



More in
Common



Reset • Tech



Sunday 27 September



13:30 to 14:30



Derwent Arena Room,
Secure Zone, ACC

The Future of the BBC



**Megan
McElroy**

Politico
(Chair)



**Luke
Tryl**

More in
Common



**Polly
Curtis**

Demos



**Ian
Murray MP**

Minister for Creative
Industries, Media
and Online Safety



**Dylan
Sparks**

Reset
Tech



**Rupa
Huq MP**

Digital, Culture,
Media and Sport
Select Committee
Member

Introducing the Seven Segments of Britain



Introducing the Seven Segments

The British Seven Segments were developed to move beyond traditional left-right or party-based analysis by exploring the deeper psychological, cultural, and value-driven foundations that shape public opinion. This approach helps explain why political loyalties have fractured and offers a more nuanced understanding of what drives attitudes on issues like immigration, climate, and the economy—enabling more effective engagement with the public across a fragmented political and social landscape.



Progressive Activists



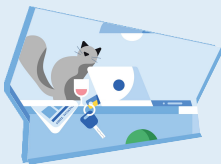
...an outspoken group that is politically engaged and globally minded, championing social justice but feeling alienated from mainstream politics

Incrementalist Left



...a group that leans left and trusts institutions, often stepping back from the news and avoiding politically fraught debates

Established Liberals



... a prosperous group that is confident in institutions, values expertise, and believes the system broadly works

Sceptical Scrollers



...a disengaged group that has lost trust in mainstream institutions and increasingly looks online for sources of truth

Rooted Patriots



...a patriotic group that feels overlooked by elites and wants leaders with common sense to protect local identity

Traditional Conservatives



... a nostalgic group that respects tradition, authority and personal responsibility, while remaining sceptical of rapid change

Dissenting Disruptors



... a frustrated group that craves radical change and backs strong leaders who promise to shake up a broken system

How the public sees the BBC



In general, Britons vary on what role the BBC is meant to play

Older members of the public, especially over the age of 65, are likely to expect and endorse the BBC's founding principles – **to educate, inform and entertain**.

However, younger Britons, especially those under 25, have less of this relationship with the BBC. **Nearly half of 18–24s (45 per cent) see the BBC as mostly a news organisation.** They are also the most likely to think of it as a public service. But they are much less likely than older Britons to think its role is to cover all three parts of this mission.

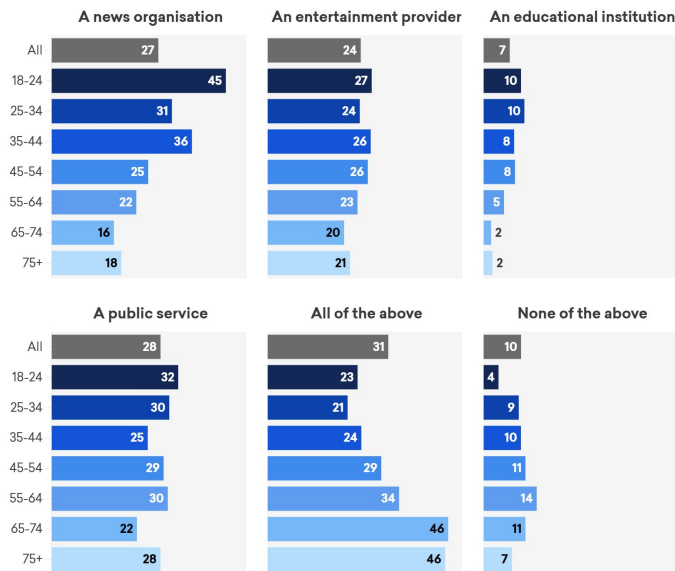


There are programmes made which are of niche interest to certain individuals but would never be made without the BBC being that public service broadcaster... communities and interests are served that wouldn't otherwise be, if it was just left to a wholly commercial market.

Nick, 46, insurance, Established Liberal

Younger Britons are more likely to see the BBC as primarily a news organisation, while those aged 65+ think of it more holistically

When you think about the BBC, what do you generally think of it as? Select all that apply.



Britons would miss a broad range of content from the BBC if it were to be abolished

Britons tend to say they would miss a variety of different things about the BBC, should it be abolished. The things they would miss the most range from **factual programmes, to dramas, to the news**, with 30 per cent or more selecting each of these.

However, these would be missed more by those who consider themselves to be traditional consumers of TV and radio. **Among those who think of themselves as modern viewers (i.e. streaming), they are just as likely to say they would miss “nothing in particular”.**

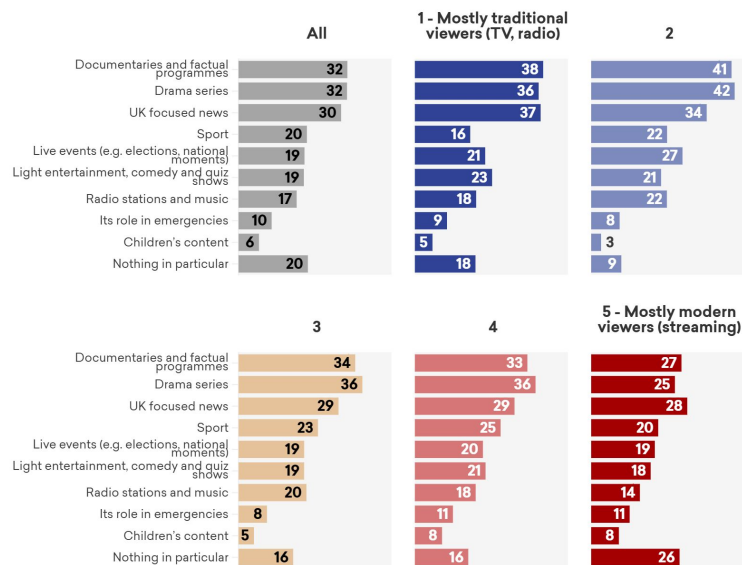


I would miss the dramas, I would miss the news, I would miss the radio. I've grown up with it. I'm 44 and I still watch things like Casualty just because it makes me feel safe... I'd really, really miss it.

Laura, 43, teacher, Cardiff, Traditional Conservative

Traditional TV and radio consumers would miss the BBC's documentaries, dramas and news the most, while streaming-first consumers are more likely to say they wouldn't miss anything

If the BBC disappeared tomorrow, what would you miss most? Select your top 3.



More trusted and respected than many other institutions

Even the most hardened sceptic of the BBC is likely to trust it more than the government.

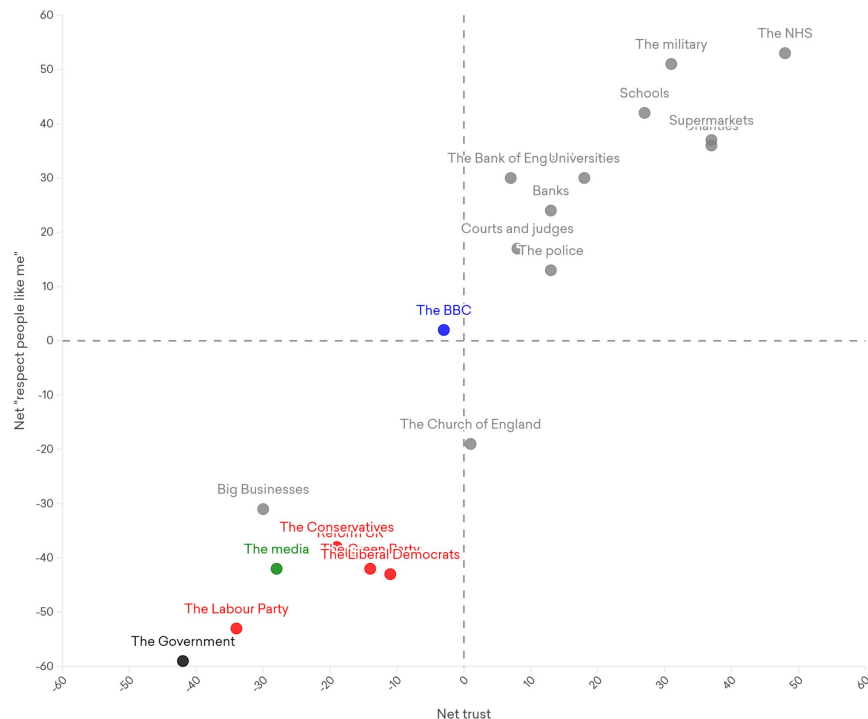
Commercial pressure on news organisations is also intuitively understood as compromising – even by those who otherwise prefer an advertising model.



If the BBC were to change and were more honest and more transparent and they got new people in there as well, I think I would prefer to go to them to handle [reform] rather than the government. Because to be honest with you, I don't really trust the government. I probably don't even trust them more so than the BBC.

Paul, 43, bus driver, non-fee-paying, Dissenting Disruptor

As trust of institutions is declining, the BBC is seen in a better light than political parties, the government, and the rest of the media



Supporters of insurgent parties are less trusting of the BBC, but not overwhelmingly

Four in five Conservative voters have at least some trust in the BBC, not far behind Labour (92 per cent) and the Liberal Democrats (85 per cent).

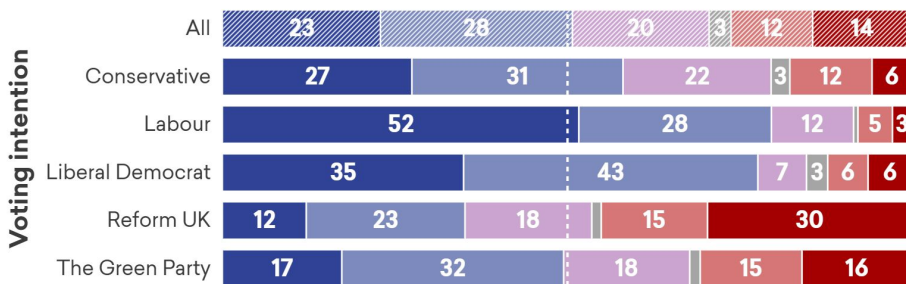
Reform voters are more split: 54 per cent have some trust, 45 per cent little or none. Those who say none at all comprise 30 per cent.

It is worth bearing in mind that scepticism of the BBC is also paired with a general scepticism of traditional media as a whole – **in News, the BBC is not threatened by its competition in the same way it is with entertainment.**

Even Reform voters still tend to trust the BBC overall

For each of the following media companies, say how much trust, if any, you have in them: **BBC**

● A great deal ● A fair amount ● Some ● Don't know ● Not too much
● None at all



Competition from streaming services



Streaming services are competing with the BBC for viewers, and are winning among some Britons

73 per cent say that Netflix is one of the main sources of their film and TV viewing, compared to 57 per cent for BBC One, and just 21 per cent for BBC iPlayer.

34 per cent describe themselves as primarily streaming viewers; only 20 per cent as primarily traditional TV – a near-inversion of the landscape a decade ago.

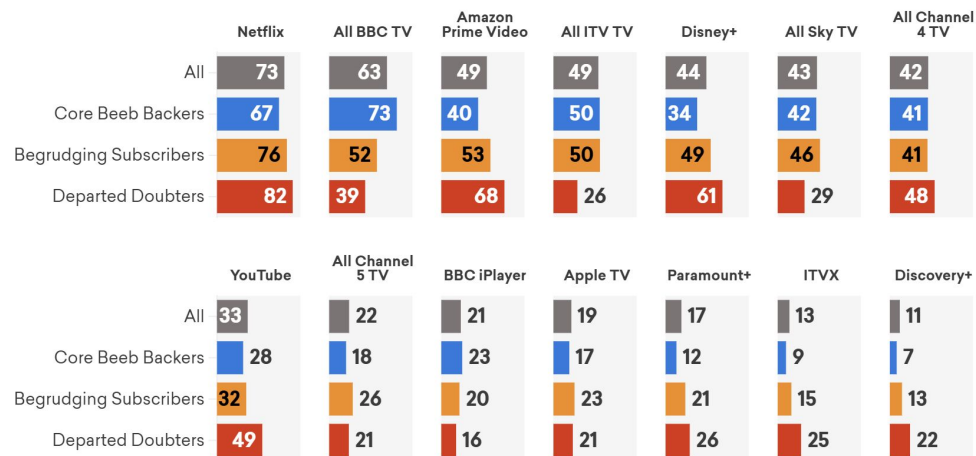


It can't compete with Netflix, Amazon, where there's really high budget, good quality stuff. And I think Jack said, it is outdated, it's not kept up. And I guess it can't. It's not one of those billion pound organisations...

Jess, 29, non-fee-paying Sceptical Scroller

Many Britons see streaming services as their main sources of TV and film

Please indicate which of the following you would say are your main sources of TV and film?
Select up to four.



Labour voters are most likely to think the licence fee is good value, while Reform's are much more sceptical

Split by voter groups, the licence fee is mostly deemed to be good value by Labour and Lib Dem supporters. Conservative and Green voters tend to be split, while Reform voters are widely opposed.



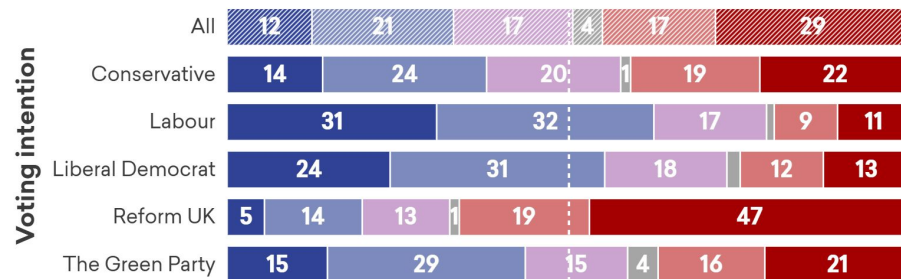
That's why people aren't paying for it and they're cancelling. You can get better value other places and a lot more available newer stuff. There's only a certain amount that you can keep watching on BBC dramas. There's not as many new dramas as they release with Netflix There's always something. BBC is not worth the value. Sorry.

Jodie, 48, beautician, Sceptical Scroller

Voters are split on whether the licence fee is good value for money

Do you think the TV licence fee, currently £174.50 a year, is good or bad value for money?

● Very good value ● Fairly good value ● Neither good nor bad value
 ● Don't know ● Fairly bad value ● Very bad value



But more people are switching off the BBC, and it's not just because of the licence fee

35 per cent of Britons say they use the BBC less than they did ten years ago, against 26 per cent who use it more.

The cost of the licence fee is cited as the top reason, but many Britons point to the BBC's actual content as a factor.

- Of those who say they used to use the BBC more, **51 per cent cite other platforms having better content** as a reason for switching
- 26 per cent are unhappy with scandals** around its presenters and management



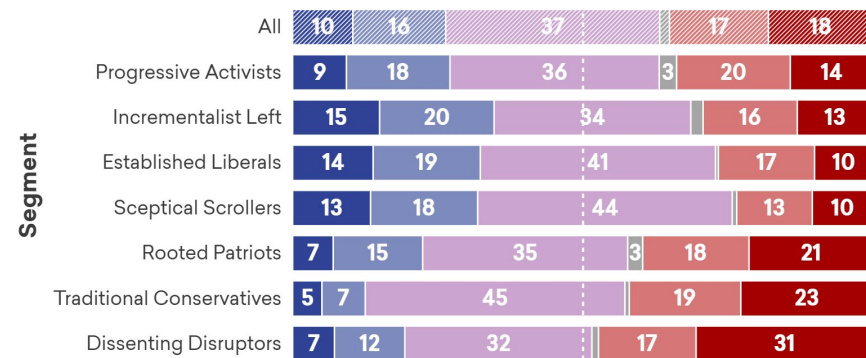
It can't compete with Netflix, Amazon, where there's really high budget, good quality stuff. And I think Jack said, it is outdated, it's not kept up. And I guess it can't. It's not one of those billion pound organisations...

Jess, 29, non-fee-paying Sceptical Scroller

Nearly half of Dissenting Disruptors use the BBC less than they used to

Do you use the BBC more, less or about as much as you used to 10 years ago?

● Much more ● A bit more ● About as much ● Don't know ● A bit less ● Much less



Those now using less of the BBC think the grass is greener elsewhere

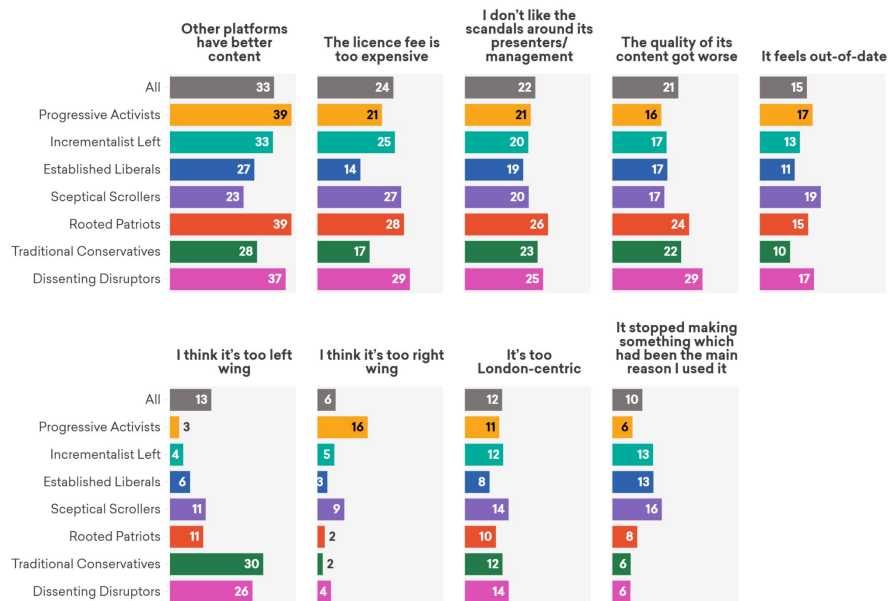
Among those who've stopped using the BBC, the argument that other platforms have better content is prevalent across all age groups. **Older Britons are more likely to feel that the quality of content has got worse.**

The **price of the licence fee** is also consistently cited across the segments.

While Traditional Conservatives and Dissenting Disruptors say the BBC is **too left-wing**, this is not an issue for Rooted Patriots who are focused on **content, quality** and **price**. Politics is much less of an issue for most of the segments.

One third of Britons feel other platforms have better content than the BBC

What are the main reasons that you use the BBC now less than you used to? Select your top 3.



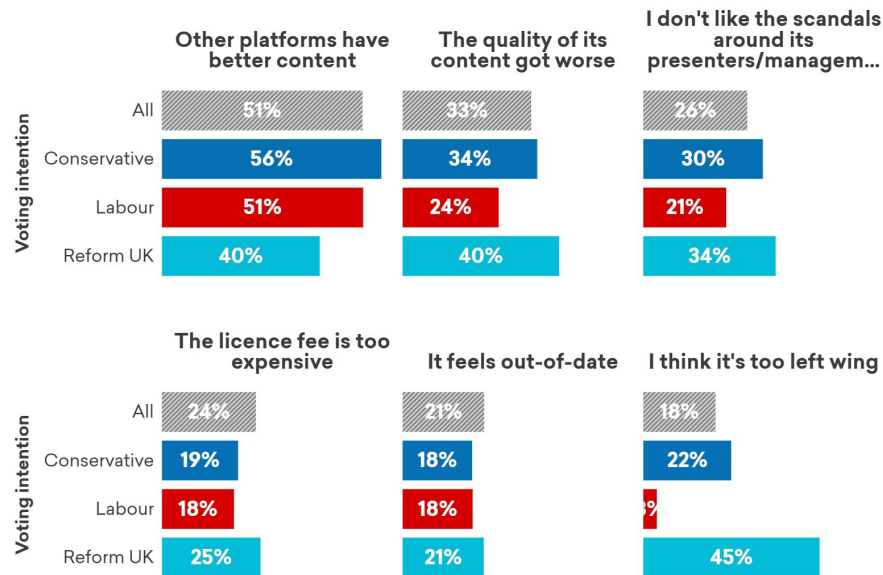
Britons are most likely to say that cost and better content elsewhere are turning them off the BBC

Perceptions of bias are a concern for some Britons, but are most pronounced among Reform voters, who cite it as their top reason for using the BBC less.

Among the public as a whole, they attribute their declining use of the BBC to the competition now available on other platforms (Netflix, Amazon Prime, etc.), and the cost of the licence fee. Most Britons who have turned off the BBC appear to be making a value assessment of the BBC as a product, and not so much a political critique of it.

Cost and content are priorities for all voters, while left-wing bias is only a top concern for Reform supporters

What are the main reasons that you use the BBC now less than you used to?
Select your top 3



The changing relationship



For me, I pay it on a monthly basis... So for me it is just another subscription that I pay. I pay Netflix, I pay for Amazon Prime, I pay for Disney Plus. It is just another subscription that I pay for my own privilege of enjoying entertainment that I like watching. I don't really look at it as, oh, it's going to the BBC or anything like that.

Mark, 42, insurance manager, Sceptical Scroller



I've got Netflix, which I pay for. I've got Amazon, which I pay for... why do I still need to pay BBC licence? I'm not watching BBC, I'm watching Amazon Prime that I'm paying for. So that is kind of double payment.

Maciek, 46, factory trainer, Boston, Dissenting Disruptor



If it became subscription and you could pick and choose the bits that you want, I would pick a bit of radio and BBC One, maybe BBC Two, and that would be it. I've got no need for certain other bits.

Anne, zoo worker, Incrementalist Left



I watch bits on YouTube... and then we like The Traitors and we watch The Apprentice and Dragons Den, I think I saw some really good dramas, but it's just not there anymore. I can't compete with Netflix, Amazon, where there's really high budget, good quality stuff. And it is outdated, it's not kept up. And I guess it can't. It's not one of those billion pound organisations like Amazon and Netflix. So tune in now and then to certain things, but other than that, that's it.

Jess, 29, non-fee paying Sceptical Scroller

Proposals for reform



Voters cannot agree on an alternative

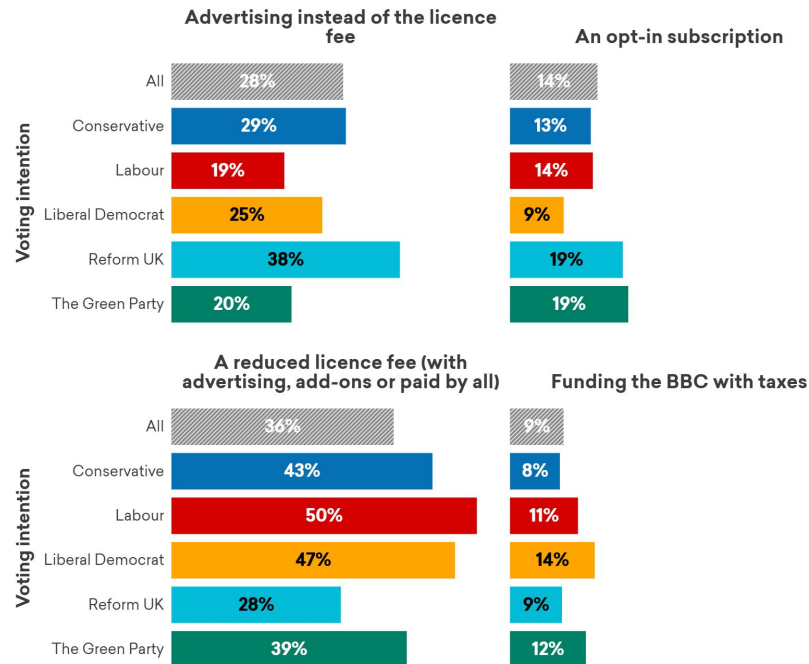
Advertising in place of the fee is the most popular single option in every group, but reaches only 37 per cent among Reform voters and 31 per cent among Conservative voters.

Some type of reformed licence fee combined with advertising, paid add-ons or a universal fee is still preferred by 39 per cent of Conservative voters and 29 per cent of Reform's.

General taxation is not preferred by any party's supporters.

No party's voters unite behind one alternative to the licence fee

Which funding model for the BBC would you personally prefer?



A subscription model would attract only a third of Britons

If the BBC were to move to a subscription model, regardless of what it would cost, **only a third of the public say that they would probably subscribe to it.**

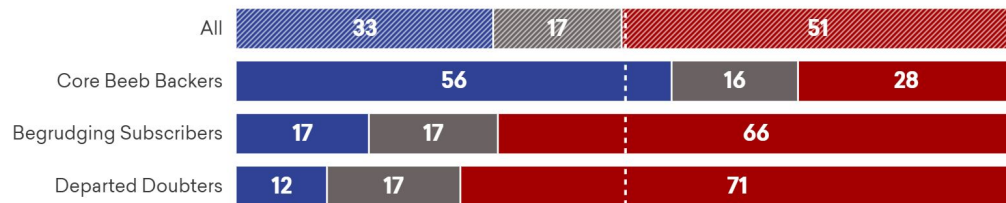
It would only retain just over half of the BBC's core backers (56 per cent).

Among begrudging subscribers, who currently pay the licence fee (but reluctantly), only 17 per cent say that they would opt in and pay for a subscription-based BBC.

Only a third of Britons say they would probably subscribe if the BBC moved to a subscription model

If the BBC adopted a subscription model, where you had to pay a monthly subscription to be able to access BBC TV, radio, podcasts, iPlayer, as well as the news and sports websites and apps, which of the following best describes you?

● I probably would subscribe ● Don't know ● I probably would not subscribe



Overall, Britons say that lowering the cost is what matters most

A majority of the public say that reducing the cost of the licence fee to £120 per year would make them more likely to continue (or for others start) paying the licence fee.

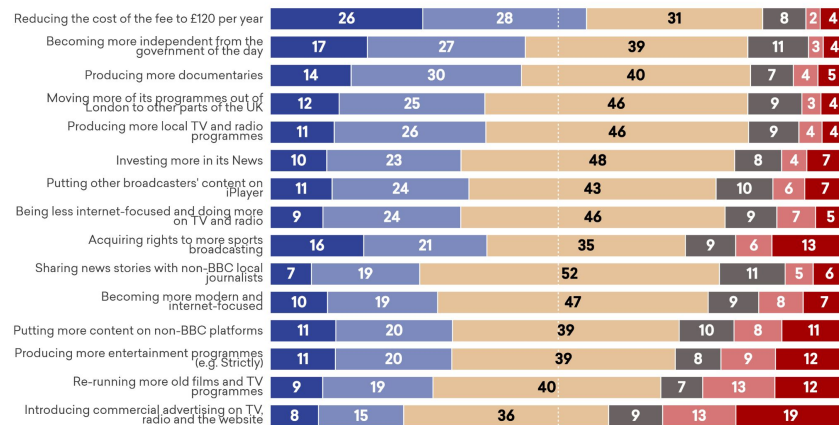
Other major motivators for Britons would be:

- making the BBC more independent from the government of the day
- producing more documentaries
- moving more production and locations outside London
- providing more local programmes and news
- adding other providers to iPlayer.

Aside from reducing the cost, being more politically independent, becoming less London-centric and producing more documentaries and local programmes are most likely to make people willing to pay the licence fee

For each of the following, state whether these would make you more or less likely to start (or continue) paying the licence fee:

● Much more likely ● A bit more likely ● No more nor less likely ● Don't know ● A bit less likely ● Much less likely



High quality content is key in perceptions of value for money

High quality content is comfortably the number one reason Britons would consider the licence fee to be good value for money (62 per cent).

This is true across all segments, though notably high among Progressive Activists and Traditional Conservatives.

More conservative segments also place greater emphasis on the **lack of advertising** on the BBC.

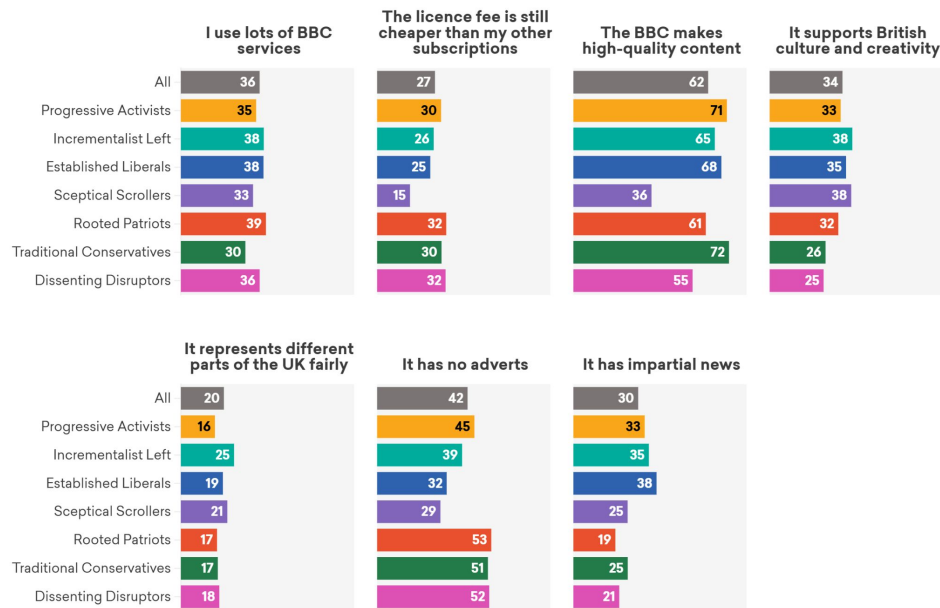


Compared to the Italian public broadcaster, the service the BBC does is just so much higher quality — the range of programming... they have the most impartial, high-quality service, and I pay the licence happily.

Laura, 30, academic, London, Established Liberal

Almost all segments see the BBC's high quality content as the biggest reason the licence fee is good value for money

What are the biggest reasons you think the licence fee is good value for money? Select your top 3.



Non-fee-payers are harder to win over, but not impossible

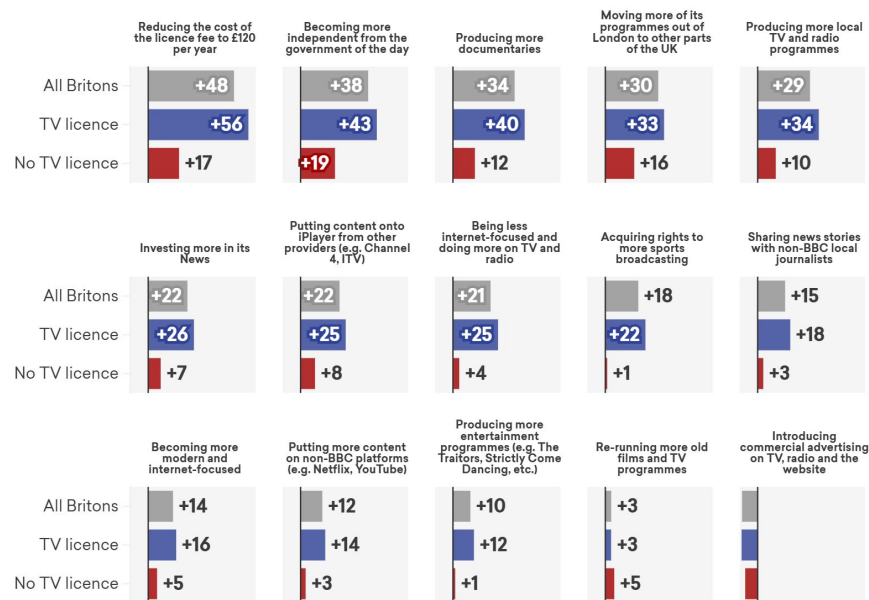
Those who currently do not pay the licence fee are less persuaded by any of the reforms on offer, but some of the options most popular with fee payers would also still appear to move the needle with this group:

- Making the BBC more politically independent (net +19 more likely to start paying)
- Reducing the licence fee to £120 (+ 17)
- Making/setting more programming outside of London (+16)
- Producing more documentaries (+12)

Greater independence from government is the thing most likely to make current non-fee-payers want to subscribe

For each of the following, state whether these would make you more or less likely to start (or continue) paying the licence fee:

Net score: % more likely minus % less likely



Many reforms would be appealing to all voter groups

Broadly speaking, voters from every party would welcome a more politically independent and less London-centric BBC, and tend to say that these things would make them more likely to start paying the licence fee again.



Something I'd personally watch would be if it was sort of local stories, here on the South Coast or in Yorkshire – local filmmakers that are interesting and different, not the sort of cosy BBC usual story. I'm sure there's loads of creative people everywhere that they could just make interesting stories... something just local, I'd be more interested in perhaps.

David, 36, solicitor, non-fee-paying, Dissenting Disruptor

Aside from reducing the fee, all voters are receptive to increasing the BBC's independence and being less London-centric

For each of the following, state whether these would make you more or less likely to start (or continue) paying the licence fee
% much or a bit more likely

