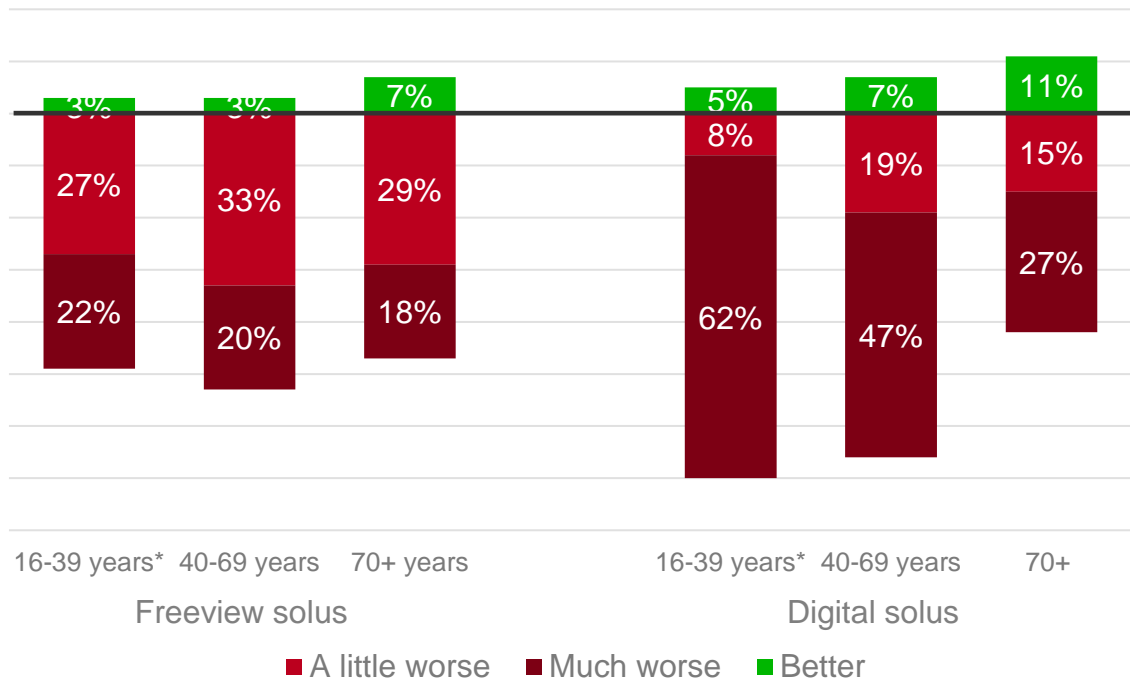
Freeview solus = All using Freeview currently AND NOT other means.

Digital solus = All using Other means AND NOT Freeview currently.

Service comparison with before the fire – by age

For all users and all ages the current service perception is lower than before the fire. However, the strength of disappointment differs by service used. Those using digital services believe the service is ‘much worse’ than before and those who are younger feel most let down.

Main TV service compared to before the transmitter fire



* Caution Small base – indicative only

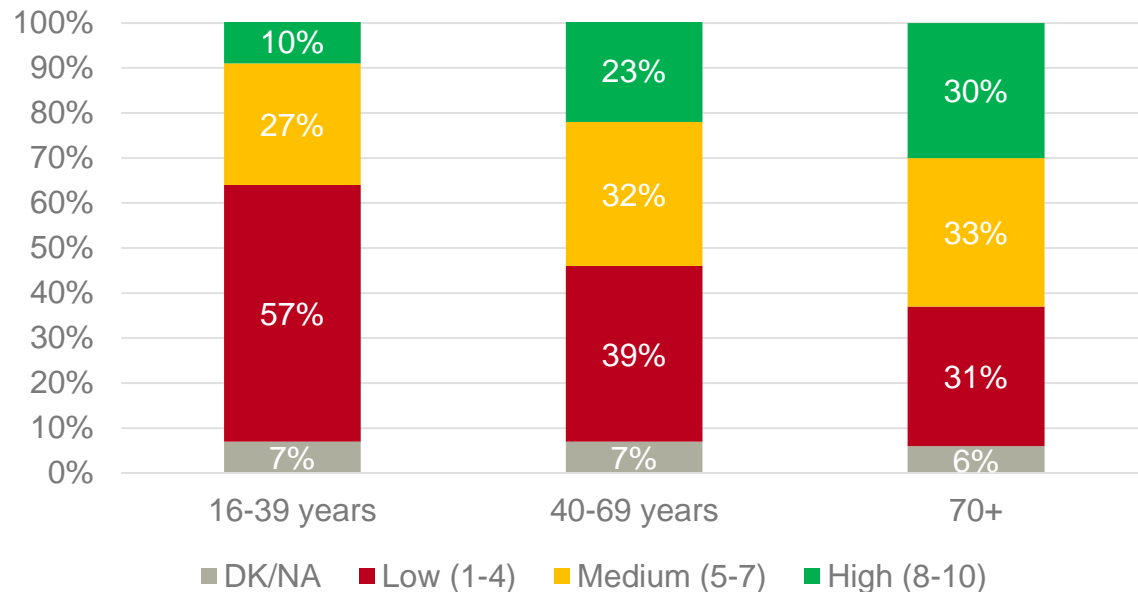
Why is it worse?

Base: All saying worse	16-39 (65)	40-69 (436)	70+ (290)
Not all channels are available	77%	64%	60%
Service is weak	65%	65%	62%
I find it hard to find programmes	20%	17%	18%
Picture isn't clear	25%	12%	9%
Regional news isn't available for my area	17%	12%	8%
Other	14%	15%	14%

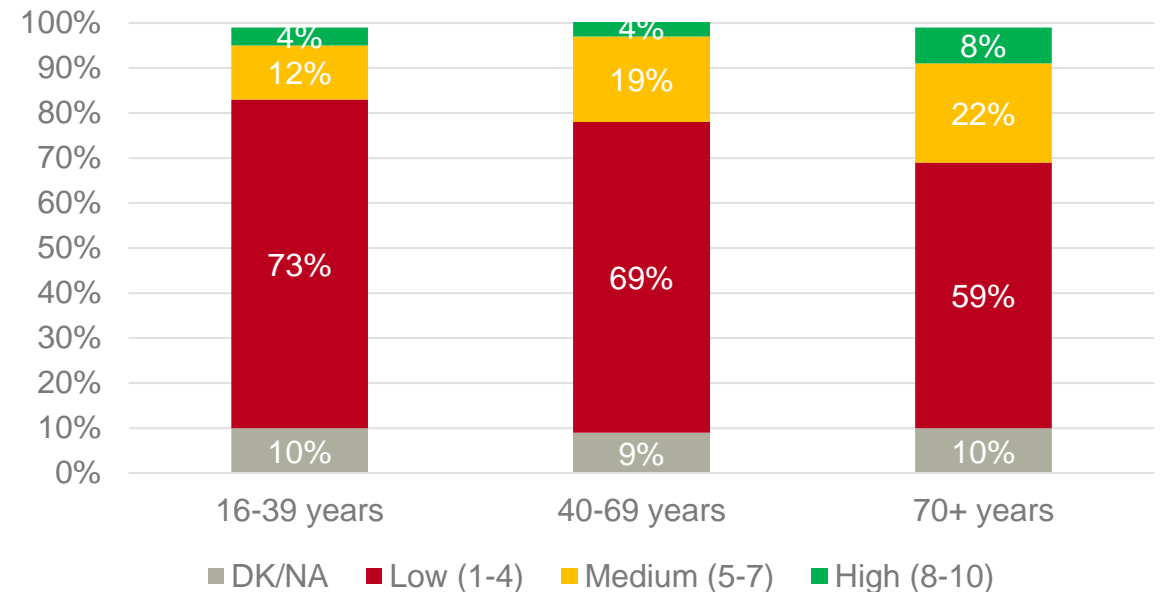
Satisfaction with service provided – by age

Similarly satisfaction with the current service is lowest among younger householders. And likewise, satisfaction with the speed of resolution. However, on this dimension there are not so stark differences by age of householder.

Satisfaction with current service

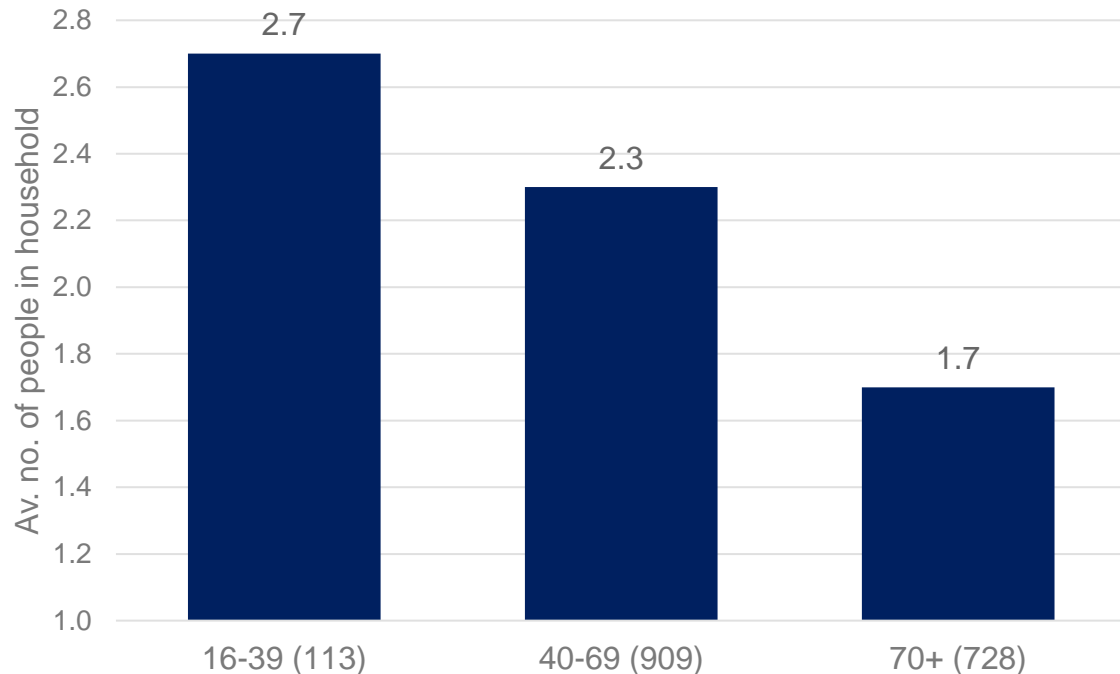


Satisfaction with speed of resolution



Qualitatively it appears the presence of children in the household, may bring additional pressure for younger households

Average Household size



Verbatim comments among householders 16-39 years:

We have been consistently unable to access our television channels outside of accessing apps through consoles. Considering we have a 3 year old who used to love watching Cbeebies and a 6 year old who is currently home-schooled, it is incredibly disappointing that we have to date been sent little contact or practical resolutions to this ongoing issue.

Loosing tv during lockdown was extremely difficult, particularly for my child who has very complex special needs and lacks understanding

Got a 10 month old baby and having no tv is really difficult as I can't entertain him whilst I have to clean up etc. No entertainment and no wind down time by watching tv

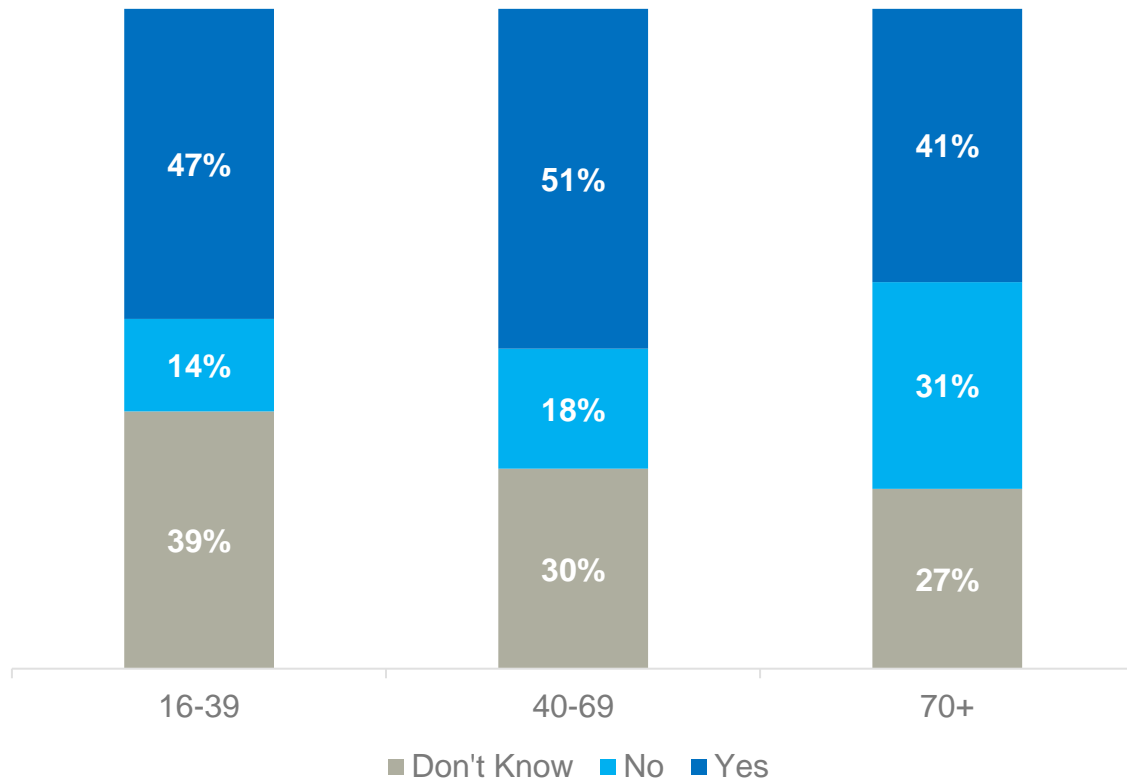
Had to pay for streaming services to access my toddlers usual channels

I have an autistic 5 year old who gets extremely upset when he can't watch his favourite programs and does not understand why. We have had no help or support since August at all, I think it's disgusting how long this has been going on.

Awareness of Radio service loss

As age progresses there is a little more clarity on whether radio service had been maintained after the fire. The older age group are clearer on whether they lost their radio service, and a third of claim not to have lost service.

Did you lose your Radio service as well?



* Caution Small base – indicative only

What stations did you lose?

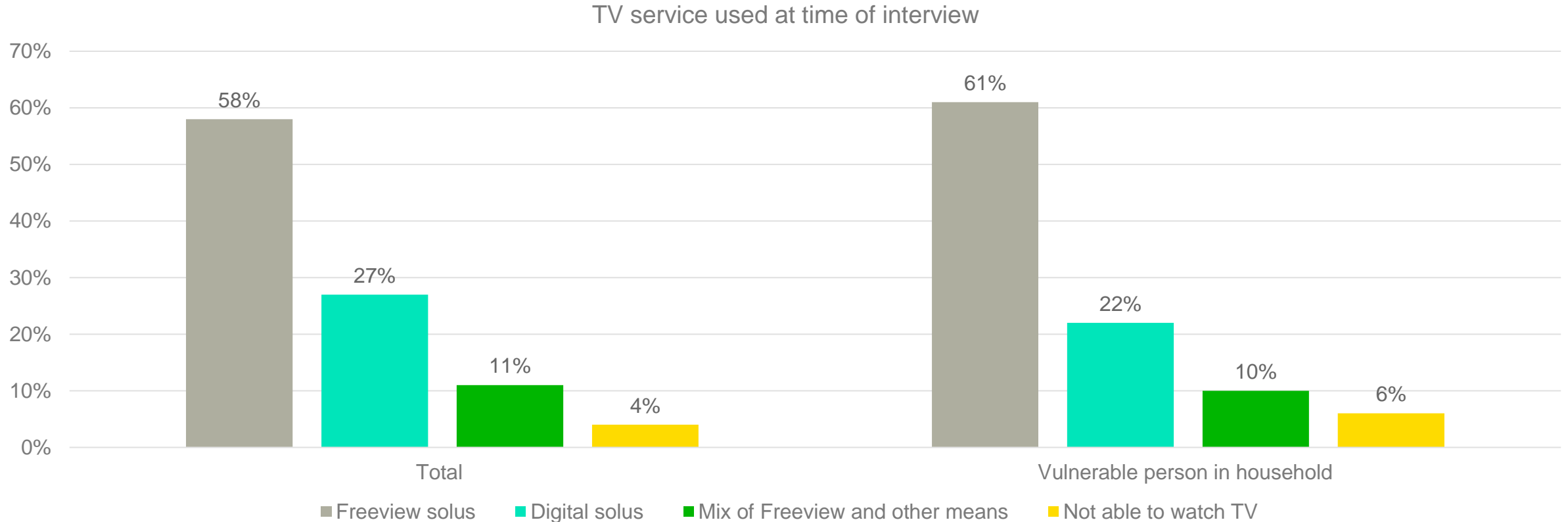
Base: All lost radio	16-39 (53*)	40-69 (464)	70+ (300)
Net : FM Stations	83%	70%	68%
Net: DAB Stations Total	66%	65%	58%
Sub Net : (DAB) BBC Stations	53%	52%	50%
Sub Net : (DAB) Commercial Radio Stations	60%	46%	33%
Another commercial station not listed	21%	17%	14%

Q30. And finally, along with losing your TV service, did you lose radio service as well? 16-39(113), 40-69(909), 70+(728)

Q31. What stations did you lose? 16-39(53*), 40-69(464), 70+(300)

TV Service used – at time of interview January/February 2022 – Vulnerable Households

There is little difference in the split of services used in households including vulnerable family members



Q13. And as of today, are you and your household able to watch TV, either by using Freeview or by using other means?

Base: Total 1757, Vulnerable Person in household 618

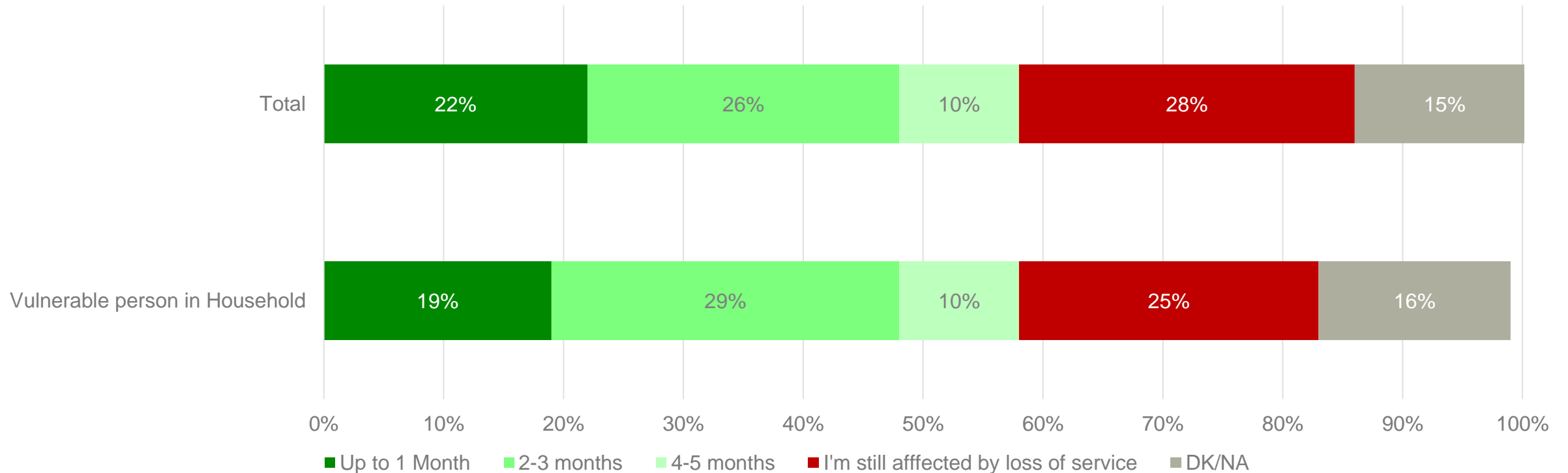
Freeview solus = All using Freeview currently AND NOT other means.

Digital solus = All using Other means currently AND NOT Freeview.

Resumption of Freeview service – Vulnerable Households

And similarly there is little difference in the length of time loss of service was experienced by those who have a vulnerable person in the household.

Freeview available on Main TV set



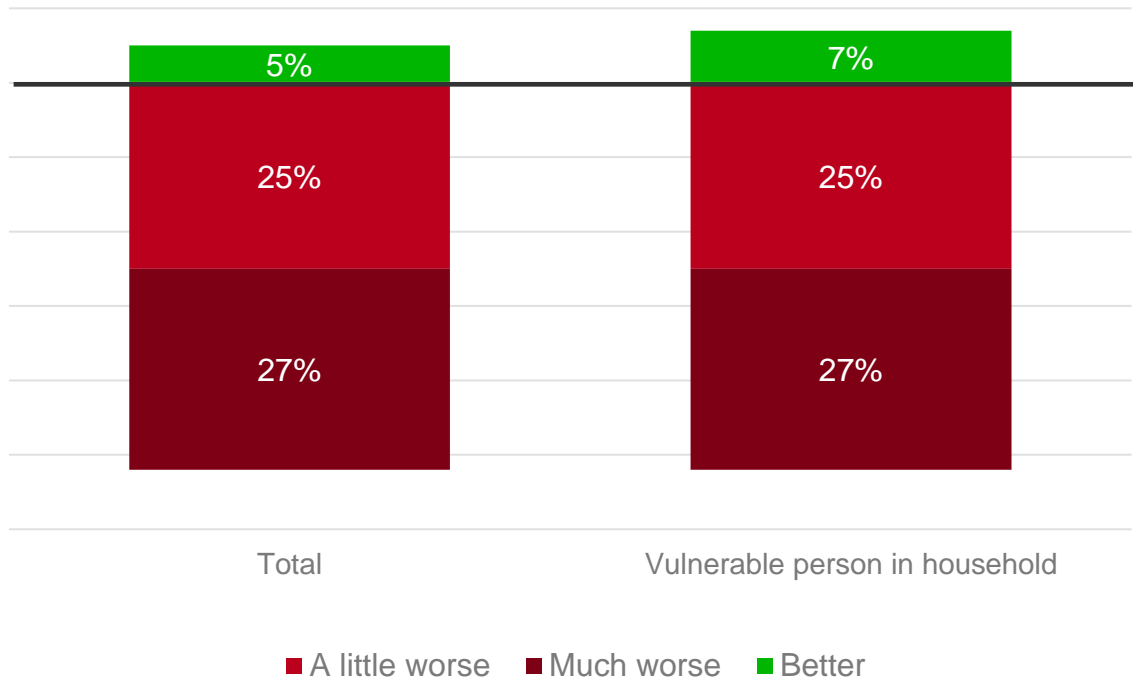
* Caution Small base – indicative only

Q11. And when did you get the Freeview service back on your Main TV set, if at all?
 Base: All losing service on Main TV set – Total 1489, Vulnerable person in Household 512
 Freeview solus = All using Freeview currently AND NOT other means.
 Digital solus = All using Other means AND NOT Freeview currently.

Service comparison with before the fire - Vulnerable Households

And a similar profile in terms of service comparison.

Main TV service compared to before the transmitter fire



* Caution Small base – indicative only

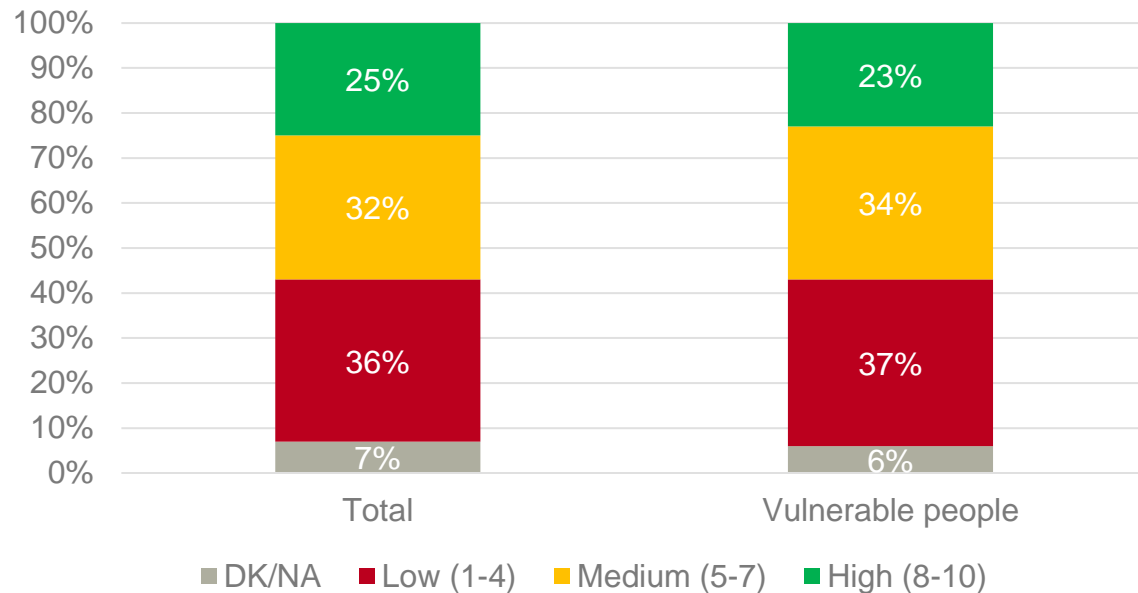
Why is it worse?

	Total (794)	Vulnerable person in Household (270)
Base: All saying worse		
Not all channels are available	63%	63%
Service is weak	64%	66%
I find it hard to find programmes	18%	21%
Picture isn't clear	12%	11%
Regional news isn't available for my area	11%	9%
Other	15%	14%

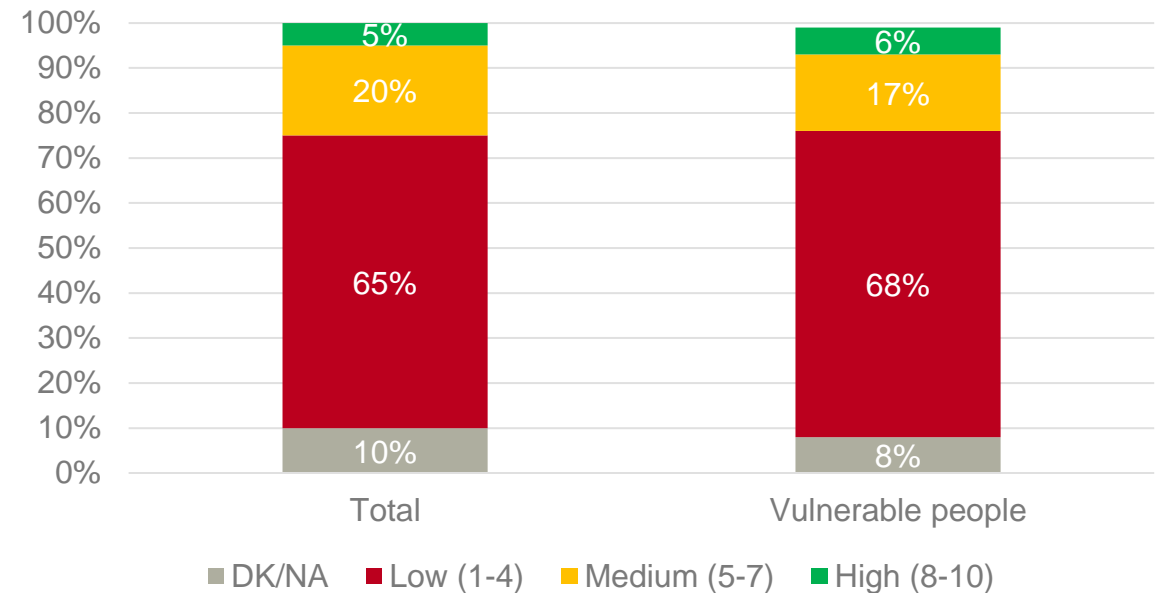
Satisfaction with service provided

Vulnerability in households does not appear to affect satisfaction with service and speed of resolution of service.

Satisfaction with current service



Satisfaction with speed of resolution



For those who are housebound, the loss of TV has increased feelings of loneliness and isolation. And where household members have disabilities, it has been difficult to explain and for them to understand

Verbatim comments among vulnerable people in Household

My elderly mam has Alzheimer's and dementia that was hard to deal with explaining about telly's not working

I am disabled and the television was my only form of communication and stopped me feeling lonely..... I have felt isolated and the lack of communication and information from the company has been appalling...

I have a vulnerable child who finds change extremely difficult to deal with and the lack of clear information was problematic. Being unable to provide her normal programmes for a month either listening or viewing was a problem.I have not used the internet as an alternative because out internet is too low powered and unreliable to download or view films that way....

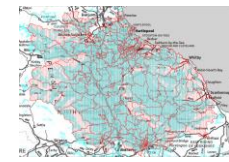
My grandad is 84 and lives alone this has caused a lot of anxiety to him, he still doesn't have all the channels and we retune and still cant help him.

Being disabled and recovering from 3 major operations this year the impact on my mental health has been considerable. I was unable to watch TV From my bed and felt lonely and isolated having to wait for people to attend to attempt to fix the problem.

My Disabled Daughter with Autism likes her own space will usually sit in the conservatory watch Tv, She was getting very frustrated and it was hard for months, we Tried everything bought new Tv and it was still broke my son bought a plug in Aerial still wouldn't work

I was severely affected with the lack of tv programmes and recording facilities on my Freeview/recorder box. Being elderly, and having poor mobility + panic attacks I am basically housebound and totally reliant on my tv + Freeview box.

My wife is bedfast, and her TV is absolutely essential to her mental wellbeing.



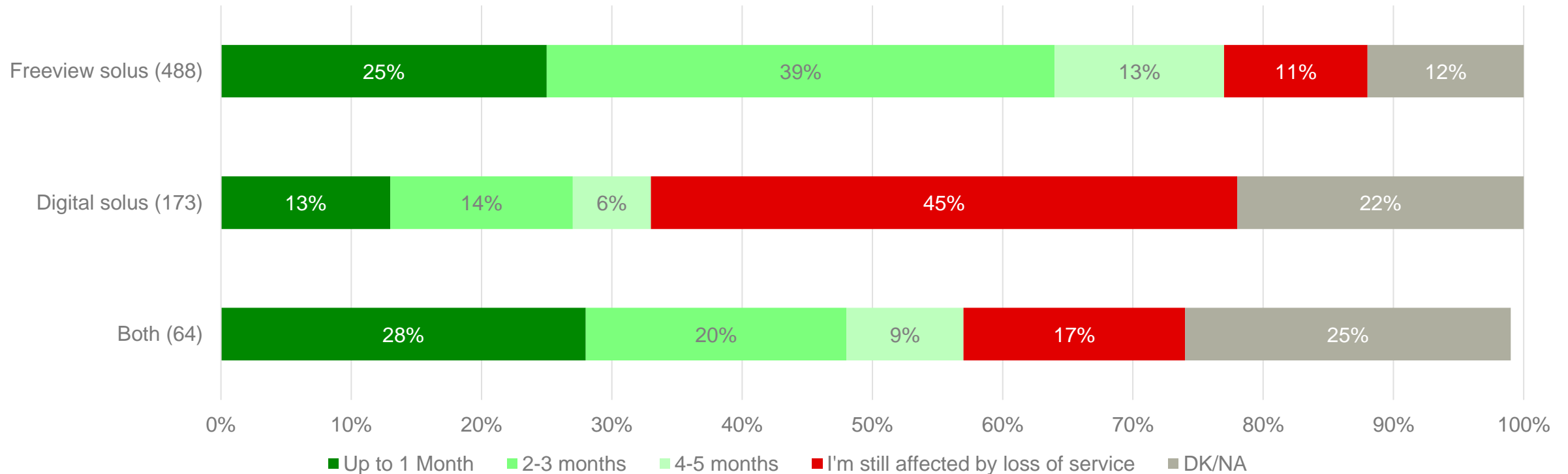
2.2 Deep Dive – Core Bilsdale Transmitter area



Resumption of Freeview service

Those who are using digital services only, claim to be still affected by loss of Freeview service, or they are uncertain what service is available to them.

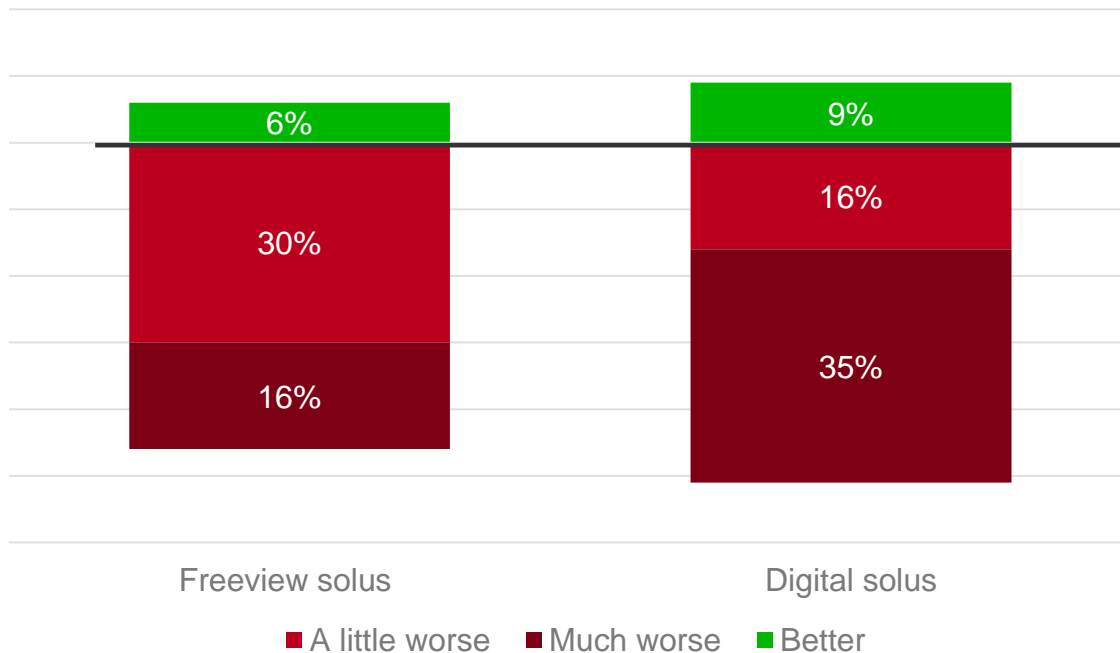
Freeview available on Main TV set



Service comparison with before the fire

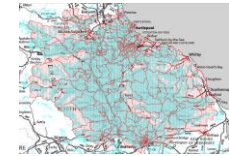
The TV service in the Core Bilsdale area is weaker now compared to before the fire. And if digital services are used solely, then this perception is accentuated – digital users cite the lack of channels, lack of specific regional services and picture quality as reasons why the service is worse.

Main TV service compared to before the transmitter fire



Why is it worse?

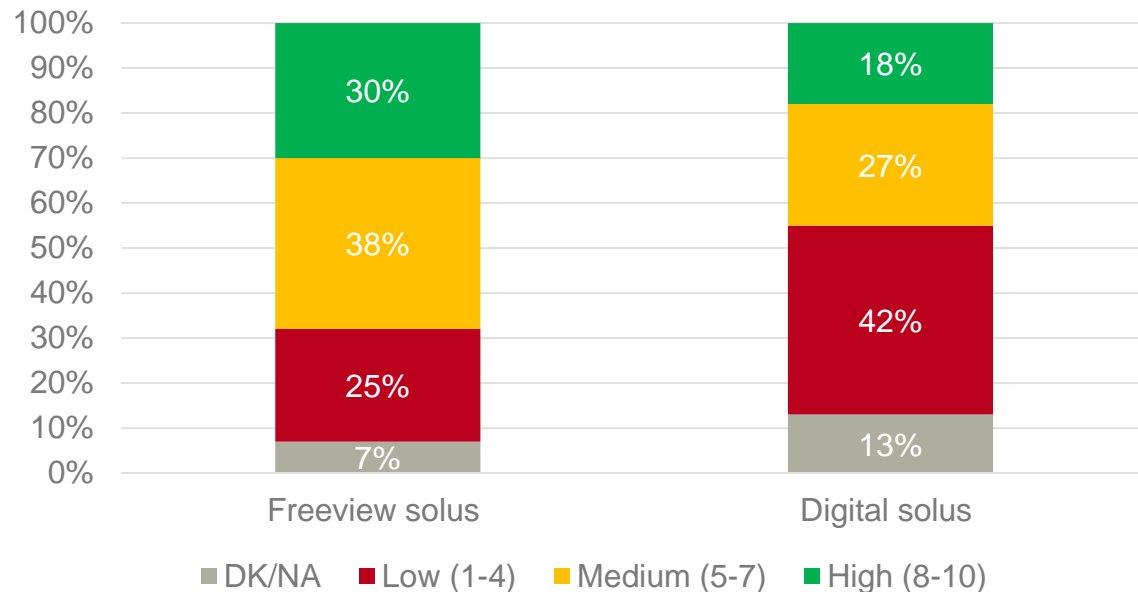
Base: All saying worse	Freeview Solus (229)	Digital solus (89)
Not all channels are available	55%	67%
Service is weak	70%	64%
I find it hard to find programmes	13%	17%
Picture isn't clear	7%	19%
Regional news isn't available for my area	4%	18%
Other	10%	17%



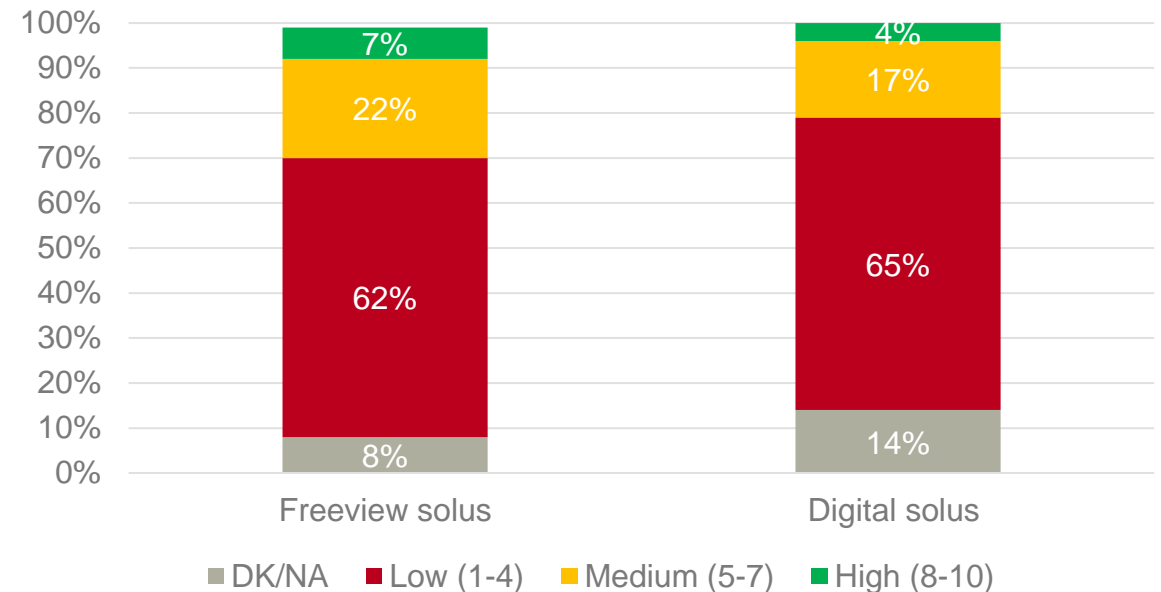
Satisfaction with service provided

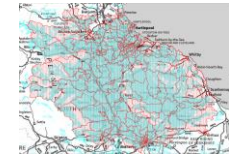
And satisfaction with TV services is weaker among those using digital services solely. For both groups, there is a strong dissatisfaction with the speed of resolution of services.

Satisfaction with current service



Satisfaction with speed of resolution

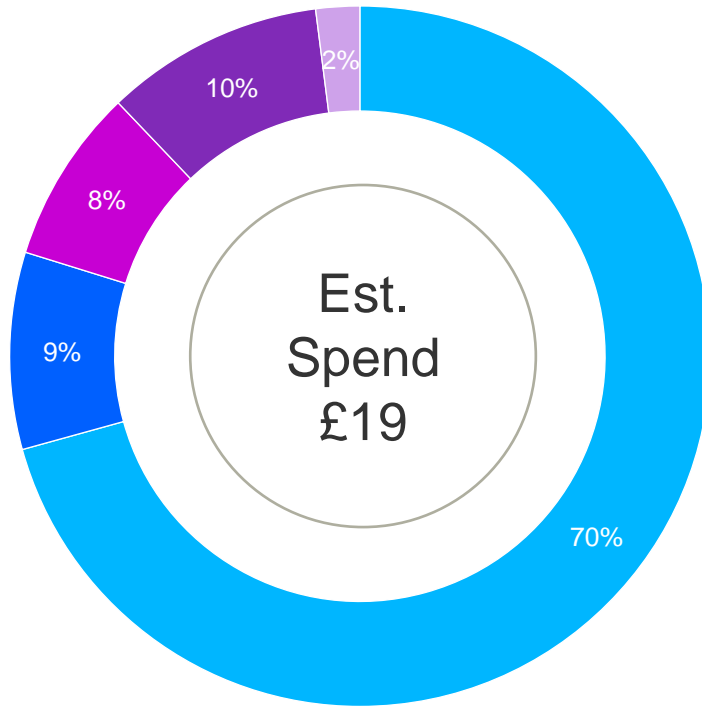




Amount Spent to restore service

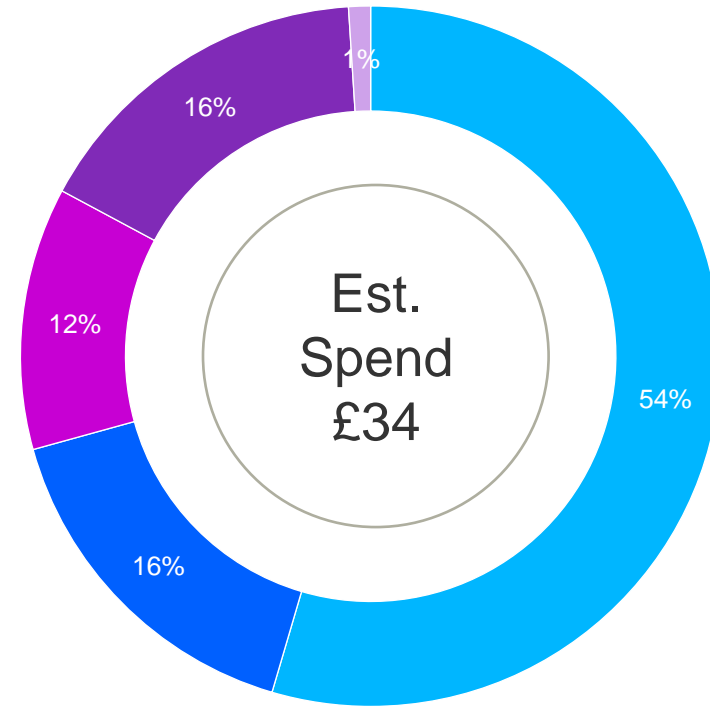
Digital users claim to have spent more money to restore services, than those using Freeview only.

Freeview Solus



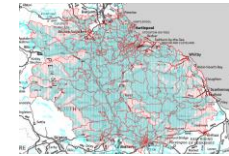
■ Nothing ■ Under £40 ■ £40-£80 ■ Over £80 ■ DK/NA

Digital Solus



■ Nothing ■ Under £40 ■ £40-£80 ■ Over £80 ■ DK/NA

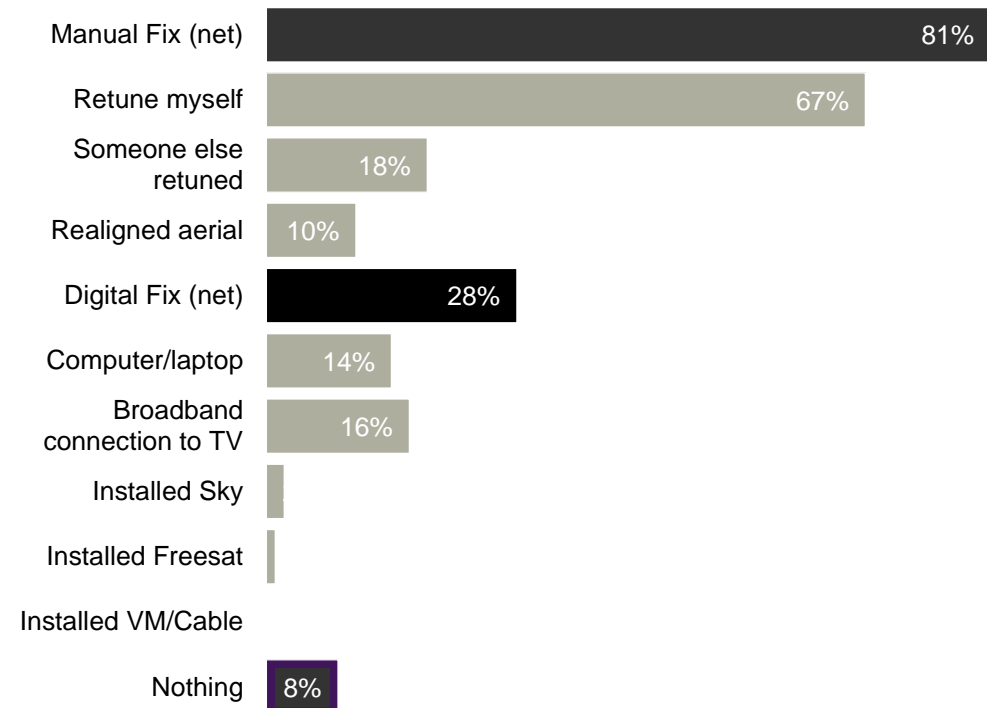
Estimated spend – respondent chose in bands of £20 with max band £100+. We assumed the mid point within band, then averaged across total sample. For £100+ band, we assumed £150.



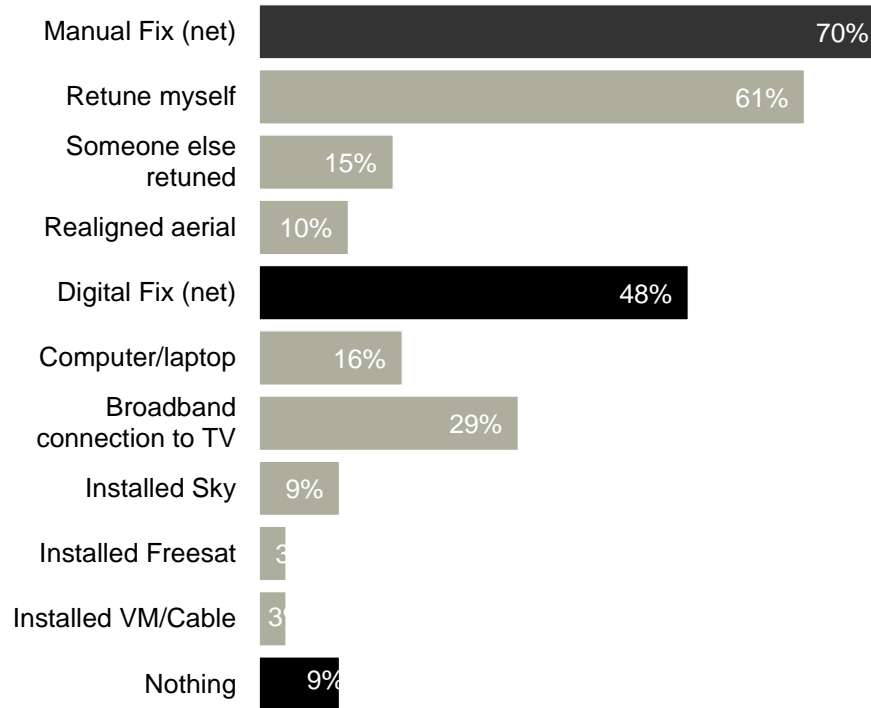
Methods used to regain service

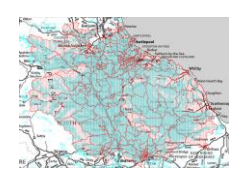
And this is due to the fact that for some digital users, they have newly installed services such as Sky, Freesat and VM.

Freeview Solus



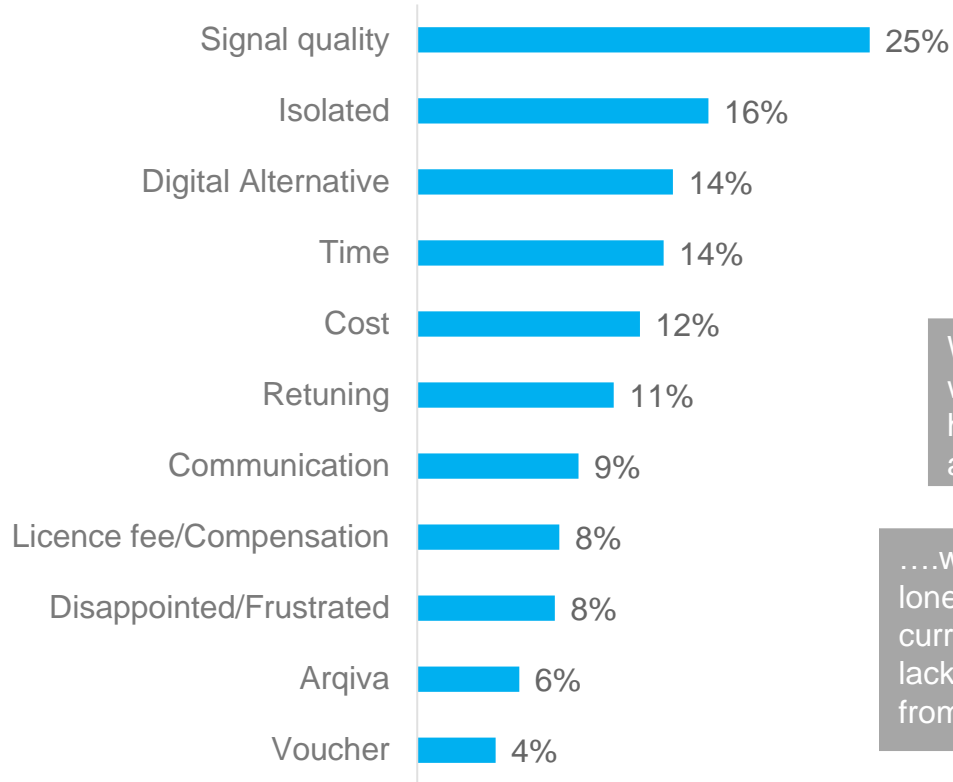
Digital Solus





How have you been affected by the Bilsdale Transmitter Fire?

Open ended response – Topics grouped



Too long to fix, when got some signal had to retune several times a day, stopped watching some programs as could not follow it properly. In this day and age, something should of been done a lot quicker..

After tuning the TV into the new mast we have lost approximately 20% of the channels we could watch when the original mast was in service..

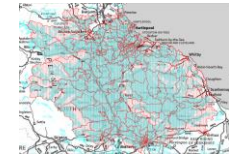
Because of continual signal break up I am still having to do retunes on a daily basis. Many of our neighbours and friends are having the same problems. When retuning messages appear on smart tv asking to select regions.

Without a good internet connection we would have had no TV or Radio, those higher up the dale with poor internet are affected badly.

Since the fire I have removed the indoor aerial and now use my broadband service for all TV and radio. This works fine apart from a lack of live local news programmes, such as Look North.

...without the television I have been lonely and not being able to keep up with current affairs. I have felt isolated and the lack of communication and information from the company

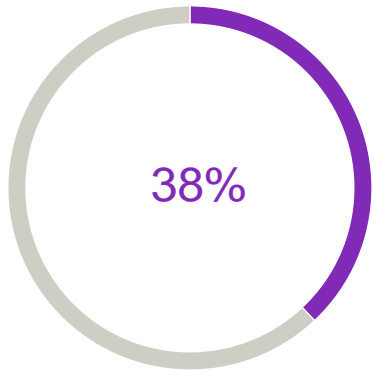
The days were so long, luckily I had my knitting, reading and crochet to do but heard nothing only through daily newspaper and what my family told me. Felt low and lonely most days. I have internet but can't use it apart from my puzzles on an iPad which family helped me with



Where was help sourced and which was the best?

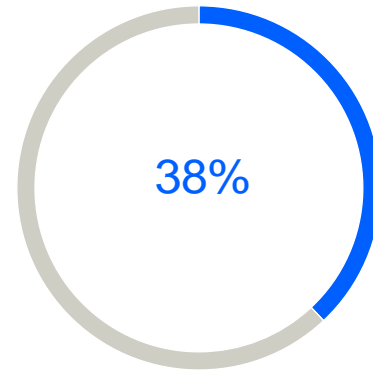
Householders have looked for help from many sources. The best source was friends and family.

Unofficial Support



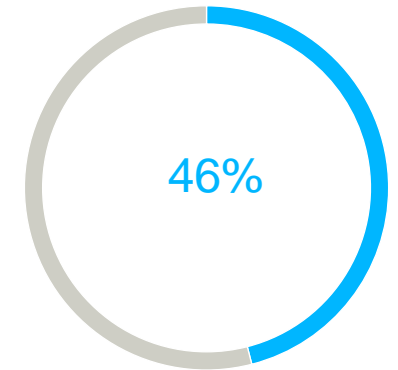
Friends/Family
#1

Official Support

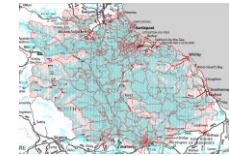


Bilsdalemast.co.uk
=#3

Media



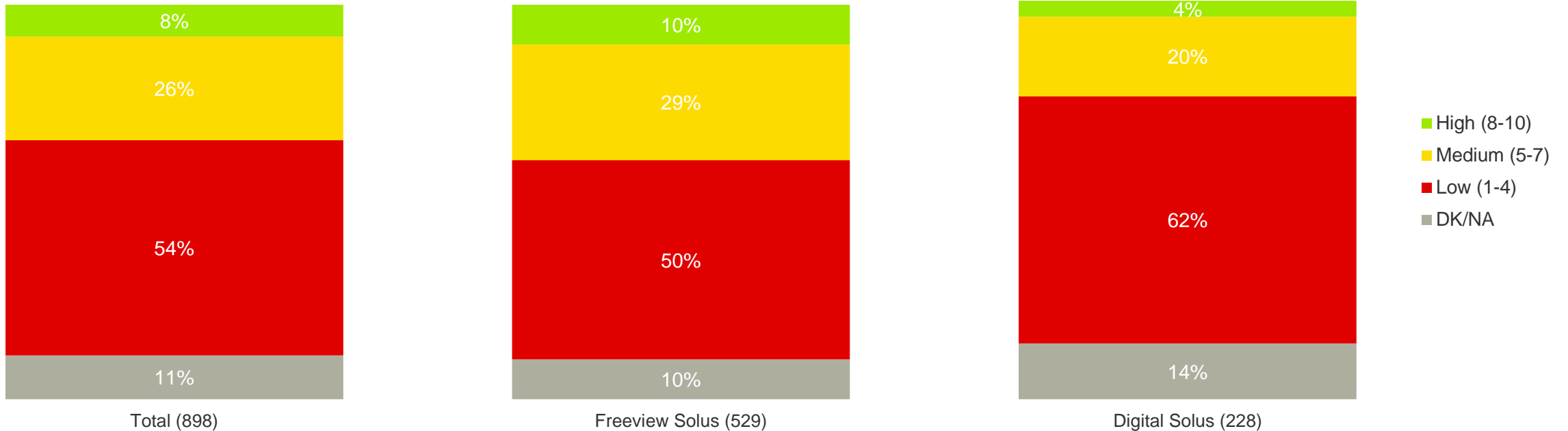
Local Press #2
BBC website = #3

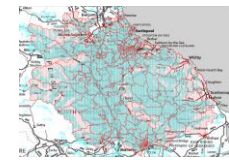


Satisfaction with Communication

But overall, householders have found communication weak.

Satisfaction with Communication

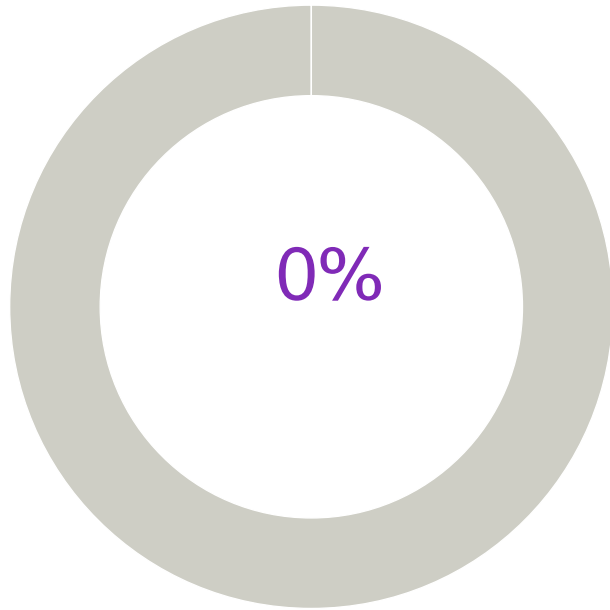




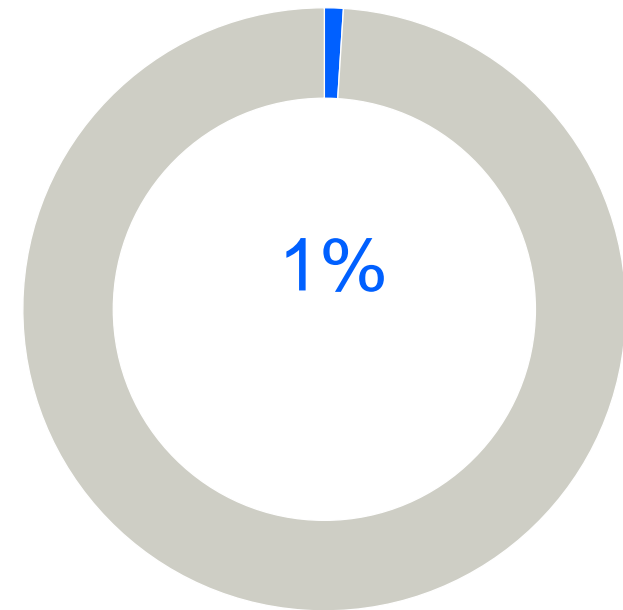
Received a voucher for Amazon Fire Stick?

As to be expected in the core Bilsdale area, there were very few households in receipt of a voucher for and Amazon Fire Stick. Verbatim response shows that few were aware of the offer.

Freeview Solus



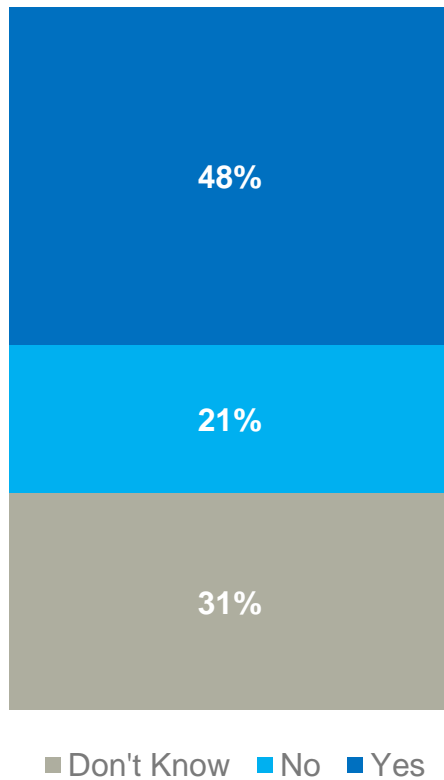
Digital Solus



Awareness of Radio service loss

Around half lost radio service as well as TV. Interestingly there is a third of all respondents in the area who are not sure if they had lost service. Approaching 3/4 lost FM service and nearly 2/3 lost DAB service.

Did you lose your Radio service as well?



What stations did you lose?

Base: All lost radio	Total (429)
Net : FM Stations	73%
Net: DAB Stations Total	59%
Sub Net : (DAB) BBC Stations	47%
Sub Net : (DAB) Commercial Radio Stations	39%
Another commercial station not listed	14%



BROWN
OVERLAP
AREA

2.3 Deep Dive – Overlap area (Emley Moor)

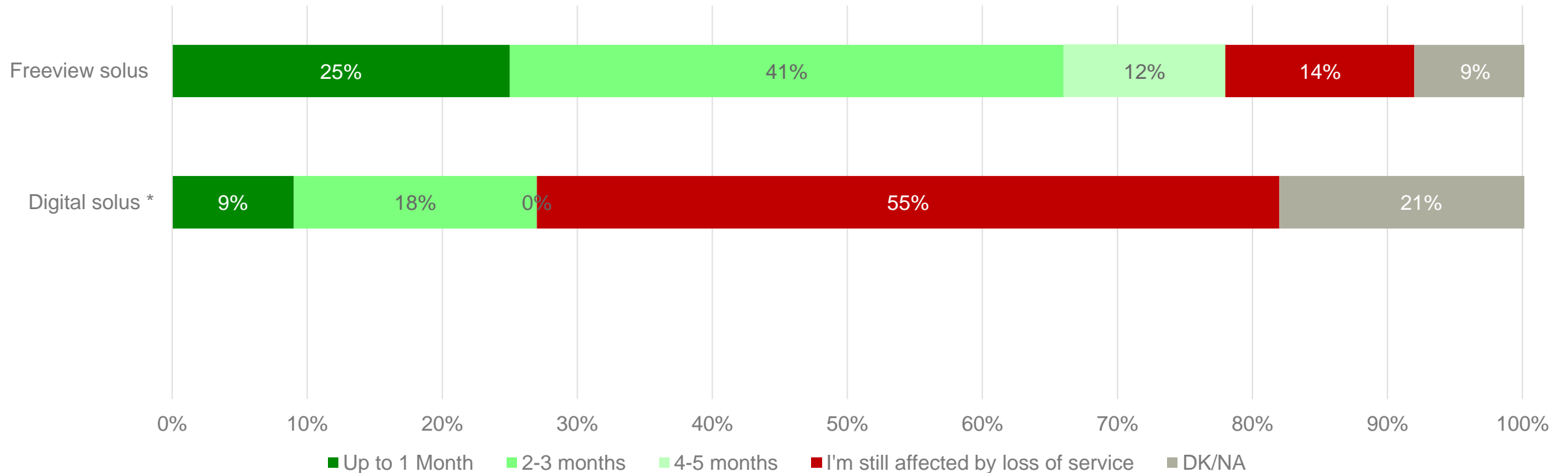


BROWN OVERLAP AREA

Resumption of Freeview service

Around ¾ of Digital only users in the Overlap area are still affected by the loss of service or are uncertain if their service has been restored.

Freeview available on Main TV set



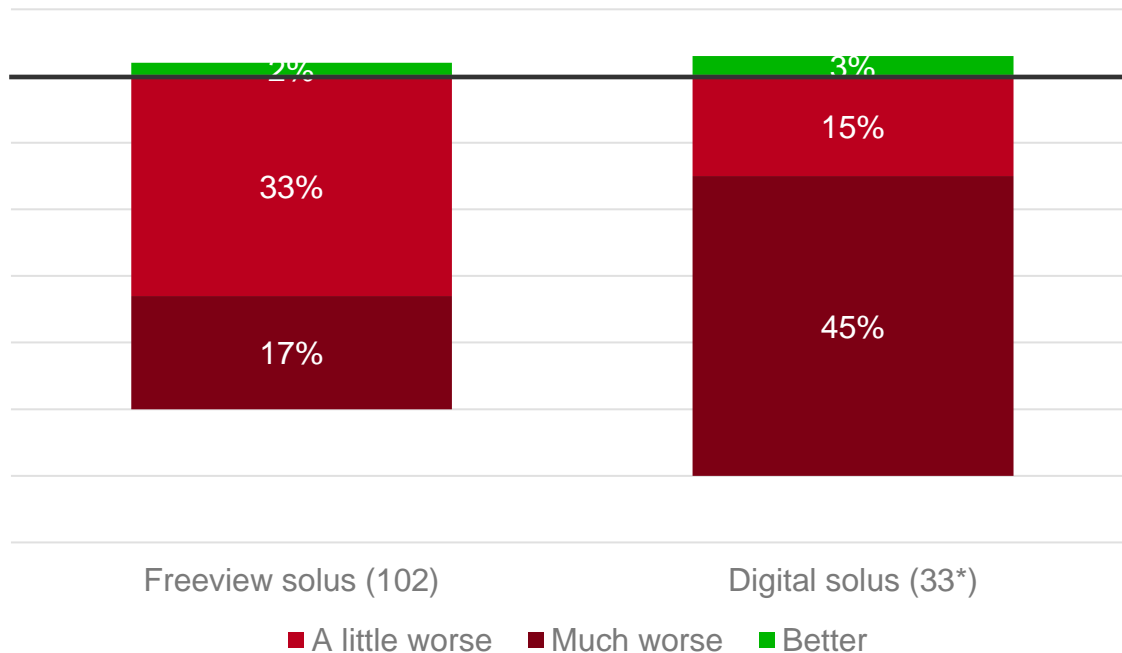
* Caution Small base – indicative only



Service comparison with before

And there is consensus that TV service is worse after the fire. The majority of Freeview users, claim the service is weaker and not all channels are available.

Main TV service compared to before the transmitter fire



Why is it worse?

Base: All saying worse	Freeview Solus (51*)	Digital solus (20*) NOS
Not all channels are available	47%	14
Service is weak	82%	13
I find it hard to find programmes	24%	3
Picture isn't clear	8%	2
Regional news isn't available for my area	14%	7
Other	14%	3

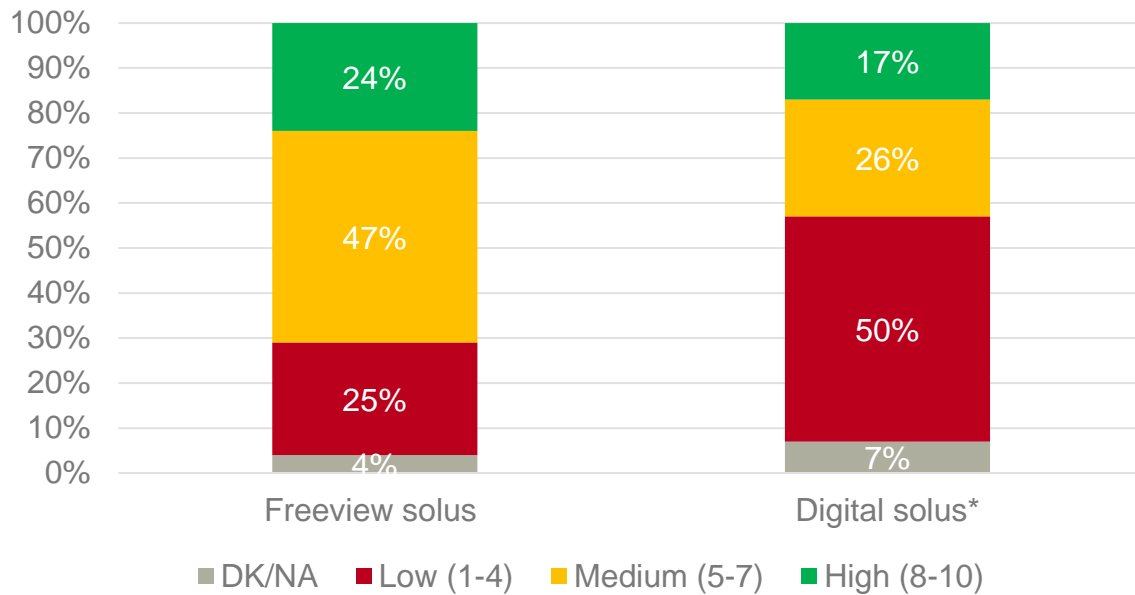
* Caution Small base – indicative only



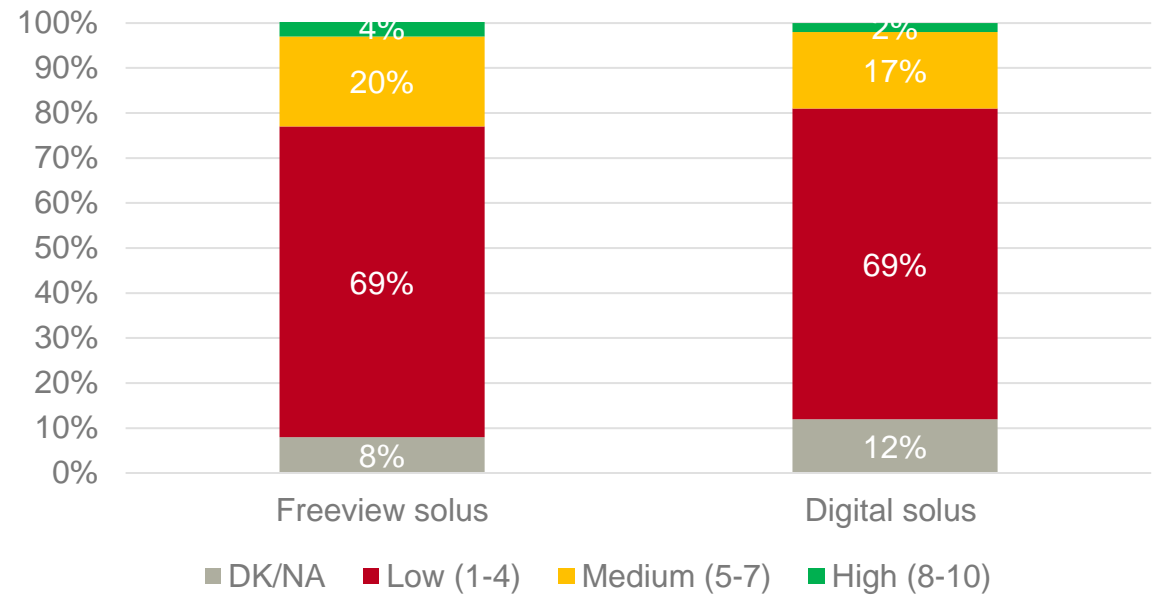
Satisfaction with service provided

Similarly half of all digital solus users rate the current service as unsatisfactory. Both user groups believe the speed of resolution of service is unsatisfactory.

Satisfaction with current service



Satisfaction with speed of resolution



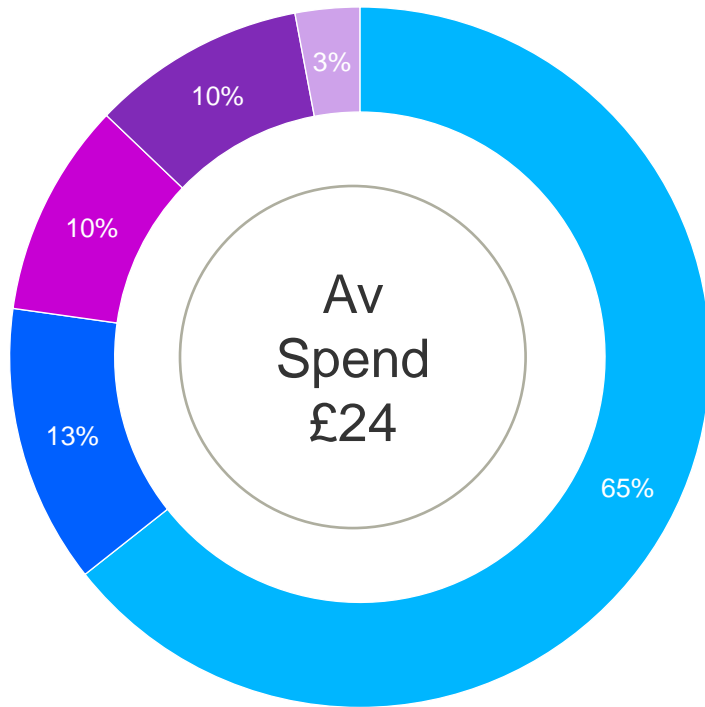
* Caution Small base – indicative only

Amount Spent to restore service



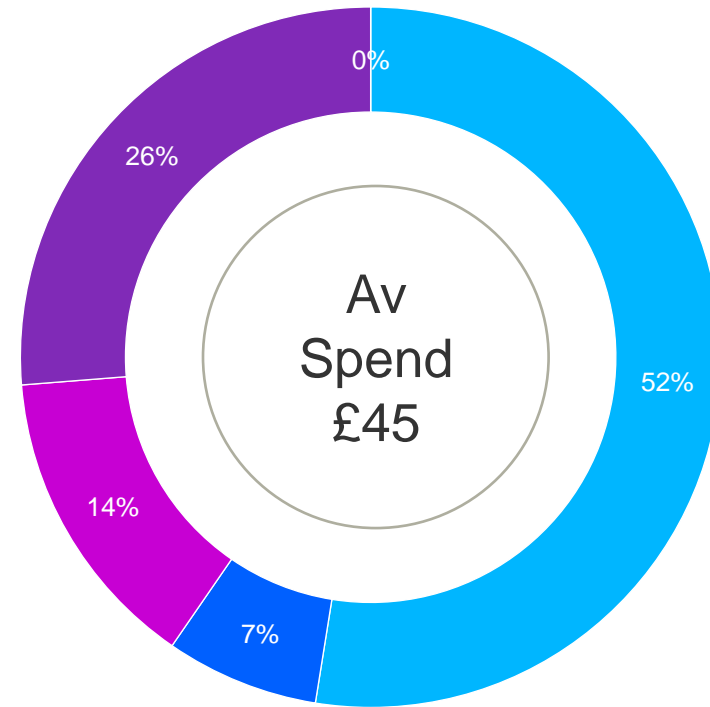
The spend among digital users is a higher than Freeview users – and the estimated average is higher in the Overlap area compared to the Core Bilsdale area.

Freeview Solus



■ Nothing ■ Under £40 ■ £40-£80 ■ Over £80 ■ DK/NA

Digital Solus *



■ Nothing ■ Under £40 ■ £40-£80 ■ Over £80 ■ DK/NA

* Caution Small base – indicative only

Estimated spend – respondent chose in bands of £20 with max band £100+. We assumed the mid point within band, then averaged across total sample. For £100+ band, we assumed £150.

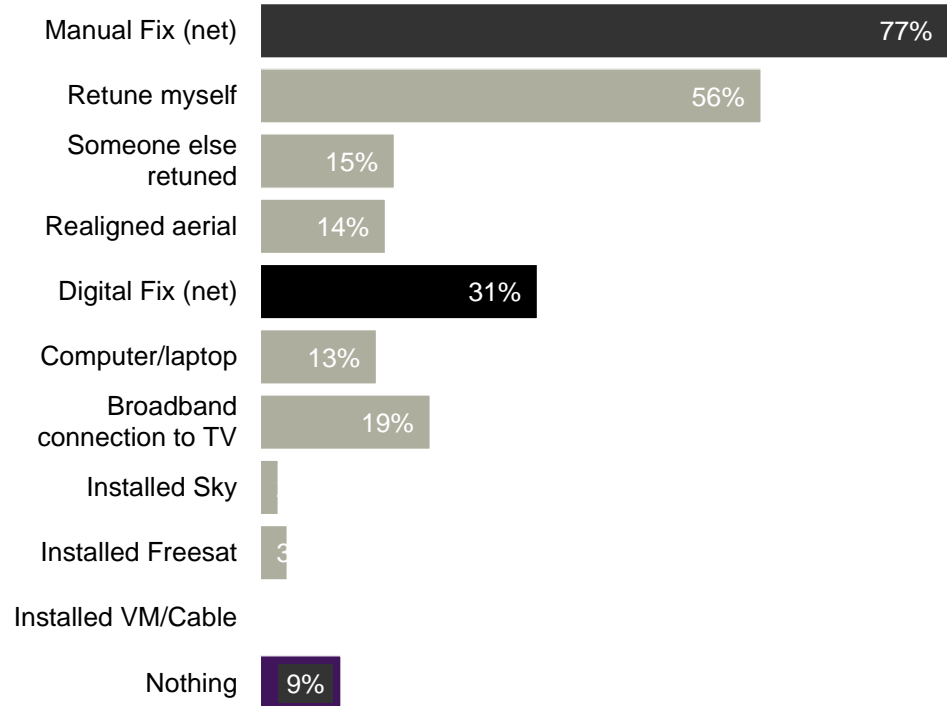


BROWN OVERLAP AREA

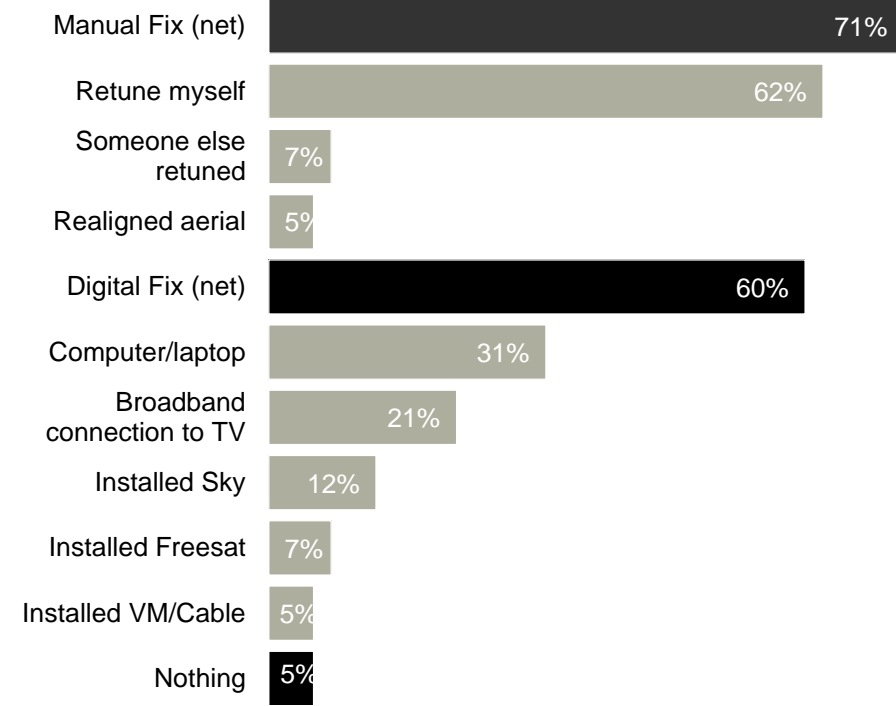
Methods used to regain service

Digital users have tried a number of fixes to restore TV Service. Computers and laptops are used in the Overlap región more than in the Core area. And there is greater combined installation of services such as Sky, Freesat and VM.

Freeview Solus



Digital Solus *



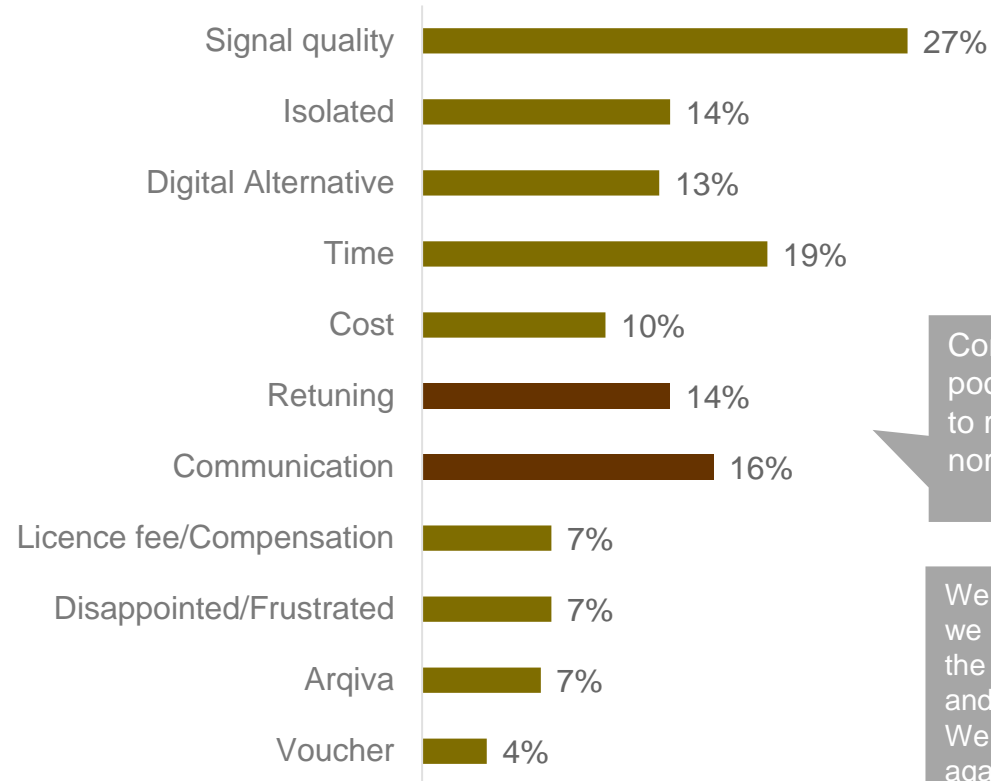
* Caution Small base – indicative only

How have you been affected by the Bilsdale Transmitter Fire?



BROWN
OVERLAP
AREA

Open ended response – Topics grouped



Replaced 30 year-old aerial with Hi-gain, and, using cheap signal meter, pointed it SSW, 200° from due north. don't know which transmitter...

We receive about 60% of expected channels and frequent picture/sound break up. Freeview website suggests we should be receiving signal from Emley Moor though...

...I still lose my TV signal in rainy weather and...the loss of the BBC Radio Tees FM signal has been particularly frustrating because I used it regularly to listen to Middlesbrough FC football commentaries that are not available elsewhere ...While BBC Radio York is presently available to me, I am hoping that the BBC Radio Tees FM signal will reappear when the repairs to the mast are complete (hopefully before the start of the next football season)!

Communication has been poor and ongoing timeframe to restore service levels to normal is unacceptable.

Main issue was the lack of communication about the situation - it was difficult to find, and when found not very useful. ...

We have a signal from West Yorks, but we prefer to watch programmes from the North East, especially local news and regional programmes from there. We would like to get the Bilsdale signal again but it is not essential to our viewing, jut more to our taste.

Very disappointed at the time as there was no communication from the provider and I cannot believe that it took so long to fix. Why build an aerial on land that is not owned by yourselves. There was excuse after excuse, not acceptable, especially for old people.



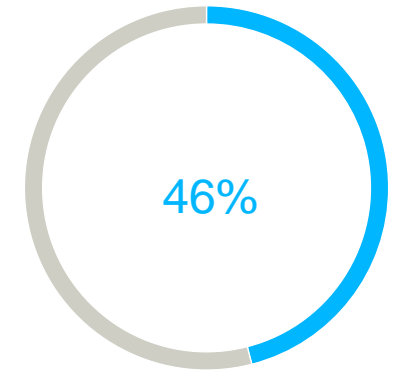
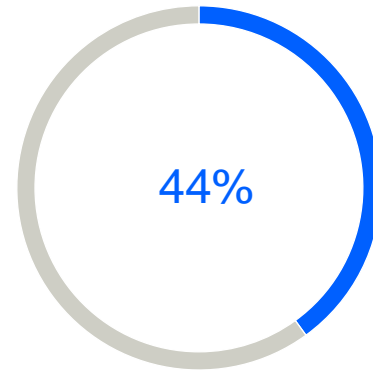
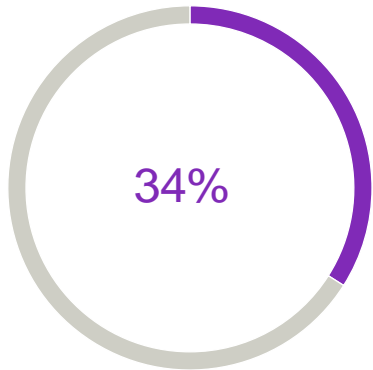
Where was help sourced and which was the best?

In the Overlap area there has been a little more consultation of official support services compared to the Core Bilsdale area, but unofficial and media support has been deemed more useful

Unofficial Support

Official Support

Media



**Friends/Family
#1**

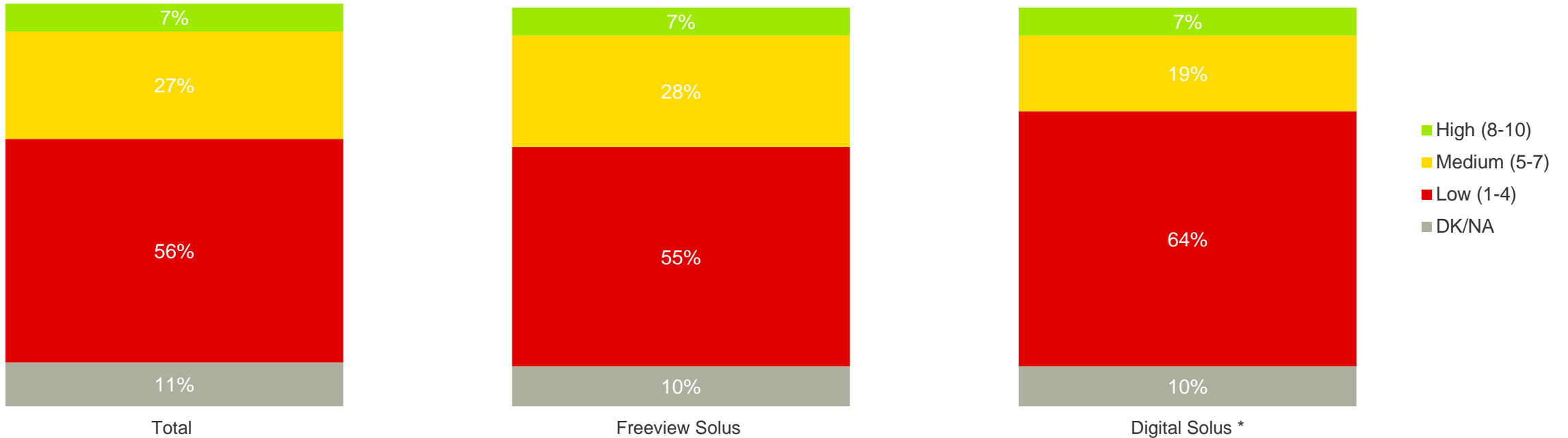
**Local Press #2
BBC website #3**

Satisfaction with Communication



Overall, communications have been unsatisfactory

Satisfaction with Communication



* Caution Small base – indicative only

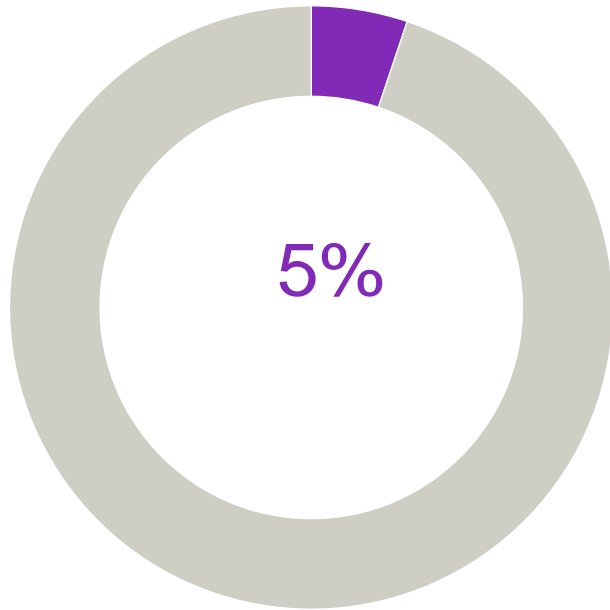


BROWN OVERLAP AREA

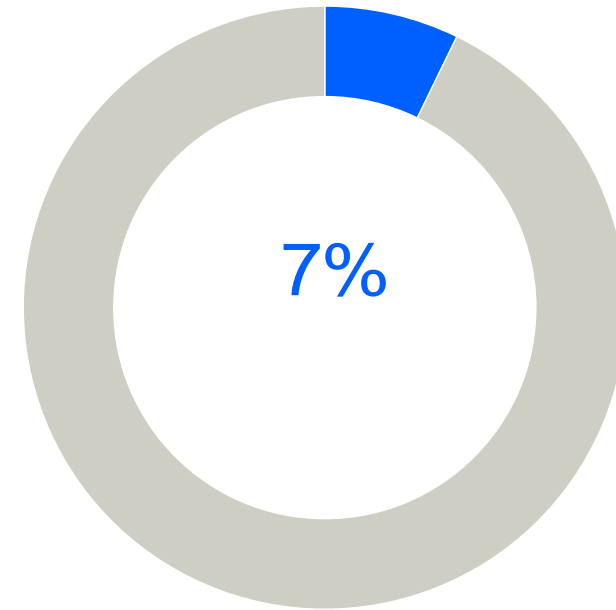
Received a voucher for Amazon Fire Stick?

A small percentage of each user group has received a voucher to buy an Amazon Fire Stick.

Freeview Solus



Digital Solus *



* Caution Small base – indicative only

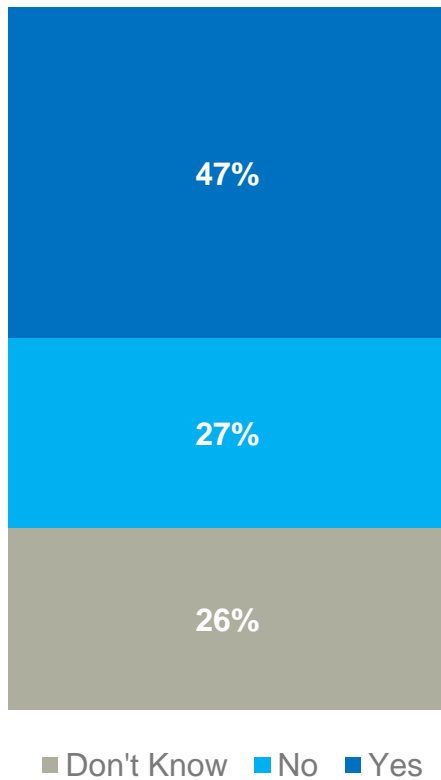


BROWN
OVERLAP
AREA

Awareness of Radio service loss

Similarly to the other regions, around half of respondents lost radio service as well as TV. In the Overlap area however, there was more awareness of losing DAB service compared with the core Bilsdale region.

Did you lose your Radio service as well?



* Caution Small base – indicative only

What stations did you lose?

Base: All lost radio	Total (84)
Net : FM Stations	68%
Net: DAB Stations Total	79%
Sub Net : (DAB) BBC Stations	65%
Sub Net : (DAB) Commercial Radio Stations	62%
Another commercial station not listed	23%



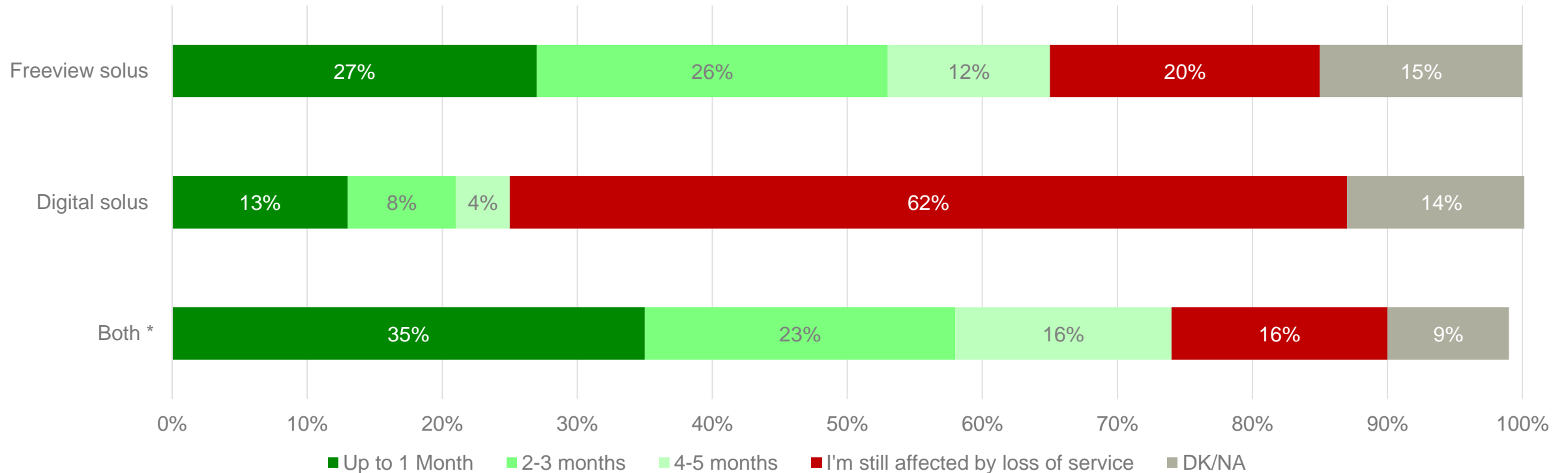
2.4 Deep Dive – ‘Not Spot’ area



Resumption of Freeview service

Around 2/3 of all digital solus users and 1/5 of Freeview solus users are still affected by the loss of service. These are the highest levels compared to the other regions.

Freeview available on Main TV set



* Caution Small base – indicative only

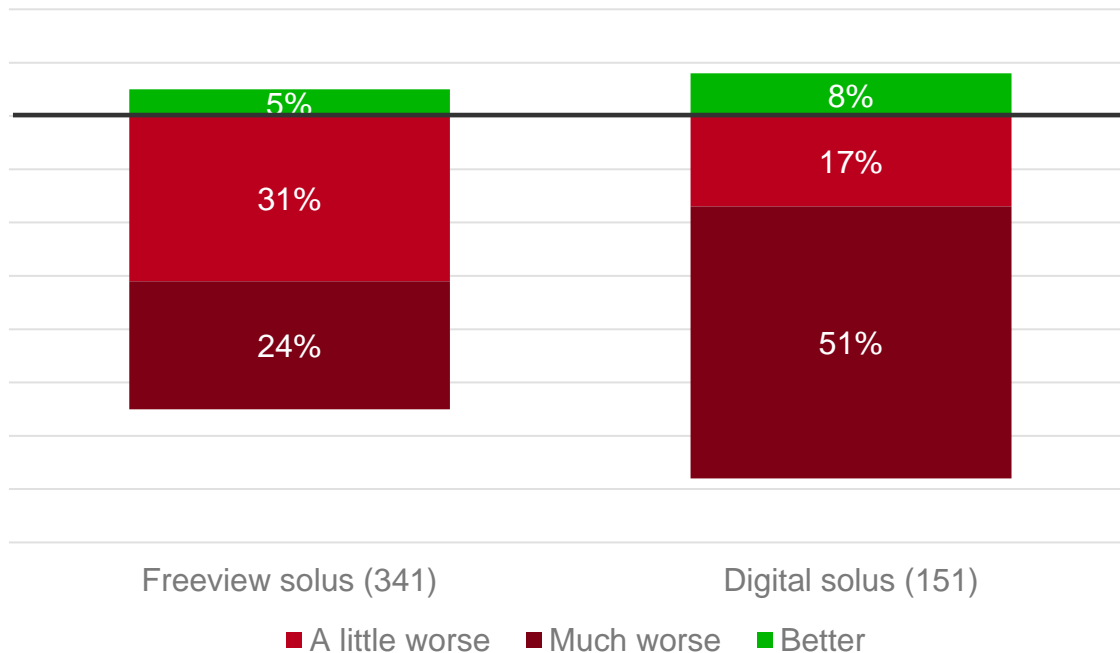
Source: Q11. And when did you get the Freeview service back on your Main TV set, if at all?
 Base: All losing service on Main TV set – Freeview solus 341, Digital solus 151, Both 56*
 Freeview solus = All using Freeview currently AND NOT other means.
 Digital solus = All using Other means currently AND NOT Freeview.



Service comparison with before

And the service levels are weakest in the Not Spot region compared to the other regions. Availability of channels is the driving factor.

Main TV service compared to before the transmitter fire



Why is it worse?

Base: All saying worse	Freeview Solus (191)	Digital solus (103)
Not all channels are available	67%	72%
Service is weak	58%	60%
I find it hard to find programmes	16%	27%
Picture isn't clear	7%	20%
Regional news isn't available for my area	7%	17%
Other	12%	24%*

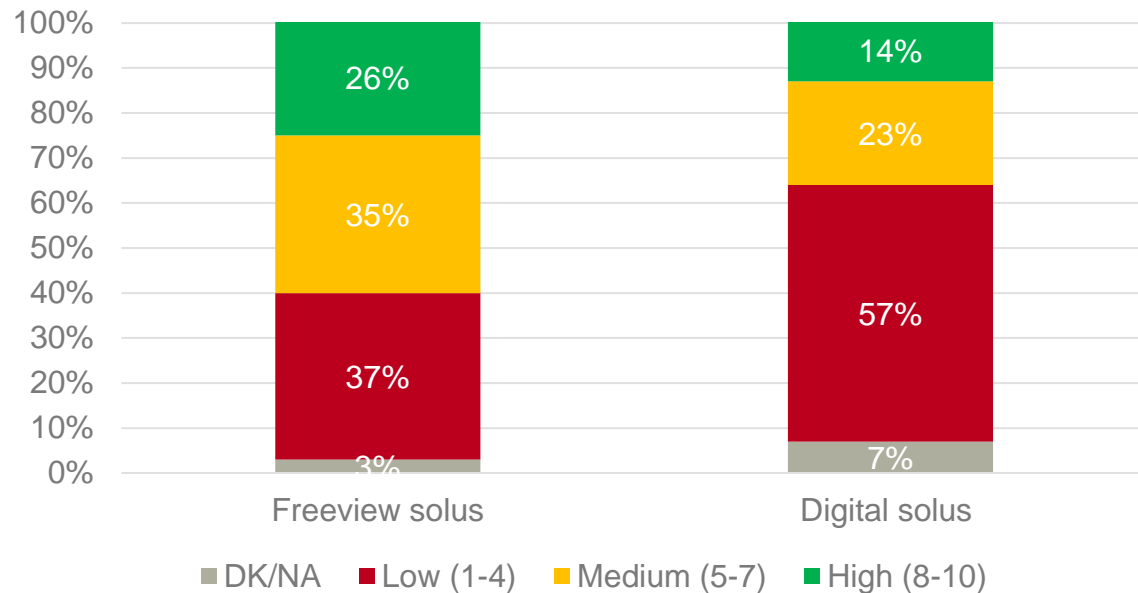
*Other comments: No channels available at all/digital not as easy to use/can only use catch up service rather than live TV/reliant on one TV



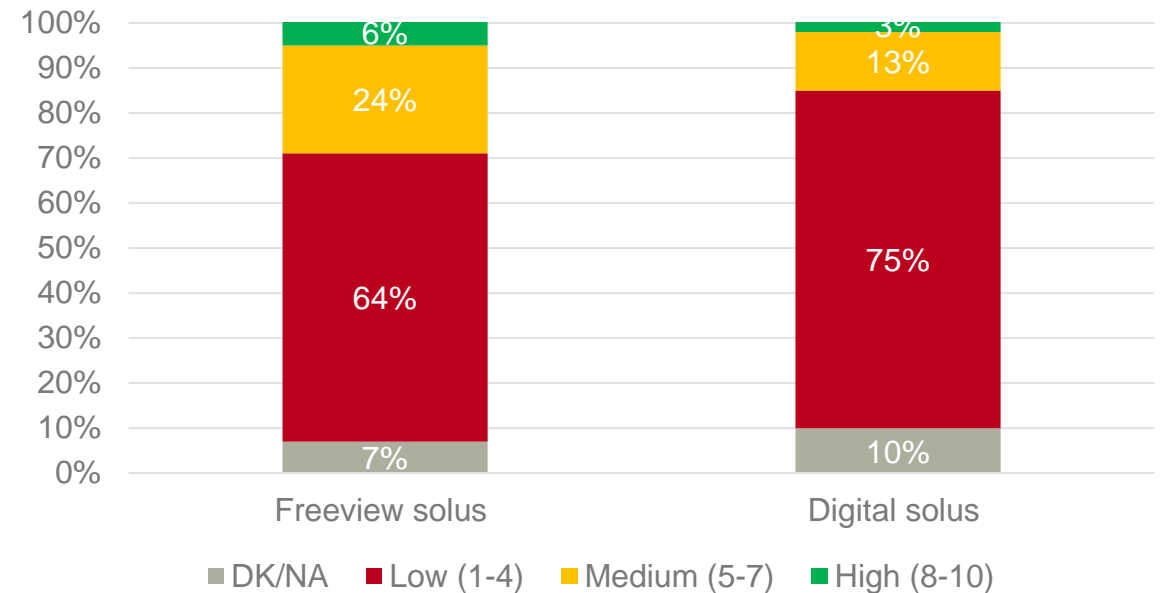
Satisfaction with service provided

A similar pattern of response by user group, but strength of dissatisfaction is highest in the Not Spot area.

Satisfaction with current service



Satisfaction with speed of resolution

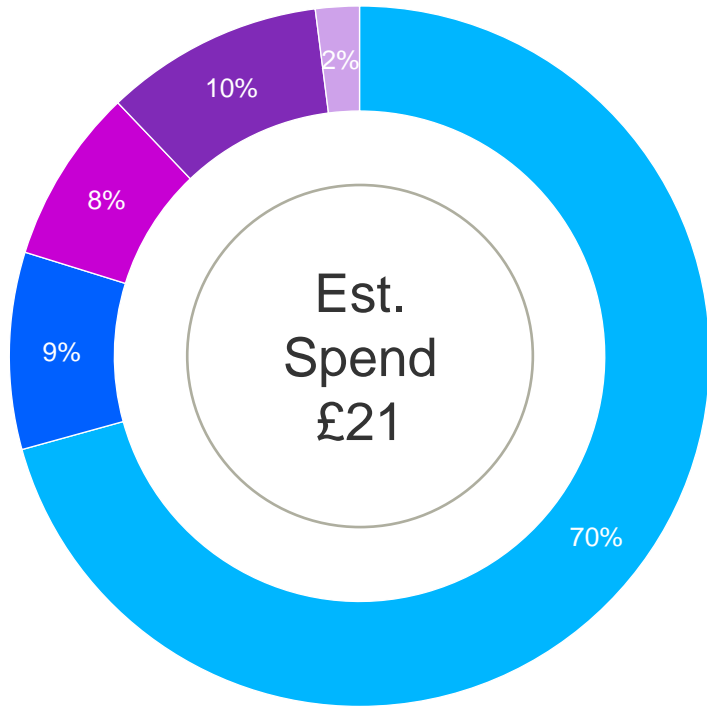




Amount Spent to restore service

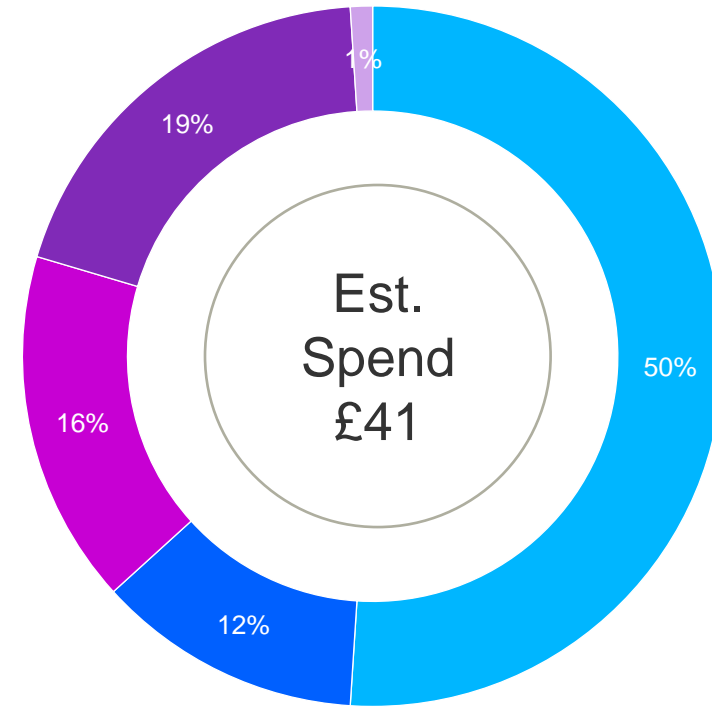
As seen in other regions, the spend is highest among digital users – estimated at double that of Freeview users.

Freeview Solus



- Nothing
- Under £40
- £40-£80
- Over £80
- DK/NA

Digital Solus



- Nothing
- Under £40
- £40-£80
- Over £80
- DK/NA

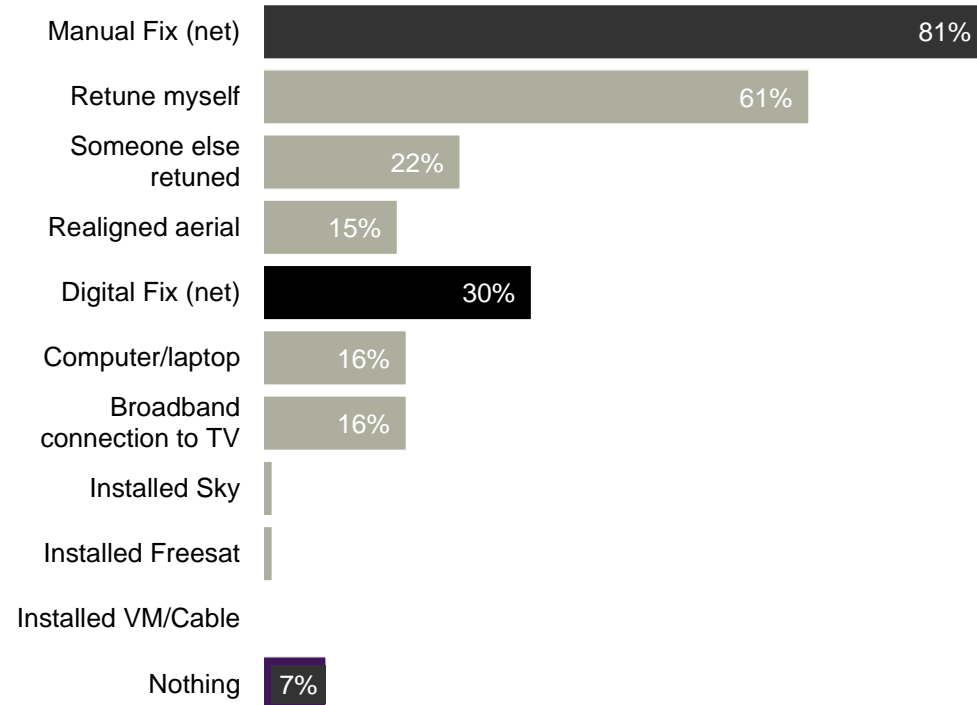
Estimated spend – respondent chose in bands of £20 with max band £100+. We assumed the mid point within band, then averaged across total sample. For £100+ band, we assumed £150.



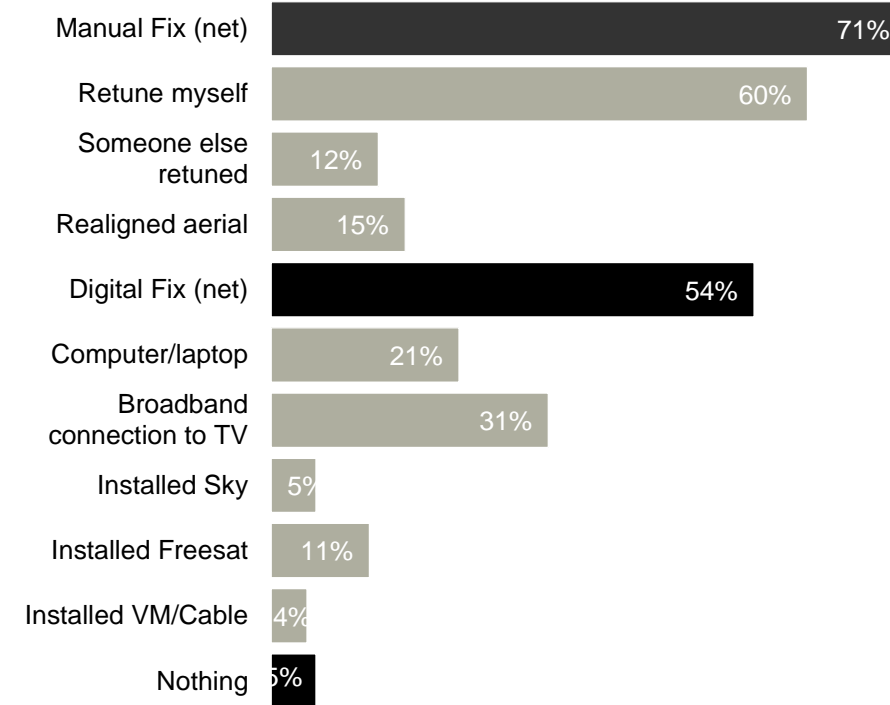
Methods used to regain service

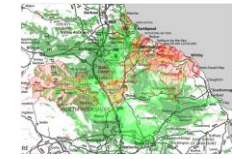
As seen in other regions, the digital users have tried more methods to restore TV than Freeview users. Marginally higher usage of Broadband connections to TV in the Not Spots than other regions.

Freeview Solus



Digital Solus

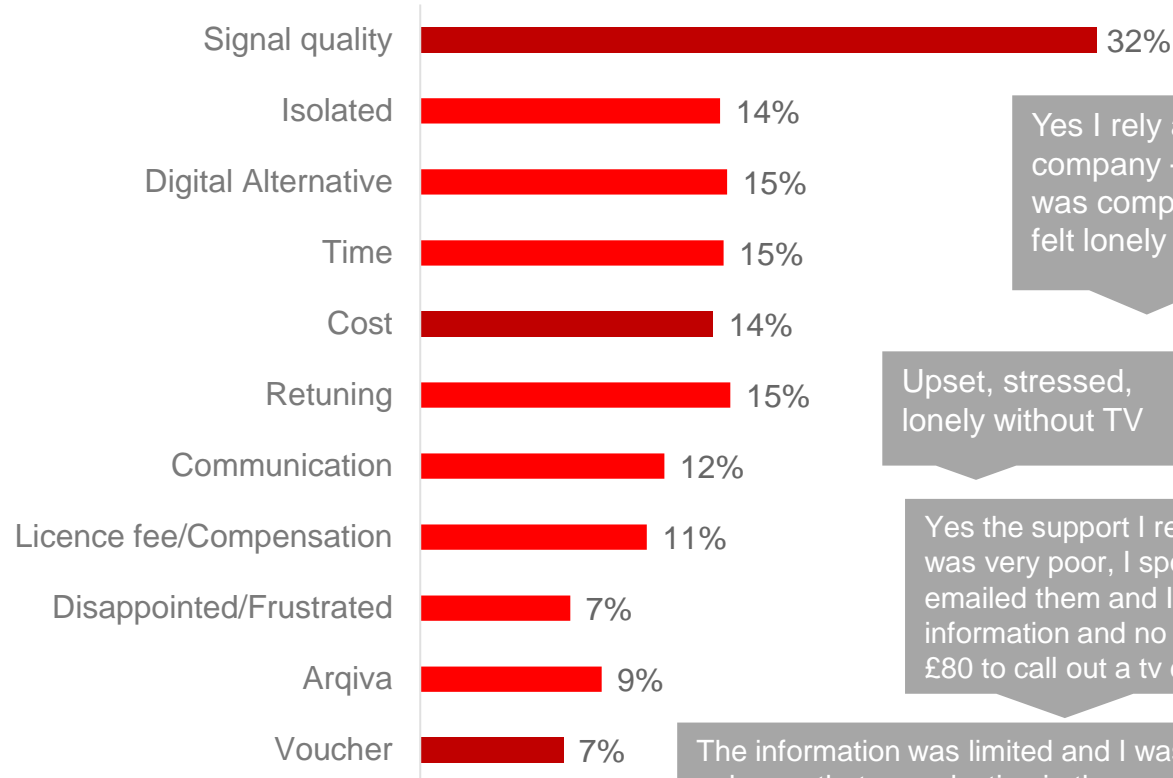




RED 'NOT SPOTS'

How have you been affected by the Biltsdale Transmitter Fire?

Open ended response – Topics grouped



We tried retuning many times but the signal kept dropping out despite been told on Biltsdale website we were not a none-spot I.e. in an area that should receive a signal.

...we still intermittently lose the signal on all our TVs, meaning that we have to resort to BBC iPlayer etc. We can watch live TV via BBC iPlayer but not ITV Hub, and local channels are not available using these methods.

Yes I rely a lot on the TV for company + interest, and I was completely lost without it, felt lonely and isolated.

After service was theoretically reinstated we continued to have periods of 'No Service', without notice. The main issue was lack of communication. It appeared that once one level of service was reinstated, 'planned outages' did not need to be communicated. This is still happening without notice. This identified by 'No Service' on all broadcast channels.

Upset, stressed, lonely without TV

The Curry's voucher is piecemeal considering the length of time it will take to rebuild a replacement mast. We are now considering alternatives which are of significant cost.

Yes the support I received from Arqiva was very poor, I spoke to them and emailed them and I received poor information and no voucher. Cost me £80 to call out a tv engineer

The information was limited and I was unhappy that no reduction in the licence fee was offered by the BBC.

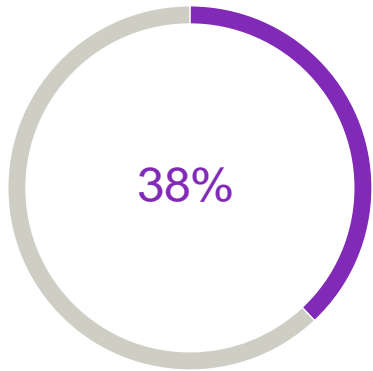
I have to date not received any financial help to get the TV services restored to my home. I look forward to receiving some payment towards the costs I have incurred to date.



Where was help sourced and which was the best?

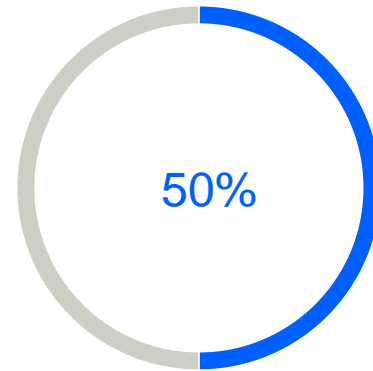
We find the highest usage of official support services in the Not Spot area. However, highest ranking support is friends/family.

Unofficial Support



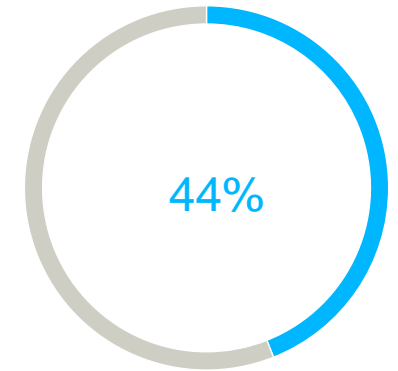
Friends/Family
#1

Official Support



Bilsdalemast.co.uk
#3

Media



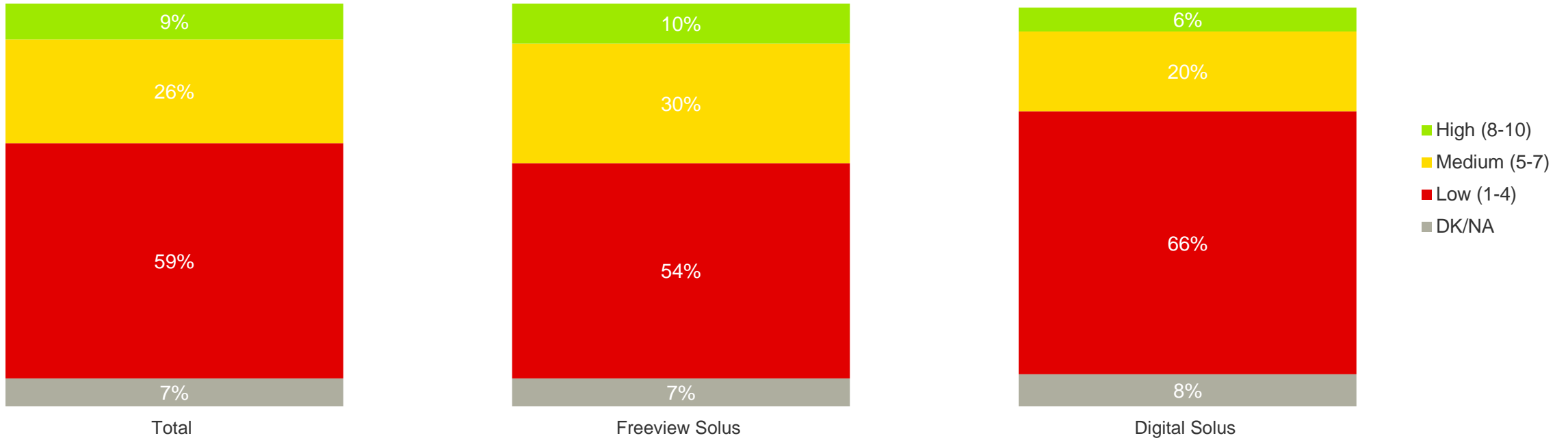
Local Press
#2

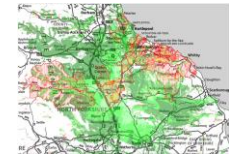
Satisfaction with Communication



Overall, communications have been unsatisfactory

Satisfaction with Communication



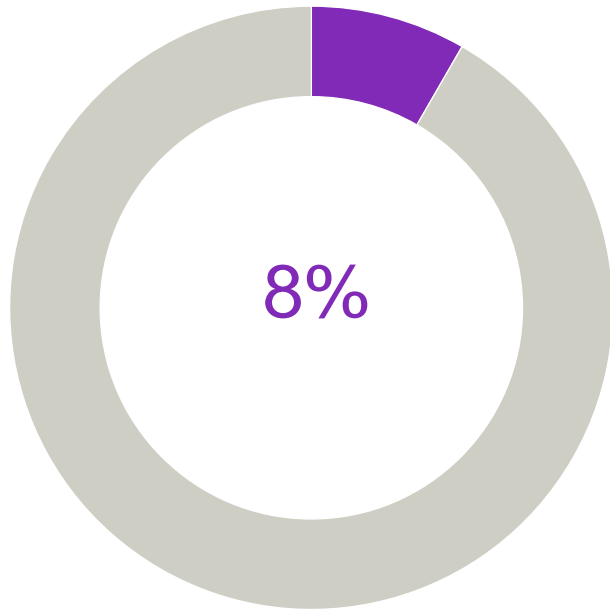


RED
'NOT SPOTS'

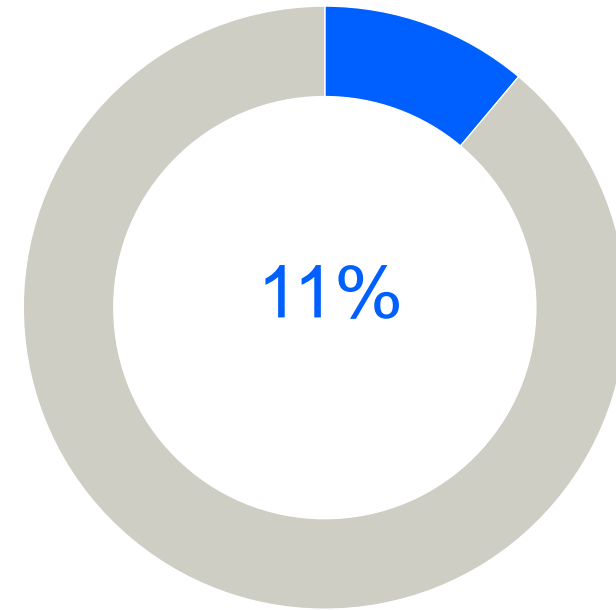
Received a voucher for Amazon Fire Stick?

Around 10% of those interviewed in the Not Spot area have received a voucher. Vouchers have been received by those who claim to only use Freeview. And around half of those using digital services are still to try the stick.

Freeview Solus



Digital Solus



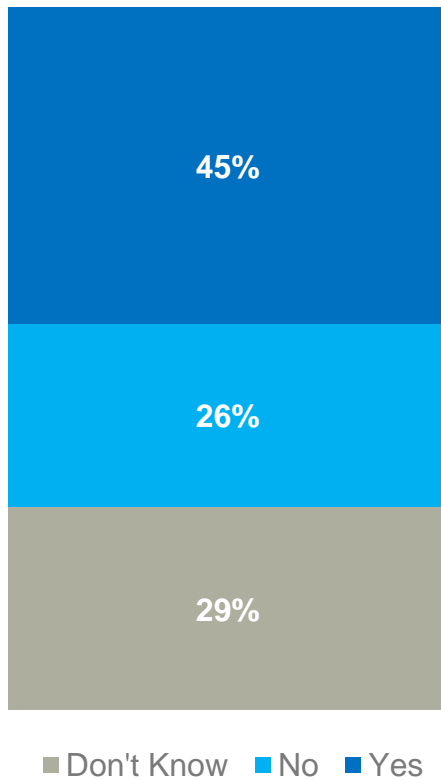
Of those who have received a voucher, 57% have not tried the stick yet



Awareness of Radio service loss

Similarly to the other regions, around half of those losing TV service were also aware they had lost radio service too. There was a similar number aware of losing FM and DAB service.

Did you lose your Radio service as well?



What stations did you lose?

Base: All lost radio	Total (304)
Net : FM Stations	67%
Net: DAB Stations Total	63%
Sub Net : (DAB) BBC Stations	53%
Sub Net : (DAB) Commercial Radio Stations	42%
Another commercial station not listed	17%

A recap – General Learnings

- At time of interview (January/February 2022) approximately 5 months after the fire, the majority of households in each area are using Freeview TV service only. And around a quarter are using a broadband service only.
- Age has a bearing on how households have responded to the problem. For those aged 70+, there is a greater reliance on Freeview services – 2/3 use Freeview alone, and 1/10 use a mix of Freeview and broadband service.
- And in younger households, over a third are using Freeview solus, and another third are using broadband services only. And indeed, approaching 20% of these households claim to have no service at all.
- Where broadband services are being used on their own, then levels of satisfaction with the TV service available are weaker – and the level of dissatisfaction among younger households is strongest. Kantar believe size of household and presence of children may accentuate the problem for this age group.
- And for older households, using Broadband services only, there appears to be a sense of uncertainty – a greater percentage claim to ‘not know’ whether the Freeview service has yet been restored.



Summary – Differences by area

- Usage of Broadband services only are highest in the Not Spots area. However, across all areas the majority of households are currently using Freeview services only.
- In the Not Spots area, 6% of households claim to have no service at all.
- In all areas, if broadband services are used alone, then the levels of dissatisfaction with service quality is greater.
- And it is in the Not Spots area where we see the greatest level of dissatisfaction due to the limited availability of channels and frustrations with broadband, such as not being able to view live TV or not being able to view specific regional programming.
- In all areas, those using broadband only services have spent more to try to rectify the problem than those using Freeview only – around double in our cost estimations.
- Householders feel let down by official communications and believe friends and family have generally provided the best support, followed by local press and radio.
- And there is a sense through verbatim comments that communication has been particularly frustrating in the Overlap area – the use of another transmitter has created additional problems – set up, continuous retuning, lack of regional programming. It is in this region where there has been greatest claimed installation of broadband services.



Julie Soulsby,
Insight Director, Media Division
julie.soulsby@kantar.com

Hugo Nelson,
Senior Insight Executive, Media Division
hugo.nelson@kantar.com