



A BBC FOR THE FUTURE

AN ESSENTIAL PART OF THE UK'S DEMOCRACY,
CREATIVE ECONOMY AND SOCIETY

March 2024

A BBC for the future

A hundred years ago, the BBC launched a new world of UK radio broadcasting. Today, the media world is utterly different. Audiences have access to an incredible variety of media: text, video, audio, social, immersive and interactive content from across the world.

What is the BBC's role today, and in the future? More than 100 years on from its foundation, what can it do for the UK to respond to the most pressing needs of our democracy, our creative economy and our society?

In recent years the BBC has been transforming to remain a part of audiences' daily lives by seeking to offer outstanding value to everyone. But a new wave of technological change is reshaping our media landscape. It brings huge benefits to consumers, with more choice than ever before. But it brings, too, fresh challenges for our media, our society and us as individuals:

- **The challenge to our democracy:** Disinformation, propaganda and partial news is weakening our shared understanding of the world, undermining trust in our institutions and our democratic processes. It leaves many of us wondering who and what we can believe, and even questioning the concept of 'truth'
- **The challenge to our creative economy:** British storytelling is at growing risk of being squeezed out in an extraordinarily competitive global media landscape. We are in danger of allowing the UK's world-class creative industries to be undermined, diminishing our unique cultural identity and its remarkable influence and export value worldwide
- **The challenge to our society:** Polarisation and social division are being fuelled by the fragmentation of media consumption among global platforms, with US and Chinese algorithms becoming the potential British taste-makers and debate-shapers of the future. Shared moments and unifying cultural experiences will become increasingly rare.

The BBC can respond to each of these challenges. Our mission remains to inform, educate and entertain all audiences. We aim to be universally relevant, accessible and used, delivering public benefit for everyone. We have always helped lead technology innovation. As we enter the AI age, we want to help shape the new era of technological change for the good of all, championing British creative talent and making sure no one is left behind. We want to focus most clearly on the critical benefits we can offer the public, the UK and its creative economy.

The stakes are high. Fail, and we do not have to look far to see what can happen when a country's democracy comes under sustained assault, when its cultural foundations are weaker, and its societal bonds fray. Succeed, and we can play our part in building a brighter future for the UK, based on trust, prosperity and a cohesive society with strong cultural identities.

To help strengthen the UK's democracy, creative economy and society, we have talked to the UK public about the three essential roles that we will prioritise. We will:

1. **Pursue truth with no agenda** by reporting fearlessly and fairly
2. **Back the best British storytelling** by investing in homegrown talent and creativity
3. **Bring people together** by connecting everyone to unmissable content.

This document sets out how the BBC plans to focus on these three roles to provide value for all audiences in the years ahead and the steps required to accelerate its transformation.

We will harness cutting-edge technologies to deliver our universal mission. Human creativity and talent will always sit at the heart of all we do, but we will maximise the potential of artificial intelligence (AI) to support our reporting, our services and our values. We will rebuild our online products to create a fully integrated, more personalised BBC that unlocks more for audiences; and we will build that out globally on bbc.com. We will set the benchmark for accessible online products so no-one is left behind in the transition to the online-only world.

We will focus on home-grown content from across the whole UK that authentically reflects our many cultures, stories and voices, and support our world-leading creative economy. We will invest in content and events that connect us, across sports, news, music and entertainment. We will work in partnership with others to support music, arts and culture. We will ensure the BBC continues to be the best place to watch and listen live, and follow big shared moments.

To make this happen, we will need a properly funded public service BBC. But in real terms, the licence fee generated 30% more income back in 2010 than it does today. That is more than £1 billion annually of lost income. With the addition of new costs, followed by two years of a frozen licence fee at a time of high inflation, the BBC's finances are under significant strain. We need urgently to find ways of meeting our financial challenges if we are to accelerate our transformation. We will need to redesign our processes, improve efficiency and serve audiences better. We will spend more money on content with higher impact and value for all audiences. We will continue to boost our commercial income to generate the maximum possible value for the licence fee. We will seek to establish a broad range of major new partnerships that can allow us to discover new talent, access capital and secure scale.

We will also need to consider how best to fund the BBC to secure all the benefits of universal public service broadcasting in the future. Over many decades, the licence fee has provided the BBC with substantial stable funding. It has been paid for by almost all households, supporting our mission to serve all audiences. Given the changes in technology and audience behaviour, we will research how we reform the licence fee post-2028, looking at its definition, whether it can and should be made more progressive, and ensuring that its enforcement is fair and proportionate. As part of this, we will engage with the work being done by the UK Government to review BBC funding. And we will discuss with them the right way to fund the BBC World Service at an important moment for democracy worldwide and for British soft power.

But our most important relationship will be with the public, who own us and who pay for us. We will aim to reach and get feedback from up to one million members of the public beginning next year, so their views are at the heart of the debate about the future BBC.

A decade ago, some argued that 'no-one would invent the BBC now'. Today, the growing pressures that rapid change is placing on our democracy, our creative economy and our society build a powerful case for creating something that looks very much like it. Many other countries continue to look to the UK and the BBC as models to emulate, and as a beacon for truth, democracy and freedom around the world. This is a strategy for that to continue: to deliver crucial benefits for the UK at a critical time, to help support a healthy democracy, a thriving creative economy, and a strong society for the future.

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1 The BBC's role in today's world

The BBC is over 100 years old. At its start, it launched a new world of broadcasting where 100% of listening in the UK was to BBC programmes and services. What the BBC provided was the only form of electronic media that audiences could consume at any moment, with no choice and no control.

Today, audiences have access to an incredible variety of media from across the world – much of it of extraordinary quality and depth: text, video, audio, social, immersive and interactive. And they have control over that consumption themselves, choosing when, where and how to use it. Anyone can be a creator, broadcaster and publisher.

The BBC operates under a Royal Charter that sets it a clear mission and five public purposes. To deliver that universal mission in today's world, we have been implementing a strategy that aims to provide value for all through impartial news, high-impact British content and a world-class online offer, supported by ambitious commercial plans. This strategy is working, with new content from across the UK, big events bringing the country together, a growing number of users choosing iPlayer, and a rapid increase in visitors accessing local news online from the BBC.

But the pace of change in the world around us is dramatically accelerating.

Every day, more content is created than can possibly be consumed in a lifetime. New technologies like generative artificial intelligence (Gen AI) promise a world of even greater variety and volume of media – in text, video, audio, and in formats as yet undiscovered. Meanwhile, broadcast forms of media are declining. Global media platforms are taking the lead over local providers – that increased variety holds the potential for serious damage to national creative ecologies. Today's polarising media environment is adding choice, opinion and ever more plurality to the news landscape, but challenges traditional concepts of impartiality.

For consumers, this is a golden age of choice. But what is the BBC's role in this world? A century on, what can its unique mission bring to our democracy, our creative economy and our society in a landscape so far removed from its beginnings?

Three essential roles to guide the BBC

The UK needs the BBC to deliver **Value for All** in the AI age by playing a timely and critical role for our democracy, our creative economy and our society. We will:

1. **Pursue truth with no agenda** by reporting fearlessly and fairly
2. **Back the best British storytelling** by investing in homegrown talent and creativity
3. **Bring people together** by connecting everyone to unmissable content.

We have been listening to those that matter most, the public, and we know there is strong support for these roles. Around nine in ten licence fee payers think it important for the BBC to pursue truth with no agenda. Nearly eight in ten think it is important that the BBC offers the best of British programmes and content from presenters, writers, actors and musicians from across the UK. And around seven in ten think it important for the BBC to bring people together through unmissable content for everyone.

These three roles will guide the BBC in the choices we make and focus our resources so that we can actively shape the new wave of technological change in the interests of the UK and for the good of all. The BBC has always been at the forefront of new technology for the benefit of citizens and audiences to ensure it fulfils its mission to serve the public interest. We are a pioneer: using technology to deliver value to our audiences in new ways. We can be a trusted guide: explaining to audiences how to get the best out of new technology. And we are a market shaper: helping ensure that the way technology develops supports, rather than diminishes, the public good.

Today, we are in the foothills of another revolution – artificial intelligence. Like radio, TV, the internet and the smartphone before it, it will reshape the media landscape, bringing both opportunities and challenges for the BBC, the media industry and society. This is particularly true for Gen AI, which creates new video, audio and text and more by itself. Throughout this document we will outline areas where we believe the BBC has an opportunity to pioneer, guide and shape this technology in the interests of the public.

2 Pursue truth with no agenda by reporting fearlessly and fairly

The challenge to democracy

Around the world democracy is under threat. The most recent report from Freedom House found that only 20% of people live in what are considered to be free countries – a proportion that has halved over a decade. In 2023, global freedom declined for the 18th consecutive year, as political rights and civil liberties deteriorated in 52 countries, representing a fifth of the world's population. The declines were both widespread and severe, eclipsing the improvements observed in 21 other countries. Freedom declined for 22% of the world's population, and improved for only 7%.

Suppressing the right to free expression is a key driver of democratic decline. Freedom House analysis suggests that over the past 18 years, the number of countries and territories that receive a score of 0 out of 4 on their media freedom indicator has more than doubled from 14 to 36, as journalists face persistent attacks from autocrats and their supporters while receiving inadequate protection from intimidation and violence, even in some democracies. The World Press Freedom Index from Reporters Without Borders shows that journalism is now completely or partly blocked in 71% of the countries it ranks. In its words:

In 118 countries (two-thirds of the 180 countries evaluated by the Index), most of the Index questionnaire's respondents reported that political actors in their countries were often or systematically involved in massive disinformation or propaganda campaigns. The difference is being blurred between true and false, real and artificial, facts and artifices, jeopardising the right to information. The unprecedented ability to tamper with content is being used to undermine those who embody quality journalism and weaken journalism itself.

Against the backdrop of the growing threat to democratic and media freedoms around the world, the news industry itself is being reshaped in a way that can undermine the pursuit of truth:

- As usage and revenues decline, newspapers, broadcasters and online providers of news around the world are finding **profits in polarisation**, with stories that speak to just one side of a debate and exclude alternative points of views. Facts are manipulated, twisted or invented to drive outrage, engagement and revenues as audiences seek out reassurance in news sources that affirm their own attitudes and opinions to the exclusion of others
- The shift of advertising from print to online has led to a **sharp decline in local and regional media** in print. Fewer journalists are pursuing original, local journalism, leaving gaps in reporting around the country

- Half of UK adults use social media for news, where the algorithms guiding personalised feeds of news stories can create closed **echo chambers** where alternative points of view are also excluded
- The quasi-anonymity of the internet – while vital in some circumstances to protect civil liberties – has **reduced trust and civility**, with language and personal attacks more common in the online world that would be barely tolerable in the real world. These impacts have a chilling effect on public debate. Only 40% of people in the UK feel they can share views without fear
- ‘Bad actors’ across the world – often funded and guided by authoritarian governments – actively manipulate public opinion through **propaganda and disinformation**. The ‘deepfake’ videos enabled by artificial intelligence will make working out what is true much more difficult, and the volume of fake news could quickly overwhelm the true
- Beyond disinformation, **artificial intelligence** poses wider challenges to the health and sustainability of our news and information ecosystem. New Gen AI services are likely to become increasingly important as ways for audiences to find, consume and engage with news and factual content. Yet, many of the emerging Gen AI services have been built on the back of the investment and endeavour of traditional news publishers without appropriate recompense for their efforts. Output from these services can be inaccurate, biased or lacking critical context, and sources are often poorly labelled
- All this contributes to an increase in **news avoidance**, where some try to disengage from a relentless, negative news agenda. In the UK, over 40% say they actively try to avoid the news often or sometimes, and the UK continues to have one of the highest rates on this measure.

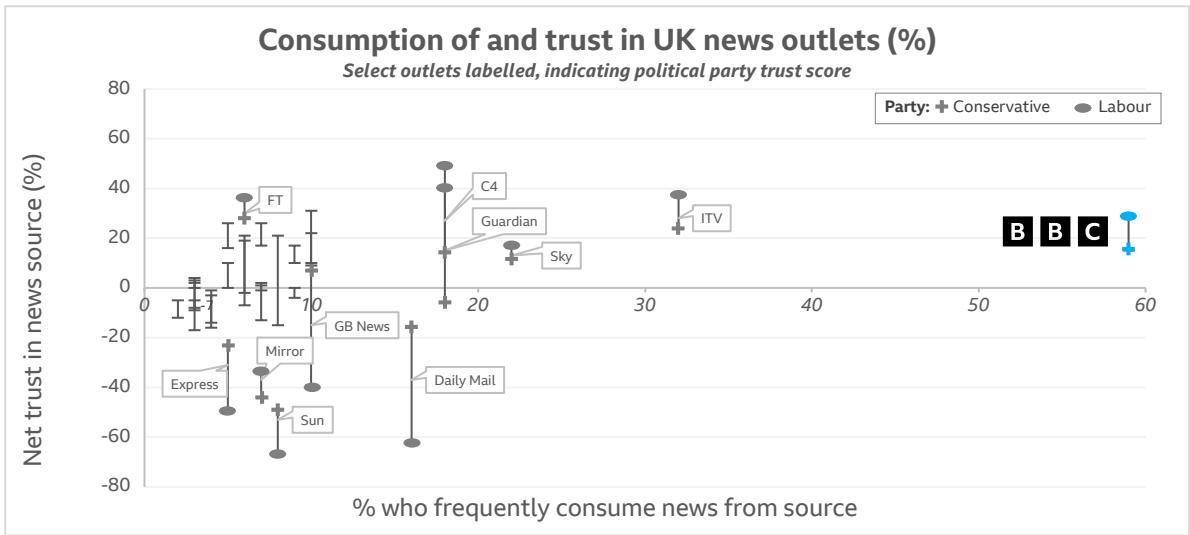
Many of these dynamics have been reinforced by recent events in the Middle East.

What is at stake is a healthy democracy, where citizens have access to a proper understanding of local, national and global issues. It is voters who are empowered with the knowledge and the motivation to take part in the democratic process. It is audiences of all political persuasions being able to hear a wide range of views and opinions, including those of elected officials and those in power. It is a society that can continue to benefit from the conditions and spaces for everyone to take part civilly in open and respectful debate.

Why the BBC is uniquely positioned to help

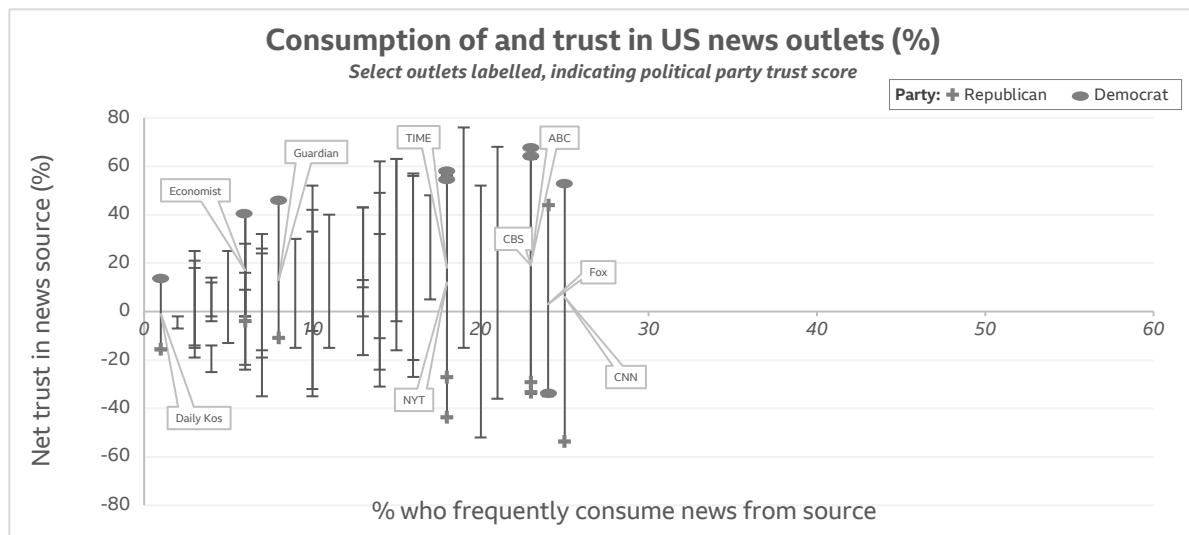
The UK has a single source of news consumed and trusted by the majority. That is the BBC. ‘Consumed’ and ‘trusted’ both matter. To have a positive impact on our democratic debate, the BBC must be perceived as trusted and accurate, and it must be consumed. Trust without usage means irrelevance.

The BBC is unique in the UK. In the independent data shown below, there is very little difference between net scores for trust in the BBC from people on the left and right of politics. BBC News is consumed frequently by the majority of the public, unlike any other news source.



Source: FT analysis (26 May 2023) from YouGov data. (Net trust = the proportion of people who regard a media organisation as trustworthy minus the proportion of people who regard it as untrustworthy.)

This is a very different picture from the US, where levels of polarisation between each side about each news provider are sharper. No news source is used frequently by more than around a quarter of the public. The effects of this news landscape are visible in the political debate, high levels of polarisation and impacts on citizens in the US.



Source: FT analysis (26 May 2023) from YouGov data. Republican and Democrat based on vote in 2020 Presidential election. (Net trust = the proportion of people who regard a media organisation as trustworthy minus the proportion of people who regard it as untrustworthy.)

But this is not just a US story. Across Europe and beyond, similar forces of media polarisation are undermining shared values and key democratic principles like freedom of expression, the legitimacy of elections, independent judiciaries, and free media. The BBC can help counter these forces. Through the World Service, it is the world's most trusted international news provider.

Our world is becoming more chaotic and divided. There is a fundamental need for the public to be able to access information they can trust, even if for some the idea of universal truth is

eroding. The BBC believes that truth is worth fighting for, even if it can be elusive, and a healthy democracy is worth defending and upholding.

What the BBC stands for

We bring audiences independent, impartial and trusted news, free from commercial or political influence, in the UK and around the world, in new ways and on new platforms.

We witness events – locally, nationally and globally – in news and beyond. We go to great lengths and dangerous places, because our job is to be there when history happens and to pursue relentlessly and fearlessly the stories that matter.

We nurture civilised spaces where people come together across boundaries. We give voice to all parts of our society and our local communities. We are here to reflect, not judge.

We take time to cut through the noise, and separate fact from fake. We bring clarity to the chaos so people can make their own judgements.

We embrace transparency to show how we know what we know. We pull back the curtain on the methods we use to verify our journalism and the choices we make. If people know how it is made, they can trust what it says.

3 Back the best British storytelling by investing in homegrown talent and creativity

The challenge to our creative economy

We live in a time when culture and creativity cross national borders frictionlessly. There are huge advantages for consumers as global media and technology firms give people access to the world's best entertainment. However, it also means there can be more on our screens about city police precincts in the US than our own, and more storytelling about high school America than secondary school Britain.

Such shows are popular, and they represent the best of global storytelling, but they cannot substitute for the cultural value of telling the story of the UK – just as the popularity of *Dallas* and *Dynasty* in the 1980s could not substitute for the enduring cultural power of *Only Fools and Horses*, *Brideshead Revisited*, *Blackadder* or *The Bill*. Today's equivalents – ITV's *Mr Bates vs The Post Office*, the BBC's *I May Destroy You*, *Happy Valley* and *Sherwood*, and Channel 4's *Derry Girls* and *It's a Sin* – continue a rich tradition of authentic UK storytelling that captures the public mood and can set the political agenda.

Globally, we have seen a fragmentation of identity. Nations and regions within countries, personal characteristics, family backgrounds and individual values can all become a stronger part of how people see themselves, sometimes in opposition to other identities. We see these multiple identities within the UK, with British / English / Scottish / Welsh / Irish and Northern Irish identities expressed differently at different times through politics, sport, drama, language and community.

So telling UK stories to celebrate both what we have in common and where we diverge is increasingly important. British culture, artistic achievement, sport, music and creativity play a crucial role in helping all our different communities understand one another. British media plays a vital role in opening up access to our world-leading culture, heritage and creativity.

The globalisation of the media market makes it harder to reassert our rich and diverse cultural identity here in the UK. As traditional broadcasting declines, the big investors in authentic British content – the BBC, ITV, Sky and Channel 4 – have less to spend on UK programmes. We have substantial new investors in British production that are helping to power the UK's creative economy. But these are primarily US media and tech giants, often focussed on creating non-specific global shows like *Game of Thrones*, and with the Britishness of UK programmes diluted to meet global tastes. Their TV production and commissioning are heavily clustered in London and the South East of England, for instance with the expansion of the Pinewood and Shepperton studios around the M25.

Media and tech giants from outside the UK are less regulated than British companies. This means that British media companies have the opportunity to uphold the highest standards, and set benchmarks for the industry around taste, decency, authenticity and dealing fairly with contributors and audiences.

A strong and vibrant culture in the UK also means strong and vibrant creative industries. This is a sector that contributes over £125 billion a year to the UK economy – greater than the life sciences, aerospace, automotive, oil and gas sectors combined. It continues to grow faster than the wider economy and has the potential to more than double in size by 2030.

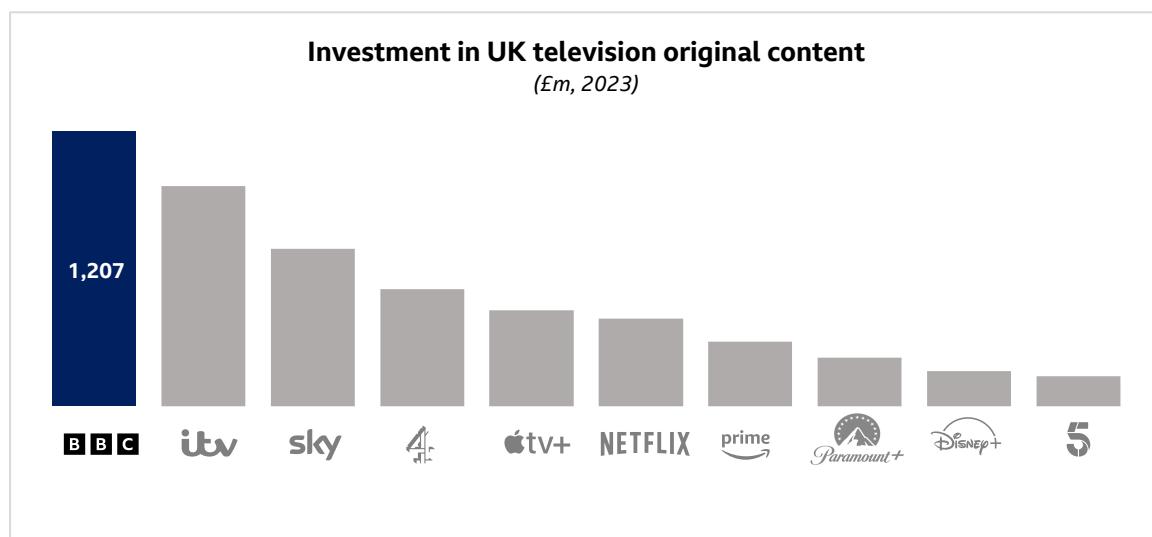
The unique mix of funding models in the UK TV industry – the licence fee, advertising-supported broadcasters and subscription-funded providers – support the diversity and vibrancy of the sector. Total exports are worth £45.6 billion, with a trade surplus of £18.7 billion in 2021. Overall, the creative industries accounted for 14.6% of all UK service exports, driving powerful cultural and economic impacts for the UK abroad.

What is at stake is a thriving creative sector that takes risks on new talent of all types. It is a vibrant culture of stories shared across the nations and regions of the UK, with a broad range of creative British output in every genre in video and audio. It is an expanding creative economy that develops the creative skills necessary to thrive in the internet-only world. It is the UK continuing to own a rich variety of intellectual property, allowing commercial returns to reward creators in this country rather than profits retained and invested overseas.

Why the BBC is uniquely positioned to help

The BBC invests more in original British creativity than anyone else. While other companies' investment fluctuates with the economy or their business strategy, the BBC has remained the cornerstone of the UK creative economy for decades. We back homegrown British creativity, now and for the long term. For some parts of the country, the BBC *is* the creative industry.

While directly comparable data is not always available, industry analysis shows that the BBC is by far the biggest single investor in original TV content.



Sources: Ampere, Oliver & Ohlbaum analysis. P&L spend used for Broadcast data; Cash spend used for SVOD data.

We contribute almost £5 billion to the UK economy each year, supporting over 50,000 jobs and working with 14,000 suppliers, 75% of which are small and medium-sized enterprises. Every £1 of our direct economic activity generates £2.63 in the wider economy as a whole.

We invest more outside London than any other media organisation: 50% of BBC economic impact is outside London versus an industry average of 20%. BBC spending occurs in over 98% of the 228 local communities across the UK's nations and regions. Since the BBC's move to MediaCity in Salford, the number of digital and creative businesses there has grown by 70%, while employment in the creative sector is 142% higher. Our current plan to shift more of the BBC's people, decision-making power and investment out of London and across the UK is on track to create over 4,500 new creative firms and around 45,000 new creative jobs by 2027/28.

This is not a journey the BBC has made alone. Partnership is at the heart of our strategy across the UK. Sustained success has been dependent on a shared ambition locally, through the work of agencies like Northern Ireland Screen, Creative Wales, Screen Scotland, Create Central in the West Midlands and the North East Screen Investment Partnership.

This long-term strategy means we draw inspiration from across the UK in a way that no-one else does. We tell stories from every part of the UK, its nations and regions, and we aim to tell stories from different perspectives and elements of society. We embrace the minority languages of these islands, too – celebrating and championing the cultural diversity of our country in partnership with bodies like MG Alba and S4C. And we commission from more regional producers with a greater breadth of output than any other commissioner. We are the champion for UK creativity, and all its parts, peoples, languages and voices.

We make content that is driven by our values. Our programmes set editorial standards that others follow. We treat programme-makers and contributors fairly, with respect, and without exploitation. We tackle the toughest stories in society without flinching, including about the BBC itself.

We tell the stories that others do not across the full range of our platforms and genres. Our mental health season had documentaries like *Matt Willis: Fighting Addiction* and Roman Kemp's film *The Fight for Young Lives*. Shows such as *EastEnders* are never afraid to raise awareness around issues like HIV, brain tumours and cancer. Our longest-standing partnership with the Open University has supported *Wild Isles*, the *Earth* series, and *Once Upon a Time in Northern Ireland*. We have opened up the world of women's sport to ensure it achieves its potential and profile – the final of the women's Euros drew a peak audience of over 17 million, with the tournament overall reaching over 27 million people on BBC TV.

We connect people with the story of the UK. From the FA Cup and Wimbledon to Glastonbury and the Proms, from Royal weddings and funerals to *Shetland* and *Springwatch*, from *The Archers* to *Happy Valley*, from *Man like Mobeen* to *Gavin and Stacey*, and from *Blue Lights* to *The Sixth Commandment* – the BBC tells the story of Britain. These shared stories remind us of our common values, history and accomplishments. They make us who we are.

We keep British children in touch with UK culture. In the face of intense global competition and a flood of foreign programming, others have retreated from making original British content. Without the BBC, UK-made hours of children's programmes would fall by more than

70%, and titles such as *Horrible Histories*, *Numberblocks*, *Newsround* or *Operation Ouch!* would never be made. We help children learn, too, with BBC Bitesize the UK's leading online service in providing curriculum support.

As part of this role, we are unrivalled in our impact, scale and support for Britain's culture and its world-leading music industry. No-one in the media industry broadcasts close to the 28,000 hours of arts, classical music and culture content the BBC does every year – across TV, radio and online. We nurture new UK talent on and off screen. We support six BBC performing groups and hundreds of classical musicians. We bring UK arts, music and culture to an audience of around 22 million UK adults on average per week.

What the BBC stands for

We reflect, represent and share stories from across the UK, to celebrate what we have in common and what makes us different, within different parts of the country and across it.

We tell the stories that others do not, to a breadth and depth they increasingly will not, championing bold new ideas, taking creative risks, exploring new technology, and nurturing new talent from across the UK.

We support UK culture, bringing art, music, sport, drama, comedy, education, film and performance to millions in the UK and beyond, working in partnership with others.

We represent the diversity of the public we serve in our workforce, our creative teams and our content.

We invest in the creative industries across the UK, showcase and export that creativity across the world, and return those profits back to its creators.

4 Bring people together by connecting everyone to unmissable content

The challenge to our society

People around the world increasingly consume content on global platforms, mainly from the US or China. Visiting Facebook, TikTok, Instagram, Google and YouTube are regular habits for many UK audiences, and they are increasingly shaping our cultural identity and viewing preferences, usually in ways that can support their businesses. Industry analysts estimate that 80% of viewing on broadcast TV is of British content, but just 10% on on-demand platforms. In future, choices made by computer algorithms may be the taste-makers of our age, with the risk that UK content is lost in a globalised offer.

Our society is increasingly fragmented. We no longer watch, listen and read the same things as our neighbours or the rest of our family. Shared moments are increasingly rare. In the words of American social psychologist and author Jonathan Haidt, the internet and social media in particular have acted as universal solvent, breaking down bonds and weakening institutions everywhere they reach: these platforms '*have unwittingly dissolved the mortar of trust, belief in institutions, and shared stories that had held a large and diverse secular democracy together*'.

At the same time, we are seeing a stubborn digital divide. Up to two million homes will not have fixed broadband connections by 2030 and will be less able to engage in the internet age. Without intervention and encouragement, the social and economic benefits of a fully internet-led UK will not be realised.

Over the next decade or two, as we move from this hybrid world where broadcast and online co-exist to an internet-only one, we can shape this tipping point to act for the benefit of UK consumers and citizens, rather than relying wholly on US and Chinese tech giants who may not have the interests of a shared British culture as their priority.

The BBC is not the only answer to this problem, but it can play its part in contributing to greater social cohesion and shared values. Without large-scale, high-impact, UK-owned, free-to-access online destinations that inform, educate and entertain, and that have free speech, civility and fairness at their heart, the huge opportunity of the next media era may be lost among its enormous challenges.

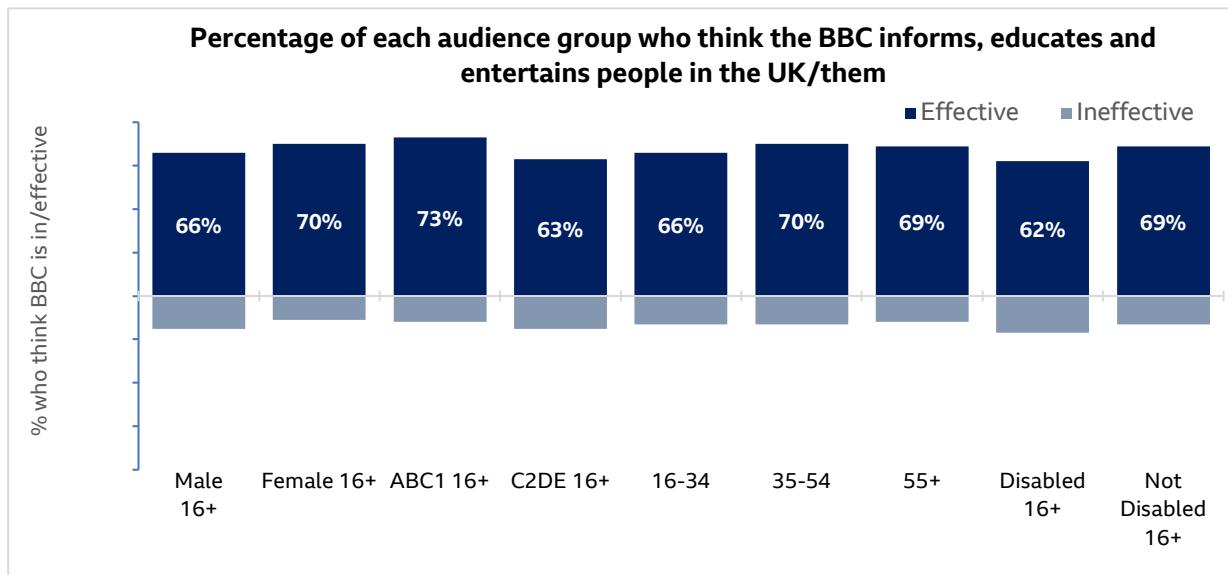
What is at stake is a fair and prosperous media economy, where everyone benefits, everyone is connected and everyone has easy access to high-quality content. It is about shared understanding and shared values. It is continuing to have universal engagement across the UK public with the best of British culture, creativity and storytelling, holding its own against stories from outside the UK. It is supporting a long-term transition to a digital-only world where no-one is left behind.

Why the BBC is uniquely positioned to help

The BBC is a universal service. We aim to connect, not divide; to bring together, not separate.

We think about the BBC's universal mission in three ways.

First, the BBC must be relevant to all. While others target profitable parts of the market and ignore other parts, we create a wide range of content that means the BBC can appeal to all UK audiences, across all our local communities. Research shows that the clear majority of the public from all parts of UK society think the BBC informs, educates and entertains the people in the UK/ them.



Source: BBC Group Annual Report and Accounts 2022/23 (Ipsos UK, 16+).

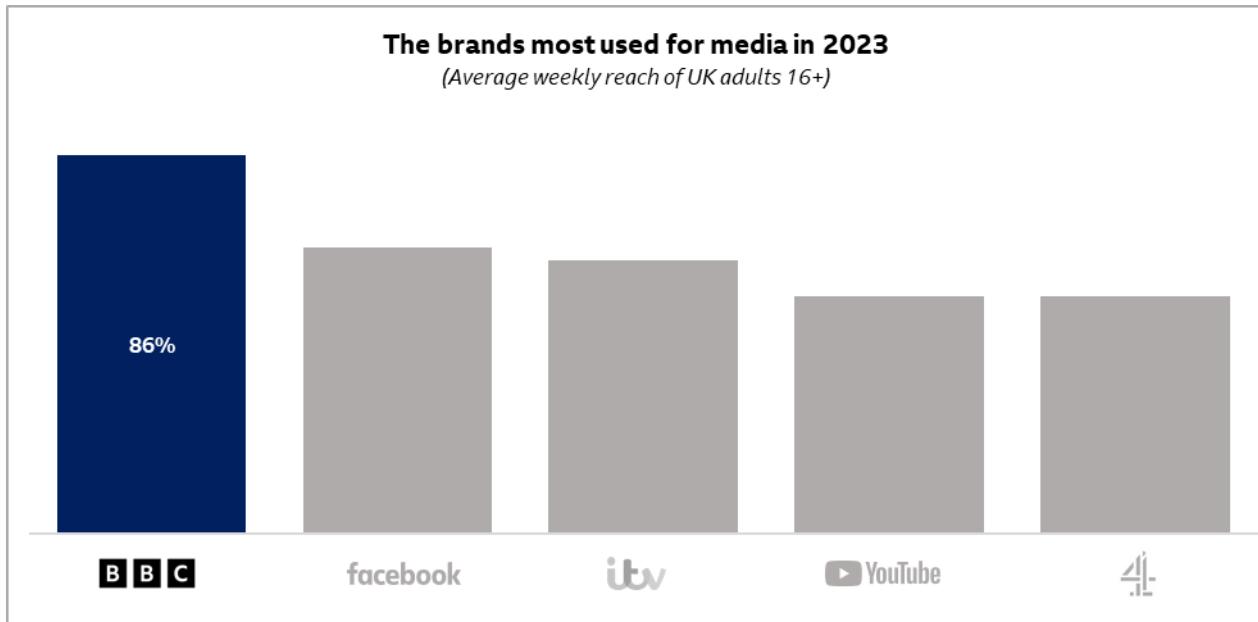
Second, we partner with others to give everyone in the UK access to the very best content the UK has to offer – not just our own, but from others, too. We have led the industry in opening up new ways of getting to British content. We launched the DAB technology in 1999 with commercial radio; Freeview in 2001 with ITV, Channel 4, Sky and Arqiva; high-definition TV standards in 2006 with Sky and Virgin; RadioPlayer in 2010 with commercial radio groups; and YouView in 2012 with ITV, Channel 4, BT, TalkTalk and Channel 5.

We invest more in distribution to make sure that terrestrial radio and TV signals reach further across the UK's geography. On Freeview, the BBC can be accessed by 98.5% of the UK population compared with commercial television that can be accessed by around 90%. The investment required to reach that extra 8.5% is higher than that required to reach the 90%. BBC DAB radio can be accessed by 97.5% of the UK population compared with the largest commercial service that can be accessed by 92%. We directly fund local DAB networks to increase coverage from 72% to 91%.

We lead the way in making our products and services accessible to all audiences. We are the only UK broadcaster that is committed to subtitling 100% of programme content, and the first to provide live audio description. For the first time *Strictly Come Dancing* has been made accessible to blind and visually impaired viewers at the point of transmission. We are the only

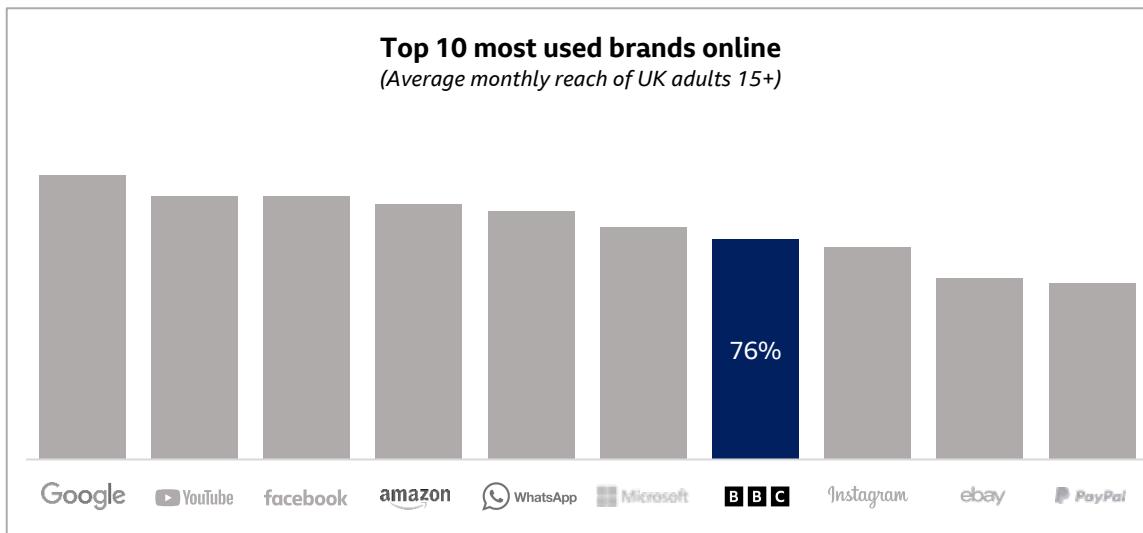
broadcaster to deliver major events with a special commentary for blind and visually impaired audiences. We provided British Sign Language (BSL) on all Government Covid briefings and have signed events such as HM Queen Elizabeth II's Funeral, the Coronation, Trooping the Colour, every main stage performance at Glastonbury, the semi-finals and final of the Eurovision Song Contest and the Coronation Concert. In 2022/23 87% of the iPlayer catalogue was subtitled, equating to 50,866 programmes. Viewers have the ability to change and control the size of the subtitles, so that they can personalise their viewing experience.

Third, we aim for the BBC to have universal engagement, and up to nine in ten UK adults use us on average per week, and 95% per month. Without universal engagement, the most trusted news and British storytelling will be removed from the consumption habits of the UK public. The BBC is still the UK's most-used brand for media, but increasingly US tech giants are pushing other UK broadcasters out of the top most used.



Compass, Ipsos UK. 15-min accum. average weekly reach. On-platform.

Online, the BBC is the only UK audience brand consistently in the top 10 – the sole UK entry among global providers.



Ipsos iris Online Audience Measurement Service, January 2023 - December 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s). Methodology available: <https://ukom.uk.net/ipsos-iris-overview.php>

What the BBC stands for

We are a universal service.

We offer something for everyone, increasingly personalised to increase that relevance, using AI and ethical algorithms driven by our values.

We are accessible to all, ensuring no-one is left behind and increasingly connecting up all the BBC to offer a frictionless, easy-to-use single audience experience.

We regularly reach and engage everyone in the UK as well as serving audiences outside the UK.

We work others to accelerate the next phase of UK digital transition to bring all audiences into the internet age, and ensure audiences see the best UK content.

5 Transforming the BBC for audiences

This chapter sets out how the BBC plans to focus on each of these three roles to increase the unique value we provide to audiences in the years ahead. It outlines the steps the BBC will need to take to accelerate its transformation.

5.1 Harness cutting-edge technology to deliver our mission and pursue truth

1. We will develop **three online news brands** to enhance our digital news services: in verification (*BBC Verify*), investigations (*BBC Investigate*) and in-depth analysis. We will take *BBC Verify* global as our spearhead to become the leader in transparent journalism in the UK, and in countries of most need around the world through the World Service, powered by the use of AI for good. *BBC Investigate* will bring together all the BBC's investigative journalism capability – among the largest investigative journalism forces in the world – under a single brand. We will launch a new in-depth digital magazine – a destination for the best of our analysis and thought-provoking journalism online. We will also expand our presence on social media to bring audiences who spend more time there back to our online services, where we can guarantee the provenance and prominence of trusted news.
2. We are **relaunching BBC.com and the BBC app internationally** to simplify the BBC's English-language digital offer outside the UK and grow our commercial business. These new digital platforms offer for the first time a unified, cohesive experience and with more coverage in areas where the BBC brings most value to international audiences: global news, business, innovation, and sustainability, among others. It will allow us to unlock new commercial opportunities worldwide, and support the BBC values of trust, impartiality, accuracy and transparency.
3. We will **pilot generative artificial intelligence-powered tools** – but will always do so transparently and with clear human oversight. For instance, we are exploring **translating** the best of the BBC's journalism into multiple languages and **reformatting content** instantaneously (for example, converting a live radio commentary into a live text page). We are also looking at improving the **accessibility** of our content, including providing text versions of podcasts, and exploring the potential for a BBC Assistant that can support **tailored learning** within BBC Bitesize. To drive the quality and accuracy of this pilot work, the BBC's Research & Development team is also developing a **BBC Large Language Model** that is trained on the BBC's own journalism.
4. We are designing **public service algorithms for our products** that will not simply serve audiences the sorts of content they already consume, but will introduce them to different types of content. Our algorithms will be built around values of impartiality, breadth and depth. We will build diversity in data teams to ensure this technology works for everyone and to counter the embedded lack of diversity in datasets that can give rise

to bias in output. We will be transparent, sharing our work and approach externally. We will launch an AI literacy campaign later in the year to help audiences understand the potential and the risks of artificial intelligence, and to be a trusted guide to those who want to try out AI tools for themselves.

5. We are increasing our focus on **local journalism** to ensure all communities have access to trusted news and information across TV, radio and online. We have recruited an additional 130 local journalists across England and enhanced the prominence of local and nations news on the BBC News app homepage, helping to drive rapid online visitor growth. As part of the new *BBC Investigate* brand, we are also launching a new network of investigative reporting teams across England – a 70-strong team of multimedia journalists with the time and space to analyse the challenges facing our fast-changing communities today.

5.2 Focus on homegrown content from across the UK

1. We will continue to **move content and decision-making outside London** and the South East of England. By 2026, we expect to exceed our target of 60% of BBC TV production being outside London. 50% of BBC radio and music production will be outside London by 2027. 50% of BBC staff will continue to be based outside London.

Over the next few years, we will tell stories set or made in Birmingham, Bristol, Brighton, Salford, Donaghadee, Sheffield, Belfast, Nottingham, Liverpool, Manchester, Cardiff, Aberdeen, Glasgow, Lockerbie, Bolton, Stockport, Cambridge, the Cotswolds, Essex, Newcastle, Preston, Lewis, Orkney, Kent, Oxford, Surrey, Sussex, Cornwall and Yorkshire – an unparalleled range of storytelling from every part of the UK told to the whole UK.

2. We will continue to spread our **UK News output across the UK**. More than half of our UK journalists will be located outside London, and we will continue to present key flagship shows like *Today*, *PM* and our UK news bulletins from a range of locations. This year, we are moving the *BBC News at One* to Salford and extending it to one hour – the first daily BBC UK TV news bulletin outside London.
3. We will place **local storytelling at the heart of our online products**, giving our audiences easy access to the stories that shape their own communities across BBC News, BBC Sport and BBC Sounds. For audiences in Wales, Scotland and Northern Ireland, we will begin to tailor the BBC iPlayer homepage later this year to provide greater prominence for stories that resonate most in the devolved nations.
4. We will **simplify and strengthen our multiple on-air and off-air talent schemes**, so that collectively they can make a bigger impact as one of the world's most ambitious talent development programmes in media. This will enhance the discovery and development of creative voices and talent across the whole UK, and help secure the long-term future of the country's creative economy.
5. We will support **the media industry in harnessing artificial intelligence responsibly**. We will work with media and tech industry partners to realise the potential of AI while ensuring we safeguard the role of the human as creator and publisher. We are committed to sharing our pilot and research work in this field regularly, as well as how we are using

Gen AI both operationally and creatively. We have recently shared our editorial guidance on AI usage and our wider approach to responsible AI. Over the coming months, we will publish research on audience attitudes to Gen AI that can help other media companies. We will hold an industry-wide event on the impact and potential for Gen AI in media.

5.3 Invest in content that connects us

1. We will invest in **output that can bring communities together**. 2024 promises a calendar of huge sporting events, from the FA Cup to the Men's Euros in Germany, the Men's and Women's FA Cup and the Scottish FA Cup Final, the Olympics in France, Wimbledon, the Women's Super League, the Challenge Cup, the Hundred and Test highlights, the Men's and Women's Six Nations, the World Snooker Championship, and TV highlights of the men's Champions League and the Premier League.

Live sport will remain a key way the BBC brings communities together and connects people. Between now and 2028, the BBC will cover on television the Olympic Games, the Men's Euros, the FA Cup, the Women's Super League, the Wimbledon Championships, the Men's and Women's Six Nations Championships, the World Snooker Championship, T20 and The Hundred in cricket, the Challenge Cup and Super League in rugby league, World Athletics Championships, the London Marathon and the Great North Run. We will also deliver highlights of the Premier League, Men's Champions League, Test cricket and the Men's and Women's Open Golf.

Across 5 Live, Sounds and the BBC Sport app and website, we will provide live audio commentary for over 40 different sports, supported by extensive live text coverage, video and news on the BBC Sport app and website – the largest online sports news provider in the UK.

2. 2023 also showed how **compelling content beyond sport** can bring people together, with the Coronation, *Happy Valley*, New Year's Eve Fireworks, *Eurovision*, *Wild Isles*, *Planet Earth III*, *Strictly Come Dancing* and *Beyond Paradise* all in the top 10 most watched episodes/events in 2023 across all broadcasters and streaming services. The other two in the top 10 were from ITV and Channel 4, showing the continuing unique power of public service broadcasting to bring the country together.
3. We will strengthen our commitment to **connect people locally**, and to hold local and regional decision-makers to account, delivering major debate programmes for all the mayoral elections in May and a 'Hot Seat' feature on local radio to enable the main candidates to face direct public scrutiny.
4. We will **bring the BBC together online**, more integrated and more personalised, connecting audiences with the best and most relevant UK content from across the BBC. The BBC online will have a single consistent experience, single pan-BBC account personalisation and sign-in, a single search function and a unified mobile experience, bringing the BBC to audiences in the simplest and easiest way. Our target to reach over 70% of UK adults online on average per week by 2028 will help migrate the traditional connection of a shared broadcast to a shared online service that everyone can be a part of, can interact with, and can share with others.

5. We will **expand our live offer online**. We will be the ‘most live’ news provider, bringing events as they unfold through live alerts, live online pages, video streaming and live audio. We will bring more live news from our local bases around the UK on to our News and Sport sites. We will make live output more prominent on iPlayer. And we will expand our live music offer online by launching four distinctive music streams on BBC Sounds supported by transmission on DAB+, extending Radio 1, Radio 2 and Radio 3 (subject to regulatory approval).
6. We will set the benchmark for **accessible online products** so that no-one is left out. We will track the performance of our digital products on accessibility, working with the creators of operating systems, browsers and specialist assistive technologies. The digital transition will make this even more important, as accessibility is vital to, for instance, older users who may be less comfortable with digital experiences. We will make sure that using our online products and services is an easy and well-supported experience, and we will help those who do not have email addresses to get accounts.
7. We will **launch in 2024 a new free TV service ‘Freely’**, with Britain’s other public service broadcasters, that will deliver live TV over broadband, so that, for the first time for free, British viewers will be able to browse easily and watch live TV channels together with on-demand content streamed straight to their smart TV via the internet. This will put free live TV that has played such an important role over decades in bringing us together at the centre of the streaming age. We will work with partners to help audiences complete the transition to fully internet-delivered media over the long term. We want to make sure everyone in the UK is connected, with no-one left behind; that everyone benefits from a fair and prosperous UK media economy; and that everyone has easy access to high-quality content.

5.4 Making it happen – a streamlined, more agile BBC

To make all this happen, we will need an even more streamlined, more agile BBC. We will continue to transform the organisation to be as efficient and effective as possible. We will move more of the money we spend on content around the organisation and, in particular, away from broadcast-only output. We will continue to boost our commercial income to generate maximum possible value for the licence fee, and establish major new partnerships that can allow us to reach new talent, access capital and secure scale.

A leaner, more focussed public service BBC

In the past three years, we have reduced public service staffing levels at the BBC by over 1,800 people, from 19,572 full-time equivalents in 2020 to 17,688 in 2023. This has been achieved through a combination of staffing reductions, outsourcing and transfers to commercial operations. This follows a decade-long reduction in senior managers, who remain at 1.3% of the total workforce, below our target of 1.5%.

Over the next three years, we anticipate continuing to reduce public service headcount. We will make the most of the digital-first opportunity to transform the technology we use, the way

we work, and the internet-based services that manage every element of how we create value for audiences. Whether it is creating text, image, video and audio, or all the way through to final distribution, we will make each element of the process digital-first. This means that wherever our audiences are and whatever devices they use, they will consume content in a consistent format, labelled in a consistent way, and with a consistent set of descriptions. That way we can deliver more content to more audiences, more quickly, in more places at once, at lower cost.

This year we are also piloting the use of AI tools for internal use. For instance, a tool enabling our journalists to reformat content at speed by providing article summaries or suggesting headlines. We will also pilot **knowledge management tools**, helping staff find and make the most of the business information they need (e.g. a chatbot to help find audience insight). We will explore **automating** faster and more intuitive labelling of source content to enable quick and effective content creation.

Alongside this, we will change how we engage with our extended workforce – the significant and growing proportion of the BBC's overall workforce made up of freelancers, fixed-term contracts, agency teams, and strategic suppliers and partners. This group is as critical a part of the BBC's programmes and services as our permanent colleagues, and we will aim to make their experience of the BBC better, more consistent and more straightforward.

Focus on content that delivers streaming value, and on commissioning high-impact programmes that appeal to the broadest audiences

We have continued to move our funding towards content that can reach broad audiences, deliver scale and drive the growth of iPlayer. We can see where this strategy is working, with hit new formats like *The Traitors* and *Race Across the World*, the return of *Gladiators*, box-set documentary series like *Earth* and *Once Upon a Time in Northern Ireland*, and scaling our biggest brands into franchises, such as *Doctor Who*.

We will continue to shift funding away from content primarily aimed at broadcast channels. We have already cut 1,000 originated hours on television. That has meant tough decisions on long-running titles like *Holby City*, *Doctors*, *A Question of Sport* and *Autumnwatch*, and newer titles like *I Can See Your Voice*, *Freeze the Fear*, *King Gary*, *The Goes Wrong Show* and *The Witchfinder*. We have reduced spend on new programmes on BBC Four and BBC Two.

In the nations, we have decommissioned titles such as *X-Ray*, *BBC Sesh*, *Mirror Mirror*, *Mela*, *Inside Central Station* and *The Hotel People*. In News we have created a single, integrated BBC News channel operation with feeds for UK and global audiences, as well as making significant changes to *Newsnight*.

With BBC iPlayer our primary video destination for all audiences, we will bring commissioning for BBC Three closer in line with what we do on BBC One, Two and Four. We will deliver more value to younger audiences by focussing our commissioning, marketing and social media activity on BBC iPlayer. We will continue to champion opportunities for the best new talent, and commission the titles that speak to younger audiences, from high-impact documentary

and drama, to new UK comedy. The BBC Three linear channel will remain to curate the very best BBC TV for younger audiences.

To drive greater impact with audiences, we are also proposing to reshape our news offer in Scotland. Subject to regulatory approval, we will replace *The Nine* – the hour-long news programme on the BBC's Scotland channel – with a new nightly 30-minute news programme at 7pm. We will extend *Reporting Scotland* regularly on BBC One for a number of hour-long specials. We will bolster *Debate Night* (Scotland's successful *Question Time* format). We will launch a visualised Scotland version of *Newscast* featuring lively discussion and analysis of Scotland's biggest stories, and develop a richer online news offer.

Continue to boost our commercial income

Following the successful moves of commercial news, children's production and some audio production into BBC Studios, we will explore shifting more production and support activity into commercial subsidiaries or to commercial partners to drive commercial growth and efficiency. This will not include any publicly funded BBC services in the UK, in order to avoid undermining the licence fee.

As part of this, we will explore further commercial opportunities in media intelligence to provide services for other institutions and companies. The BBC has expertise and depth of analysis in this area at a time when it is needed more than ever in an age of rising global insecurity and disinformation. In BBC Monitoring, we have outstanding analytical capabilities, including on disinformation, jihadism, and the influence of Russia and China. We have identified commercial opportunities that, with Government support, could further expand the BBC's unique offer in a way that is consistent with our values, and would keep the services and expertise BBC-owned and operated.

Establish major partnerships that allow us to reach new talent, invest in high-impact content, access capital and secure scale

We will explore partnerships with global technology and services firms to help reduce cost, bring global investment into UK online and technology services and cutting-edge global capabilities to UK audiences. We will continue to seek out major partnerships in content that help us invest in franchises with global potential, as we have done with Disney with *Doctor Who* and *Bluey*.

5.5 Future public service funding

We will also need to consider how best to fund a universal BBC in the long term and secure all the benefits of universal public service broadcasting into the future.

Over many decades, the licence fee has provided substantial and stable funding for the BBC. It has been paid for by nearly all UK households, enabling the BBC to provide content and

services at exceptional value for money – with the licence fee priced well below a bundle of equivalent advertising-free subscription services. Our public funding has also served as investment capital for the UK’s creative industries; it has stimulated commercial investment; driven economic growth; and complemented the business models of other broadcasters.

But just as the BBC has evolved and changed over its 100-year history, so has the way it has been funded. Over the past few years, we have seen reforms to the licence fee, adding in on-demand iPlayer and the BBC paying for free TV licences for over-75s on Pension Credit. This continues a journey of reform that goes back to when the BBC was first funded by a royalty on wireless-receiving sets. We want to ensure that the way we are funded is fit for purpose for the future.

We are clear that substantial public funding is vital to the BBC’s future to allow us to deliver our public service mission. In real terms, the licence fee generated 30% more income in 2010/11 than today – a difference of more than £1 billion a year. Various costs have been added, followed by two years of a frozen licence fee at a time of high inflation. So the BBC’s finances are under significant strain.

In 2022, to respond to this challenge and invest in high-impact video content and product capability, we announced a £500 million savings and reinvestment plan. We have delivered around £400 million of this plan already, while also dealing with high inflation. To implement the vision laid out today, we will extend our plan to look for a further £200 million annual savings and reinvestment by 27/28, on top of the £100 million we have still to deliver from the original plan.

The licence fee will be in place until at least 2027/28 and the end of the current Charter. But given the rapid changes we have seen in audience behaviour and in the media market, it is right that we look at how we are funded in the future. So, as part of the run-up to the BBC’s new Charter that begins in 2028, we will begin now to research proactively how we might reform the licence fee from then to secure the benefits of a well-resourced, universal BBC of scale for the long term. This work will look at:

- The scope of what the fee covers. At the moment a licence is required for consumption of any live TV and iPlayer. Changes to the scope of a fee can increase the household base and stabilise public funding, or decrease the household base and provide more choice to consumers
- The debate about whether to make the fee more progressive. The licence fee today is the same for every eligible household though there are some targeted concessions that provide free licences for over-75s on Pension Credit, a 50% discount for blind users, and discounts for designated care homes
- The enforcement mechanism. The BBC cannot practically switch off its services to non-payers, and so a strong deterrent is needed. It is vital that the system of enforcement is not only effective, but also that it is fair and proportionate. We welcome the debate on whether the current model is the right one, drawing on the findings of recent Government reviews. We will look closely at the opportunities for reform.

As part of this, we will engage with the work currently being done by Government to review BBC methods of funding.

We will also discuss with the Government how to support the World Service. The BBC World Service is a priceless national asset. In the age of disinformation, it offers an extraordinary opportunity to establish the UK and the BBC as the pre-eminent purveyor of facts to the world, and to provide trusted, independent news where it is needed most.

UK Governments have long recognised what the BBC World Service achieves for the UK. But the financial pressures on the BBC are holding the World Service back at a critical moment. Elsewhere in the world, some countries increasingly see news provision as an extension of state influence and a major tool for democratic disruption, with funding that outstrips World Service investment by an order of magnitude. However, we cannot keep asking UK licence fee payers to invest in it when we are faced with cutting UK content.

The case is strong for Government to look again at taking back responsibility for funding the BBC World Service, as it did for the first 80 years of its life.

5.6 What success will look like

This strategy will deliver a BBC that is more relevant, that is universally used and offers outstanding value to all. It will be a digital-first BBC for future generations – the foundation for a growing UK cultural and creative industries sector, powered by British-owned intellectual property. It will be a globally admired digital public service, and an organisation that can continue to attract the best talent in the industry to do their best work.

A BBC with strong audience engagement and universal usage

A universal BBC in the UK means:

1. Offering something for everyone
2. Being accessible to everyone, as much in the online world as in the broadcast
3. Regularly reaching and engaging everyone.

Reaching and engaging everyone in the UK means aiming for nine in ten adults using us monthly, and eight in ten using us weekly. This universal usage would be underpinned by remaining the number one provider in watching, listening and news, and the most trusted news brand in the country. As audiences continue to shift from broadcast to online, we will target a minimum of 70% of the adult population using the BBC online on average per week by 2028, with the great majority of those signed up and using a BBC account.

Outside the UK, we would expect over a decade to target half a billion monthly global users, subject to discussions with the Government over funding, with a majority of those using BBC platforms. We will continue to be the world's most trusted international news provider.

A BBC that is the foundation for thriving UK cultural and creative industries

This document has already outlined the BBC's critical role in the creative industries:

- The single largest investor in original UK content
- Contributing almost £5 billion a year to the UK economy each year, with 50% of its economic impact generated outside London, compared with a sector average of 20%
- For every £1 of the BBC's direct economic activity, generating £2.63 in the UK economy as a whole
- Supporting over 50,000 jobs around the country.

The plans outlined in this document will strengthen our unique contribution to the UK's creative economy. After implementation, we will be making more content than ever across the UK, with over 60% of network TV and 50% of radio and music spend outside London, and around 20% of TV spend in Scotland, Wales and Northern Ireland. Our creative industry partnerships, apprentice programme and talent schemes will help discover and nurture talent in every part of the country, with a thriving global Studios business bringing that talent to the rest of the world.

There is no questioning the unique value the BBC brings to the creative industries. In an alternative world – a what-if scenario where a publicly funded BBC did not exist – commercial broadcasters might invest more in content, but they would not replace the scale, scope or distinctiveness of what the BBC does.

Without the BBC, the amount spent on original British video content over the course of a year could fall by over £1 billion by 2027. UK-made hours in the key genres of drama, factual, comedy and entertainment could fall by around 25%, while UK-made hours of children's content and arts content could both fall by more than 70%. The BBC is a key investor in UK audio production, and spend on British audio speech production could fall by over £250 million in this scenario. Closure of BBC News services would see nearly 100,000 hours of trusted news and current affairs on TV and radio services lost and not replaced. Without the BBC World Service, we would see an incalculable loss of UK soft power and a rise in the risk of disinformation and democratic disruption worldwide.

A BBC that is a globally admired digital public service, and a great place to work

Delivering this strategy will require the BBC, more than ever, to operate as one Group, with a single public mission and strategic ambition, but funded by both public service and commercial means. We will build a commercial BBC Studios business that can double profits between 2021/22 and 2027/28, and which is ever more closely linked to the BBC's mission.

We will represent the diversity of the public we serve in our workforce, our creative teams and our content. We will be an inclusive organisation that represents the population of the country both on and off air, in its range and diversity of backgrounds, voices and opinions.

We will continue to run the BBC effectively and efficiently, benchmarking the costs of running the publicly funded parts of the organisation against the top 25% in the market, aiming for that cost to be kept below 5% of controllable spend.

We will continue to inform, educate and inspire our audiences on climate change and biodiversity through our content and programming. The BBC is a signatory of both the climate content pledge and the journalism climate commitment to ensure that our output is evidenced by the latest science and remains impartial. Our sustainability strategy is underpinned with scientific rigour to meet the highest standards, working collaboratively with our suppliers and across the industry to drive towards a sustainable media industry, both on and off screen.

5.7 A BBC for the future

We have based our vision and our plans on what the UK public – our owners and stakeholders – tell us and show us they value about our role. The public’s input will continue to guide our choices for how to deliver it. So beginning next year, and ahead of the new Charter in 2028, we will launch the biggest ever public engagement process to inform and drive the debate on the BBC’s future. This will be one of the most significant consultations the BBC has ever undertaken, aiming to reach and get feedback from up to one million people through a combination of surveying BBC account-holders, nationally representative polling, deliberative research and in-person sessions to hear directly from members of the public. We will ensure the views of the public – our owners – are at the heart of the debate about the future BBC.

This document sets out a strategy to create an inspiring, creative digital-first public service. An independent world-leading organisation that informs, educates and entertains, shaped by our unique set of purposes and values. An organisation actively shaping a new wave of technological change for the benefit of our democracy, our creative economy and our society at the tipping point of a digital-only future, and making sure no one is left behind.

It will require the BBC to accelerate rapidly the pace of its transformation and the way it is organised and run. It will mean a leaner, more focussed organisation. It will require the BBC, more than ever, to operate as a single organisation, but to be more open than ever to other institutions and partners.

Rather than choosing to follow the market, we are choosing a different path – a choice for the BBC to step up its role as a unique universal public service for the UK and across the world. A choice to lead the digital transition for the good of the UK, shaping a media ecology fit for the digital age. And a choice to reap all the critical benefits – democratic, economic and social – that this could bring for the UK public, and our country.