



**Safeguarding Britain's Social Resilience:
The Critical Role of Terrestrial Television**

**digital
poverty
alliance**

Contents

1. Forewords

- Elizabeth Anderson
- Professor Ted Cantle

2. Introduction

3. Executive Summary

- Key Stats

4. Methodology Summary

5. Recommendations

6. Section 1: Terrestrial TV and Resilience

- Social Resilience and its Value
- Terrestrial TV versus IPTV

7. Section 2: The Pillars of Social Resilience

- Community: Digital Inclusion and Terrestrial TV Beyond 2035
- Reliable and Simple Access to Information
- Trust: Terrestrial TV is Trusted in the Hybrid Media Landscape

8. Final Remarks and Recommendations

- Conclusion
- Recommendations

9. Appendix

- Full Methodology

In partnership with:

The Digital Poverty Alliance | Broadcast 2040+ Coalition | Dr. Gregory Asmolov | Professor Ted Cantle CBE DL



“The digital world is increasingly making more vulnerable people isolated – making [IPTV] the only option would be negative for Great Britain.” - Michelle

Foreword:

Elizabeth Anderson

A socially resilient society is one where everyone can take part in national life and enjoy rich cultural experiences, regardless of their income or technical skill level.

Most of us take for granted that when we want to catch up on the news, relax with a soap or share in a big national event like the Coronation, we can simply switch on our television and tune in. In recent years, the TV watching experience has become more varied and complex, with smart TVs connected to the internet. This offers, for those who can afford it, a plethora of ways of watching – from streaming apps and firesticks to subscription packages. One thing has guaranteed that UK TV remains a universal service: terrestrial television. It is a pillar of the UK's social resilience.

As this new report demonstrates, for the millions of people living in, or at risk of, digital poverty, free-to-air terrestrial TV – television services delivered to your home for free via an aerial – is a lifeline. It reaches over 98% of homes across the UK through the airwaves, with no need for a high-speed fixed broadband subscription or the latest smart tech. Its simple interface makes it inclusive of all skill levels. It provides quality and choice at no additional cost to viewers beyond the annual license fee. All this makes it a daily essential for those living with digital poverty. It also provides reassurance for millions more, who can currently afford a monthly broadband or streaming bill, but know if they need to tighten their belts, they won't be cut off from the social and cultural life of the UK. Terrestrial TV is there for them. When services move online only, households and families can be – and are – cut off from them, from education to healthcare.

Protecting our social and national resilience by maintaining a choice of how we watch TV, with a strong ongoing role for universal, free-to-air terrestrial television alongside more expensive and complex streaming options, is about ensuring that millions more people do not fall the wrong side of the digital divide. The ambition for more people to enjoy the benefits of access to the internet is the right one, and one the Digital Poverty Alliance champions. What would be unconscionable, however, is to use any threat of the removal of the terrestrial TV service as a coercive stick with which to force people to take on new and unwelcome financial burdens simply to continue being connected to shared televisual experiences. The millions of people who watch terrestrial TV every day as their preferred mode of TV viewing deserve more respect than to be treated in that way.

As policymakers look to the future of UK television, it is essential they grasp that reality. As this report shows, the health and resilience of our society depends on everyone having access not just to trusted sources of news and information, but also to shared national and cultural moments. Terrestrial TV underpins that social resilience. **That is a priceless asset which we lose at our peril.**



Elizabeth Anderson,
CEO of the Digital Poverty Alliance

Professor Ted Cantle CBE DL

It is an honour to write in support of this important report on the social value of terrestrial television. The research it contains reinforces what I have learned throughout my career, that fostering community cohesion in support of social resilience in our communities is vital.

In August 2001, I was appointed by the Home Secretary to chair the Community Cohesion Review Team (CCRT) and investigate the causes of summer disturbances in northern towns. These events exposed deep socio-economic inequalities and cultural divides. The resulting report, *Community Cohesion: A Report of the Independent Review Team*, introduced “community cohesion” to the UK Government, promoting a society built on mutual respect and shared understanding.

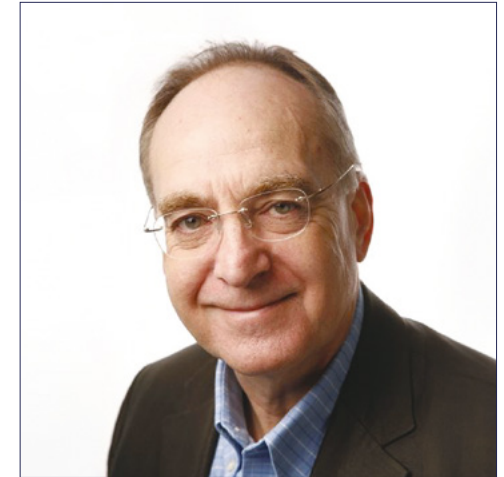
Two decades on, the challenges we face today are even more complex, amplified by the role of unregulated social media and the echo chambers they create. We now hang on the precipice of deepening divides that threaten our nation’s social fabric. To counter this, we must unite to foster connection, acceptance, and resilience across Britain. Social cohesion and resilience are inextricably linked—when communities fracture, the resilience of a society is fundamentally compromised.

This report comes at a critical juncture. Will we be a resilient society built on inclusion, where every citizen, regardless of income, skills, or location, has access to reliable information and a shared community experience? To ensure this, we must make efforts to preserve those services that work to overcome fragmentation and marginalisation, including those who cannot afford digitalisation, those who lack digital literacy, and those who live in rural or underserved areas.

Terrestrial TV remains one of the few truly universal services, creating ties that bind us and cement our nation’s cohesion. Despite our differences, we are united when we gather with our families to watch the Royal Christmas Message, cheer for our athletes at the Olympics, or tune in to vital government updates that impact all of our lives. These shared moments create a sense of unity, bridging divides across regions, income levels, and generations.

This report has strengthened my faith in our ability to bridge divides. Protecting terrestrial TV is not just about safeguarding a broadcast service — it is about protecting a lifeline for millions of families and individuals, particularly during challenging times. Phasing out terrestrial TV would leave vulnerable communities at risk of exclusion, stripping them of a service they rely on. Such a move would not only widen the digital divide but represent a step backward for Britain.

I have always believed that cohesion is a basic requirement for a healthy society; we need to be able to live together. Cohesion is the bedrock of resilience, and resilience is what allows us to meet challenges, adapt, and thrive as a nation. I am encouraged by this report’s recommendations to protect terrestrial TV. It is not merely a service — **it is a cornerstone of our shared identity and an essential pillar of social cohesion and resilience in the UK.**



Professor Ted Cantle CBE DL

Introduction

Like many democracies, Britain faces mounting external threats - from geopolitical instability to climate change. Meanwhile, its social fabric faces unprecedented challenges through growing political polarisation, high inequality, and widening digital divides.

Against this backdrop, the concept of '**Social Resilience**' - a community or nation's ability to respond to external changes - is gaining renewed attention as threats to our social bonds increase.

These bonds, which include the shared experiences that foster understanding, trust, and cohesion, are essential to maintaining a healthy and unified society. From gathering to watch significant national moments on television to staying informed about local events, these common connections help us to navigate crises together and strengthen the sense of belonging that underpins social life. Social resilience emphasises that no matter the challenges that face us, everyone, no matter who they are, can continue to take part in and access these connections.

At the heart of social resilience is the ability to stay informed and connected. Shared experiences foster trust and community cohesion, enabling societies to weather crises and adapt to change. Terrestrial TV - the TV received to your house via an aerial on your roof - plays a unique role in resilience, and this report demonstrates why its protection is crucial to resilience.

Scholars have identified multiple critical challenges to the UK's social resilience, including:

- **Political polarisation:** The deepening divisions in political discourse have eroded trust in institutions and fractured community cohesion.¹
- **Income and wealth inequalities:** Economic disparities remain high and growing, and cost-of-living has placed more economic pressures on individuals and communities, leaving vulnerable populations further marginalised and limiting their access to resources and opportunities necessary for resilience.²
- **The rise of social media and its algorithms:** Social media and its algorithms have amplified the spread of misinformation, creating echo chambers that distort reality, deepen divisions, and diminish trust in reliable information sources.³



Social resilience refers to the capacity of individuals and communities to adapt, endure, and recover from adversity while fostering positive relationships and maintaining cohesion. This concept extends beyond immediate recovery from crises, emphasising the importance of ongoing community development and preparedness between events.

The importance of social resilience in the UK has long been recognised. A landmark 2001 report by Professor Ted Cante, who contributed the foreword to this report,⁴ examined the root causes of summer disturbances in northern towns and cities in the summer of 2001 and guided the government's response. Subsequently, the concept of 'community cohesion' became ingrained as a policy framework within the UK. It pointed to the increasing 'depth of polarisation' and communities living without communication between them, highlighting the importance of maintaining national connection.

Two decades later in 2022, Cante published a follow-up report⁵ that identified new threats to this community cohesion. His analysis linked these threats to the rise of social media, finding that its unchecked power to shape popular views poses serious risks to cohesion and connection. These findings reinforced the continuing importance of maintaining an effective 'shared society'.

Now, this report finds that social resilience faces even greater challenges. In particular, as the government considers the future of terrestrial TV, the importance of social resilience takes on new urgency, as it is one of our last truly universal services as defined by the ability for all audiences in the UK, regardless of finances or background, to be able to access a broad range of content.⁶ At a time when digital exclusion affects millions – nearly one in four individuals in the UK⁷ – and shared experiences become increasingly rare,⁸ terrestrial TV's role in maintaining social resilience remains critical. This infrastructure, which reaches 98% of UK homes and is able to be universally accessed, provides not just entertainment but a vital foundation for community cohesion and social bonds – precisely the elements that are deemed essential for a resilient society.

In studying social resilience, scholars, supported by new research, emphasise that universal media access through services like terrestrial TV is essential to bolstering the UK's increasingly fragile social resilience. By ensuring that everyone—regardless of location or socioeconomic status—can access reliable, trustworthy, and regulated content, universal accessibility provides many benefits: fostering community cohesion, ensuring effective communication during crises, and supporting the functioning of a healthy democracy.⁹

Critically, digital poverty – a growing crisis in the UK that is affecting between 13 and 19 million¹⁰ people – makes universal accessibility through traditional systems such as digital terrestrial television all the more vital. Digital poverty, defined by the DPA as "the inability to interact with the online world fully, when where and how an individual needs to,"¹¹ is measured by an individual or household meeting the criteria of having a lack of devices, limited internet access, or insufficient digital skills.

Many households, particularly in economically disadvantaged or digitally excluded communities, cannot afford broadband or subscription-based services, making terrestrial TV the cost-effective and accessible form of information and community connection for millions. This universal accessibility distinguishes the UK from countries with fragmented, subscription-driven, or social media-reliant systems, which lack the benefits universal media provides.



“When the WiFi goes down, [Terrestrial TV] is there as a backup for me. What happens if there is a bigger outage, and people need to access information?” – David

Executive Summary

This report finds that terrestrial TV stands as the key guarantor of the UK's universally accessible TV services. Through its infrastructure, terrestrial TV uniquely builds resilience in a way that cannot be replicated by a transition to an all-online world or to broadband-supported TV. It is crucial in supporting social resilience through three key pillars identified by scholars which will be detailed in sections to come: community, reliable and simple access to information, and trust.

At its very foundational level, terrestrial TV's infrastructure is critical for its universality, providing a simple and affordable way for everyone to access information and media. This is especially vital in the context of digital poverty. Terrestrial TV serves as a lifeline, ensuring access to reliable and trustworthy content without the financial or technological barriers of online systems. The transition to an online-only world, as some have optimistically proposed, is not just impractical—it is exclusionary. The reality of digital poverty makes it extremely unlikely that such a transition could succeed. Terrestrial TV's mechanism of delivery is pivotal to ensuring resilience and inclusion, safeguarding access for the most economically vulnerable in society.

Terrestrial TV infrastructure therefore needs urgent protection

Terrestrial TV's infrastructure is under threat, leaving populations and communities at risk of digital exclusion and loneliness, removing the safeguard terrestrial TV provides for families who are or will experience economic difficulties, whilst threatening to undermine the pillars of social resilience that underpin and strengthen British society.

Crucially, 97% of the British public *do not* believe that support for the transition to internet-based television should be a priority for government spending, and many were unaware (69%) that its future was even at stake.

These findings underscore the need for urgent action to protect terrestrial TV infrastructure, which is widely recognised as universal and essential to the nation's social resilience. Nearly three-quarters of respondents (73%) agree that safeguarding terrestrial TV is a critical priority to ensure equitable access to information, foster community cohesion, and maintain trust across the UK.



What people say

“The digital world is increasingly making more vulnerable people isolated – making [IPTV] the only option would be negative for Great Britain.” – Michelle

“It is valuable in British society and in my life as well.” – Carrie

“I only think of positives when I think of [terrestrial TV]; I have watched it all my life, and because of it, I feel like I was born here.” – Sara

Nationally Representative Survey of the Public: Key Stats



84%

say that terrestrial TV is important for national unity and bringing the UK together.



69%

of citizens indicated they were unaware the future of terrestrial TV is under consideration.



73%

of people believe that terrestrial TV should be protected well beyond 2035.



55%

of people found that watching live British events and programming increases a sense of connection, rising to 65% among 18–24-year-olds and 67% for 25–34-year-olds.



90%

say that terrestrial TV is pivotal for ensuring that people who can't afford more expensive TV subscriptions can access information and entertainment.



75%

of citizens agree that the availability of free-to-air terrestrial TV helps reduce loneliness or isolation; 87% of those aged 65+ affirm this.

Nationally Representative Survey of the Public: Key Stats



70%

of the public feel reassured knowing that terrestrial TV is available as a fallback option.



96%

of the UK population trust terrestrial TV as a source of accurate and impartial information, compared to significantly lower trust levels for social media platforms, and 61% are more likely to turn to terrestrial TV when they want reliable, simple access to information.



97%

of individuals do not believe that support for the transition to internet-based television should be a priority for government spending.



Findings:

Research through large-scale polling and focus groups resulted in five key takeaways:

- **Terrestrial TV is uniquely positioned to provide universally accessible, reliable, and trustworthy content:** Reaching over 98% of households in the UK, our research shows that over half (61%) of individuals in the UK find terrestrial TV easier to navigate than streaming services, underscoring its role as an accessible and reliable source of information for all. It has earned public trust for its regulation and commitment to delivering accurate, impartial content, with 96% of those who access its news trusting the information it provides.
- **The digital divide, exacerbated by digital poverty, makes terrestrial TV a critical safety net for millions of UK households:** 70% of the British public feel reassured knowing that terrestrial TV is available as a fallback option, especially in times of crisis or when they cannot rely on more complex digital solutions. This is crucially echoed by 57% of people who indicate they don't currently watch terrestrial TV, highlighting its universal appeal and role as a safety net, offering peace of mind across diverse groups.
- **Terrestrial TV fosters and builds community bonds through a simple, universal method in a way that cannot be replicated by online platforms:** 84% say that terrestrial TV is important for bringing the UK together; terrestrial TV fosters community cohesion by offering a universally accessible service that connects people, particularly through national events (e.g., the Royal Wedding, major sporting events) and local news.
- **Without intervention, the loss of terrestrial TV would lead to increased social isolation, loneliness, and a diminished sense of belonging:** Our research shows that 75% of individuals agree that terrestrial TV helps reduce loneliness and isolation, particularly for vulnerable groups. Notably, 87% of individuals aged 65+ value terrestrial TV for its role in keeping them connected, showcasing its importance for older generations and those at risk of social exclusion.
- **Cost-effective television is vital for communities – which terrestrial TV provides:** At the point of consumption, terrestrial TV is free to watch – something that is critical for inclusion. 70% of respondents state that having access to affordable television is either extremely or very important to their day-to-day lives, and of those who use terrestrial TV, 57% highlight that terrestrial TV has the advantage of being cost-effective over other forms of watching TV.

Methodology: Summary

One nationally representative survey aimed to gather insights from 2,005 members of the UK public through an online survey and 20 participants in focus groups.

Our survey was nationally representative of age, gender, NUTs 1 region, personal income, measures of digital poverty, and internet use at home. The sampling frame is based on the latest data from the Office for National Statistics (ONS).

Two further surveys were distributed to groups who are experiencing digital poverty – respondents received physical and email copies of the survey.

Sampling procedure

- **Target Population:** Residents of the United Kingdom.
- **Sampling Frame:** Derived from the latest ONS data.
- **Sample Size:** 2005 respondents.
- **Sampling Method:** Stratified random sampling using online modes.

Data collection:

- **Data Collection Method:** Mixed-mode approach (paper and online).
- **Quota Setting:** Quotas were established based on ONS data for each demographic category.
- **Data Collection Period:** 4th December to 20th January 2025

Weighting procedure:

- **Weighting Variables:** Age, gender, NUTs 1 region, education, personal income, and internet use at home.
- **Weighting Method:** Post-stratification to align the sample with the known demographic distribution

For full details please see page 41





“You know all your friends are watching a programme at the same time – without this, there’s no warmth and no community.” – Nadia

Recommendations

This research highlights the critical role of Terrestrial TV in bolstering social resilience and its enduring importance in the daily lives of people across the UK. Our key finding reveals that the majority of respondents (73%) believe Terrestrial TV must be safeguarded well beyond 2034 to ensure a resilient, connected society.

As such, we are recommending to Government a four-point plan to protect the UK's social resilience:

- 1. Provide a clear commitment to the protection of Terrestrial TV services well beyond current commitments, including the extension of licences to safeguard terrestrial TV and the broadcast services it delivers.**
- 2. Acknowledge the role of terrestrial TV in supporting the UK's social resilience, recognising its unique capacity to provide universal access to trusted information, foster community through shared experiences, and act as a vital safety net for those at risk of digital exclusion.**
- 3. Require Public Service Broadcasters (PSBs) to sustain universal broadcasting via terrestrial TV, with a clear commitment in the next BBC Charter period.**
- 4. Prioritise the voices of listeners, particularly those facing digital poverty or exclusion, in government and Ofcom decision-making processes, including safeguarding the true essence of universality, ensuring that services are accessible to all, regardless of income or location.**

Armed with a clear understanding of public sentiment and the evidence presented in this research, there are significant opportunities for policymakers to act decisively to protect terrestrial TV and its critical role as an infrastructure that has universal access and reach, one that provides a foundation for the pillars of social resilience.

As this report demonstrates, ensuring media legislation supports and protects terrestrial TV, which is universally accessible and free to use from the point of consumption, is a priority for the British public. Its infrastructure is a lifeline for millions, particularly those experiencing digital poverty who rely on Terrestrial TV to access vital news, information, and entertainment without the barriers of broadband costs or digital intensity challenges.

The Digital Poverty Alliance (DPA) has long advocated for those excluded by the digital divide, particularly low-income households, rural communities, and individuals unable to access or afford online services. Policymakers and regulators must listen to these voices as they consider the future of media services. By protecting terrestrial TV, we ensure that those most vulnerable to exclusion remain connected, informed, and supported, strengthening the bonds between us all. We ask that policymakers and regulators strive to include these voices as they review current commitments in the media landscape.



“TV is part of our national identity and who we are. Cost should never be an issue with something that bonds us all together, like the NHS or sport.” - David

Section 1: Terrestrial TV and Resilience

Terrestrial TV has long been a cornerstone of the UK's media landscape, providing universal, reliable, and cost-effective access to information and entertainment for millions of households – a service that over half of UK households (52%) enjoy, and 17% depend on.¹² As the UK transitions further into the digital age for aspects of life from media to public services, questions surrounding the future of terrestrial TV have emerged, with discussions about its potential phase-out raising significant concerns about the implications for social resilience, digital inclusion, and community cohesion.

This report explores the critical role that terrestrial TV plays in ensuring universal access to trusted information, fostering community identity, and bridging the digital divide at a time when digital poverty and social fragmentation are becoming increasingly pressing issues. Based on comprehensive surveys and focus groups, the findings offer valuable insights into how individuals and communities rely on terrestrial TV for news, entertainment, and a sense of connection.

The research also examines public sentiment toward the future of terrestrial TV and highlights the importance of protecting this service to maintain social resilience, particularly for vulnerable populations who face barriers to digital access. As we navigate the challenges of a rapidly evolving media landscape, this report underscores the need to preserve Terrestrial TV as a universal, inclusive, and accessible platform that supports the well-being of individuals and the cohesion of communities across the UK.

1.1 The State of Social Resilience in the UK

Defining Social Resilience

Social resilience is a crucial element of British society. Over the past decade, global developments have tested the UK's resilience of withstanding and adapting to changes. Time and time again, the UK has demonstrated its strength by responding with unity. However, changes to the landscape of our society threaten to form fractures and undermine the foundation that makes Britain the strong society we are.

Social resilience refers to the capacity of individuals and communities to adapt, endure, and recover from adversity while fostering positive relationships and maintaining cohesion. As defined by scholars, it can be understood as "an attribute (e.g., ability or capacity), a process, and/or an outcome associated with successful adaptation to, and recovery from, adversity".¹³ This concept extends beyond immediate recovery from crises, emphasising the importance of ongoing community development and preparedness between events. On an individual level, this means that when tested with challenges, everyone has a safety net they can defer to to support their recovery from adversity.

Similarly, Cacciopo (2011), a prominent contributor to the field of resilience, highlights that social resilience is "the capacity to foster, engage in, and sustain positive relationships and to endure and recover from life stressors and social isolation."¹⁴ Adger (2000) further notes that in the context of crises, resilience is the ability of groups to cope with external social, political, and environmental stresses.¹⁵ Thus, social resilience is both a protective mechanism during crises and a foundational component of everyday community strength and stability.

The Growing Importance of Social Resilience

In the context of modern UK society, social resilience has become increasingly critical. The rapid pace of change, compounded by growing inequality and the fragmentation of traditional community structures, has exposed vulnerabilities within the social fabric. This dynamic environment requires not only the ability to recover from crises but also a readiness to adapt and transform in response to emerging challenges.

Current Threats to Social Resilience

There are several factors undermining social resilience in the UK today as outlined previously: Political polarisation,¹⁶ income and wealth inequalities,¹⁷ and the rise of social media and its algorithms.¹⁸ These elements which are shaping our social landscape make the work of preserving community bonds and resilience evermore urgent – and terrestrial TV is a keystone of this in a media context.

The Pillars of Social Resilience

To safeguard and strengthen social resilience, three interconnected pillars must function together.

- 1. COMMUNITY:** Resilience is deeply tied to the sense of belonging, cohesion, and solidarity within a community. Community resilience is not only tested during crises but also nurtured in everyday life, creating bonds that enable collective action and mutual support. Terrestrial TV is critical for fostering community by providing universally accessible programming that brings people together, whether through national events, local news, or classic British shows. These shared experiences create a sense of belonging and understanding, which are essential to building and maintaining community ties.
- 2. RELIABLE AND SIMPLE ACCESS TO INFORMATION:** Access to trustworthy information is essential for preparedness and informed decision-making. There must be a straightforward, universal, and cost-effective means of delivering accurate information to all segments of the population, including those without access to high-speed internet or digital devices. This ensures that even the most vulnerable individuals can stay informed and connected, particularly when national and individual challenges arise, and that no one is ever excluded from key cultural moments that generate our unifying bonds. Terrestrial TV is critical by providing a simple, universally accessible, and cost-friendly infrastructure to access information. Terrestrial TV does not involve hurdles that some are unable to overcome, such as the barrier of having to log in to IPTV, or the cost of broadband.
- 3. TRUST:** Trust is the cornerstone of resilience, underpinning relationships within communities and between individuals and institutions. Reliable, regulated information sources play a critical role in building and maintaining this trust, especially during a time of misinformation and sensationalism prevalent on social media platforms. Terrestrial TV provides a straightforward user experience, delivering regulated and reliable access to content. As such, there is a demonstrated higher trust in it as a platform.

As Aslam Saja et al. (2021)¹⁹ argue, resilience should not only be viewed as a response to isolated crises but as an ongoing process that strengthens communities between events. Similarly, Alexander (2013)²⁰ emphasises that resilience involves transforming social systems rather than simply returning to a previous state. Terrestrial TV, through its universal reach and trusted content, plays a pivotal role in supporting this transformation—nurturing community cohesion, sustaining trust, and ensuring equitable access to information in an increasingly polarised and digitalised world.

Terrestrial TV underpins these pillars of resilience in a way that cannot be replicated in a digital world – it is terrestrial TV's infrastructure that uniquely enables its capacity to build resilience. By delivering information and entertainment in an accessible, cost-effective, and reliable manner, terrestrial TV fosters resilience by ensuring that communities remain informed and connected. Crucially, it bridges the gap for those most vulnerable to digital exclusion, providing a vital lifeline for accessing trusted news, cultural content, and entertainment without the barriers posed by high-speed broadband or complex online platforms.



What people say

“You know all your friends are watching a programme at the same time – without this, there’s no warmth and no community.” – Nadia

“[Terrestrial TV] gets you talking to your peer groups about what you’ve been watching.” – Joanne

1.2 Terrestrial TV Versus IPTV: Why Terrestrial TV is a Must

Throughout its history, terrestrial TV has played a vital role in providing local and national news, ensuring that all members of society—regardless of socio-economic status or geographic location—have access to reliable, impartial, and regulated information, and in turn, our national and cultural life. Recent reviews of terrestrial TV that threaten its future in the UK claim that the content it supports can be accessed on Internet-Protocol Television (IPTV), a form of a “Smart TV”. However, this overlooks that terrestrial TV and IPTV represent two distinct models for delivering content, with key differences that have critical implications for social resilience and digital inclusion. This section details terrestrial TV and its crucial differences compared to IPTV, its internet-supported alternative.

Terrestrial TV operates through terrestrial signals received by aerials that require no internet connection, making it accessible to all households with an aerial and a television. In contrast, IPTV relies on high-speed broadband to deliver content, which introduces both technological and economic barriers. For many UK households, particularly those in rural areas or on lower incomes, these barriers make IPTV an impractical and exclusionary alternative to terrestrial TV. Its higher barriers to access mean it cannot straightforwardly replicate the universality of terrestrial TV.

Terrestrial TV's Advantage for Digitally Excluded Groups

Unlike IPTV, terrestrial TV does not depend on costly, fixed high-speed broadband internet, ensuring that its services remain accessible to digitally excluded groups. This accessibility is crucial for households that cannot afford broadband or lack the digital literacy required to navigate complex online systems. Elizabeth Anderson, CEO of the DPA, shared her thoughts on how many people cannot make this switch, “As soon as you asked some people to log in, you’ve lost them.” The Older People’s Commissioner for Wales echoes these themes in 2024 research which emphasises that access is not the same as inclusion when it comes to the digital world. Their research also shows that a stark divide will continue to grow in terms of digital poverty and age and that people who have been digitally confident may begin to lose their skills as they age – through factors from visual impairments, to loss of dexterity, and to the mental load of learning new things, today’s middle aged confident digital users risk not being as equally confident digital elders.²¹



What people say

“It’s simple. My parents are 76 years old – they don’t have internet – they wouldn’t entertain digital at all. Using a smart tv remote is hard – it is too much for my parents. With a normal remote for [terrestrial] TV they know how to use it.” – Irene

“My daughter has a smart system and I don’t know how to use the remote.” – Marion

“When the WiFi goes down, [Terrestrial TV] is there as a backup for me. What happens if there is a bigger outage, and people need to access information?” – David

As the UK continues to grapple with widespread digital poverty, our findings highlight the prevalence of this challenge among renters and economically disadvantaged groups:

- 29% of those renting from housing associations or councils lack a device capable of handling complex tasks like filling out applications, compared to 14% of homeowners. For those who are unemployed, this figure rises to 32%, and for those unable to work, 36%.
- One out of every five (21%) people who rent from a housing association or council indicate that the cost of the internet is a barrier to accessing online services.
- Of those who rent and watch terrestrial TV, without terrestrial TV, one out of three (34%) would feel isolated, and one out of four (27%) would feel disconnected.

Research indicates that renting is becoming increasingly difficult yet remains the only option for many – and renters are overrepresented among the financially vulnerable.²² As a result, the financial barriers to accessing reliable internet and subscription services continue to grow, leaving many forced to make difficult choices about how to allocate their resources.

These groups are among those who are most vulnerable to exclusion or disconnection in the case of a terrestrial TV switch-off. For them, terrestrial TV is not just a convenience—it is a lifeline, offering reliable access to critical information and entertainment without the financial or technical barriers of broadband-dependent IPTV systems.

Finally, a significant challenge of moving entirely to IPTV is the cost burden it imposes on consumers. This transition would disproportionately affect low-income households,²³ exacerbating digital exclusion and social inequality.

The Impracticality of an All-IPTV Model

A move to eliminate terrestrial TV and transition to an all-IPTV system is impractical and exclusionary. High-speed broadband infrastructure is not universally available or affordable, particularly in rural areas where connectivity issues persist. Despite technological advances, broadband has dropped out in the past 12 months while watching TV for 41% of people. 52% of those who rent from a housing association or council say their broadband is unreliable, compared to 35% of those who own their house outright.

Terrestrial TV is not only reliable in the technical sense, but importantly, offers greater affordability in the case of tough financial times – the additional costs associated with IPTV place an undue financial burden on households already struggling to make ends meet, further widening the digital divide.



What people say

“The role of social media and digital platforms is strengthened when combined with access to terrestrial TV. It is inaccurate to view digital media as a replacement for terrestrial TV, as the convergence of different access forms can expand accessibility, reach more diverse audiences (especially in crises), and enhance the visibility of content that fosters community and mutual aid.”

– Dr. Gregory Asmolov

Cost Barriers and Real-World Impacts

IPTV inherently involves higher costs for consumers, including subscription fees and broadband expenses. Our findings show that nearly three-quarters (74%) of the public agree that terrestrial TV is pivotal for ensuring people who cannot afford expensive TV subscriptions can access information and entertainment. This underscores the vulnerability of relying solely on broadband-supported services for media delivery.



Case study

Broadband in the Cost-of-Living Crisis

In 2023, Citizens Advice research found that around a million households during the peak of the cost of living crisis between 2022 and 2023 had to terminate their broadband access as they could no longer bear this cost.²⁴ In the process, this ended any broadband-supported IPTV use. Our research corroborates that nearly a fifth (19%) of British individuals still worry about their ability to pay for their internet. Notably, 27% of renters from a housing or council association, 27% of parents or guardians, and, crucially, nearly a third (32%) of those who have a disability or chronic healthcare condition indicated they were worried about their ability to pay for their internet. These groups are especially vulnerable to disconnection and exclusion, attesting to the Citizens Advice findings that essential services are increasingly out of reach for many.

The same report also found that “people on Universal Credit were more than six times as likely to have disconnected compared to people not claiming Universal Credit”²⁵ – demonstrating that lower-income groups are especially affected by external factors and must have a safety net when these tough times come around. Our findings echo this: 70% of the public agree that they feel reassured that if they ever need it, terrestrial TV is a ‘fallback option’ to stay informed and connected.



What people say

“If you’re low income, broadband isn’t at the top of your list of priorities. It would be the first to go.” – Marion

“My mum had to cancel her TV subscriptions because it grew too expensive.” – Chloe

“Some people don’t have much money coming in and can’t afford subscriptions.” – Sara

“With these [TV] subscription prices going up all the time, it’s just not fair to some people.” – Michelle

1.3 The Role of Universal Media in Social Resilience

The media landscape in the UK today stands at a crossroads, on the brink of exclusion and fragmentation. Our hybrid landscape, combining both traditional and online platforms, offers many positives – including increased efficiency, rapid access to information, and diverse content options. However, there are many drawbacks, including an overwhelming amount of information present on online sources, identified by nearly half of individuals (47%), and an increase in conflicting information highlighted by the same amount (47%). This figure increases to 52% for the population who identify as having a disability or a chronic healthcare condition.

A lack of cohesion and shared understanding contributes to unrest – there is an urgent need to strengthen the social fabric of our communities. Further fragmentation of media systems risks exacerbating polarisation, weakening the connections and shared experiences that underpin social resilience.

Universality

Terrestrial TV is uniquely considered a near-universal service as it is able to reach over 98% of households,²⁶ which sets it apart from other platforms to access TV. This unparalleled reach distinguishes it from broadband-dependent platforms, which often face limitations tied to cost, technical proficiency, and regional availability. Universality is not just a feature of terrestrial TV—it is its defining strength, providing equitable access to information and entertainment – regardless of income, location, or digital intensity. Universal access and reach, provided by terrestrial TV, are two features that must come before something can be considered “universal” – which remains unattainable by the digital world.

Universal media ensures equitable access to reliable information and culturally significant content for all, regardless of income, location, or digital proficiency. It plays a vital role in fostering social resilience by maintaining trust, reducing isolation, and creating shared experiences that bind communities together.

Data from the survey underscores the value of terrestrial TV as a universal service:

- 71% of the public agree that the universal nature of terrestrial TV is valuable to society, and 49% attribute its value to its accessibility.
- 69% of people agree that without terrestrial TV, communities would face digital exclusion – seeing a genuine risk to the ties that bind us.



What people say

“Traditional and new forms of communication create a convergent system that relies on a complex network of relationships. Removing one element from this system could potentially disrupt the whole. Therefore, new media forms should not be seen as replacements for traditional forms, but rather as components of a complex hybrid media system that includes terrestrial TV.”
– Dr. Gregory Asmolov



“Some people don’t have much money coming in and can’t afford subscriptions.” - Sara

Highlighting the trust in terrestrial TV's universal appeal, 71% of respondents believe it will remain essential for future generations, particularly for those without digital skills or internet access, while 73% support maintaining terrestrial TV services well beyond 2035.

Some proposals seek to redefine universality, suggesting a model where making TV services or content solely online would suffice. However, this approach risks undermining the true essence of universality, which ensures that everyone—regardless of income, location, or access to broadband—can receive and benefit from these services. Universality must remain a principle of inclusivity and accessibility for all.

We urge the Government and regulators to uphold and protect this standard, resisting any attempts to dilute its definition or reach. Subtle shifts—such as withdrawing certain services or relegating them to online-only formats— set a precedent that risks eroding the foundations of universality and a system that currently unites millions.

The Risk of Fragmentation

Fragmentation of the media landscape, driven by a shift toward subscription-based and digital-only platforms, threatens the pillars of resilience that terrestrial TV supports. The survey reveals that 61% of respondents find terrestrial TV easier to navigate than streaming services, emphasising the importance of its simplicity and accessibility. A further 47% say they feel overwhelmed by the amount of conflicting information on digital platforms. Without the clarity and reliability offered by terrestrial TV, the public risks being further disconnected and fragmented in an already complex media landscape.

By providing universal, reliable, and affordable access to information and entertainment, terrestrial TV safeguards social resilience. Its ability to connect communities, reduce digital exclusion, and foster trust makes it a vital component of a cohesive and resilient UK society, particularly as digital and economic divides grow.

A key aspect of the existing media landscape is choice – no matter location, age, or income, individuals can decide how and where they access their TV content, and, even beyond, have the choice to switch should their preferences or circumstances change. Protecting terrestrial TV is not merely about preserving a broadcast service—it is about ensuring that no one is excluded in a rapidly changing media landscape. Terrestrial TV, as a universal service, underpins unity and cohesion – to take away this vital infrastructure would rend the fabric of our collective connection.

1.4 The Critical Role of Terrestrial TV

As outlined, terrestrial TV uniquely supports the pillars of social resilience—community, trust, and reliable access to information—in ways that no other platform or system of media delivery can replicate. While public service broadcasting is an essential component of the UK's media ecosystem, it is the infrastructure and delivery mechanisms of terrestrial TV that ensure these services remain accessible, equitable, and functional for all.

This report underscores why terrestrial TV is indispensable for Britain's social resilience, digital inclusion, and local communities. Currently watched by over 16 million households (approximately 60%), and the main platform for 10 million,²⁷ its value extends far beyond times of crisis; it is a daily lifeline that keeps millions informed, entertained, and connected. Terrestrial TV bridges digital divides by offering a free-to-air service that requires no high-speed broadband connection, a critical distinction in an era where digital exclusion is a growing concern.

A society that maintains universal, cost-free access to media through platforms like terrestrial TV is inherently more resilient than one that relies exclusively on subscription-based or broadband-dependent systems and transitions to a solely digital system. By safeguarding terrestrial TV, the UK ensures that no community is excluded, reinforcing the social cohesion and inclusivity essential for a thriving society.

Section 2: The Pillars of Resilience

Terrestrial TV is pivotal to supporting the social resilience that underpins Britain's strength and unity when facing external challenges – fostered by shared experiences that stitch our social fabric. The following sections will delve deeper into how terrestrial TV reinforces each key pillar of social resilience—community, reliable access to information, and trust—emphasising its unique capacity to connect the nation.

2.1 Community

Fostering Community Through Shared Media Access

Terrestrial TV plays an essential role in fostering community by providing access to content that connects individuals and strengthens social cohesion. National events, such as royal occasions, the Olympics, and World Cup matches, unite diverse audiences, creating shared experiences that transcend regional and socio-economic divides. Over half (58%) of citizens say that accessing television increases a sense of national community connection. Similarly, local news and programming offered through terrestrial TV reinforce regional identity, promoting a sense of belonging and cohesion within localised communities for 64% of the population.

75% say that the availability of free-to-air terrestrial TV, which enables shared media experiences, reduces social isolation.

By delivering free-to-air content that is easily accessible, terrestrial TV helps individuals stay connected to their communities and the broader world, fostering a sense of inclusion and purpose

Targeting Vulnerable Audiences Now and in the Future

Terrestrial TV is particularly critical for vulnerable groups at risk of digital exclusion, including older populations, low-income households, people with disabilities, and those who may lack the digital skills required to navigate IPTV-based platforms. For the three-quarters (75%) of individuals currently aged 55-64, who will age into their retirement years beyond the guaranteed timeframe of terrestrial TV, preserving this platform is vital, as online platforms, and the skills required to navigate them, are rapidly evolving.

These groups are unlikely to have their needs met by a transition to digital and IPTV-based streaming.

Survey data reveals:

- 92% of the public who identify as having a disability or chronic healthcare condition and watch terrestrial TV rely on it for information on important topics within the UK.
- 71% of those who identify as having a disability or chronic healthcare condition agree that without terrestrial TV, communities might experience digital exclusion, and 77% reinforce the idea that the availability of terrestrial TV services helps to reduce loneliness.
- Overall, 90% of people agree that terrestrial TV is valuable for ensuring that those who cannot afford expensive TV subscriptions can access information and entertainment.

Promoting Community Through Interconnectedness and Universality

Terrestrial TV's universality is a cornerstone of its community-building power. It is accessible to virtually all UK households, regardless of location or broadband availability, ensuring that no one is excluded from participating in shared cultural and informational experiences.

- **Reducing Disconnection:** For individuals at risk of loneliness, disconnection, or social isolation, terrestrial TV provides a vital connection to the world and their local community. Three-quarters (75%) of citizens say that the availability of free-to-air terrestrial TV helps reduce loneliness or isolation, while a further 80% of those who live in villages agree, and a striking majority (87%) of those aged 65+ affirm this as well, demonstrating that terrestrial TV is *pivotal* for the older generations.
- **Strengthening Identity:** Accessing British programming, live events, and local news fosters a sense of unity and belonging – 55% of people said watching British shows or events live increased their sense of British identity and made them feel more connected to their community. Crucially, this figure increases to 65% of young people aged 18-24 and 67% of those aged 25-34, demonstrating that building community ties are critical for younger generations who may find these cultural touchstones especially meaningful as they navigate a changing, fast-paced world.
- **Fostering cohesion:** Terrestrial TV's universal reach builds unity, connecting communities across the nation. This fosters and reinforces cohesion and enables collective responses to external changes – 61% believe that terrestrial TV is vital for national unity and bringing the UK together.



What people say

“It’s very important for everyone to have access to TV to stay in the community and be a part of it. [Terrestrial TV] makes TV accessible to low-income community and asylum seekers and refugees.” – Nadia

“To switch off [terrestrial TV] would increase isolation and loneliness, and would potentially worsen some people’s mental health.” – Joanne

Terrestrial TV is a necessary pillar for maintaining connected communities, especially as it is crucially free-to-air and does not require a high-speed fixed broadband connection. These findings reinforce the idea that protecting terrestrial TV is not only for those who are most at risk of digital exclusion, younger generations recognise its value in fostering ties in the climate in which they have grown up.

A Stable Service for Identity and Connectedness

As a universal service, terrestrial TV ensures that all communities—regardless of income, location, or digital literacy—can access trustworthy information. With 71% of the UK population believing that the universality of terrestrial TV is pivotal, the reach to nearly every UK household reinforces a sense of identity and connectedness, providing a shared platform for news, cultural programming, and national events. A further 85% of people believe that terrestrial TV is also important for increasing understanding of the nation's history and traditions.

In an age where misinformation and distrust in media are on the rise, terrestrial TV stands out as a safeguard. Its role in delivering accurate, impartial content is not only essential for individual users but also for maintaining the cohesion and resilience of society as a whole. By preserving terrestrial TV, the UK ensures that its citizens continue to have access to a reliable and unifying source of information amidst the noise of the digital landscape.

In turn, terrestrial TV helps preserve community cohesion and identity. Terrestrial TV continues to be a uniting pillar for all generations, fostering a stronger, more connected society – it is a foundation of both local and national communities.



What people say

“For some people [terrestrial TV] is their life. It would increase loneliness and isolation. There is education in TV and documentaries. When you leave the house it gets you talking to peers about series and dramas.” – Irene

“If terrestrial TV is switched off, it could really impact the elderly, disabled, people with less income, young children who rely on TV, and areas with poor broadband speeds” – David



The importance of terrestrial TV for those in digital poverty

Terrestrial TV is especially important to communities who face digital poverty. Their perspectives shed light on the critical role terrestrial TV plays for those most at risk of digital exclusion and surveys – distributed by both mail and email – to these communities demonstrate just how important maintaining the service is to them.

For many respondents, terrestrial TV is not just a convenience but an essential service that reduces isolation and provides reassurance. 75% agree that free-to-air Terrestrial TV helps reduce loneliness or isolation – rising to 86% of those who completed the paper survey only due to a lack of a device capable of completing detailed forms. Overall, 64% feel reassured knowing it is available as a fallback option to stay informed. Its simplicity is another defining strength, with 72% agreeing that it is easy to use without complex setup.

Even beyond, respondents in the DPA community also emphasised the importance of terrestrial TV in reliably providing both information and entertainment:

- 70% believe it is crucial for keeping them informed about significant UK topics.
- 76% value its convenience and ease for accessing entertainment.
- Of those who completed the paper surveys, 71% see terrestrial TV as key for staying up-to-date about what is going on in the world.

Finally, in line with the nationally representative survey, those who were or are experiencing digital poverty strongly affirm that terrestrial TV should be protected as a service, with 57% agreeing it should remain available as a service beyond 2035. A further 65% believe it will be important for future generations, especially those without digital skills or internet access, and 63% think the government should actively support its continued provision – a figure which rises to 86% of those who completed the paper surveys.



What people say

“When we all sit together watching something, it increases our national togetherness. We see that in terrestrial TV, and without that, it can lead to the loss of our national identity.” – David

“My mum couldn’t cope [with digital options]. She’s on her own, and when she watches TV, it’s company for her. Telly is her company.” – Rachel

“My getaway time is to watch TV. I’m a stay at home dad. Being British is having Coronation Street, EastEnders, and watching them all together at the same time. We have quality TV, and it’s ours.” – Lee

2.2 Reliable and Simple Access to Information

Previous research has underscored the central importance of the universal availability of public services via terrestrial TV. As the 'Building Public Value' report set out in 2004, broadcasting should aim to "enrich individuals with knowledge, culture, and information about their world, to build more cohesive communities, to engage the people of the UK and the whole globe in a new conversation about who we are and where we are going [for] the sole benefit of the public."²⁸

Terrestrial TV's key value lies in its ability to offer simple and universal access to both news and entertainment services across the UK, without the need for a high-speed broadband connection, as outlined previously.

This service is especially crucial during times of uncertainty, such as public health crises or national emergencies. Terrestrial TV's independence from internet infrastructure ensures it remains functional even when digital services fail, offering a dependable lifeline for those in need. In fact, 29% of respondents reported experiencing weekly internet outages, and a third faced buffering or slow-loading issues on streaming platforms, underscoring the instability of online services compared to terrestrial TV.

There are a plethora of barriers to accessing internet-based TV and online platforms when seeking out information. Barriers identified included:

- 9% of respondents face difficulties accessing news online, while 11% struggle with online entertainment.
- The main barriers to accessing online news include unreliable or slow internet connections (28%), the overwhelming number of news sources (27%), and difficulty distinguishing trustworthy information (27%).
- The main barriers to accessing online entertainment include difficulty navigating streaming websites or apps (31%), the cost of online entertainment services (28%), and unreliable or slow internet connections (26%).
- A further 29% of respondents reported that their internet has dropped out at least once a week or more often while they've been watching television in the past 12 months.

For many households, these obstacles hinder consistent and equitable access to information. Although only 1 out of 10 (9%) report difficulties accessing news online, and 11% struggle with online entertainment, terrestrial TV bridges this gap. Without terrestrial TV, this portion of the population would be left vulnerable to exclusion from information, entertainment, and key updates provided on terrestrial TV.



What people say

"My parents don't have the internet. If they can only manage a TV remote with simple controls, how are they supposed to manage when they are told to log in to subscriptions? It's just too much, too many buttons."
– Joanne

"A lot of people would miss out [without terrestrial TV] like people in rural areas because they can't get the speed of WiFi." – Lee

"Moving to digital versions will increase the number of people who don't have access to TV at all." – Nadia

Simplicity and Accessibility of Terrestrial TV

Terrestrial TV provides immediate access to news, entertainment, and essential programming without requiring broadband or subscriptions. Unlike streaming platforms, which often involve subscription costs, login requirements, and digital navigation challenges, terrestrial TV offers a seamless experience, cementing its role as the primary method for watching live TV. 67% of respondents cited terrestrial TV's ease of use as a key advantage, and 61% emphasised its reliability without needing an internet connection.

For many, particularly older and less digitally confident populations, the barriers posed by streaming platforms are significant. 56% of respondents found navigating traditional TV channels easier than browsing for news on streaming services or online, and 55% said the same for entertainment. This underscores the simplicity of terrestrial TV as a service that does not require complex interactions, making it accessible to all demographics and communities.

Internet-supported TV and streaming services are becoming more difficult to access, despite arguments that say interfaces can be designed to be more simple. For many the opposite is proving true: the more advanced digitalisation becomes, the more complex it becomes to use.

Furthermore, a crucial quality of terrestrial TV is that it is free at the point of consumption, entrenching its role as a critical service. Terrestrial TV eliminates the financial burdens associated with subscription-based services. For 57%, cost-effectiveness is a key reason for favouring terrestrial TV, especially at a time when broadband and subscription costs are rising.

The ability to access a straightforward service for TV is crucial as TV is a vital source of information and general entertainment. TV has long been a beating heart for British identity and culture – no one should be excluded from accessing it due to a lack of digital skills, the proper equipment, or the costs involved.



What people say

“On digital, there’s hundreds of channels, but they cost a fortune.” – Linda

“When I go to use the digital remote, I think, I haven’t got a clue!” – Marion

**“[Terrestrial TV] gives people who have lower income the chance to educate themselves, entertain themselves, feel less isolated, and help with their mental health. Especially people who are older or know English as their second language.”
– Julie**



Case study

Children's TV services

Terrestrial TV remains a cornerstone for families across the UK, providing essential educational and entertainment programming for children. According to our survey, 59% of parents or guardians use TV daily as a trusted source of information and entertainment for their children. 56% also reported that they or someone they know relies on terrestrial TV for access to children's educational content, such as CBBC, CBeebies, and Channel 5's "Milkshake". This reliance is even more pronounced among specific groups, rising to 64% for full-time working parents and 77% for those living in rural areas, where access to high-speed broadband is often limited.

The COVID-19 pandemic demonstrated the importance of terrestrial TV's children's programming. 73% of parents or guardians reported that access to these services was crucial to support their family's needs during this challenging time. Over half (51%) of households relied on live TV channels through terrestrial broadcasts to access these programmes. Of those, 82% stated that losing access to terrestrial TV would have significantly hindered their ability to balance work and childcare.

For many families, especially those without reliable internet connections or facing economic constraints, terrestrial TV serves as an indispensable resource for their children's learning and development. If families were to lose access to children's TV services via terrestrial TV, nearly four out of five (79%) of parents or guardians say this would impact their ability to balance work and childcare. Notably, 65% of all respondents were not aware that the BBC had planned to switch off the broadcast of BBC Four and CBBC via terrestrial TV in 2026.



What people say

"With all this choice on online platforms, kids just don't want to sit and watch TV as a family anymore." – Rachel

"Having access to TV is crucial for asylum seekers or anyone who doesn't have access to funds. It enables them to stay informed about local events and culture. Their children can watch the same programmes as their peers in schools which can help them feel part of the community. CBBC helped my kids practice English and know what's going on. We were part of the community. Without [terrestrial TV], they'd have been completely outside of the community." – Nadia

2.3 Trust

The final pillar supporting resilience is trust – all community members must have both trust in their community and, importantly, trust in the information they are seeing. The British public places their trust in terrestrial TV as it has long been a foundation of trust in the UK, serving as a dependable source of news and entertainment. Its stable and regulated nature underpins the public's confidence in its content, strengthening identity and connectedness across the nation.

The public's trust in terrestrial TV is evident in that:

- The British public is far more likely to trust terrestrial TV for news and information, as indicated by 61%.
- Over half (51%) of citizens receive their news via terrestrial TV, and, of those, 96% are confident that the information and content it supports is accurate and impartial.
- When asked about the potential loss of terrestrial TV services, 58% said such a move would diminish their trust in media.
- 82% of individuals in the UK say it is important for them to have access to trusted news channels without the need to navigate apps or select platforms.

For 70% of British people, access to terrestrial TV remains crucial as a source of reliable information.

Trust in Terrestrial TV Versus Internet-Supported Platforms

Terrestrial TV has earned its reputation as a trusted source of information, underpinned by regulation and a commitment to delivering high-quality, impartial content. These regulatory frameworks ensure that terrestrial TV supports reliable, accurate news and programming that fosters public confidence and supports social cohesion. 77% of people in the UK value TV for its regulation, believing it is important that television content is regulated to ensure accuracy, impartiality, and quality.

This is a stark contrast compared to online platforms. Internet-supported and online platforms like IPTV and social media often prioritise engagement over accuracy, operating within an "attention economy"²⁹ designed to maximise user retention and profit. Algorithms amplify sensational content, often at the expense of factual reporting, leading to misinformation and contributing to public distrust:



What people say

"With paying to view news channels, I'm getting concerned about what we are seeing." – David

"I don't trust some of the streaming channels because you can't trust who is paying for the content – it may not be safe for teenagers and kids." – Sara

"I'm cautious about people being able to access my information in the digital world." – Joanne

"On terrestrial TV you even trust the adverts – they are controlled – on digital, there is no control." – Nadia

- The content that terrestrial TV supports provides a place of solace in a world of overloading information and conflicting facts – 66% of individuals find that TV content helps combat misinformation.
- Beyond this, traditional television news helps 65% verify the information they see on social media or online – acting as a factual baseline.

Maintaining trust is vital to sustaining and strengthening social resilience. In a resilient society, trust fosters a sense of reliability in institutions, media, and communities, enabling individuals to feel secure in the information they receive. Without trust, misinformation and confusion can spread, weakening social bonds and creating divisions that hinder effective responses to external changes.

These findings attest to the trust people in the UK place in terrestrial TV in their daily lives and, notably, during challenging times. Trust in terrestrial TV stems not only from the quality of the content it supports but also from its infrastructure and straightforward delivery. Unlike digital platforms that rely on algorithms to drive engagement, terrestrial TV's broadcast infrastructure ensures that regulated, impartial, and accurate information reaches audiences directly and simply.

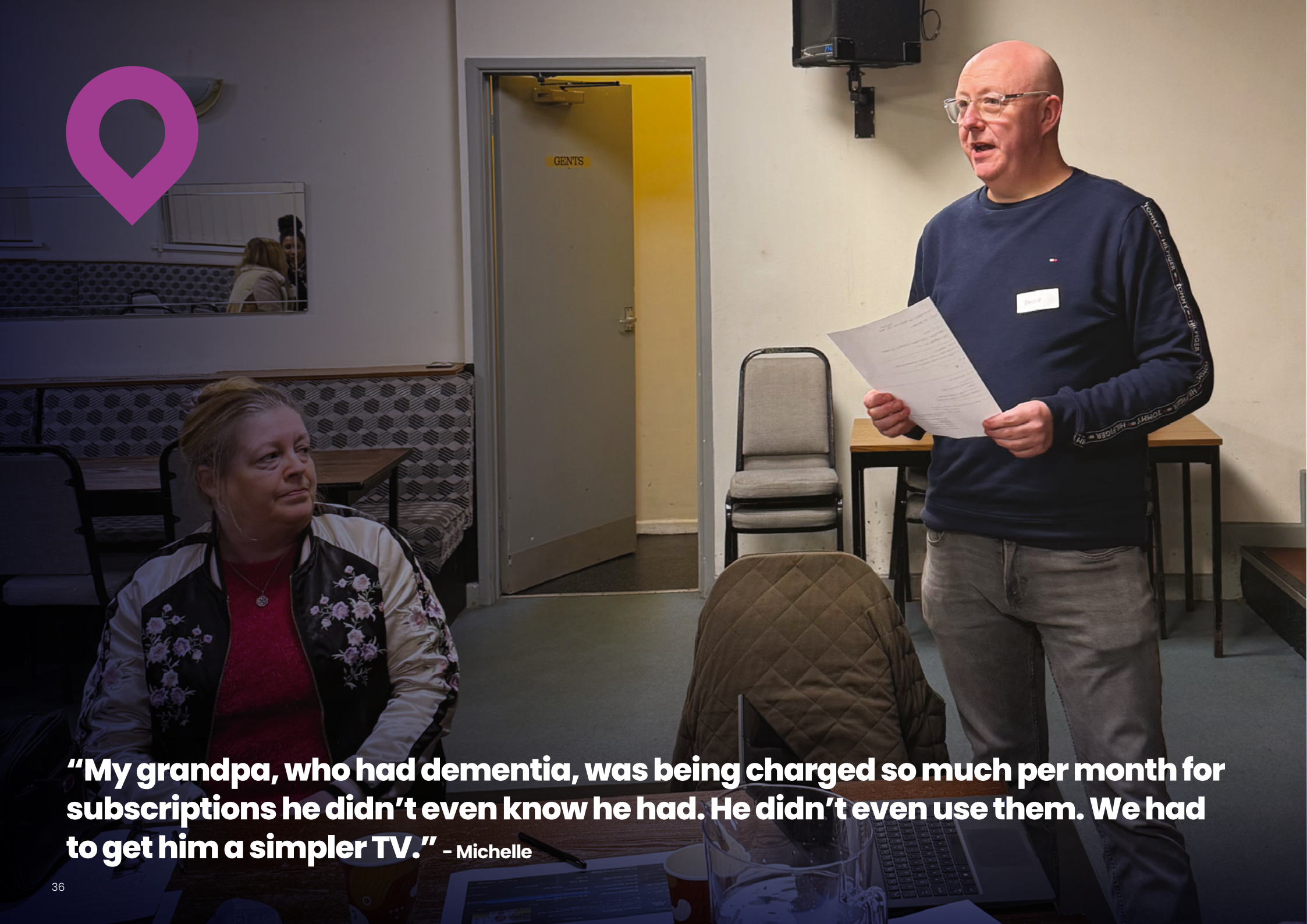
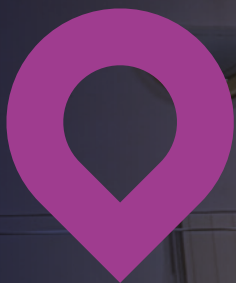
Terrestrial TV's reliability underpins the 70% of individuals who value terrestrial TV as a trusted source of information and the 66% who believe TV helps combat misinformation better than other platforms. Additionally, 65% reported using traditional television news to verify information encountered online or on social media, highlighting the unique confidence people have in terrestrial TV's delivery system. Terrestrial TV's universally accessible infrastructure ensures that all communities, regardless of digital access or skill, can depend on it for accurate, trustworthy news, reinforcing social cohesion and resilience in an increasingly fragmented media landscape.

Finally, with 65% of citizens not aware that the BBC had planned to switch off the broadcast of BBC Four and CBBC via terrestrial TV in 2026, and 69% unaware that the future of terrestrial TV was at stake at all, citizens are in the dark about losing access to the day-to-day universal services they rely on. Without the knowledge that these changes are looming, citizens are unable to voice their concerns or advocate for services that are integral to their daily lives. This lack of awareness underscores the need for transparent communication from both broadcasters and policymakers about the future of terrestrial TV. Trust in media systems is not only built on the reliability of the content but also on the assurance that these services will remain easily and readily accessible and available when needed.



What people say

“While terrestrial TV infrastructure alone cannot solve issues of disinformation, propaganda, or influence operations, it can facilitate access to trusted content providers who are equipped to address these challenges, thereby increasing the likelihood of effectively countering them.”
– Dr. Gregory Asmolov



“My grandpa, who had dementia, was being charged so much per month for subscriptions he didn’t even know he had. He didn’t even use them. We had to get him a simpler TV.” - Michelle



Case study

COVID-19

The COVID-19 pandemic tested Britain's resilience in an unprecedented way, challenging the nation's ability to stay connected, informed, and cohesive during a time of uncertainty. In turn, the pandemic underscored the critical role terrestrial TV plays in sustaining trust, fostering community resilience, and providing reliable information during crises – as many individuals turned to their TVs as a steady beacon of trust and hope. At a time when the public faced unprecedented uncertainty and an overload of conflicting messages, terrestrial TV emerged as the most trusted source of information, significantly outpacing other platforms and delivery systems:

- 45% of the public identified terrestrial TV as their most trusted platform to access information, outranking online news platforms (17%) and social media (13%).
- Trust in terrestrial TV was especially high in rural areas including villages (50%), and the rural countryside (48%). Interestingly, trust in terrestrial TV during COVID was also particularly high for certain income groups, namely those earning less than £20,000 (51%), and those earning over £100,000 (57%).
- In contrast, 38% of people found the lowest quality information on social media – higher than any other platform.
- Even beyond, 88% of terrestrial TV watchers say that, generally, terrestrial TV is important for relieving stress and anxiety, which is absolutely crucial during challenging times.

For families, terrestrial TV was a very important service during the pandemic, as when work and school from home were necessary, 73% of parents or guardians said that accessing terrestrial TV was crucial in supporting their family's needs.

By supporting informed communities, connecting families, and bridging divides, terrestrial TV proved to be an essential element of Britain's resilience during COVID-19 in a way that no other platform or service can replicate. This case study underscores the importance of preserving terrestrial TV to ensure the nation is equipped to face future challenges, maintain equity, and foster cohesion in times of crisis and beyond. As the nation prepares for future challenges, preserving terrestrial TV ensures that this vital lifeline will remain accessible for all.



What people say

“Reliable communication during a crisis is essential not only to keep affected communities informed and alerted but also to ensure efficient community mobilization. Terrestrial TV plays a vital role in strengthening the resilience of crisis communications.”

– Dr. Gregory Asmolov

“Terrestrial TV is important in times of crisis, like during COVID-19. We all watched the same information at the same time. It was uniting even in the crisis.” – David

Part 3: Final Remarks and Recommendations

3.1 Conclusion

With social resilience under threat due to a rapidly changing media landscape and increasing external changes, maintaining the bedrock of resilience has never been more important.

Terrestrial TV, as demonstrated, is undoubtedly key to preserving resilience through its support of the pillars of resilience – community, reliable access to information, and trust – in ways that cannot be replicated in a digital world. It fosters unity through shared experiences, ensures equitable access to vital news and entertainment, and provides a trusted platform free from the pitfalls of the digital attention economy.

In an era of digital poverty and a shift to costly online alternatives, the protection of terrestrial TV infrastructure has never been more urgent. For millions of British individuals, terrestrial TV is a lifeline that bridges divides, supports vulnerable communities, and strengthens the social bonds of the nation.

3.2 Recommendations

As such, to safeguard the UK's social resilience and ensure equitable access to vital media services, we propose to Government the following four-point plan:

- 1. Provide a clear commitment to the long-term protection of terrestrial TV services well beyond current commitments, including the extension of licences to safeguard terrestrial TV and the broadcast services it delivers.**
- 2. Acknowledge the role of terrestrial TV in supporting the UK's social resilience, recognising its unique capacity to provide universal access to trusted information, foster community through shared experiences, and act as a vital safety net for those at risk of digital exclusion.**
- 3. Require Public Service Broadcasters (PSBs) to sustain universal broadcasting via terrestrial TV, with a clear commitment in the next BBC Charter period.**
- 4. Prioritise the voices of listeners, particularly those facing digital poverty or exclusion, in government and Ofcom decision-making processes, including safeguarding the true essence of universality, ensuring that services are accessible to all, regardless of income or location.**

By adopting these measures, the UK can safeguard terrestrial TV's infrastructure, ensuring that it continues to play a pivotal role in maintaining social resilience, reducing digital exclusion, and fostering community cohesion. Government, broadcasters, and the public must collaborate to ensure that universal access to media remains a cornerstone of British society.

The government must act decisively to protect terrestrial TV, recognising its pivotal role in maintaining a resilient, inclusive, and connected society. Preserving terrestrial TV is not just about protecting television. It is about protecting Britain's resilience.



“ [Terrestrial TV] gives people who have lower income the chance to educate themselves, entertain themselves, feel less isolated, and help with their mental health. Especially people who are older or know English as their second language.” – Julie

Appendix

Methodology

The research was conducted by Strand Partners' in-house research team between 4th December and 20th Jan 2025, following the guidelines of the UK's Market Research Society. The methodology included a combination of surveys and focus groups.

One focus group took place in Gateshead, England, supported by the Connected Voices group, and another in Bridgend, Wales, to explore in further depth the themes and ideas that emerged in the survey. These focus groups took the form of semi-structured conversations and included various exercises and games to facilitate dialogue and debate. Participants were compensated for their time.

All focus groups were transcribed. In compliance with General Data Protection Regulations (GDPR), all identifiable features of participants have been removed and answers were anonymised.

In addition, three surveys were conducted. The first survey included 2005 respondents and was nationally representative by gender and NUT S1 region. The statistics cited in the report are drawn from this second survey, in line with MRS polling guidelines.

The second survey received 160 responses, distributed via email to the DPA's network of those whom the DPA has supported previously. The final survey physical copy of the survey, distributed to 150 people recruited from the DPA's membership database, and a further 20 from the National Pensioner's Convention, who received physical copies of the survey. The survey received 14 completes. The aim of both surveys were to capture the opinion of those who are experiencing digital poverty.

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