



SILVER VOICES

SAFEGUARDING UNIVERSALITY

The Future
of Broadcast
TV and Radio





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Foreword



As the Director of Silver Voices, a national organisation representing the interests of older people in the UK, I am pleased to introduce this landmark report on the future of broadcast TV and radio.

In December 2022, voices in the BBC called for a switch-off of these services and laid out a vision of the future in which online-only streaming was the sole method of accessing TV and radio. The concern that these comments provoked among our members intrigued us, and led to the questions driving this research: what do people value about broadcast TV and radio and how important will these services continue to be in the long-term? The research presented in this report highlights the crucial role that broadcast TV and radio play in knitting together the social fabric of our nation. These services bring people of different ages and backgrounds together and provide a cultural framework for the entire country.

We now find ourselves at a crossroads where the principle of universality that underpins these services could be threatened. Rather than just a technical issue of policy, this research shows that it is an issue that deserves much greater public attention. In fact, the greatest risk of all is that decisions about the future of these broadcast services are made without proper consideration of the voices of diverse listeners and viewers.

This research shows that we need to recommit to the principle of universality, recognise the value of broadcast services to our society and reconsider the agenda set out by BBC executives. Without this it is entirely plausible – and possible – that we sleepwalk into a situation we cannot recover from, with broadcast services being lost for everyone.

In this report, we present the voices of people for whom these services really matter. We show that a broad group will be impacted: older people, poorer people, people living in less connected and more rural areas and those with disabilities are particularly reliant on broadcast TV and radio. Yet the effects of a broadcast switch-off would be felt in all corners of society. All these voices deserve to be heard and it is essential that we safeguard universal free access to information, education and entertainment for all members of society.

As technology continues to progress rapidly, and as policy evolves alongside it, I hope this research serves as an urgent wake-up call for policymakers and decision-makers to ensure that these vital services are protected for generations to come.

Dennis Reed
Director of Silver Voices.

Executive Summary

The why

Broadcast TV and radio services form one of the cornerstones of British society today by providing universal, reliable access to information, entertainment, and education. Despite widespread reliance on these services, they are only protected by current government policy until the early 2030s. In recent months, comments suggesting a possible future without these services provoked concern and led to a widespread petition calling for the UK Government to guarantee access to these services in the decades ahead. As such, it became our endeavour to delve further and understand the implications of a potential broadcast 'switch-off'.

Until now, this conversation has largely been kept out of the public discourse, yet it is clear from our research that people across the UK feel strongly about the long-term provision of broadcast services. Through this process we have sought to highlight the voice of viewers and listeners – these insights should inform any conversation on the future of broadcast TV and radio.

This research surveyed a wide range of people in the UK, cutting across all age ranges, geography and income levels to represent a wide range of opinions. While we have sought to highlight the disproportionate impact changes could have on older people in particular, our research has emphasised that the principle of universality is important to everyone in the UK, no matter their background, and that a variety of audiences want to continue to use broadcast services in the long-term.

METHODOLOGY SUMMARY

[For full details please see page 37]

Introduction: This survey aims to gather insights from 2,000 members of the UK public through an online survey and 55 participants in in-depth interviews and focus groups.

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

SAMPLING PROCEDURE:

- **Target Population:** Residents of the United Kingdom.
- **Sampling Frame:** Derived from the latest ONS data.
- **Sample Size:** 4,012 respondents.
- **Sampling Method:** Stratified random sampling using telephone and online modes.

DATA COLLECTION:

- **Data Collection Method:** Mixed-mode approach (telephone and online).
- **Quota Setting:** Quotas were established based on ONS data for each demographic category.
- **Data Collection Period:** 6th June, 2023 to 13th June, 2023.

WEIGHTING PROCEDURE:

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

i. The UK government has stated that these services are protected until 2034, however this is not protected in licences which can be terminated in 2030. The petition asks that the government guarantee access to Freeview and aerial radio beyond 2040. More information can be found at: <https://petition.parliament.uk/petitions/630957>



Broadcast services and universality

Over 100 years ago, broadcasting services were established for the very first time in the UK, with the mission to inform, educate and entertain.

The BBC's founding father, John Reith, set out to create a universal service that would draw out "everything that is best in every department of human knowledge, endeavour and achievement."² During the chaos and violence of the Second World War, the newly formed broadcast services provided a steady supply of reliable news and entertainment to maintain morale.³

The circumstances we live in today are very different to those when broadcast first became available – from advancements in broadcast technology and the types of content being distributed, through to the wide variety of actors who service the industry. Yet the principles of universal provision of information, education and entertainment remain just as important and relevant to

people now as they did then. By universality, we mean the ability for all audiences in the UK – regardless of finances or background – to be able to access a broad range of content.ⁱⁱ

As we engage in a national conversation around the future of these services, we must remember the values we wish to be reflected, and those we wish to shape our nation. As former news reporter and journalist Robin Aitkin noted on broadcast, "for many it is an ever-present companion: from breakfast-time to bedtime, from childhood through to old age, there it is telling us about ourselves and the wider world, amusing and entertaining us."⁴

ii. This is the definition we tested in focus groups and is from the BBC's response to Ofcom's consultation on the Future of Public Service broadcasting (Page three, BBC's consultation response, 16th March 2021).

Executive Summary

Linear broadcast services not only provide a cultural framework for the entire nation, but they also offer once-in-a-lifetime events for all to watch together. Recently, 20 million people in the UK tuned in to watch the coronation of King Charles III and joined the celebrations through the live broadcasts of the event.ⁱⁱⁱ

The principle of universality, now deeply embedded within our society, today finds itself threatened. Through a lack of attention, commitment or awareness among politicians and the general public, the services many take for granted are at risk of being lost. Linear broadcast services have critical cost, availability, and usability advantages and to protect these services and the values they underpin, decision makers must be proactive.

We directly asked respondents to provide a specific date they considered the minimum year until which broadcast TV and radio services should be protected. The answers ranged from 2051 – 2079 (25th to 75th percentile) with an average result of 2067. All of these dates are well

beyond the current provision, which grants protection of these services until the early 2030s.

The research conducted for this report highlights the importance of ensuring that any developments in technology continue in line with the key principles and values shared widely across the United Kingdom. It is crucial that we safeguard universal access to information, education and entertainment for all members of society and that broadcast services remain alongside the growing range of online services.

KEY FINDINGS

Research through large-scale polling, focus groups and in-depth interviews drew out five key findings:

1 On average, people believe broadcast TV and radio should be protected until well beyond the 2040s, with a range from 2051 to 2079.

2 Three-quarters (74%) said that partial or total removal of broadcast services in the future risks leaving behind significant portions of the population.

3 The cost of online subscriptions (53%) and struggling to afford broadband bills (46%) in the next 15 years were cited as the top barriers to moving to online-only TV and radio services.

4 2 in 3 (67%) worry that large sections of the population would be left behind if broadcast TV and radio were not protected, citing older generations, disabled people and those living in rural areas as most vulnerable to future changes.

5 81% say that universal access to public service content should be protected by the law.

ⁱⁱⁱ. The focus of this research is on Digital Terrestrial TV (DTT) and DAB radio, which are referred to throughout as 'broadcast TV and radio'. Broadcast TV refers to a mode of receiving TV content via an aerial, such as Freeview. Internet-streaming services refers to the delivery of television and radio content over IP (Internet Protocol) networks, such as subscriptions or on-demand services.

Recommendations



This research highlights the multiple benefits of broadcast TV and radio and its continuing importance to have in everyday lives across the UK.

Our key finding was that, on average, people want broadcast protected until well beyond the 2040s. As such, we recommend:

- **That government provide a clear commitment to the long-term protection of broadcast services including a date well beyond current commitments.**
- That government ensure that TV and radio broadcasting, and the broad range of services delivered through it, are **protected for the long-term within any ongoing and future legislation.**
- That the spectrum used by broadcast is **protected at the World Radiocommunication Conference 2023 (WRC23) and at future international spectrum conferences.**
- That there are ongoing requirements for **Public Service Broadcasters (PSBs)** to continue to support universal broadcast services and the **rich public service content** delivered through them, including through a **commitment within the next BBC Charter period.**
- That the voices of the listeners and viewers, and in particular those groups most heavily reliant on broadcast services, are **put at the centre of the debate and any decision-making by government or Ofcom, the sector regulator.**

Armed with knowledge of the public consensus, and with political will, there are multiple opportunities for politicians to step in to protect these services.

As this research shows, ensuring media legislation supports and protects TV and radio which is free to access and available universally is a central concern to the general public. A useful first step would be to include safeguarding broadcast delivery in updates to ongoing and future legislation regarding media in the UK, for instance, within the Media Bill currently under discussion and within any government or Ofcom reviews of the sector.

At the same time, we welcome steps that would enable a thriving broadcast ecosystem that delivers a wide range of choices to audiences while ensuring universal access to broadcast services.

Crucially, we must recognise that interventions to safeguard the spectrum used by broadcast services is required in order to protect these services. This is an issue which spills beyond the UK's borders and requires collaboration with global partners. The spectrum allocated to broadcast services is a key technical element which provides long-term security of universal access to these services. Upcoming events such as the next World Radiocommunication Conference (WRC23) in Dubai in November 2023 highlight the global dimensions of decisions about broadcasting – British representatives need to be able to bring and defend a clear agenda at a regional and global level, now and in the future.

As the only independent national membership organisation for senior citizens in the UK, Silver Voices continues to defend and protect the interests of those it represents: older generations who are frequently left out of the national conversation on important issues.

We ask that policymakers and regulators strive to include these voices as they review current commitments in the media landscape.



PART 1

The benefits of broadcast TV and radio

Participants identified a number of benefits from broadcast TV and radio in their day-to-day lives and to the nation as a whole, now and in the future.

Information and education

A clear majority (77%) of respondents of all ages reported watching TV through Freeview weekly, while (64%) listen to broadcast radio every week in their homes.

Freeview TV means delivery via an aerial and it reaches 98.5% of UK households,⁵ while weekly radio listeners have remained at a constant 88% in the past few years, of which DAB radio makes up the largest platform share.⁶

Our research echoes the findings of previous work, which has underscored the central importance of the universal availability of public service broadcasting. 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.”⁷ Across all age groups in this study, 81% say that universal access to public service content should be protected by the law.

Providing information and education to all is perceived as a valuable part of British heritage, and, as such, broadcast TV and radio are essential. In the absence of broadcast TV and radio, over one-third (38%) were concerned about limited access to education content.

Beyond being a vital source for education and entertainment, access to high-quality information is crucial for maintaining a healthy participatory democracy.⁸ With a trustworthy news source everyone around the UK – regardless of background, age, or wealth – can be well-informed and capable of holding the political apparatus of the nation to account.

Our research showed that the vast majority still believe in the central pillar of universality today. Nearly 8 in 10 (77%) believe that most people in the UK can get good access to TV and radio services, but many believe this universality is under threat. Over half (54%) would be worried about their ability to access TV and radio services if broadcast services were switched off in 2035.

WHAT PEOPLE SAY

“Broadcast TV helps our little ones.”

– Adrian

“I’d miss TV for programmes I like to watch about interesting stuff and for the news...that’s important. I would miss the radio because I just switch it on in the morning and let it do its thing.”

– Kay

“Educate, inform, entertain is the prime objective.”

– John

“TV is quite important to me as I put it on in the morning for the news and when I’m at home I keep it on during the day to keep on top of everything.”

– Jan

Spotlight: DAB radio



In our research, broadcast radio emerged as a crucial part of respondent's everyday lives with 67% saying it was important for them.

Our research shows that, across all age groups, 2 in 3 (64%) listen to broadcast radio weekly, with 58% saying that they have listened to their radio in the car. The vast majority of cars do not have online radio installed, and, as a result, online radio cannot be accessed in the car without a smartphone and data – an option which is not available for many of our respondents, nor recommendable, given the associated risks of using a mobile phone in the car.

On further investigation in our focus groups, we found that DAB radio is crucial, particularly in the car, and is unlikely to be replaced in the future. Most would not consider retro-fitting for cost reasons, nor would they buy a new car. For those whose livelihoods rely on the car or travelling frequently, such as lorry drivers, DAB radio can be especially important – not only to keep informed, but also for companionship in what can sometimes be a solitary occupation.

WHAT PEOPLE SAY

“I listen to the radio when I work in the shed fixing up bikes for the community...it would be very quiet without that.” – Mike

“I listen to the radio first thing in the morning for the news...it's company too, isn't it?” – Garnet

“I don't see myself replacing my car anytime soon...it works very well... I shouldn't be expected to pay for a new car if DAB wasn't available.” – Mike

Coffee break moments

TV and radio also provide access to cultural moments and common frames of reference. One focus group participant referred to ‘coffee break moments’, pointing to the universal impact of broadcast TV and radio on daily life.

Participants identified particular contexts where traditional TV and radio were preferable to internet-streaming, due to a less quantifiable and intangible – but nonetheless important – feeling of ‘togetherness’. Many participants spoke of the excitement in watching important national events, such as the Coronation or big sports matches, through linear TV, as it could be enjoyed all together. Indeed, 47% considered live sports to be better viewed through broadcast TV compared to 18% who believe it is better online. Special occasions were also deemed

better on broadcast, with 53% stating that watching state occasions, such as the King’s coronation, is ‘much better’ on broadcast compared to internet-streaming services (12%).

Broadcast TV and radio can thereby provide universally accessible content that can bring families and people of different ages and backgrounds across the country together.

WHAT PEOPLE SAY

“How can you talk about anything without TV, or without radio? How do you know what’s going on?”

– Beth

“If something big happened, everybody would be talking about it the next during their coffee break. That national identity is being totally lost.”

– Mike

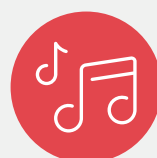
TOP 3 PROGRAMME TYPES SEEN AS BETTER WATCHED VIA BROADCAST TV THAN ONLINE:



National and local TV news (53% vs. 14% national online and 13% for local)



State occasions e.g., the Coronation (53% vs. 12% online)



Live events e.g., music, London marathon (50% vs. 17% online)

Keeping choice available

Many participants expressed the view that there is a false assumption of a zero-sum game between internet-streaming and broadcast services. In other words, it is often assumed that these two modes of content delivery are in direct competition with each other and that only one can emerge as the winner.

However, participants argued that there is a role for both broadcast and internet-streaming to coexist and run alongside each other. Three-quarters (77%) of respondents agreed that broadcast TV and online services should continue to operate alongside one another, while 71% supported the same sentiment for DAB radio and online services. When asked to cite an appropriate year that services should be protected until, there was a range of answers from 2051-2079, with younger audiences (18-24) averaging a response of 2067 – this is over three decades longer than provided for under current regulation.

There were several reasons why respondents felt broadcast services must continue alongside streaming options. Overall, 33% believe that picture quality is better through traditional broadcast compared to online, 48% believe that it is the same as online, and only 18% believe

that online delivers better quality. Among those who believed that broadcast services were better, 69% cited better signal quality and reliability. For older viewers aged 65 to 74, easier channel navigation was a particularly prominent feature for their preferences for watching broadcast TV over online services, with almost half (49%) raising the issue. This was an important theme raised by focus group participants who, discussed the use of accessible technology. One participant cited his wife's arthritis as a significant barrier to using more modern technology, in particular touch screens. Respondents who said they had a disability were most likely to rely on broadcast services, with 1 in 5 (22%) saying they found Freeview TV essential to their daily lives, with a similar number (19%) asserting the same for radio.

The key to universal access is in offering not only content to a variety of audiences, but ensuring technology is accessible to all individuals no matter their technical ability or mobility. In other words, the simpler, the better for everyone. Survey respondents with disabilities expressed the most concern about a potential switch-off of broadcast services in the next decade, with 59% saying they would be worried about their access to TV content and 60% saying the same for radio.

TOP 3 BENEFITS OF TRADITIONAL TV COMPARED TO INTERNET-STREAMING



69%

Better signal quality and reliability



49%

Reduced reliance on internet connectivity



48%

Familiarity and comfort with the experience



Internet-streaming, on the other hand, can be more complicated but does offer a wide range of on-demand content as has been widely noted in other research. If both options are kept available, consumers can enjoy the best of both worlds.

As well as noting their desire for choice, focus group participants also drew attention to the significance of broadcast as ‘critical national infrastructure.’^{iv}

Given the vulnerability of the internet to cyberattacks, it is important for the UK to have communications backup in the case of failure. Indeed, the Electronic Communications Resilience and Response Group – a cross government and telecoms industry forum – regard that against a backdrop of the Information Age, a resilient telecommunications apparatus is required. The group stress the importance of actively planning for emergency situations, should they arise.¹⁰ For the EC-RRG, “the key is to avoid, wherever possible, ‘single points of failure’”, such as limited pathways to communications.¹¹

WHAT PEOPLE SAY

“Without broadcast and just relying on internet TV...it just puts all your eggs in one basket.”

– Peter

“What we need is a broad variety of telecoms for infrastructure resilience...we need back ups and alternatives. So we should keep both.” – Kenneth

“Why can’t we have broadcast forever?...the poor and old will be left behind.”

– Sharon

“The internet compared to DTT is horrendously unreliable. If we have a national emergency, it is absolutely vital.”

– Adrian

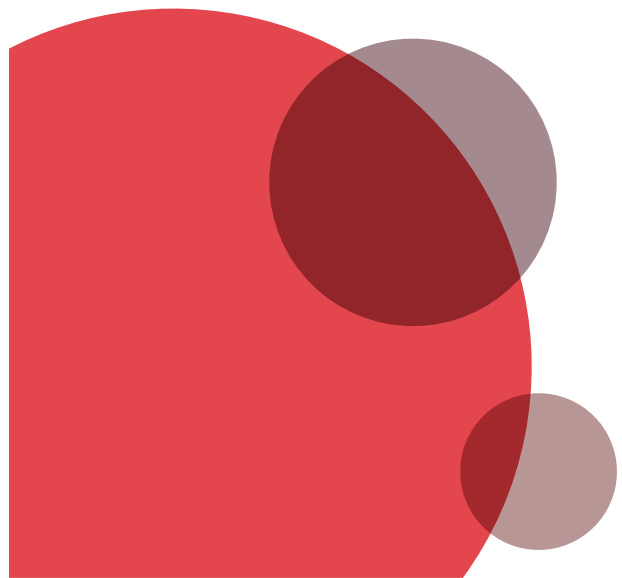
iv. Critical national infrastructure (CNI) refers to assets that the government has identified as being of strategic importance to essential service delivery.

The role of government and public service broadcasters

Given the importance and value they attribute to broadcast services, survey respondents identified an important role for broadcasters as well as government stakeholders to protect universality. 81% agreed that universal access to public service content should be protected by the law.

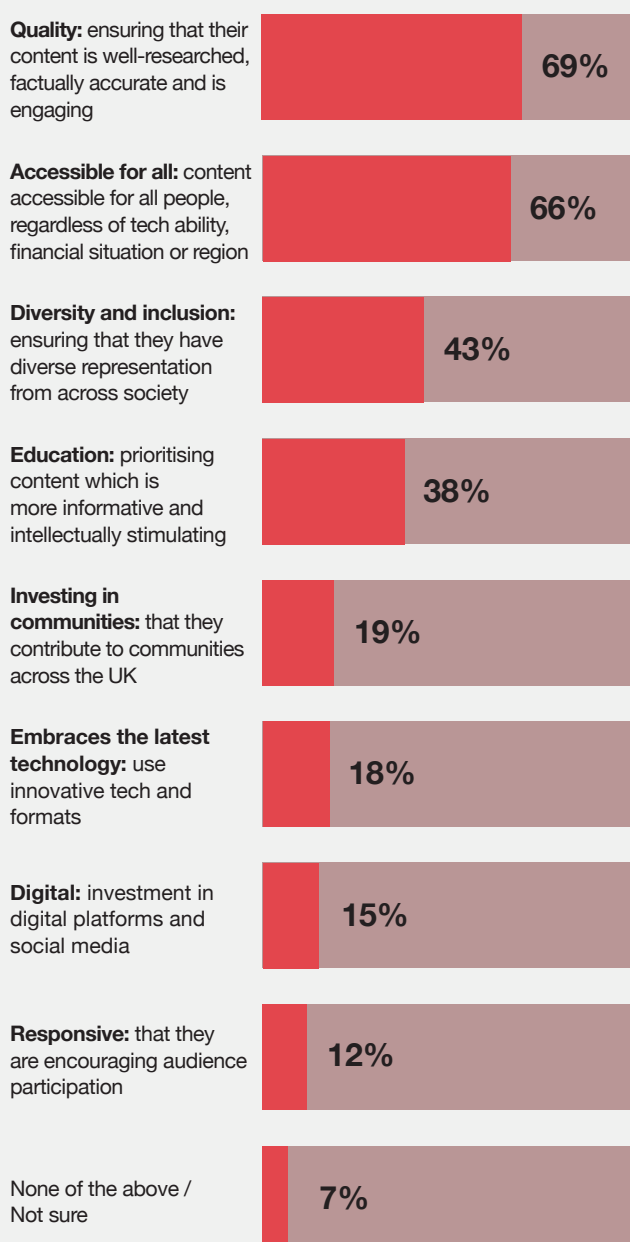
While many believe that public service broadcasters should not actively support one means of access over the other, 69% agreed that the BBC should actively support the continued provision of broadcast TV through an aerial until at least 2040.

Furthermore, respondents identified an important role for the UK government in committing to the delivery of broadcast TV and radio beyond the next decade. When thinking about the future of broadcasting in the UK, survey respondents placed high priority on ensuring that broadcasting remained accessible for all (66%). This was particularly important for older generations, with 83% of people 65+ marking it as a priority.



PRIORITIES FOR THE PROVISION OF PUBLIC SERVICE BROADCASTING

Q. What do you think is most important for the government to address about the future of public service broadcasting?
Please select your top three priorities



PART 2

Barriers to a broadcast switch-off

Respondents were typically passionate and concerned about the future protection of broadcast services.

Many cannot imagine operating in an online-only world and identified several barriers to a potential broadcast switch-off, especially considering the unique benefits broadcast provides.

Inclusion was the most important requirement identified: all participants agreed that everyone should have access to the universal benefits of broadcast, including information and entertainment so that they are included in national conversations, well beyond the next decade.

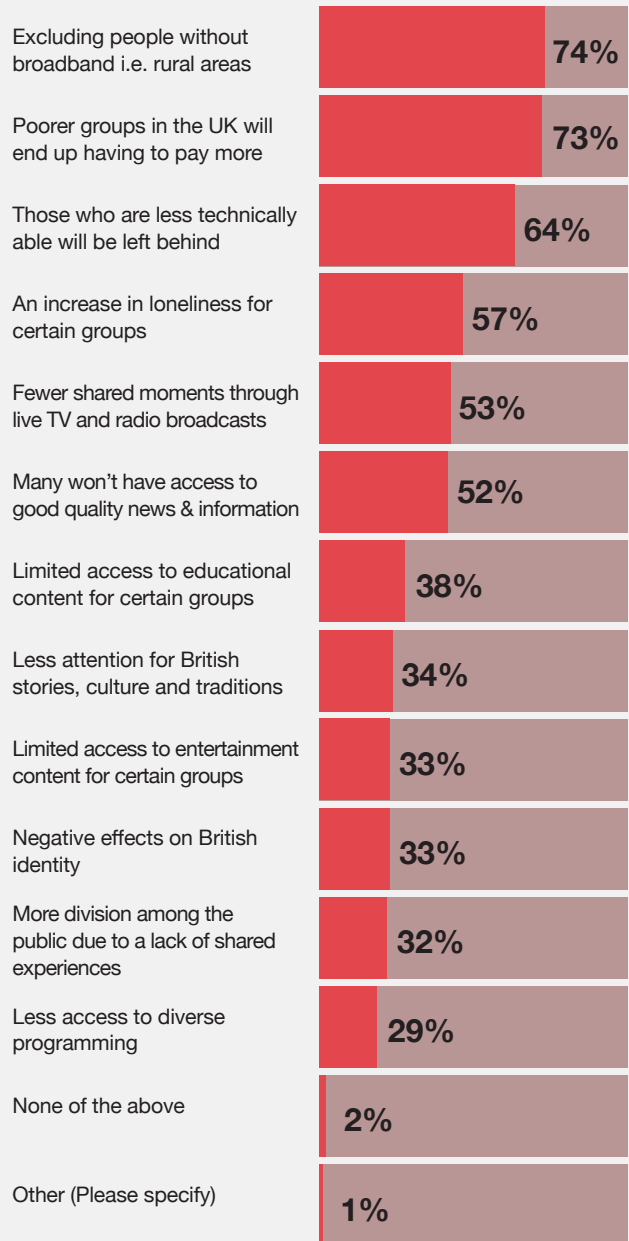
Fairness

Overall, over 2 in 3 (67%) agreed that it would be unfair to make people rely on the internet or online for all TV and radio services. A wide range of concerns emerged in our research. About three-quarters worry that large sections of the population would be left behind if broadcast TV and radio were not protected, particularly those living in rural areas (74%) and poorer groups (73%).



MAIN CONCERNS IN AN ONLINE-ONLY WORLD

Q. If any, which of the following negative impacts do you think the UK as a whole may experience if these broadcast services were switched off. Select all that apply



The importance of access to public service broadcaster content through free-to-air TV and radio cut across generational and wealth lines in the UK. According to Ofcom's Chief Executive, Dame Melanie Dawes, "universality is a core part of what makes public service broadcasting valuable. It is that ability to reach out to many audiences, and the availability of content for all people in the UK, free at the point of coming to air."¹² In contrast, broadband is not free nor freely available to all equally.

For participants, a future in which TV and radio is delivered only through the internet and online would lead to adverse consequences. Top concerns included worries that people without access to high-quality broadband (such as in rural areas) would be left behind (74%) and that poorer groups in the UK would end up having to pay more (73%).

As discussed in the previous section, large swathes of the population living with a disability would be unfairly impacted by changes to traditional broadcast services. If there was a potential switch-off of broadcast in 2035, people with disabilities express the most concern, with over half (59%) saying they would be worried about their access to TV and radio content, and 60% saying the same for broadcast radio. Indeed, within this group, three-quarters (74%) thought that failing to protect access to public service content on all platforms, including broadcast, would be unfair and exclude large sections of the population.



WHAT PEOPLE SAY

"I think that a lot of people are going to struggle with the costs and tech."

– Sue

"There are lots of people with the cost of living that aren't going to be able to afford alternatives."

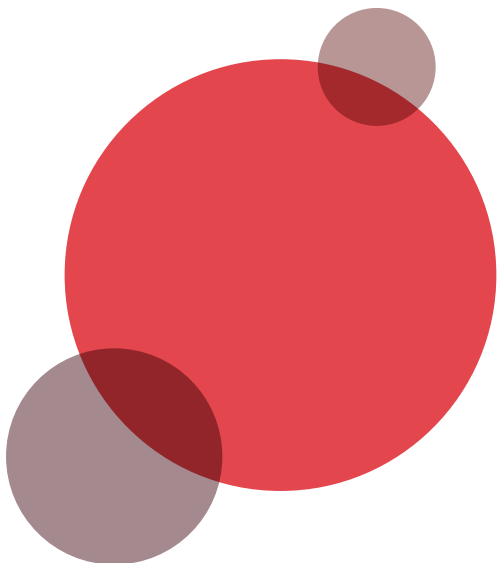
– Beth

"It's just nice to hear a voice in the corner sometimes, while I'm busy in the kitchen or something."

– Colin

"I watch TV everyday, I live alone so it's good company."

– Anna Rose



Fairness and older Generations



- As members of the Silver Voices community have highlighted, older generations (65+) in particular are unfairly impacted by changes in broadcast TV and radio provision. Those 65+ are the least likely, compared to other age groups, to subscribe to a monthly streaming service (46%) and are most likely to watch Freeview TV on a daily basis (71%). As such, they are significantly more reliant on traditional broadcast services than other age groups for access to good quality news, education and entertainment.
- This is especially concerning as 1.4 million older people in the UK suffer with loneliness, according to Age UK research. Those suffering are especially likely to be those who live alone, are in poor health or feel as if they do not belong to their community.¹³ Social isolation is common in old age and leads to a decrease in both physical and psychological skills, and is consequently linked to a poorer quality of life and even higher mortality risks.¹⁴ As such, connecting to the national and local conversation through TV and radio is a crucial tool those in more vulnerable positions can use to stay informed and entertained. 51% of over 65s said broadcast TV via Freeview

was 'essential' or 'very important' to them on a daily basis, with 52% saying the same of broadcast radio. Broadcast TV and radio remain important and easy to access sources of information, entertainment and company.

- In this context, social exclusion was a real concern for 8 in 10 (79%) of this age group, with 70% worried that removal of broadcast services could lead to an increase in loneliness for certain groups.

WHAT PEOPLE SAY

“The problem for me is that I rely on other people to come round and do it all for me...it’s too hard.”

– Pat

“Setting up a digital service would be too much – you can’t just press a button.”

– Tony

- At an individual level, adapting to fast-changing technology is a difficult and unreasonable ask for many. Almost 2 in 3 (62%) find technology and interfaces involved in streaming services too confusing to manage and see this as an issue that will only increase in the next decade. As the Centre for Ageing Better stress, there remain significant gaps in digital literacy since inclusion is not just about “being online”, but having the skills, confidence and support when encountering unfamiliar tasks. Ofcom states that around a quarter of all internet users find themselves in this situation, classifying them as “narrow” internet users – this is weighted significantly towards those aged 55 and above. In our research, 75% of respondents said they felt they often lacked the right skills to use the internet well, while over 2 in 3 (68%) are worried about breaking something or doing something wrong.
- The multiplying impact of lack of access to alternative services and the reliance on current universal broadcast services means that older people would be one of the groups most significantly impacted by a switch-off in the UK. Considering their needs and listening to their wishes when thinking about the future of broadcast is one of the core takeaways of this research, drawn out on several occasions by focus groups participants and interviewees.

Some participants noted that they either didn't have internet services in their house at all or knew of neighbours who didn't. **Reducing access to broadcast services would undermine the key principle of universality.**

Respondents believed that making decisions about the future of broadcast TV and radio without taking the needs of these groups into account is unfair, lacks respect and is dismissive of their needs and wishes.

WHAT PEOPLE SAY

“My mother would be lost. She’s on her own all day and has not got a laptop. She isn’t internet active and the TV is a main part of her life.” – Tracey

“We’ve got to remember that there’s a whole spectrum in society, of different people with different capabilities, all who are equally important to the well-being of this country and if we don’t do our damn best to include them in society then we’re not going forward in society.” – Adrian

“We’d be stuck – we’ve got no computers and would be completely lost.” – Mike

“We do have a part to play but it seems that we’re just a burden. And so we’re excluded from important decisions.” – Françoise

“There’s already gross inequality living in this society, this will make it worse.” – John

SPOTLIGHT: LEARNING FROM PAST LESSONS

Many participants drew comparisons between online streaming and online banking, or other transitions to online-only services, to underscore the need for support in education and awareness.

Bringing these groups into the conversation and respecting their views is crucial for a thorough understanding of the wants and needs of the consumer.

“I worked for a bank – they didn’t educate people about online banking, they just did it. I think the same will happen here – if older people don’t have a family member to help them they can’t do it” - Tracey

Choice

Many participants in our research viewed the potential removal of broadcast TV and radio as an infringement on their freedom and a limitation of their choices as viewers and listeners.

Linked to concerns about fairness, they believe that protecting hybrid viewing – the ability to access both broadcast and internet-streaming services – is the clear winning option.

Overall, almost 2 in 3 (62%) were strongly opposed to the statement made recently by a BBC executive, “a switch-off of broadcast TV and radio will and should happen over time.”¹⁶

Broadcast TV and radio makes available a wide range of live, high-quality programming. At the same time, technology has led to an assortment of streaming platforms and subscription services that cater to different tastes and niches within entertainment.¹⁷ The landscape of British telecommunications networks allows for these to co-exist and for consumers to enjoy the different advantages of each form of delivery.

With equal access to both broadcast and internet services, hybrid viewing is seen as important not only for preserving individual choice but also for promoting inclusion. For instance, in our survey older people in particular related to being more familiar and comfortable with traditional broadcast TV and radio services (56%). Removing these options could exclude them from accessing information, education and entertainment.

In this study, the public overwhelmingly wants to protect the choice to watch and listen to broadcast services, with 8 in 10 (81%) saying that committing to the protection of universal access to broadcast services should be part of legislation on the media in the UK.

WHAT PEOPLE SAY

“This is being approached from perspectives from tech companies, but the ordinary viewer isn’t being considered at all.” – Chris

“They’re taking our choice away.” – Beth

“Why make things more difficult when it doesn’t need to be?” – Tony

“You’d be taking away people’s freedom to choose.” – Jan

“In principle, I don’t have anything against [internet-streaming] being made more widely available, however I am against the loss of the terrestrial broadcast services.” – Adrian

“Choice is being eroded, not just for older people, but especially older people, and you’re seen as irrelevant if you don’t just get on with it.” – Ann

Cost

All focus group participants noted the spiralling costs of requiring high-speed internet and subscriptions to access online streaming platforms, with 64% currently struggling to afford broadband. If traditional broadcast services were phased out in the next 15 years, 1 in 5 say they don't know how they would access radio, while 1 in 4 anticipate difficulties accessing TV. In particular, over half (53%) anticipate struggling to afford the subscriptions for online TV and radio services in 15 years' time.

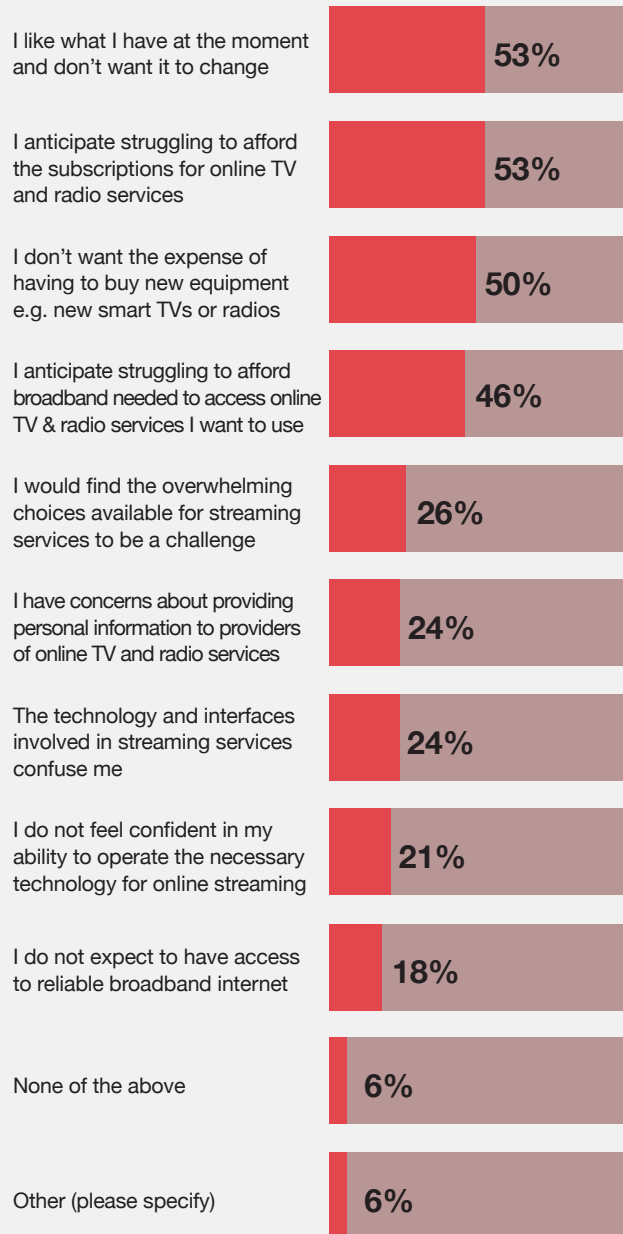
Other research has shown that 77% of the UK are worried about the rising costs of living, a consistent concern over the past year.¹⁸ While the myriad streaming options available to consumers provide a range of choices, research by Citizen's Advice suggests that people feel caught in 'subscription traps' that are becoming more and more expensive.¹⁹ Many have cancelled subscriptions to streaming services completely. Research published in early 2023 found that 2 million households have cancelled their streaming subscriptions in the past year in the face of rising costs.²⁰

As many families have begun to give up expensive monthly subscriptions, broadcast TV and radio are seen as increasingly valuable and universally accessible services – the removal of these services seems unthinkable to many respondents. As focus group participants noted, it seemed futile and a waste of good technology and money to spend more on new equipment such as up-to-date smart TVs or speakers. 50% of respondents didn't want the expense of having to buy new equipment, viewing it as unnecessary.

While focus group participants considered internet streaming subscriptions as a 'luxury', access to broadcast TV and radio was seen as a basic necessity and as providing fundamental access to services. Across all age groups, 85% see a continued, or increasing, relevance for broadcast TV and radio in the future.

ANTICIPATED BARRIERS TO A BROADCAST SWITCH-OFF IN 15 YEARS

Q. Why do you anticipate there may be issues with online-only access of TV/radio services in 15 years?



Part 2: Barriers to a broadcast switch off

Moreover, the high costs of broadband also risk excluding many from universal access in an online-only future, especially in the context of the increasing cost of living. Indeed, recent research conducted by Citizens Advice suggests that up to 1 million people have cancelled their broadband in the past year because of concerns about the increasing cost of living.²¹ This was supported by our research, where 64% said they currently struggle to afford broadband. While this has an impact across different groups in society, such as those living on pensions or their savings, our research also highlighted the impact on younger generations. Those aged 18-25 particularly struggle to afford the internet at the moment, with 14% saying they did not have access to broadband at home.

Even when thinking about the next 15 years, almost half (46%) anticipated costs of broadband would be a key barrier to accessing TV and radio services.

Therefore, ensuring everyone has access to low-cost sources of information and entertainment is crucial, even more so for those on pensions and relying on low-cost services.

Some also saw broadcast services as part and parcel of the licence fee. Without a commitment to broadcast services, over 2 in 3 (68%) would be unwilling to pay the current level of the licence fee.

WHAT PEOPLE SAY

“Netflix is a luxury.” – Sue

“I’d be averse to the whole idea to have to pay more to access the basic info I rely upon – to be informed, educated and entertained.”

– Adrian

“I worry for people who can’t afford to pay for subscription services.”

– Beth

“For me its [about] cost: smart TVs and all the rest of it are too costly.”

– Pat

“Streaming online can be expensive and quite a lot of them will have you tick boxes and you don’t know what you’re signing up to so it can cost you even more.”

– Ann

“A new price would need to be under the current licence fee level.”

– Tony

TOP 3 PRIORITIES FOR THE FUTURE OF BROADCAST



69%

Quality of content



66%

Accessibility for all



43%

Diversity and inclusion

Accessibility to reliable emerging technologies



The complexity of online services vividly contrasts with the simplicity of accessing broadcast TV and radio.

While the UK has become increasingly dependent on internet-connected technologies in recent years, many people across the country lack the digital literacy needed to access online services. Of those who anticipate issues if broadcast services were removed, 1 in 4 (24%) said that they would find it too confusing and a further (46%) anticipate struggling to afford the broadband needed to access these services. This is especially a

WHAT PEOPLE SAY

“If it’s not straightforward I get frustrated.”

– Sharon

“I get stressed even at the thought of having to do it all online.”

– Leanne

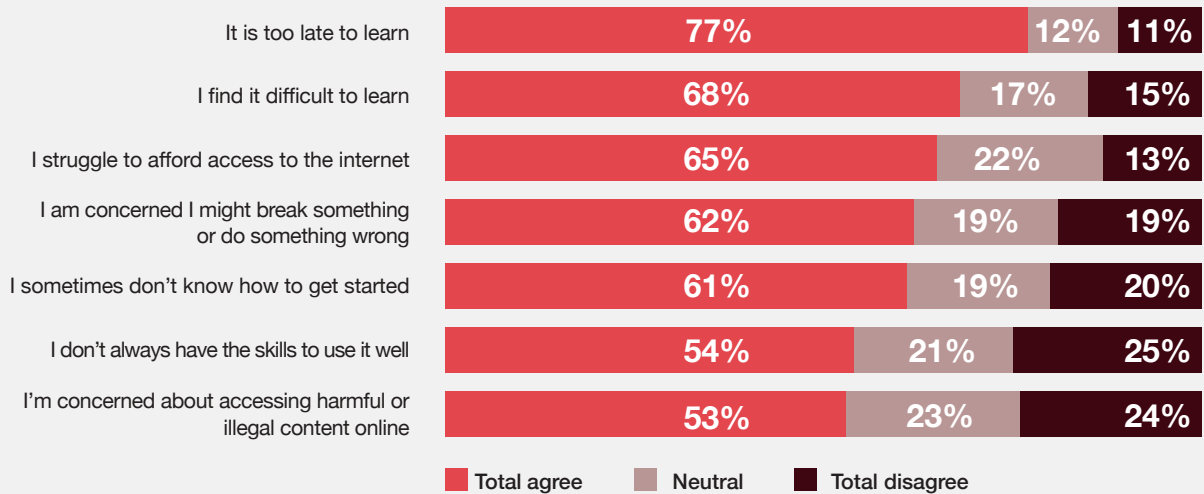
burden for those with increased difficulties accessing new technologies. For those living with disabilities, our survey revealed a sense of disconnection and that people were already feeling excluded to a certain extent. 45% of individuals with a disability said they find it difficult to learn the right skills for the internet while over 2 in 3 (67%) believe it is simply too late for them to learn.

In addition, a broadcast switch-off was seen as unfair to those with limited access to fast broadband. Across all respondents, the largest concern if there were a reduction of broadcast services was for those living in rural areas. Poor quality broadband often emerged in our research as an important structural barrier to a broadcast switch-off in the next decade. For respondents, slow internet was the largest source of frustration when attempting to access TV and radio content online (43%). According to research published in 2020, 33% of UK consumers suffered from a bad internet connection during lockdown, a time in which many were reliant on good service.²² Furthermore, Britain has far slower internet speeds than many other European countries, including major markets such as Spain and Germany. This analysis from 2020 has shown that in the UK it can take an average household twice as long to download a film compared to European counterparts.²³ Buffering was a key complaint among participants in certain regions. For instance, over half (56%) of those living in the South West with poor access to internet said it was because their area did not have good enough quality broadband.

This is an ongoing issue which is unlikely to be resolved in the short-term. Despite government plans to rollout superfast broadband, observers have been critical of the lack of planning and the ongoing failures to upgrade broadband infrastructure. As the parliamentary Committee of Public Accounts warned last year: “failures with the rollout of superfast broadband across the UK risked

TOP CONCERNS WHEN USING THE INTERNET

Q. To what extent do you agree or disagree with the each of the following... With the internet...



exacerbating digital and economic inequality.”²⁴ Indeed, for those with no access at all, an online-only future is not only difficult to conceive, but totally unimaginable.

The Committee’s report also found that the government’s highly ambitious plan for superfast broadband rollout is unlikely to be secured in the following decade: “although the Department now states that it plans to reach nationwide coverage for gigabit-capable broadband by 2030, it has no detailed plan in place for reaching communities where it is not commercially viable to do so. Moreover, its goal of full coverage by 2030 does not cover the very hardest to reach areas, which include around 134,000 premises.” Furthermore, even if successfully rolled out, our survey suggests significant portions of the public are concerned about the cost of broadband services, with 46% citing it as a potential issue with moving to online-only TV services.

As such, committing too heavily to an online-only future relies on false assumptions that everyone will be connected with universal, high-speed, affordable and reliable broadband. This risks excluding those in rural areas, which are difficult to connect with high-quality and reliable broadband, and those without the means to invest in high-speed internet where it is available. Investing in and protecting broadcast TV and radio will

ensure continued universal free-to-air access well beyond the next decade, in the face of this technological and affordability uncertainty.

As noted above, the rollout of superfast broadband is failing to meet government targets and currently no plan exists for its completion in the next decade. 1 in 5 (18%) do not expect to have access to reliable internet in the next 15 years. This is a particular concern for the age group 45-54, where 1 in 3 (33%) don’t expect to have access to reliable broadband in the next 15 years’ time, and 23% saying the same in the 18-24 age bracket.

WHAT PEOPLE SAY

“I’m just not into technical stuff and really not good with computers, I can’t even set up a TV so the technological side I would really struggle with.”

- Pat

“My broadband isn’t so good so it’s a lot more difficult for me.”

- Jan

Security, privacy and harmful content

Particularly for older people, fears around privacy compound the 'tech fatigue' felt around online services.

The need for logins and passwords for internet services compared to the simple 'one-button' method for broadcast TV and radio was seen by participants in our focus groups as an added barrier.

While many saw the need for heightened security with the internet, it also engendered concerns around security and safety too, since many participants in focus groups spoke of their distrust of the internet.

This came through strongly in different ways across our focus groups and survey. In particular, harmful content emerged as a strong topic in our focus groups while 24% of survey respondents said they were concerned about accessing harmful or illegal content online.

Further, broadcast TV and radio are seen as important components of the resilience of communications infrastructure in the UK. In an internet-only future, many focus group participants expressed fears about the need for backup and alternative options in the face of national emergencies.

Indeed, the UK government's 2016 cyber security strategy initiated a process of getting to grips with the new realities of technological advancements and the potential threats that are emerging. However, enquiries into this strategy later led to the acknowledgement that "cyber risk is still not properly understood or managed, even as the threat continues to diversify and increase." As the renewed 2022 strategy shows, this threat continues to be poorly understood, with progress on developing strategies to mitigate it still evolving.²⁵ Maintaining multiple channels for communications is thus crucial while we seek to understand and formulate long-term plans for resilience and protection against ever-evolving cyber threats.

WHAT PEOPLE SAY

"What really worries me...is things like cyber security and at times of national emergency and things like that, we need a reliable service to alert us to dangers and what to do about it. And how are we going to do that with just the internet?"

– John

"Everyone wants a different password...it's relentless. It's done for protection, I understand that – but then how secure is this internet?"

– John

"Young generations on the internet have seen things they never should have seen."

– Elaine

"Kids watching TV online is scary because you don't know what they're watching."

– Leanne

PART 3

Spotlights

Spotlight: Older generations

Our research analysed the responses of those aged 65 and older to understand what their main concerns were. This segment of the population was most worried about the exclusionary impacts of a potential reduction of broadcast services. In particular, they were concerned that people without high-quality broadband services could be left behind, such as those living in rural areas, and poorer groups would end up paying more.

TOP 5 STRUCTURAL CONCERNS OF BROADCAST TV AND RADIO

1. People without high-quality broadband will be left behind. **84%**

2. Poorer groups will end up paying more. **84%**

3. Those who are less technically able will be left behind. **70%**

4. An increase in loneliness among certain groups. **70%**

5. People wouldn't have access to good quality news and information. **66%**

THE ROLE OF GOVERNMENT AND THE BBC

- Almost 2 in 3 (64%) agree that if the BBC decided to no longer support broadcast services, it would no longer provide a 'universal' service.
- They are the most likely age group to believe that new legislative commitments should include a commitment to protect TV and radio broadcast services until at least 2040 (90%).

IMPORTANCE OF BROADCAST SERVICES

- Over 65s are the most dependent on broadcast services, with almost half (48%) listening to radio in their home on a daily basis, and 71% watching Freeview on a daily basis.
- On average, over 65s believe that broadcast should be protected until 2074.

TOP BARRIERS

- For those aged 65-74, the main reason for poor internet connection was the quality of broadband available in their area (37%). For those aged over 75, having poor internet connection was because they weren't tech savvy enough (50%) or they simply didn't have use for it (40%).

Spotlight: Wales

For the population of Wales, the poor quality of broadband remains a top structural barrier for an online-only future. 32% said they believed watching live TV events through broadcast was better than watching them online, while 55% believed that live viewing on broadcast TV and online services was of the same quality. Only 13% believed that it was better online.

The key reason for preferring broadcast TV was clear, with 83% noting that the signal quality and reliability of connection was better on broadcast TV. Linked to this, 42% noted that through online viewing, they would be too reliant on their internet connection while a third (33%) believed that their broadcast TV services were higher resolution and had a better picture quality.

THE IMPORTANCE OF BROADCAST SERVICES

- 58% of noting Welsh respondents see Freeview as important or essential to their lives, while 53% say the same of broadcast radio.”
- On average, respondents believe that broadcast services should be secured until at least 2063.

UNIVERSAL SERVICES

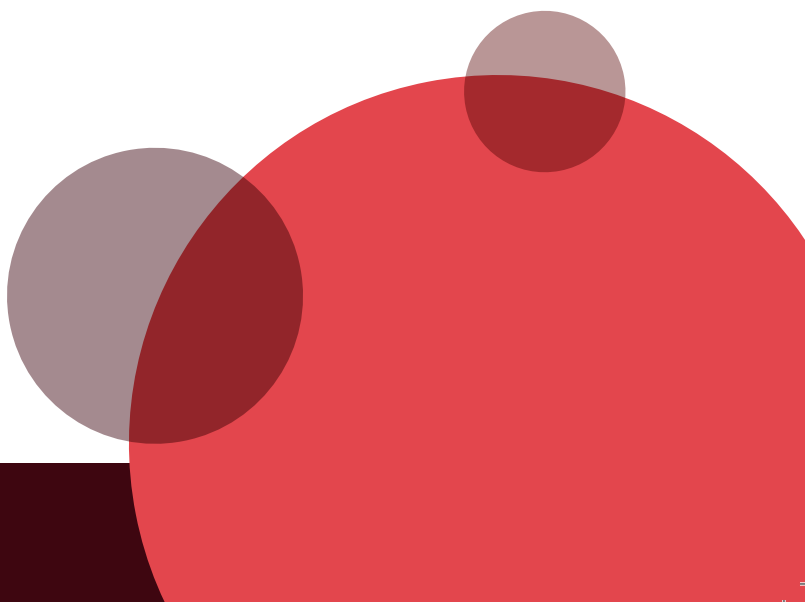
- Almost 2 in 3 (63%) worry that certain groups would be ‘left behind’ in an online-only future. Among those worried, concerns are particularly high about those in rural areas (88%).
- 83% believe that universal access to public service content should be protected by the law, with 2 in 3 (67%) agreeing that making content accessible for all should be a top priority for the UK government.

- Half (50%) believe that the BBC’s ability to provide a shared national experience would be impacted if digital terrestrial television (DTT) was removed.

COSTS

- Just under half (45%) would definitely not be willing to pay any licence fee if the BBC moved to online-only services.
- If DTT was not available, 60% would not want the expense of having to buy new equipment such as new smart TVs or smart speakers and radios.

Taken together, this indicates that respondents from Wales would have greater difficulty in moving to an online-only future than the average UK respondent.



Spotlight: Scotland

For the respondents based in Scotland, broadcast TV and radio remain an integral part of society and should remain this way in the future. 87% believe that broadcast TV and radio services will remain or be increasingly relevant in the future.

THE TOP CITED BENEFITS OF TRADITIONAL BROADCAST SERVICES INCLUDE:

1. Familiarity and comfort with the experience. **50%**

2. Higher resolution and picture quality. **46%**

3. Better signal quality and reliability of connection. **46%**

INTERNET CONNECTION

- Even if effective broadband coverage was rolled out across Scotland, many Scottish respondents cited cost as a significant barrier. Regarding an online-only TV future, 69% said that they anticipate struggling to afford the broadband services needed to access the services they wanted. 54% cited struggling to afford subscription services.
- 34% believe that watching live events is better on broadcast, compared to 14% who say online is better.
- 50% stated that broadcast was better because of the familiarity and comfort with the experience.

SOCIAL INCLUSION

In an online-only future, social exclusion was a primary concern. Among survey participants in Scotland:

- 78% believe those without high-quality broadband (such as rural residents) would be left behind.
- 70% were concerned about poorer groups having to pay more.
- 65% worried that loneliness would increase in certain demographics.

PRIORITIES FOR THE FUTURE

- 83% believe that universal access to public service content should be protected by the law.
- People believe the top priorities for the UK government when thinking about the future of broadcasting are:
 - Making it accessible for all (67%)
 - Diversity and inclusion (59%)
 - Quality (59%)

Taken together, this indicates that respondents from Scotland would have greater difficulty in moving to an online-only future than the average UK respondent.

Living with disabilities

For the respondents living with a disability, easy access to broadcast TV and radio can be an important way to stay informed and entertained. They are one of the most dependent groups on traditional broadcast services, with 57% watching Freeview every day. They are the most likely to find TV via Freeview ‘essential’ to their everyday life (22%), with a similar sentiment regarding broadcast radio (19%). On average, respondents believe these services **should be protected until 2068.**

THE BENEFITS OF BROADCAST

- Respondents cited a number of benefits of broadcast compared to online streaming, including better signal quality and reliability (86%), with over half (57%) seeing a reduced reliance on internet connectivity as a key advantage.
- They are most likely to believe that live events are better on broadcast than online (44%).
- 71% think that broadcast should continue alongside internet streaming.

THE COSTS OF AN ONLINE-ONLY FUTURE

- Those with disabilities are the group most concerned about costs, with almost 1 in 3 (30%) concerned about the increasing costs of the internet.
- Barriers to an online-only future in 15 years’ time included: struggling to afford the broadband needed to access the online TV and radio services (67%); struggling to afford subscriptions (67%); and not wanting the expense of having to buy new equipment e.g., new smart TVs or radios (56%).

COMMITTING TO UNIVERSAL ACCESS

- If there was a potential switch-off of broadcast in 2035, people with disabilities express the most concern, with 59% saying they would be worried about their access to TV and 60% saying the same for radio.
- 74% believe that those who access public service content through broadcast platforms, e.g. Freeview TV delivered via an aerial, should have the same level of access and quality of experience as those who access it through online services. The same number believe that failing to protect access to public service content on all platforms including broadcast would be unfair and exclude large sections of the population.
- The perceived number one priority regarding public service content was making it accessible for all (63%).

Taken together, this indicates that respondents with a disability would have greater difficulty in moving to an online-only future than the average UK respondent.

Low-income groups

For respondents earning between £5,000-£10,000 a year, concerns around the cost of good quality broadband are particularly resonant. On average, these respondents believe broadcast TV and radio services should be protected until at least 2066.

ACCESS

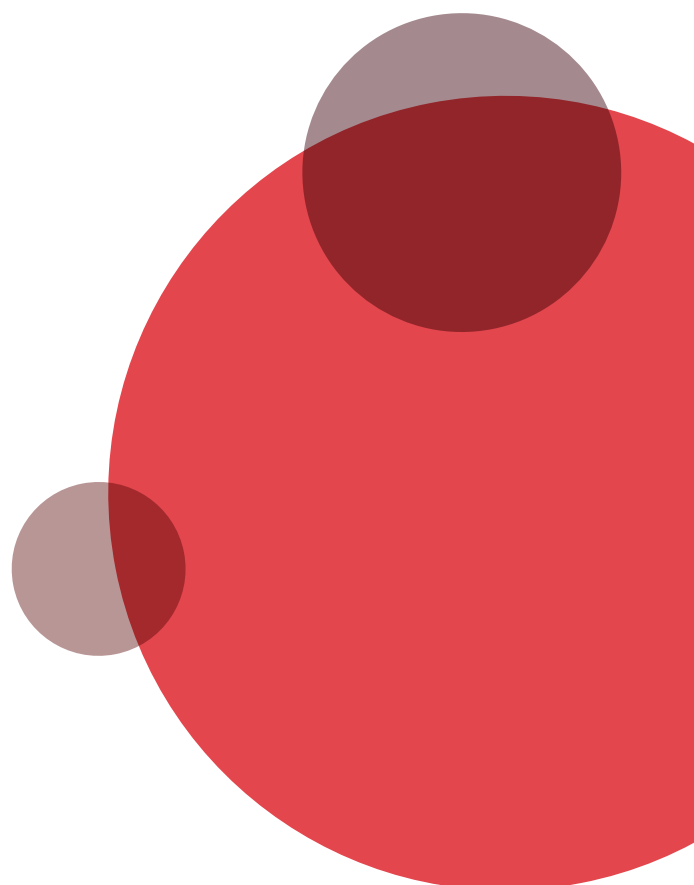
- Just under half (46%) have access to streaming or on-demand services, yet 68% agreed that they had good access to affordable TV services.
- This group were the least likely to own a smartphone (17% did not) or other internet connected devices such as computers (43% did not) or smart TVs (52% did not) and: least likely to have watched TV via subscription streaming (54% have not).
- Respondents with low personal incomes are equally concerned with the cost of subscriptions, new equipment or hardware and changing habits. The top barriers to an online-only future in 15 years' time were:
 - Struggling to afford the subscriptions for online TV and radio services (59%)
 - They were content with the current choice at the moment and wouldn't want it to change (59%)
 - Not wanting the expense of having to buy new equipment e.g. new smart TVs or smart speakers (59%)

RELEVANCE

- 59% say that broadcast TV and radio are as relevant now as they always have been, despite the growing availability of online TV and radio services.
- The top strengths of broadcast services were seen to be better signal quality and reliability (63%) and reduced reliance on internet connectivity (63%).

PRIORITIES FOR GOVERNMENT

- 75% agree that universal access to public service content should be protected by the law.
- Low-income households overwhelmingly prioritised maintaining quality content (71%) and accessible services for all (63%) above embracing the latest technology (20%) or making better use of digital platforms (15%).



PART 4

Part 4: Final remarks and recommendations

Conclusion



Overall, people identify an important role for broadcast TV and radio well beyond the current provisional date of 2034. On average, survey respondents said that broadcast TV and radio services **should be protected until 2067, with a range (25th to 75th percentile) of 2051 to 2079.**

For many, the benefits of online-only viewing have been overstated and broadcast TV and radio services should be maintained alongside internet-streaming and broadband delivered services. In particular, both focus group participants and survey respondents raised structural barriers to an online-only world. Affordability and weak broadband connection and coverage emerged in our research as particularly strong barriers.

The current prospect that broadcast services will not be protected beyond 2034 is a concern for many and some see this as a threat to the principle of universality. In fact, 81% believe that universal access to public service content should be protected by the law.

Our research found that most are passionate defenders of the universality of broadcast TV and radio. People worry that internet-only TV and radio would exclude and leave behind large sections of the population, in particular older generations and those with limited access to good quality broadband. 67% agree that failing to protect access to public service content on all platforms, including broadcast, would be unfair and exclude large sections of the population.

Many also believe that losing access to broadcast services would have wider negative implications for the current media landscape. For instance, 44% believed it would threaten the universality of the BBC service as it might no longer be accessible to everyone in the UK on a free-to-air basis.

Many see an opportunity for government action on this issue, with 67% agreeing that it should be a priority for the UK government.

Recommendations

Considering the key themes which have emerged in this research, we summarise our recommendations as follows:



1 That government provide a clear commitment to the long-term protection of broadcast services, including a date well beyond current commitments.

2 That government ensure that broadcast TV and radio, and the broad range of services delivered through them, are **protected for the long-term within any ongoing and future legislation.**

3 That **the spectrum used by broadcast is protected** at the World Radiocommunication Conference 2023 (WRC23) and at future international spectrum conferences.

4 That there are ongoing **requirements for Public Service Broadcasters (PSBs)** to continue to support universal broadcast services and the **rich public service content** delivered through them, including through a **commitment within the next BBC Charter period.**

5 That the voices of the listeners and viewers, and in particular those groups most heavily reliant on broadcast services, are **put at the centre of the debate and any decision-making by government or Ofcom, the sector regulator.**

As always, politicians should continue to listen to their constituents and ensure that the voices of listeners and viewers are placed at the centre of a debate concerning the future of broadcast.

Methodology

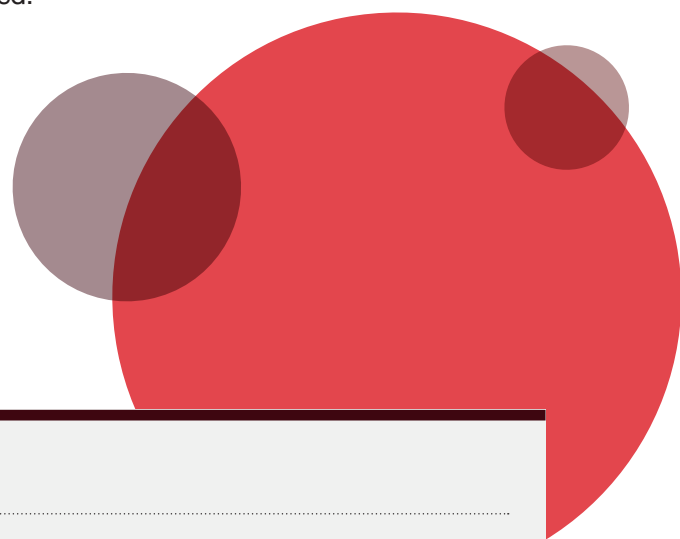
The research was conducted by Strand Partners' in-house research team between 6th March and 27th April 2023, following the guidelines of the UK's Market Research Society. The methodology included a combination of in-depth interviews, surveys and focus groups.

A total of 55 in-depth interviews were conducted online, with 24 participants selected from Silver Voices members and a further 31 participants selected through third-party recruitment.

In addition, two surveys were conducted. The first survey included over 700 respondents recruited from the Silver Voices' membership database and formed the basis of the first stage of the research process. The second survey included over 4,000 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.

Two focus groups were also organised in Bristol, and an additional session in Darlington, to explore in further depth the themes and ideas that emerged in the online interviews. 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 in-depth interviews and focus groups were transcribed. In compliance with General Data Protection Regulations (GDPR), all identifiable features of participants have been removed and answers were anonymised.



ABOUT SILVER VOICES



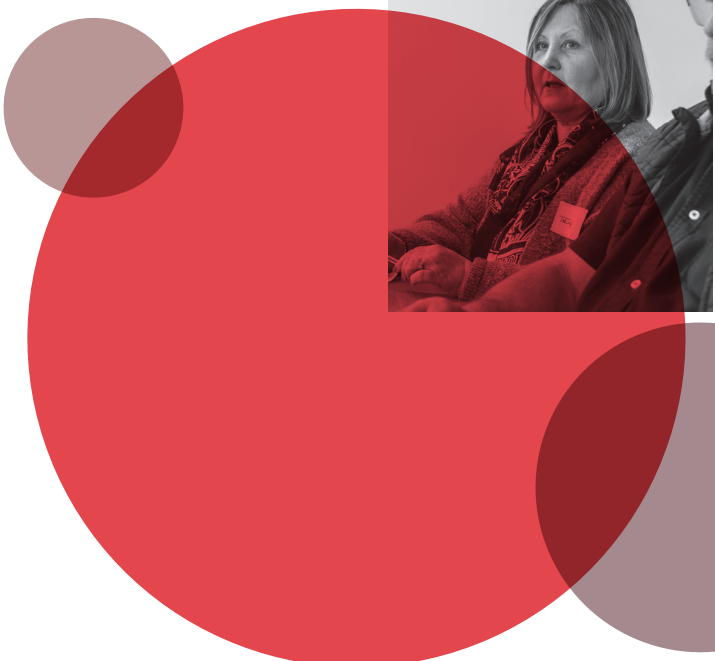
This research is presented by Silver Voices to draw attention to the cross-sectional impacts that policy changes related to broadcast will have on segments of the population.

Silver Voices is the only independent, individual membership organisation for

senior citizens in the UK. MPs, councillors and many other opinion-formers receive our briefings and we continue to grow in size. While we are unashamedly political, we are strictly not affiliated to any political party.

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