

Bilsdale Transmitter Research 2022

Technical Report

June 2022

JN.45122734

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1. 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.

They wished to understand if there were particular issues for those households who moved to broadband only delivery for TV and to assess whether it was an adequate replacement for broadcast TV within the area.

The study focussed on three geographical areas, and each was analysed separately given the different likely impact of the loss of the transmitter service on the region. The areas were:

- The Core Bilsdale Area
- The area of overlap with the Emley Moor Transmitter
- 'Not Spots' area – i.e., the area where it was most likely no service had been restored since August 2021

There was no overlap of postcodes assessed between groups.

2. Methodology

2.1.1 Address Based Online Surveying (ABOS)

The ABOS approach is used on a large number of projects for government departments when a strong nationally representative sample is required, and indeed provides a broader coverage than possible by interviewing face-to-face, as interviewing is not limited to areas of greater population size. In this particular example it allowed us to focus on all postcodes within the three geographical areas of interest to Ofcom and provided the opportunity for a representative sample of those living in each area to provide feedback.

Invitations were posted to a sample of households drawn from the UK postcode database (PAF) in each area. In the main, the invitations encouraged recipients to follow a link to an online survey. However, there was an option to request a paper questionnaire if preferred.

In order to ensure coverage of those without access to the internet, paper questionnaires were targeted to older households (estimated from CACI data) and those in the lower IMDs. As such, there was a subset of the recipients who received a paper questionnaire at the first invitation.

The invitation asked the person who opened the letter to respond on behalf of their household.

2.1.2 Number of invitations

20,000 invitations were sent out in total:

- 17,000 pushed to online, with option to request a paper questionnaire if preferred.
- 3,000 included a paper questionnaire at the invitation stage.
- In all cases, there followed a first and second reminder.

2.1.3 Incentives

No incentives were provided. Kantar estimated a response rate of 10%, considering usual response rates for the ABOS method, the subject matter, the use of the Ofcom name on the invitation and the length of the questionnaire. The invitation is provided in Appendix A.

2.1.4 Fieldwork period

As the response rate was a little lower than estimated, Kantar allowed the field period to be extended by 2 weeks.

Invitations posted	24 January 2022
Original deadline for final responses	18 February 2022
Extended deadline for final responses	2 March 2022

3. Sampling

3.1.1 Overall Sampling Approach

20,000 invitations were sent out to the three areas within the Bilsdale Transmitter coverage area, with the aim of achieving 2,000 interviews in total – assuming a 10% response rate, a standard response using the ABOS methodology.

As the purpose of the study was to examine the responses among those people who had experienced a loss in service as a result of the Bilsdale Transmitter fire, the three areas were not sampled in proportion to their population size within the overall area covered by the transmitter.

The 'Not Spot' area was boosted so as to ensure there was a large enough sample to conduct analysis on a subgroup level. The views of this group were particularly important to capture due to the fact they were unlikely to have had any service since the fire.

The number of interviews within the overlap area with the Emley Moor transmitter was proportionately lower than its population size. It was hypothesised that householders in this area would have been impacted less than other areas given they could switch to the Emley Moor transmitter.

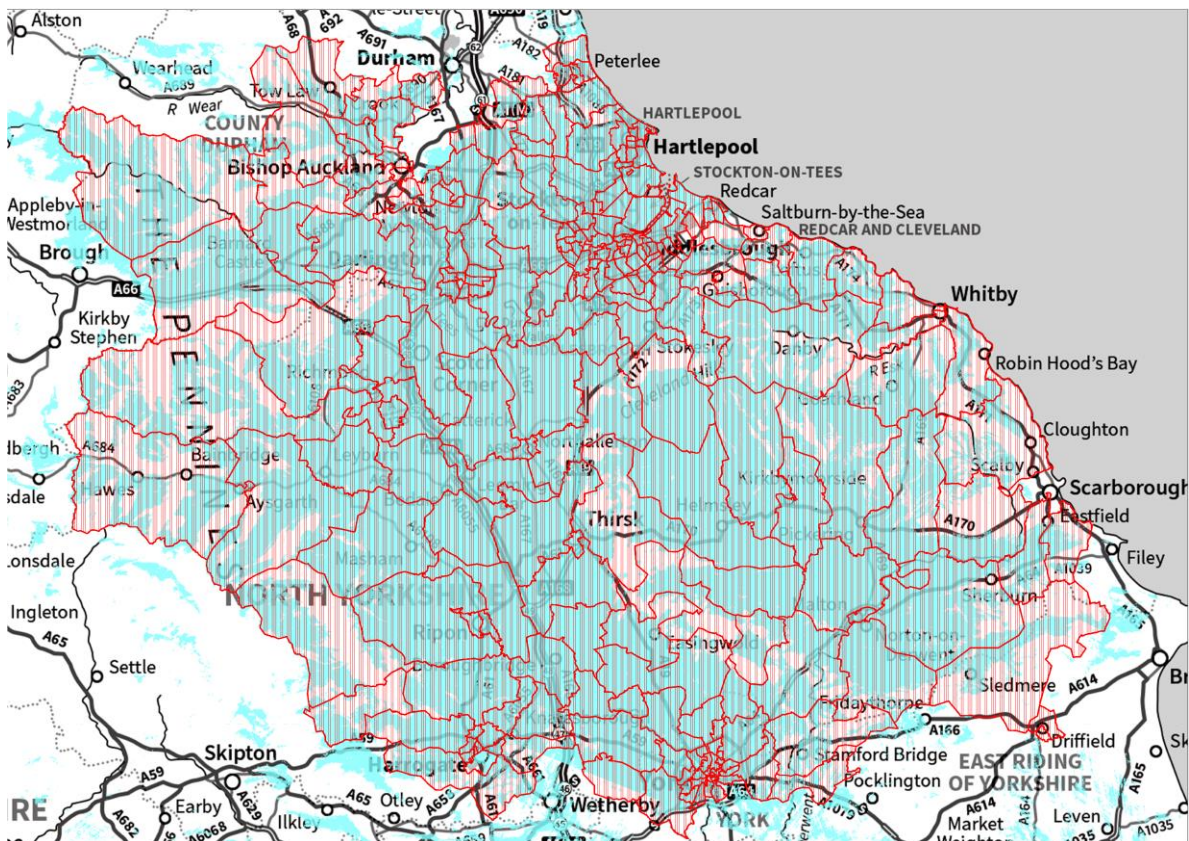
The Core Bilsdale area sample accounted for 55% of the overall sample.

	Sample split	Total invites	Projected 'target' interviews
Core Bilsdale area	55%	11,000	1,100
Emley Moor Overlap area	12%	2,400	240
'Not Spot' area	33%	6,600	660

Ofcom provided the postcodes which fell into each of the areas and Kantar drew sample from the PAF, taking into account the overall proportions of each postcode within each regional grouping.

3.1.2 Core Biltsdale Transmitter Area

A map of the core Biltsdale transmitter area, shaded in blue – provided by Ofcom.

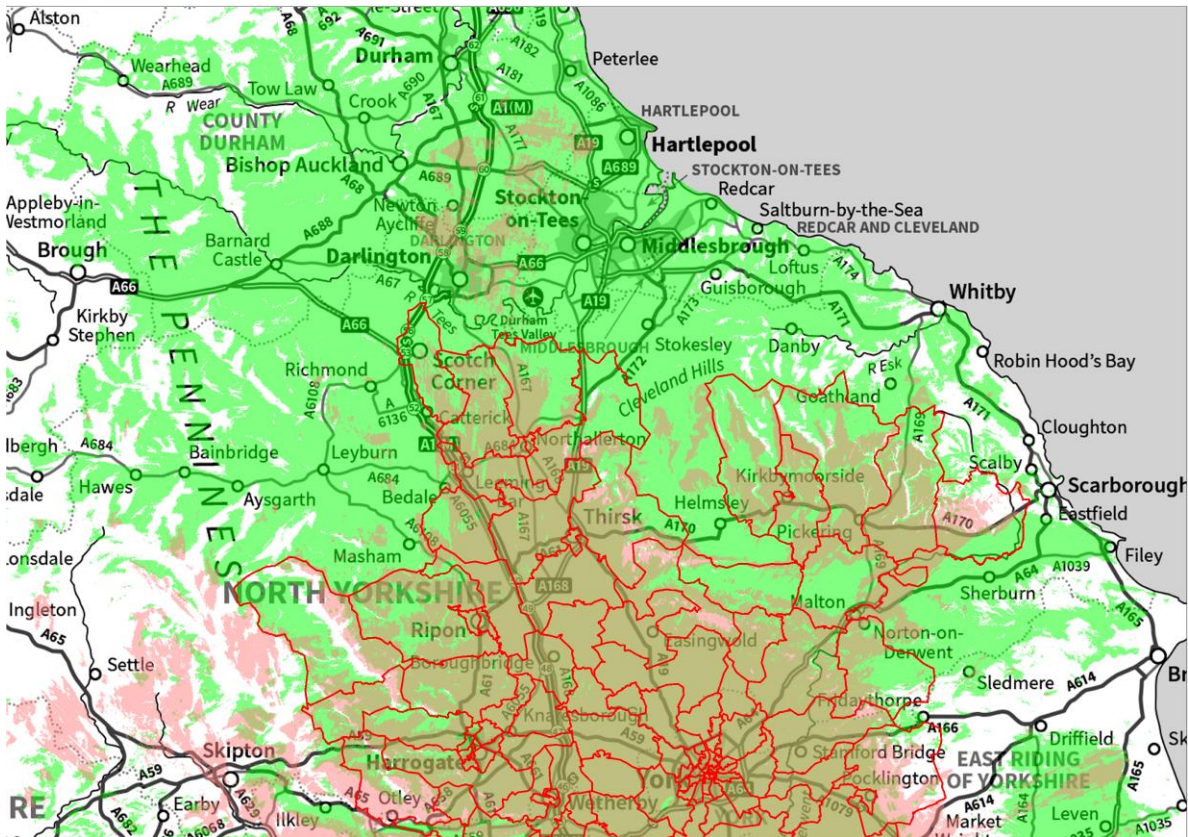


Here is a detailed breakdown of the mail out to major towns within the area.

11,000 invitations		Mail Out %	
Stockton-on-Tees	17	Bishop Auckland	5
Darlington	13	Peterlee	3
Hartlepool	10	Barnard Castle	2
Middlesbrough	12	Malton	1
Billingham	4	Yarm	1
Crook	3	Thirsk	1
Newton Aycliffe	3	Durham	3
Richmond	1	Ferryhill	2

3.1.3 Overlap Area with Emley Moor Transmitter

A map of the area assumed to be able to access the Emley Moor Transmitter – the area is shaded in brown. Provided by Ofcom.

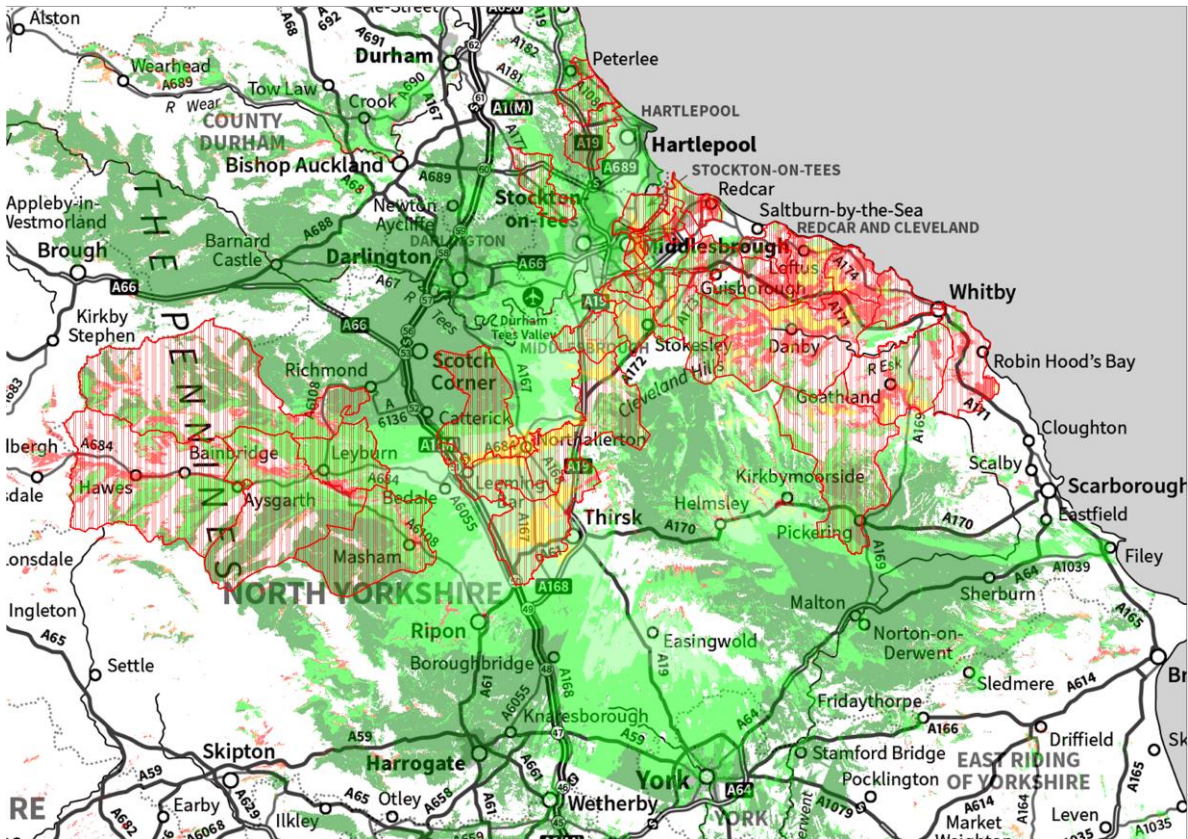


Here is a detailed breakdown of the mail out to major towns within the area.

2,400 invitations	Mail Out %
York	60
Ripon	6
Harrogate	16
Northallerton	3
Malton	3
Pickering	2
Bedale	1
Knaresborough	5
Thirsk	2
Richmond	1

3.1.4 'Not Spots' Area

A map of the area assumed to have no service since the Bilsdale transmitter fire in August 2021– the area is shaded in red. Provided by Ofcom.



Here is a detailed breakdown of the mail out to major towns within the area.

6,600 invitations		Mail Out %	
Middlesbrough	35	Guisborough	5
Northallerton	7	Yarm	1
Whitby	8	Peterlee	3
Leyburn	4	Thirsk	1
Saltburn-by-the-sea	11	Ripon	1
Redcar	13	Hawes	1
Hartlepool	5	Stockton-on-Tees	1
Pickering	2	Richmond	1

4. Response Rates

4.1.1 Response rate by area

The response rate to the survey was 8.8% overall, which was a little lower than Kantar had estimated.

The response rate by area fell out as follows:

	Total invites	Interviews achieved	Response rate %
Total	20,000	1,757	8.8%
Core Bilsdale area	11,000	898	8.2%
Emley Moor Overlap area	2,400	180	7.5%
'Not Spot' area	6,600	679	10.3%

5. Sample profile and Weighting

5.1.1 Demographic profile by area

The demographic profile of householders was similar across the areas:

	Total	Core Bilsdale Area	Overlap Area	Not Spots Area
Base:	(1757)	(898)	(180)	(679)
16-39 years	6%	6%	8%	6%
40-69 years	52%	53%	46%	51%
70+ years	41%	40%	46%	42%
Average Household size	2.1	2.1	2.0	2.1

When examining the demographic profile there are a number of things to remember about the approach, particularly when reviewing the age profile, which has skewed older for this study.

- All respondents were responding on behalf of their household, rather than as individuals.
- All households taking part in the survey, had lost service in August 2021.
- Householders self-selected to take part in the survey

As such the survey cannot be used to size the number of households within each area who were affected by the loss of the Bilsdale Transmitter.

5.1.2 Regional profile – Overall

The number of achieved interviews fell out very much in line with the mail out percentages in both the Core Biltsdale and 'Not Spot's areas. In the Overlap area with the Emley Moor transmitter, interviews achieved did not fall in line with the mail out – there were less surveys completed in York and more achieved in Ripon, Northallerton and Malton compared to the sample send out.

5.1.3 Regional profile – Core Biltsdale Area

	Mail Out %	Achieved %		Mail Out %	Achieved %
Stockton-on-Tees	17	21	Bishop Auckland	5	3
Darlington	13	16	Peterlee	3	3
Hartlepool	10	9	Barnard Castle	2	2
Middlesbrough	12	7	Malton	1	2
Billingham	4	5	Yarm	1	2
Crook	3	4	Thirsk	1	2
Newton Aycliffe	3	4	Durham	3	2
Richmond	1	4	Ferryhill	2	2

5.1.4 Regional profile – Overlap Area with Emley Moor Transmitter

	Mail Out %	Achieved %
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

5.1.5 Regional profile – ‘Not Spots’ Area

	Mail Out %	Achieved %		Mail Out %	Achieved %
Middlesbrough	35	36	Guisborough	5	3
Northallerton	7	13	Yarm	1	2
Whitby	8	8	Peterlee	3	2
Leyburn	4	7	Thirsk	1	2
Saltburn-by-the-sea	11	7	Ripon	1	1
Redcar	13	6	Hawes	1	1
Hartlepool	5	5	Stockton-on-Tees	1	1
Pickering	2	3	Richmond	1	1

5.1.6 Weighting

There was no weighting applied to the sample. Given the focus of interest was households who had experienced disruption to their TV service, within a small population area, it was not appropriate to weight.

Appendix A – Invitation



Riverside House,
2a Southwark Bridge Rd,
London,
SE1 9HA

The Resident(s)
Street name
Town
County/Country
Postcode

The Bilsdale Transmitter Fire

On 10th August 2021, a fire caused serious damage to the transmitter site at Bilsdale in North Yorkshire, resulting in the loss of radio and television services to some households in your area.

Ofcom wishes to hear back from those households who lost some or all of their television broadcast services (Freeview) in August last year. We want to understand how you have been impacted by the transmitter failure over the last few months.

The survey is being administered by Kantar, an independent research organisation, working on our behalf.

Taking part is easy. Simply go online to <http://www.bilsdale-transmitter-study.com/> and log in using the reference number and password details provided below. We ask that the person who opens the letter responds on behalf of their household.

Household login

Reference No: 1234
Password: xxxxxxxx

The closing date for this survey is **Friday 18th February** and should take no more than **12 minutes** to complete.

You can complete the survey in any location with internet access and on a desktop computer, laptop, tablet or mobile phone.

I hope you enjoy the survey and the opportunity to express your thoughts and opinions on the impact of the Bilsdale Transmitter incident. The results will enable Ofcom to advise broadcasters how to better handle this type of incident in the future.

Yours faithfully,

Deborah McCrudden
Director of Market Research
Ofcom

This study is being carried out on behalf of Ofcom by Kantar, an independent research organisation. If you would like to talk to someone about the study or if you require a postal version of the questionnaire, please contact **Kantar** between 9am-5pm on Monday to Friday, via the email address below.

✉ Bilsdaletransmitter@kantar.com ☎ Information line: 0800 046 9809