Delivering Quality First in Wales
DELIBERATING QUALITY FIRST IN WALES

EXECUTIVE SUMMARY

The BBC is the most trusted and valued broadcaster in Wales. Its mission is to help audiences discover and make sense of Wales, and to champion the brightest talent and boldest ideas for national and UK audiences. It aims to do this on a canvas big enough to make a difference, not just to its audiences, but to Wales itself.

The BBC in Wales is the only broadcaster committed to reflecting and reporting Wales in both languages – and across all platforms and devices – and it prioritises investment in programming and services that most clearly deliver value to the public. The BBC in Wales is driven by a commitment to build and sustain a trusted public space for the nation, and to help support Wales’ wider creative economy.

The BBC provides value to audiences in Wales in two main ways: through national programmes and services which are made in Wales and for Wales specifically, and through network programmes and services which are broadcast across the whole UK.

The BBC performs consistently well in Wales, attracting higher audiences and appreciation than the UK average. This is true both for network content and for content produced specifically for audiences in Wales. The proportion of the population reached each week by the BBC’s portfolio of television and radio services is higher in Wales than elsewhere in the UK. And in addition to reaching more people, those reached also watch and listen to BBC content more than the UK overall – nearly 45 minutes more per week, on average.

The general impression of the BBC is also higher in Wales than in any of the UK’s other three nations. The BBC’s English language television programmes specifically for audiences in Wales reach over a million viewers each week (36% of the population) and the average appreciation for these programmes is higher than the average across all BBC network output. BBC Radio Wales reaches almost half a million listeners each week (18% of adults) and BBC Radio Cymru around 140,000 (34% of fluent Welsh speakers).

Despite a reduction in the volume of national output for audiences in Wales over recent years, the performance and impact of this programming has improved steadily (including BBC Wales Today, The Story of Wales, Coal House and Scrum V). In addition, Wales has established itself as a major provider of drama and factual programming to the BBC’s UK networks (from Doctor Who, Sherlock and Torchwood to The Indian Doctor, BBC Cardiff Singer of the World and Tribe).

Since 1982, the BBC in Wales has also provided more than ten hours of output a week to the Welsh language broadcaster S4C, funded by the licence fee. This output remains the cornerstone of the channel’s peak-time schedule, and includes daily news, the popular drama Pobol y Cwm, live rugby and extensive annual coverage of the National Eisteddfod.
Delivering Quality First

In response to the licence fee settlement for the period to 2016/17, the challenge for the BBC in Wales is to build on these successes while delivering 16% savings. Delivering Quality First for the BBC in Wales is underpinned by four aspirations.

a. Supporting quality and distinctiveness

The BBC in Wales will aim to safeguard and strengthen the quality and distinctiveness of its programming and services at a time of constrained funding. Across all services, the BBC in Wales will focus on what it does best, and on the output that matters most to audiences.

High-quality journalism will remain the backbone of the BBC’s service for audiences in Wales. Through increased efficiency – and a reduction in output at times of the day when fewer viewers and listeners are available – the aim is to consolidate the BBC’s role as Wales’ most trusted news provider by ensuring its journalism is a standard-bearer for accuracy, impartiality and originality.

The BBC in Wales will protect investment in journalism across both languages and all platforms, and additional correspondent posts will be created to strengthen specialist coverage of economics and culture. Reporting and analysing the work of the devolved institutions will remain a strong commitment, with more political output integrated into regular news services.

The BBC in Wales will also aim to ensure that its general television programming for Wales makes an even greater impact by showcasing more output in peak on BBC One Wales. To support this aim, investment in landmark documentaries and drama will be maintained. The BBC in Wales will also work with BBC network teams and S4C to identify appropriate opportunities for co-commissioning that maximise the impact of more limited investment funds.

The BBC’s two national radio services in Wales will continue to showcase new Welsh music, invest in drama and comedy, and commission weekly arts and political programmes. However, there will be a 25% reduction in documentary and feature programming on both services.

b. Reflecting and representing Wales on the BBC’s UK networks

As part of its Delivering Quality First plans, the BBC is determined that increased investment in network production in Wales over recent years should lead to an improvement in the portrayal and representation of Wales on its UK networks. Some of the largest gaps in the delivery of the BBC’s public purposes in Wales relate to the portrayal of Wales to the rest of the UK, and the portrayal of the particular culture and communities of individuals to the rest of the UK.

Although there is room for improvement, Wales’ profile on the UK networks has grown considerably over recent years through the success of productions such as Torchwood, The Indian Doctor, The One Show, Rhod Gilbert’s Work Experience and Gavin and Stacey. In addition, the perceived accuracy of network news coverage of Wales has improved significantly. Over the next period, the BBC expects a growing proportion of ‘opt-out’ programmes produced for audiences in Wales to be shown on the UK-wide channels too.

1 BBC Trust purpose remit tracking study 2010/11.
The recently completed Roath Lock Studios will further develop Wales’ reputation as a world-class centre of drama production. The 175,000 square foot complex has nine HD-ready studios, producing a range of BBC dramas such as *Casualty, Pobol y Cwm, Doctor Who, Upstairs Downstairs* and the new children’s production *Wizards Vs. Aliens*. 

Under the *Delivering Quality First* proposals, the BBC expects the existing 17% target for network television production spend in Wales, Scotland and Northern Ireland to be met earlier than the target date of 2016, and to be exceeded by 2017. Under these plans, Wales’ strength as a key base for in-house drama production will be maintained and its contribution to network documentary and feature production will grow. The BBC will also continue to work proactively with independent producers in Wales in order to strengthen their contribution to the BBC’s UK networks.

The shift of some BBC network programming to Cardiff over the last two years is only the first stage in a long-term strategy to develop a creative cluster of talent in Wales that can support and build a more sustainable broadcasting ecology that benefits both in-house and independent producers. This strategy will also see the relocation of major network production roles from London to the devolved nations, including the appointment of a new in-house Head of Television Documentaries based in Cardiff.

**c. Guaranteeing access to national services and programming**

The BBC will aim to ensure Wales has a free and open public space in the digital world, where audiences can easily access and share high-quality BBC programmes and services. This poses a dual challenge of resolving current distribution issues facing traditional television and radio services, while ensuring that interactive services made in and for Wales enjoy appropriate coverage and prominence across a fragmenting digital landscape spanning mobile, PCs, tablets and internet-connected TVs (or ‘smart TVs’).

On television, the BBC will launch an HD version of BBC One Wales by the end of 2012 and maintain the BBC Two Wales SD (standard definition) service until at least 2015. On radio, the BBC will undertake a definitive cost/benefit analysis exploring further options for addressing the low coverage levels for Radio Wales on FM and both services on DAB.

In the interactive space, the BBC is currently developing ‘nations’ editions’ of bbc.co.uk which will help audiences find content about Wales more easily across PCs, mobile and tablets. The editions will provide a more effective way of publishing relevant Welsh content within a UK-wide interactive portfolio of services.

**d. Partnership and collaboration**

The BBC is already an integral part of national life in Wales, working in partnership with a wide range of national institutions and organisations, including Arts Council Wales, the Welsh Rugby Union, the National Eisteddfod and the Open University. It also has a long-established and developing partnership with S4C.

Building on these solid foundations, the BBC in Wales will seek to be even more open and ambitious in the way it partners with others for the benefit of audiences and national life in Wales. By leveraging the scale, funding, creativity, innovation and heritage of the BBC, future partnerships will seek to unleash the full creative potential of Wales.
The BBC will increasingly focus its partnership work on activity that can:

- deliver measurable audience and/or economic impact
- offer clear scope for ongoing creative collaboration
- help nurture new talent and expertise, and help build production or cultural capacity in Wales.

In addition, the BBC in Wales will work to strengthen its long-standing partnership with S4C by exploring the scope for collaboration across programming and operational areas, with the aim of releasing considerable additional investment for content in both languages.

**Conclusion**

The BBC in Wales plays a unique national role as a creator of distinctive programmes and services for audiences in Wales that are available across **all platforms and devices and in both languages**. This public service role is particularly important in Wales given the state of alternative media. Indeed, there has never been a time when the role of the BBC in Wales has been more important.

Whilst meeting the *Delivering Quality First* targets will undoubtedly be challenging – leading to the loss of some TV and radio programmes – the BBC in Wales will safeguard the output that matters most to its audiences and, in some cases, increase or ring-fence key areas of spend such as political output. Peak programmes have been prioritised and news content budgets have been protected. The BBC’s role in Wales as a world-class base for network programming in the UK will be strengthened.
INTRODUCTION

In October 2011, the BBC published Delivering Quality First, detailing BBC Executive proposals for delivering Putting Quality First within the terms of the 2010 Licence Fee settlement.

The BBC Trust asked the BBC Executive to prepare statements, as part of the implementation of Delivering Quality First, about what the BBC intends to offer the audience in each of the Nations of the UK. This statement sets out the strategy and proposals for Wales:

1. The national, political and broadcasting context
2. The BBC in Wales
3. The value provided to Wales by the BBC through a high-level view of BBC performance
4. Delivering Quality First in Wales to 2016
5. The strategy for network production in Wales to 2016
6. Summary and conclusions

A more detailed Appendix on audience performance is included for context and is referred to where relevant throughout the statement.

I. NATIONAL, POLITICAL AND BROADCASTING CONTEXT

The national, political and broadcasting environment in Wales provides important context for the relative performance of the BBC in Wales compared with the UK overall and with commercial broadcasters.

I.1 Social, political and economic context

Wales has a population of 3 million, representing 5% of the UK population. Over half of Wales’ population lives in the south-east, within 40 miles of Cardiff. Notions of identity and citizenship are more complex and varied in Wales than in many other parts of the UK. One quarter of the population was born outside Wales (by contrast, in Scotland just 8% were born outside its borders). However, by now, more than half the population consider themselves ‘Welsh not British’.

Over half a million people in Wales can speak Welsh, around 20% of the population. The total number able to speak the language has remained fairly steady for a generation. However, the language is in the throes of a gradual and far-reaching linguistic shift from being largely a first language to its speakers to being mostly a second language.

People in Wales are slightly older than the UK average, mainly due to outward migration to seek work and inward migration on retirement. In addition, Wales lags behind much of the rest of the UK economically and educationally. Overall, the socio-economic profile is slightly more C2DE than the UK average.

The Welsh Government is the devolved government for Wales. The Labour Government is held to account by the 60-member National Assembly for Wales. A referendum in 2011 granted the

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2 BBC Wales tracking survey 2010
Assembly primary legislative powers in devolved areas – including health, education, environment, economic development, agriculture, transport and culture. Whilst culture is devolved, responsibility for broadcasting resides with the UK Government. In Westminster, Wales is represented by 40 MPs, while four MEPs represent Wales in Europe.

1.2 Media and communications context

Consumer adoption of new technologies and platforms in Wales is accelerating. Broadband take-up in Wales is now broadly in line with the UK average, having previously lagged behind. Smartphone take-up is also accelerating rapidly, while 30% of television viewers already access HD channels in their homes. However, the speeds of broadband connections in many parts of Wales remain amongst the slowest in the UK.

Media provision from Wales is declining from a historically weak base as the commercial marketplace is faced with both structural and consumer challenges. The vast majority of newspaper readers in Wales read London-based papers that provide minimal coverage of Wales, whilst the circulation of indigenous newspapers is in long-term decline. Wales has only a single newspaper that positions itself as a national daily.

All indigenous commercial radio stations are music-led and most have experienced stable or declining audiences over recent years. The notable exception is Real Radio, which has become the first indigenous commercial station with complete coverage in Wales (all on FM).

The changing political and social map of the UK – with increased devolution of powers to Wales – means that the rationale for television output which addresses the specific needs of the Welsh audience is stronger than ever. However, investment in English language television programming provision for Wales continues to fall. The total combined spend of ITV and the BBC on television programmes for Wales (in the English language) decreased by 33% between 2005 and 2010.

This reduction in spend has inevitably had a significant impact on the volume of output. In 2008, ITV Wales’ non-news programming more than halved from four hours per week to 1.5 hours a week, whilst its news provision obligations fell from more than 5 hours to 4 hours per week. This reduction occurred in parallel with a decline of 16% in the BBC’s English language TV output for Wales between 2005/06 and 2010/11.

In parallel, however, the BBC has been making a significant – and unrivalled – investment in increasing Wales’ contribution to UK network television production. Ofcom-qualifying network TV production spend in Wales nearly doubled between 2007 and 2011, and is set to grow even further in 2012.

The Welsh language channel, S4C, broadcasts 115 hours of programming per week across a range of genres. It commissions programmes from independent companies and ITV in Wales. In addition, the BBC has provided at least 10 hours per week of licence fee funded programming, since the channel’s inception. In October 2010, the UK Government announced a 24% reduction in S4C’s

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3 Ofcom Communications Market report 2011
4 Ofcom, UK Broadband Speed report 2011
5 Ofcom Communications Market Report 2011
6 BBC Wales Annual review, 2005/06 and 2010/11
budget. It was also agreed, as part of the new Licence Fee settlement, that the BBC Trust would become the primary funder of the channel from 2013/14.

The proportion of Welsh speakers in Wales is now rising as a result of considerable growth in Welsh language education. But this demographic shift towards younger, mainly second language Welsh speakers – in tandem with other social changes – is placing the reach and audience impact of Welsh language content under pressure. A large part of the Welsh speaking population – primarily those with lower levels of fluency – no longer engage in any meaningful way with Welsh language media and for the majority of others these services are now just one part of a much wider repertoire.
2. THE BBC IN WALES

The BBC is the most trusted and valued broadcaster in Wales. Its mission is to help audiences discover and make sense of Wales, and to champion the brightest talent and boldest ideas for national and UK audiences. It aims to do this on a canvas big enough to make a difference, not just to its audiences, but to Wales itself.

Wales’ growing contribution to BBC network output is vital in ensuring that a Welsh perspective is available to audiences throughout the UK and beyond, and that Wales’ most talented programme-makers can contribute to UK and global BBC services.

BBC output for audiences in Wales is delivered across television, radio and interactive services, and in both languages.

The services which the BBC delivers in Wales are summarised below.

2.1 BBC services for audiences in Wales

**English Language television.** Each year, the BBC broadcasts approximately 700 hours of English language TV programming made for audiences in Wales on BBC One Wales and BBC Two Wales. In 2010/11, the total cost of this output was £31.1m.

*BBC One Wales* offers news, current affairs and general programming for Wales as an integral part of the UK-wide channel proposition. This national programming for Wales displaces network output seen elsewhere across the UK. The strategy for BBC One Wales is to provide a range of engaging, relevant and high impact programming for audiences in Wales. A significant proportion of this output will be broadcast in HD from the end of 2012.

*BBC Two Wales* typically schedules more specialist or targeted public service programming for audiences in Wales, including arts, politics and minority sports. In addition, it is also home to live domestic rugby coverage, typically broadcast on Friday evenings in peak-time.

This investment across BBC One Wales and BBC Two Wales produced the following output:

**Table 1: English language originated television output by genre 2010/11**

<table>
<thead>
<tr>
<th>Genre</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drama, Comedy, Entertainment, Music, Arts</td>
<td>19</td>
</tr>
<tr>
<td>News and Current Affairs</td>
<td>451</td>
</tr>
<tr>
<td>Sport</td>
<td>167</td>
</tr>
<tr>
<td>Education, Factual and Religion</td>
<td>71</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>708</strong></td>
</tr>
<tr>
<td><strong>Budget (service licence basis)</strong></td>
<td><strong>£31.1m</strong></td>
</tr>
</tbody>
</table>

7 English language TV, BBC on S4C and Interactive budget figures are expressed on a service licence basis, which includes elements such as pan-BBC overhead adjustments and the cost of sports rights, to ensure that they are presented on a like-for-like basis with the service licence budgets for Radio Wales and Radio Cymru, as published in the BBC’s annual report.
These programmes are produced by in-house teams and the independent sector – with independent companies producing a minimum of 35% of non-news hours each year.

Over recent years, the BBC in Wales has sought to increase the distinctiveness of this national output, reprioritising investment from less distinctive content and strands into more challenging and ambitious output primarily on BBC One. This has included landmark series such as Coal House, Snowdonia 1890 and The Story of Wales.

**BBC Radio Wales’** remit is to provide a radio service for people interested in the life, culture and affairs of Wales. It broadcasts for 20 hours per day. The cost of the service in 2010/11 was £13.0 million.

**Table 2: Radio Wales Originated output breakdown 2010/11**

<table>
<thead>
<tr>
<th>Programming</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>News and Current Affairs</td>
<td>2,161</td>
</tr>
<tr>
<td>General programming</td>
<td>4,946</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>7,107</strong></td>
</tr>
<tr>
<td>Service Licence Budget</td>
<td><strong>£13.0m</strong></td>
</tr>
</tbody>
</table>

At present, the BBC guarantees that a minimum of 10% of Radio Wales output is produced by the independent sector. From 2012/13, a further 10% of content will be placed in the so-called ‘window of creative competition’ between the independent sector and in-house production.

The recent BBC Trust Service Licence review endorsed Radio Wales’ strategy to improve quality in order to address the decline in the length of time people spend listening.

Looking ahead, the station will focus on delivering high-quality original journalism at the heart of the station’s peak schedule to maintain reach and impact with audiences. Peak daytime hours will feature more distinctive and ambitious content to increase share and listener hours, building on the existing commitment to explore the full diversity of contemporary life in Wales. The station will continue to champion Welsh arts, entertainment and culture across the schedule.

**BBC Radio Cymru’s** remit is to provide a radio service for people interested in understanding the life, culture and affairs of Wales in the Welsh language. The service is on air for up to 20 hours each day. The total cost of the service in 2010/11 was £11.9m.

**Table 3: Radio Cymru Originated output breakdown 2010/11**

<table>
<thead>
<tr>
<th>Programming</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>News and Current Affairs</td>
<td>1,281</td>
</tr>
<tr>
<td>General programming</td>
<td>5,365</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6,646</strong></td>
</tr>
<tr>
<td>Service Licence Budget</td>
<td><strong>£11.9m</strong></td>
</tr>
</tbody>
</table>

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8The 10% independent sector target for both Radio Wales and Radio Cymru excludes news programmes and news and sport bulletins.
In common with Radio Wales, at least 10% of output is produced by the independent sector and a window of creative competition will be introduced in 2012/13.

Radio Cymru’s strategy is also to improve quality and to serve different audiences by harnessing the complementary roles of radio and interactive platforms. Given the challenging demographic changes facing the Welsh language, the radio schedule will work “with the grain” of existing listeners to maintain reach, while a complementary Welsh language internet-driven offer will be provided for younger audiences.

Radio Cymru will deliver high-quality and distinctive journalism across the schedule with a greater proportion of original stories from within Wales. To improve the value for money delivered to audiences, the station will seek further opportunities to work with external bodies and for cross-media collaboration (particularly with S4C).

**BBC Cymru on S4C.** The BBC has a statutory obligation to provide at least 10 hours a week of programming to the Welsh language channel S4C. The BBC’s contribution is a key element of the BBC’s public purpose delivery to Welsh language audiences, and includes the daily news service (*Newyddion*), the weeknight drama (*Pobol y Cwm*), live domestic and international rugby, and extensive coverage of the annual National Eisteddfod. In 2010/11, the total cost of the BBC’s programmes was £26.8m. This investment produced the following output:

**Table 4: Originated BBC Cymru Wales hours on S4C by genre 2010/11**

<table>
<thead>
<tr>
<th>Genre</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drama, Comedy, Entertainment, Music, Arts</td>
<td>258</td>
</tr>
<tr>
<td>News and Current Affairs</td>
<td>343</td>
</tr>
<tr>
<td>Sport</td>
<td>130</td>
</tr>
<tr>
<td>Education, Factual and Religion</td>
<td>22</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>753</strong></td>
</tr>
<tr>
<td>Budget (service licence basis)</td>
<td><strong>£26.8m</strong></td>
</tr>
</tbody>
</table>

The BBC’s content is produced by in-house production teams, and complements the independently produced programming slate which makes up the remainder of the S4C service.

Beyond this statutory supply, the BBC is seeking to develop a more collaborative approach with S4C that recognises and reflects the complementary nature of Welsh language television, radio and online services.

The **BBC’s interactive services** for Wales deliver the BBC’s public purposes through a focus on news, sport, learning and information. The cost of Wales-specific content in both languages in 2010/11 was £4.4m.

The BBC’s learning services are a core part of our interactive offer to the audience in Wales. *Bitesize* will continue to be the foundation-stone of the learning portfolio, and the BBC in Wales will work closely with BBC Learning to ensure resources for Wales are effectively integrated with pan-UK Knowledge services and to ensure continued support for the distinctive needs of the Welsh Curriculum.
The BBC is currently developing ‘nations’ editions’ of bbc.co.uk which will help audiences find content about Wales more easily. The editions will provide a more effective way of publishing relevant Nations content within a UK-wide online proposition and will eliminate editorial and technological duplication. Implementing the ‘nations’ editions’ strategy will see a significant reduction in the number of stand-alone sites. Instead, content will be integrated into pan-UK ‘products’. The BBC will ensure that interactive content for Wales is prominently available across the four screens of the digital age – PC, smart TVs, tablets and mobiles.

In addition, BBC iPlayer will provide access to BBC Radio Wales, BBC Radio Cymru and television programming made in and for Wales.
3. THE VALUE PROVIDED TO AUDIENCES BY THE BBC IN WALES

The BBC provides value to audiences in Wales in two main ways: through programmes and services made in and for Wales specifically; and through the delivery of BBC services that are broadcast across the whole UK.

**National services for audiences in Wales**

The BBC broadcasts a range of services and programming to meet the distinctive needs of audiences in Wales, including BBC Radio Wales, BBC Radio Cymru, a range of interactive content and dedicated television output such as *BBC Wales Today* and *Scrum V* on BBC One Wales and BBC Two Wales. In addition, the BBC also produces programming for the Welsh language channel, S4C, funded by the licence fee. This programming includes the *Newyddion* news service and the daily drama *Pobol y Cwm*.

The BBC’s services and programming specifically for Wales are highly valued and overall performance is strong and improving. The BBC’s TV programmes specifically for audiences in Wales reach a million viewers each week (36% of the population) – the highest for seven years – and the average appreciation for these programmes is higher than the average across all BBC TV output. Radio Wales reaches almost half a million listeners each week (18.4% of adults) and Radio Cymru around 140,000 (34% of fluent Welsh speakers – the highest level of any radio station amongst this group). The BBC’s output for S4C reaches 190,000 viewers each week.

**Table 5: Performance of BBC services specifically for audiences in Wales**

<table>
<thead>
<tr>
<th></th>
<th>Average weekly reach (%)</th>
<th>Quality</th>
<th>Average time spent per viewer/listener per week (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All BBC TV Opt (inc news),</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4+ 15 mins</td>
<td>35.6</td>
<td>83.7</td>
<td>n/a</td>
</tr>
<tr>
<td>BBC Radio Wales</td>
<td>18.4</td>
<td>81.5</td>
<td>10:44</td>
</tr>
<tr>
<td>BBC Radio Cymru</td>
<td>5.5</td>
<td>n/a</td>
<td>10:36</td>
</tr>
<tr>
<td>BBC Cymru on S4C</td>
<td>6.8</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>BBC Wales Today combined TV</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>news bulletins, 16+ 3mins+</td>
<td>54.7</td>
<td></td>
<td>n/a</td>
</tr>
</tbody>
</table>

*Unless otherwise stated, the sources of data in this section are as follows:
TV: BARB, 4+, 2011 calendar year. Channel reach (15 mins consecutive); news reach 3 mins consecutive all BBC news for Wales, 15 mins reach consecutive Wales Today 18:30 programme and opts
Radio: RAJAR, 15+, Q4 2011 12-month weight, Wales TSA
All BBC figures: Cross-Media Insight Survey by GfK NOP for the BBC, 16+, UK c. 37,070 responses, Wales c2,868 responses, 2011
Quality: Appreciation Index (AI): average out of 100 based on scores respondents give to programmes they watched / listened to on the previous day (respondents give the programme a score out of 10 and the average of all the marks is multiplied by 10 to give an AI out of 100). Pulse panel by GfK NOP for the BBC, 16+, 2011
General impression of the BBC: Kantar Media for the BBC, adults 16+ in Wales 1,674, 2011 (respondents give a score out of 10 based on their general impression of the BBC: 1 = extremely unfavourable; 10 = extremely favourable)

 Appreciation Index (AI) average out of 100: based on scores respondents give to programmes they watched / listened to on the previous day
Pan-UK BBC services
The BBC’s UK-wide network services (like BBC One, Radio 4, CBBC or BBC Three) provide significant value to audiences in Wales and contribute the majority of their consumption of the BBC. Network services like BBC One do not just deliver value to audiences, they also provide direct economic investment as a steadily rising proportion of programmes for the BBC’s UK-wide services are made in Wales. See section 5 for an analysis of network production in Wales.

The BBC performs consistently well in Wales, attracting higher audiences and appreciation than the UK average. This is true both for network content and for content produced specifically for audiences in Wales.

Table 6: Pan-BBC performance in Wales, 2011

<table>
<thead>
<tr>
<th>Average weekly reach (%)</th>
<th>Quality$^{11}$</th>
<th>Average time spent per viewer/listener per week (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
<td>Wales</td>
</tr>
<tr>
<td>All BBC$^{12}$</td>
<td>96</td>
<td>97</td>
</tr>
<tr>
<td>All BBC TV</td>
<td>87</td>
<td>89</td>
</tr>
<tr>
<td>All BBC Radio</td>
<td>68</td>
<td>75</td>
</tr>
</tbody>
</table>

The proportion of the population reached each week by the BBC’s television and radio services is higher in Wales compared with the UK on average. This is especially true for BBC radio, where reach is consistently much higher in Wales compared with the UK average. In addition to reaching more people, those reached also watch and listen to BBC content more than the UK overall – c45 minutes more per week on average. The general appreciation of the BBC is also higher in Wales than in any of the UK’s other three nations, with programme appreciation being a little higher in Wales for BBC TV and BBC radio.

For further context on audience performance, please see the performance appendix.

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$^{11}$ Appreciation Index (AI) average out of 100: based on scores respondents give to programmes they watched / listened to on the previous day

$^{12}$ General impression (GI) mean score out of 10: respondents give a score out of 10 based on their general impression of the service: 1 = extremely unfavourable; 10 = extremely favourable

$^{12}$ ‘All BBC’ time spent per user is rounded up or down to the nearest quarter hour
4. **DELIVERING QUALITY FIRST IN WALES**

4.1 **Supporting quality and distinctiveness**

The BBC’s strategy for this Charter period focuses on delivering high levels of quality and distinctiveness across the BBC’s five Editorial Priorities (the best journalism in the world; ambitious original British drama and comedy; inspiration and commitment in the fields of knowledge, music and culture; outstanding services for children; and events that bring communities and the nation together).

Quality and distinctiveness are the primary drivers of BBC services in Wales and define the role which they play in the nation’s media landscape. As the national public service broadcaster, the BBC in Wales has a responsibility to deliver impartial news and investigative journalism, political debate and free-to-air sport, original drama, culturally-specific music and speech radio, and major events and celebrations that bring the nation together.

Many of these services are distinctive, in part, because they are simply not available elsewhere. But the BBC in Wales seeks to further differentiate them by focusing on content which matters deeply to the audience, and by striving to ensure that the creative ambition of the BBC’s services for Wales matches or exceeds that of the BBC’s UK-wide services. This commitment is already paying dividends. In 2011, the average appreciation scores for programming made for audiences in Wales exceeded the high scores attained by the BBC’s pan-UK network services.

The BBC in Wales is committed to meeting its 16% savings targets by safeguarding the quality and distinctiveness of its key output – rather than seeking to protect overall volumes of output. Of course, this is not a new challenge. In English language television, for example, the delivery of efficiency targets over the last five years has meant that the combined volume of drama, comedy, entertainment and arts programming for Wales has reduced to approximately 20 hours per year.

In order to protect this already constrained provision in key genres, the BBC in Wales will:

- seek much higher productivity efficiencies in overhead and support areas that do not impact directly on the services delivered to audiences
- reduce investment in less distinctive or valued output, particularly outside peak viewing or listening times.

4.2 **Serving the five editorial priorities**

The BBC’s approach to serving the editorial priorities in Wales is outlined below.

The best journalism in the world – The BBC in Wales delivers a comprehensive journalism service across all platforms in Wales, including dedicated political and current affairs programming on both television and radio, in English and Welsh. The BBC is not the just the most popular but also the most trusted source of news for and about Wales.

The BBC’s journalism must reflect a modern nation in all its complex diversity, reflecting the lively civic and political debate in a changing Wales. The BBC in Wales will use the broad canvas of its services to inform, to challenge and to engage audiences with ambitious and distinctive programming that reflects every part of Wales.
Investigative journalism will be a key priority across television and radio. From investigating our major national institutions to analysis of economic change, the BBC in Wales will seek out even bigger stories that can and do make a difference.

**Inspiring knowledge, music and culture** – A national service seeking to capture the diversity and richness of national life must always be about more than news and debate. It must capture a diversity of viewpoints and experiences that could never be sufficiently or adequately explored through the more limited prism of journalism.

The BBC in Wales will continue to engage audiences with programmes of real quality and distinctiveness – from *The Story of Wales* and *Sunday Supplement* to *The Indian Doctor* and *Rhod Gilbert’s Work Experience*. Working assiduously with both in-house and independent producers, the challenge for the BBC in Wales will be to ensure its factual output is not just relevant and accessible, but continues to be ambitious, thought-provoking and highly valued by audiences.

It will also continue to be a major champion and platform for Welsh culture in both languages. Its national radio services, for example, will not only feature specialist arts programmes, but will also reflect the diversity of Welsh culture throughout their daily strands. The BBC will also strengthen its coverage and support for contemporary culture and music, working in partnership with key institutions and harnessing the full cultural value of the BBC National Orchestra of Wales.

In network programming, BBC Wales will lead the development of in-house documentary production across the UK and will make a growing contribution to features production too.

**Ambitious UK drama and comedy** – the BBC in Wales will continue to grow Wales’ reputation as a world-class centre of drama production, based at the brand new Roath Lock production studios. It will work with partners to ensure that this growth in production also leads to an improvement in the portrayal and representation of Wales across network output.

The BBC in Wales will also work with a range of partners – including S4C and the BBC’s network television commissioners – to explore joint/co-commissioning opportunities in these vital genres. This more collaborative approach should maximise the value and impact of more constrained funding, and potentially provide more opportunities for programming made in Wales to be seen across the whole UK.

In addition, the BBC will continue to harness its two national radio stations to develop and showcase new writing for both drama and comedy. This commitment will be supported by a new writers’ bursary, developed in partnership with National Theatre Wales.

**Events that bring communities and the nation together** – The BBC in Wales will continue to provide expert coverage of major sporting and cultural events for audiences in Wales, including Six Nations rugby, the National Eisteddfod and coverage of the principal football clubs.

Friday night live coverage of domestic rugby is a key pillar of the BBC’s television schedule in Wales and both national radio services will remain committed to delivering expert live coverage and analysis of Welsh sport. The BBC’s strategy for sports rights in Wales will continue to prioritise the most important sporting events.

**Outstanding children’s content** – The BBC’s learning services are a core part of our interactive offer to the audience in Wales. *Bitesize* will continue to be the foundation-stone of the learning
portfolio, and the BBC in Wales will work closely with BBC Learning to ensure resources for Wales are effectively integrated with pan-UK Knowledge services and to ensure continued support for the distinctive needs of the Welsh Curriculum.

In the Welsh language, we will continue to work with S4C and BBC Childrens to explore partnership opportunities to deliver high-quality children’s content for the Cyw service.

4.3 Delivering Quality First: the financial context

Under the proposals for Delivering Quality First, the BBC in Wales must make savings totalling 16%, or £10.7m, over the five years from 2012/13 to 2016/17. This figure excludes spend on programming for S4C, the BBC National Orchestra of Wales and network commissioned productions.

The BBC in Wales will, as far as possible, protect programming and content spend by seeking deeper savings from overhead costs and support departments. Over the five-year period between 2012/13 and 2016/17, it expects to deliver a 25% reduction in non-content spend in Wales. As a result, budget reductions facing programme-making areas are expected to be limited to an average of 10% between 2012/13 and 2016/17.

The BBC estimates that between 100 and 120 posts in Wales will be closed over the period.

The BBC’s re-investment priorities in Wales are:

- BBC One Wales to migrate to HD by end 2012 – an additional investment of £2m
- Improving coverage for BBC Radio Wales and Radio Cymru
- Greater specialist reporting and newsgathering across the BBC’s news services
- Content delivery and production for mobile, PCs and tablets.

These new savings targets follow a five year efficiency programme which has resulted in incremental efficiencies and other savings of 25%. These targets were met despite an ageing building and technology infrastructure which is leading to increased costs.

While Delivering Quality First will lead to an overall reduction in BBC network production budgets, Wales can expect to see new investment due to the BBC’s on-going commitment to increase the share of network production produced by the devolved nations, particularly in drama, documentary and feature production.

Though shifts in investment across the UK are difficult to predict accurately, the BBC believes that through a combination of significant new network investment and lower than average savings targets for the BBC in Wales, the proportion of the licence fee spent in Wales will be higher in 2016 than it is today.

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13 The BBC’s expenditure on programmes for S4C from 13/14 will be informed by a new strategic partnership, to be agreed between the BBC Trust and S4C Authority. A review of all BBC Orchestras and Performing Groups is being conducted separately.
4.4 Content savings in Wales

The new savings targets will affect the shape of the BBC’s content portfolio in Wales. The volume of TV opts and of radio hours for Wales will reduce, but the quality and distinctiveness of output will be safeguarded. In parallel, the BBC expects the volume of Welsh content seen or heard on the BBC’s pan-UK networks will grow. More of Wales’ opts will be transmitted UK-wide, and more content will be co-commissioned with the BBC networks and other co-producers.

The proposals are detailed below:

News and Current Affairs for audiences in Wales

The BBC in Wales will strengthen its news services, with additional correspondents and investigative resources. There will be no service cuts in the BBC’s daily news services in Wales and a lower efficiency target will be applied in this area given its key importance to audiences. Reporting and analysing the work of the devolved institutions will remain a strong commitment. This strategy will refocus political output, with more integration of political analysis across regular news programmes. Proposals are to:

- increase specialist news coverage in Wales with the appointment of Economics and Culture Correspondents
- improve news coverage of underserved areas, with the appointment of a new South Wales Valleys reporter
- increase investment in the peak-time breakfast news programmes, with the establishment of a dedicated ‘news focus’ research team
- launch a new Welsh affairs series for BBC One Wales to improve coverage of politics, economics and society and other public policy issues (replacing Dragon’s Eye)
- streamline coverage of Party Conferences
- reduce radio current affairs output in off-peak hours
- extend daily coverage of politics with two additional reporting posts
- end the Wednesday edition of am:pm on BBC Two Wales.

BBC English language television programming on BBC One Wales and BBC Two Wales

The BBC in Wales will maintain investment in landmark documentaries and drama, with the aim of broadcasting more programming in peak on BBC One Wales. The BBC will aim to sustain investment through internal collaboration and a greater focus on co-commissioning with in-house for consistency and external partners. BBC One Wales will launch in HD in 2012, with a review of BBC Two Wales expected in 2015. Current proposals are to:

- reduce the volume of off-peak programming on BBC Two Wales
- focus sports rights investment on those events that provide greatest value and impact for audiences (including live TV coverage of domestic and international rugby, and, where possible, coverage of international football, and radio coverage of domestic football)
- increase the number of opt-out programmes broadcast on the BBC’s networks
- continue to seek productivity efficiencies within production areas (including in-house and independent)
- work with BBC network teams and S4C to identify opportunities for co-commissioned programmes.
BBC Radio Wales and BBC Radio Cymru
As with television, the priority is to protect quality and distinctiveness as far as possible by seeking greater savings at times of the day when fewer listeners are available. Resources will be focused on peak listening times, and we will look to share a greater volume of Radio Wales programming with BBC network stations. The BBC in Wales is already a significant producer of programming for the BBC radio networks – including classical concerts and documentaries for Radio 3 and drama for Radio 4. Proposals are to:

- increase investment in peak time programming
- continue to showcase new Welsh music, invest in drama and comedy, and broadcast weekly arts programmes
- continue dedicated political programming on both stations
- reduce the number of off-peak programmes broadcast on both Radio Wales and Radio Cymru over the five year period
- make a small reduction in Radio Cymru broadcasting hours late at night
- make a 25% reduction in long-form programming (e.g. documentaries)
- assess options for increasing FM/DAB coverage of stations
- ensure stations are integrated within all BBC iPlayer applications and services.

The existing comprehensive coverage of major sporting and cultural events will be maintained, including The National Eisteddfod and Royal Welsh Show, and coverage of live domestic rugby.

Interactive Services
BBC online ‘nations’ editions’ will publish relevant Welsh content within a UK-wide online proposition, thereby eliminating any editorial or technological duplication, and improving audience access to Welsh content. Implementing the nations’ editions strategy will see a significant reduction in the number of English language stand-alone sites, as content is integrated into ten pan-UK ‘products’. Proposals are to:

- complete existing 24% reduction in the interactive service budget
- realise efficiencies of a further 10% in non-news and sport content by 2016/17, as new products are launched and evolve
- introduce new nations’ editions of the most popular websites, starting with the BBC Homepage in 2012
- build income from network commissions.

4.5 Guaranteeing access

The BBC will aim to ensure Wales has a free and open public space in the digital world, where audiences can easily access and share high-quality BBC programmes and services. This poses a dual challenge of resolving current distribution challenges facing traditional television and radio services, while ensuring that interactive services made in and for Wales enjoy appropriate coverage and prominence across a fragmenting digital landscape spanning mobile, PCs, tablets and internet-connected TVs.

On radio, the BBC faces considerable distribution challenges in Wales. Although Radio Wales has near universal coverage on AM, almost a fifth of people in Wales are unable to hear Radio Wales on either FM or DAB at present.
By platform, the station is currently available to 81% of the population on FM and 37% on DAB (with DAB coverage broadly limited to areas already served by FM).

Although Radio Cymru has near-universal coverage on FM, as many as 70% of Welsh speakers are currently unable to receive Radio Cymru on DAB. The growing disparity in DAB coverage between Radio Cymru and BBC network stations will put pressure on audience reach over the coming years.

The BBC is currently undertaking a definitive cost/benefit analysis exploring further options for addressing the low coverage levels for Radio Wales on FM and both services on DAB. Meanwhile, additional BBC investment has already been approved to fund carriage of both Radio Wales and Radio Cymru on a new local commercial DAB multiplex in northeast Wales which is expected to launch later this year.

In parallel, the BBC is also working with the DCMS, Ofcom and industry on a joint memorandum of understanding on local DAB build out.

On television, the BBC will launch an HD version of BBC One Wales on Freeview, DSAT and Cable by the end of 2012.

The current BBC Two Wales service will be maintained until at least 2015, while the BBC reviews its long term future.

In addition, BBC iPlayer will provide access to BBC Radio Wales, BBC Radio Cymru and television programming made in and for Wales. The BBC will also pursue the live streaming on BBC One Wales and BBC Two Wales on iPlayer.

4.6 Partnership and collaboration

The BBC is a key cultural patron in Wales. It has established a number of creative collaborations with major national institutions that assist in sustaining the cultural life of the nation. Examples include:

- Partnering with the Arts Council of Wales, who provide funding for the BBC National Orchestra of Wales to support a broad range of outreach activities across Wales
- Working with the Welsh National Opera, The Royal Welsh College of Music and Drama and Cardiff Council to deliver the biennial BBC Cardiff Singer of the World competition – the world’s greatest singing competition for new operatic performers
- A range of creative partnerships – including working with the Welsh Government’s historic environment service, Cadw, on the Coal House and Snowdonia 1890 series and collaborating with the Open University to co-fund The Story of Wales series
- A long-standing relationship with Europe’s largest cultural festival – the National Eisteddfod for Wales. The BBC, as the official broadcast partner, delivers comprehensive coverage of this unique event.

Building on these solid foundations, the BBC in Wales will seek in future to be even more open and ambitious in the way it partners with others for the benefit of audiences and national life in Wales. By leveraging its scale, funding, creativity, innovation and heritage, it can deliver considerable additional value to Wales’ media and cultural sectors – and help develop Wales’ public space.
In future, the BBC in Wales will focus partnership work on activity that can:

- deliver measurable audience and/or economic impact
- offer clear scope for ongoing creative collaboration
- help nurture new talent and expertise, and help build production or cultural capacity in Wales.

The BBC is also committed to working with others to develop the next generation of creative and media talent. In conjunction with Skillset Cymru and the independent sector, the BBC has recently established Apprenticeships in Creative and Digital Media to provide a broad introduction into working in the creative media industries in Wales. Up to 24 apprentices will gain on-the-job, practical training and experience as well as classroom-based learning, leading to an industry-recognised qualification. Twelve-month work placements will be available with BBC Cymru and with independent companies.

**Partnership with S4C**

The BBC has a long history of partnership with S4C. Since the establishment of the channel in 1982, we have contributed at least 10 hours of licence-fee funded programming a week to S4C.

In 2010, the UK Government announced that S4C would, in future, be primarily funded by the licence fee, rather than by the UK Government. On the 25th of October 2011, the BBC Trust, S4C Authority and DCMS announced that an agreement had been reached on the future funding, governance and accountability of the channel's funding until 2017.

The arrangements will protect the editorial and managerial independence of S4C, whilst safeguarding appropriate accountability to the BBC Trust for licence fee funding spent by the service. The establishment of a broadly stable funding position until 2016/17 reflects the BBC Trust's commitment to supporting a strong Welsh-language service.

The BBC in Wales will continue to work with S4C to explore the scope for collaboration across a wide range of areas, including marketing, research, distribution and technology.

Both broadcasters are also assessing longer-term partnership options, including the strategic benefits of co-locating both organisations at a single media centre in Cardiff. The potential to develop an integrated hub for content production in Wales has been prompted by the technological and infrastructure challenges posed by the BBC's existing Wales HQ building.

Such a development could encompass not only the major broadcasters, but also the wider media sector. It would hold the prospect of also bringing together independent producers, academic and training institutions and facilities houses to create a significant media cluster that would maximise synergies and spark sustainable creative and economic growth in Wales. But at a time when we are making significant cuts across the organisation, turning this vision into reality can only be achieved if the development is cost-effective, delivers value for money and ensures that the BBC in Wales is fit for the future.
5. BBC NETWORK PRODUCTION IN WALES

5.1 Current network production in Wales

The recent opening of the purpose-built drama production facility, Roath Lock, underlines the BBC’s commitment to the continued development of Wales as a world class network production centre. The 175,000 square foot complex has nine HD-ready studios, providing a home for BBC dramas such as Casualty, Pobol y Cwm, Doctor Who and the new children’s production Wizards Vs Aliens. The ‘Doctor Who Experience’ exhibition, run by BBC Worldwide, is being built next to Roath Lock in partnership with Cardiff Council, and is scheduled to open in July 2012.

Wales is also a significant base for network factual productions. High profile programmes include Crimewatch and Human Planet, the latter produced in partnership with Bristol. The growth of in-house network production across drama and factual has been complemented by a significant increase in independently-produced network productions from Wales, such as Sherlock, The Indian Doctor and Being Human.

These programmes are making an indelible mark with audiences in Wales, across the UK and internationally. The second series of Sherlock for example attracted 10.2m viewers UK-wide and achieved a very high appreciation score, ahead of the drama average. The first series has now been sold to 183 territories worldwide.

The growth of network production in Wales was sparked by the BBC’s Network Supply Review of television, and the transforming impact of Doctor Who’s revival. It has established Wales as a major production centre and has strengthened the wider creative economy in the nation. Network Supply Review targets are currently being exceeded in Wales. The challenge will be to ensure that those targets form a floor – rather than a ceiling – in order to sustain creative momentum.

Table 7: Proportion of Eligible Network TV Spend in Wales

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2011</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>BASE</td>
<td>3.0%</td>
<td>5.3%</td>
<td>4.9%</td>
</tr>
<tr>
<td>ACTUAL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TARGET</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The target in the table above represents BBC Executive’s planning assumption; however, the target for network production for Scotland, Northern Ireland and Wales has been set at 17% across all three nations to allow for creative flexibility.

The development of network production in Wales has meant that it is increasingly becoming a magnet for key creative talent in both factual and drama. Production teams are increasingly a mix of “home grown” producers, designers and writers – people who began their careers in Wales – and people who have been drawn to Wales because of the range of output and opportunities now available.

As a direct result of the increased investment by the BBC in drama production in Wales, a critical mass of craft talent has been established, with a broad range of skills and experience. As the drama

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14 2011 figures are unaudited and may change
production economy is largely based on freelance expertise, this has meant that independent companies – as well as BBC Wales in-house teams – can develop some of the most ambitious and high-profile projects in British television safe in the knowledge that the skills are available to produce them in Wales.

Roath Lock has quickly established itself as a hub for innovation, collaboration and efficient working practices, as a diverse range of production teams begin to work together and share their skills. As output continues to grow, the BBC in Wales is working closely with organisations such as Cyfle and Skillset to develop skills in key areas of programme-making.

5.2 Impact of Delivering Quality First

As part of Delivering Quality First, the BBC has committed to continue to grow the proportion of network investment spent in the nations across television, radio and online.

The BBC expects the existing 17% target for network television production spend in Wales, Scotland and Northern Ireland to be met earlier than the target date of 2016, and to be exceeded by 2017. Under these proposals, Wales’ strength as a key base for drama will be maintained and BBC Wales’ contribution to network documentary and features production is expected to grow.

The shift of some BBC network programming to Cardiff over the last two years is only the first stage in a long-term strategy to develop a creative cluster of talent in Wales that can support and build a more sustainable broadcasting ecology that benefits both in-house and independent producers.

Growth in interactive network productions from Wales has occurred in parallel with the development of the nation as a major BBC television production centre. The BBC in Wales is responsible for interactive sites such as Human Planet Explorer, Sherlock, The Sarah Jane Adventures, Crimewatch and the ground-breaking Doctor Who Adventure Games. This growth will continue as we make progress towards meeting the interactive production spend target of 17% in the nations by 2016.

There will also be an increase in the volume of network radio programmes produced in the nations during this licence fee period, building on existing growth. In 2010 we committed to doubling the amount of network radio drama produced by the BBC in Wales, further contributing to the development of Wales as a centre of excellence for BBC drama.

5.3 Representation and portrayal

As part of its Delivering Quality First plans, the BBC is determined that increased investment in network production in Wales over recent years should lead to an improvement in the portrayal and representation of Wales on its UK networks. Some of the largest gaps in the delivery of the BBC’s public purposes in Wales relate to the portrayal of Wales to the rest of the UK, and the portrayal of the particular culture and communities of individuals to the rest of the UK. Although there is room for improvement, Wales’ profile on the UK networks has grown considerably over recent years through the success of production such as Torchwood, The Indian Doctor, The Story of Wales, The One Show, Rhod Gilbert’s Work Experience and Gavin and Stacey. In

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15 BBC Trust purpose remit tracking study 2010/11.
addition, the perceptions of accuracy of network news coverage of Wales have improved significantly.

The issue of portrayal across the UK was addressed in depth in a BBC project of 2009, which recommended that the BBC could strengthen the portrayal and representation on its network TV output by focusing on three key elements:

- **Perspective** – ensuring the subject matter or tone of a programme better reflects different experiences and stories from across the UK
- **Casting** – ensuring programmes have a diversity of cast, without reinforcing negative stereotypes
- **Setting** – creating programmes with a clearer sense of place

The BBC will work to increase the volume, visibility and impact of content which offers distinctive Welsh voices, perspectives and an authentic sense of place across our network channels. This will be achieved in part by seeding more programme development funding across the UK and through further shifts of commissioning outside London. As part of these proposals, a new BBC Head of Documentaries post for in-house production is planned to be based in Wales.

The BBC also believes that showcasing more content made specifically for the Welsh audience on network channels could also strengthen portrayal of the nation to the rest of the UK. There is scope to bring more output such as *Snowdonia 1890* and *Rolf on Welsh Art* to audiences around the UK.
6. CONCLUSION

The BBC performs well in Wales, with reach and appreciation for both TV and radio services higher than the rest of the UK. The general impression of the BBC among the people of Wales is higher than in any of the UK’s other three nations.

The BBC plays a unique national role as a creator of distinctive programmes and services for audiences in Wales in both languages. This public service role is particularly important in Wales given the size of the commercial marketplace.

However, the BBC faces significant challenges in ensuring universal access to all services and further work is to be carried out to understand the alternative options for increasing coverage of Radio Wales on FM and both national radio services on DAB in Wales.

Whilst meeting Delivering Quality First targets will undoubtedly be challenging – leading to the loss of some TV and radio programmes and fundamental changes to support areas – the BBC in Wales has sought to safeguard the output that matters most. Peak programmes have been prioritised and news content budgets have been protected. In addition, the BBC’s role in Wales as a world-class base for network programming in the UK will be strengthened.

The BBC in Wales is confident it will emerge from the challenge of Delivering Quality First with its creativity and ambition intact, and that it will continue to play a vibrant role at the heart of national life championing the best talent and the boldest ideas.
APPENDIX - THE PERFORMANCE OF THE BBC IN WALES

A. Overall BBC performance in Wales

A1. Quality

The general impression of the BBC among the people of Wales is higher than in any of the UK’s other three nations. The average level of the BBC’s general impression (7.1 out of 10) is higher in Wales than the average across the UK; among Welsh speakers, it is higher again – with the general impression of the BBC at 7.4.

Figure 1: General impression of the BBC: UK, Wales and Welsh speakers (mean score of 10)

<table>
<thead>
<tr>
<th>General impression of the BBC (/10)</th>
<th>UK</th>
<th>Wales</th>
<th>Welsh speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7.0</td>
<td>7.1</td>
<td>7.4</td>
</tr>
</tbody>
</table>

The BBC’s general impression in Wales has been consistently ahead of the UK average for years.

Figure 2: General impression of the BBC in Wales and the UK (mean score out of 10)

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16 Unless otherwise stated, the sources of data in this section are as follows:
TV: BARB, 4+, 2011 calendar year. Channel reach (15 mins consecutive); news reach 3 mins consecutive all BBC news for Wales, 15 mins reach consecutive Wales Today 18:30 programme and opts
Radio: RAJAR, 15+, Q4 2011 12-month weight, Wales data based on Wales TSA
Quality: Appreciation Index (AI): average out of 100 based on scores respondents give to programmes they watched / listened to on the previous day (respondents give the programme a score out of 10 and the average of all the marks is multiplied by 10 to give an AI out of 100). Pulse panel by GfK NOP for the BBC, 16+, 2011
General impression of the BBC: Kantar Media for the BBC, adults 16+ in Wales (1,674), 2011 (respondents give a score out of 10 based on their general impression of the BBC: 1 = extremely unfavourable; 10 = extremely favourable)

17Source: Kantar Media for the BBC, adults 16+ UK 11,560, Wales 1,674, (respondents give a score out of 10 based on their general impression of the BBC overall: 1 = extremely unfavourable; 10 = extremely favourable)
Viewers in Wales return an average AI (appreciation index) of 83.4 for BBC TV programmes, 1.0 points ahead of the UK-wide average of 82.4.

A2. Reach

The BBC’s portfolio of television channels reach 89% of people in Wales each week (based on those watching for at least 15 consecutive minutes). This is 2½ points ahead of the UK average.

The weekly reach of four of the BBC’s main channels in Wales (BBC One Wales, BBC Two Wales, BBC Three and BBC News Channel) are each ahead of their respective UK level, with the reach of BBC Four matching its UK-wide reach.

Figure 3: Average weekly reach of BBC TV in Wales (%)\(^8\)

Likewise for radio, the overall reach of BBC radio in Wales is 75% – consistently well ahead of the UK-wide average and higher than in previous years. The BBC’s lead in Wales over its UK level is driven by Radio 1, Radio 2 and the national radio stations for Wales (Radio Wales and Radio Cymru) reaching a higher proportion of listeners in Wales than the corresponding UK-wide reach in each case.

BBC radio also outperforms commercial radio in Wales by a wide margin, with the BBC’s reach more than ten points ahead. Again, this is a similar story to the last few years.

\(^8\) Source: BARB 4+, 15minutes consecutive
The marked success of the BBC’s two most popular music stations is in part due to the less developed local commercial radio market in parts of Wales, which in turn is hampering the willingness of the commercial radio market to invest in local DAB multiplexes in Wales.

In contrast, the BBC’s other stations – Radio 3, Radio 4, Radio 5 live and the BBC’s digital networks – perform less well in Wales compared with the UK average.

**B. Performance of the BBC’s programming and services specifically for Wales**

The overall reach of the BBC’s programming and services made in and for Wales is driven by English language television. For example, BBC Wales Today news bulletins are seen by more than half the adult population each week (based on three consecutive minutes of viewing).

Radio Wales reaches approximately a fifth of the adult population each week – with each listener consuming around 10½ hours per week on average. BBC Radio Cymru is the most popular radio station among fluent Welsh speakers, reaching a third of them each week and 5.5% of the population of Wales. Radio Cymru listeners also hear around 10½ hours of output each week.

**Table 8: Performance of BBC services specifically for audiences in Wales**

<table>
<thead>
<tr>
<th>Service</th>
<th>Average weekly reach (%)</th>
<th>Quality</th>
<th>Average time spent per viewer/listener (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Wales Today combined TV news bulletins (16+, 3mins+)</td>
<td>54.7</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>All BBC English Language TV opts (inc news, 4+, 15 mins)</td>
<td>35.6</td>
<td>83.7</td>
<td>n/a</td>
</tr>
<tr>
<td>BBC Radio Wales</td>
<td>18.4</td>
<td>81.5</td>
<td>10:44</td>
</tr>
<tr>
<td>BBC Radio Cymru</td>
<td>5.5 (34% fluent Welsh speakers)</td>
<td>n/a</td>
<td>10:36</td>
</tr>
<tr>
<td>BBC Cymru on S4C</td>
<td>6.8</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

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19 Source: RAJAR, adults 15+

20 Appreciation Index (AI) average out of 100: based on scores respondents give to programmes they watched / listened to on the previous day
Figure 5: Average weekly reach (000s) of BBC Wales news on BBC One

![Average weekly reach (000s) of BBC Wales news on BBC One](image)

B1. English language television

The BBC’s English language TV programmes specifically for audiences in Wales reach one million viewers in Wales each week on average – the highest for seven years (using the usual 15-minute definition for general programmes). This reach of 36% in Wales for all BBC Wales opts has been driven by recent increases in the reach for BBC Wales Today and for BBC’s opt-out programmes, with both reaching around 23% of the population each week.

Figure 6: Average weekly reach of the BBC in Wales’ opt programmes on BBC One and BBC Two (%)

![Average weekly reach of the BBC in Wales’ opt programmes on BBC One and BBC Two (%)](image)

Programmes from the BBC specifically for audiences in Wales achieve an average AI (audience appreciation score) of 83.7 in Wales, slightly ahead of the level for network programmes.

The average channel share of viewing for BBC programming specifically broadcast for audiences in Wales exceeds the corresponding UK-wide channel share at the same time by an average of +0.1 points on BBC1 and +1.1 points on BBC2, or an average of +0.7 across both channels.

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21 Source: BARB, 4+, 3 minutes consecutive
22 Source: BARB, individuals 4+, 15 minutes consecutive
B2. TV news

The BBC’s news provision specifically for audiences in Wales on BBC One Wales reaches 54.7% of adults in Wales each week (based on three consecutive minutes), a similar level to Scotland and higher than Northern Ireland and regional TV news in England.

However, the average share for the main 6.30pm BBC Wales Today bulletin is 0.2 points lower than the average 6.30pm share across the UK.

B3. BBC Radio Wales and BBC Radio Cymru

The average AI for Radio Wales’s programmes is 81.5, on a par with the average AI of 81.6 across all BBC radio in Wales. There are no reported AIs for Radio Cymru as it is not asked on the relevant BBC survey.

Radio Wales reaches almost half a million adults in Wales each week (18.4% of adults in Wales), in joint third position (after Radio 2 and Radio 1, and jointly with Real Radio). Radio Cymru is heard by 5.5% of adults, or a third of all fluent Welsh speakers in Wales.

Radio Wales has 9% of all listening in Wales and Radio Cymru has a share of 20% of all listening among fluent Welsh speakers. The total Radio Wales / Radio Cymru share in Wales is 12%, which is three points higher than the UK average for Nations/local radio.

Radio Wales and Radio Cymru listeners spend almost 11 hours with their station each week.

B4. BBC Cymru on S4C

The BBC’s statutory provision for S4C reaches 190,000 viewers each week (15-minute consecutive), and has been broadly stable at this level over the past three years. This programming delivers 37% of S4C’s total viewer hours.

B5. Online services for audiences in Wales

The BBC’s online service for Wales has around 2.7 million unique browsers23 each week, of which 20,000 are for Welsh language content. Usage is driven primarily by news and sport.

23 One individual may well use several browsers (for example on a work PC, a personal smartphone and a home laptop), so this may not equate to unique individuals. Source: iStats Digital Analytix, Q4 2011