

BBC Trust service review:
BBC nations' news and radio
services summary report

August 2016

Executive summary

Introduction

The BBC nations' news and radio services are a very important part of the BBC's offer in each of the devolved nations. They are highly distinctive, very focused on delivery of the BBC's public purposes and are seen as high quality by their audiences.

These services play a particularly important role because Wales, Northern Ireland and Scotland are devolved within the UK in many important policy areas and each has a strong and distinct sense of identity. These services allow the BBC to properly inform citizens in each nation about news which is relevant to them including government policy areas affected by devolution such as education, agriculture, the environment, health and housing. Our research found clear audience demand for this output.

While the nations' radio and TV services have content that is relevant to all audiences, they tend to reach older adults more effectively than younger ones. The challenge to reach a broad audience is growing, as younger adults in particular (but all adults to some degree) use broadcast services less and consume more online content. This affects news consumption in particular.

New technology provides more innovative and flexible ways for the BBC to offer its content, but it also increases choice for audiences and creates a risk that, if the BBC does not keep pace with change, it will not be able to deliver its public purposes to a broad audience. The services must find a way to remain relevant and modernize their offer for younger adults, but they must do so at a time when funding across the BBC is under pressure, and this may entail difficult trade-offs.

The nations' radio services

The BBC nations' radio services operate alongside 10 network radio stations.¹ The weekly reach of the full BBC radio portfolio ranges widely, from 59% in Scotland and 60% in Northern Ireland to 73% of adults in Wales. For the nations' radio stations, weekly reach ranged from 35% for Radio Ulster/Foyle to 21% for Radio Scotland and 16% for Radio Wales in 2015.

The two indigenous language stations have high reach among their target audiences: Radio Cymru reaches 30% of fluent Welsh speakers and Radio nan Gàidheal has claimed reach of 69% among Gaelic speakers.²

Each of the nations' radio stations focuses on delivering the public purposes of citizenship and civil society, reflecting the nations' regions and communities and their culture and creativity. The stations have increased their focus on the public purposes since our first review in 2011, and this has made each of them more distinctive within the BBC radio portfolio.

¹ The 10 BBC network stations are: BBC Radio 1, BBC Radio 1 Xtra, BBC Radio 2, Radio 3, BBC Radio 4, Radio 4Extra, BBC Radio 5 Live, BBC Radio 5 live sports extra, BBC 6 Music, and BBC Asian Network

² Sources: Radio Cymru - RAJAR (2015) and Radio nan Gàidheal, claimed reach from Leirsinn survey

Peak-time programming on the stations is focused on high-quality journalism and other speech-led output. Programmes about the life, culture and affairs of the devolved nations meet the audience demand for news about their individual nations in a way that pan-UK stations generally cannot.

The public value of these services is rooted in a small number of quantitative commitments set in the service licence for each station. We have found that delivery of news and current affairs by each station now outstrips the level of commitment by a large margin. We will, therefore, reset the commitments at a closer level to actual output, with a margin of around 20% to allow normal variations in programming and small changes to editorial strategy.

Each station aims to serve all listeners – they, rightly, do not target older listeners as their content is relevant to all adults. However, it is undeniable that they attract an older audience, with mean ages of 53 for Radio Scotland, 55 for Radio Ulster/Foyle and 56 for Radio Wales.³ This is partly because older people are generally more interested in news about their nation⁴ but also because younger listeners are particularly likely to consume BBC and commercial music stations and newer digital music services. This has contributed to pressure on the stations' reach and hours of listening, as well as their typical age profile.

The stations' challenge is how to continue to reach a broad audience without weakening their distinctive, speech-led offer. The BBC recognises this and in Wales and Scotland, where the challenge is greatest, the BBC is considering whether the stations might vary the mix of music and speech, either on the core service or by launching a second offer with a greater emphasis on music while the main service retains its focus on news and speech output. We encourage the BBC to find new approaches that will allow it to continue to deliver these public purposes to audiences in the nations. We are mindful, however, that the BBC radio portfolio already has a range of music stations and that distinctiveness within this context should be taken into account when plans are made.

Making some nations' radio content available on demand, via apps and social media, may help to maintain reach among younger adults. It may also help to raise awareness of parts of the off-peak schedule of each station. We encourage the BBC to find new approaches in this area.

News and current affairs on TV and online

The BBC offers news and current affairs programmes and online content made in and for Northern Ireland, Scotland and Wales alongside its UK-wide ('network') news and current affairs. The main programmes and offers are:

- **Northern Ireland:** *BBC Newsline, Spotlight, Stormont Today, Sunday Politics, The View*
- **Scotland:** *Reporting Scotland, Scotland 2016, BBC Scotland Investigates, Sunday Politics*
- **Wales:** *Wales Today, the Wales Report, Week in Week out, Sunday Politics*

These programmes are valued by their audiences and play a critical role in the overall BBC news provision in each nation.

³ Source: RAJAR (2015)

⁴ Source: Ofcom (2015) News Consumption in the UK

Television remains the most effective way for the BBC to deliver its news output to large audiences – BBC TV news is used by 65% all adults each week.⁵ But television faces a similar challenge to radio: as online becomes a more important source of news for all adults, and in particular for younger ones, audience reach of television news falls and the online news offer in each nation needs to develop. To date, online has not compensated in measurable terms⁶ for the decline in reach of BBC TV and radio news services. While maintaining the quality of TV and radio programming, the development of online, particularly for mobile use and on social media, will be a key part of the BBC's future strategy in each nation.

Our research showed clearly how highly audiences regard the BBC's news offer in each nation. It also showed some areas where expectations are not met and our public consultation indicated that some people have very strong views about the BBC's news in Scotland. The BBC acknowledges the challenge it faces in meeting the range of audience expectations for its network and nations news offer in the devolved nations, and it is actively considering whether the scope and format of its offer on TV, radio or online should change. We note that this is matter of public debate, particularly in Scotland, and we expect to see the conclusions from the BBC Executive's work later this year.

The indigenous minority language services and content

Language plays an important part in the history and cultural heritage of all the devolved nations, and indigenous minority language programmes are highly valued by their speakers and those who appreciate their cultural content. The BBC provides content in Welsh, Gaelic, Irish and Ulster-Scots on TV, radio and online, funded by a mix of licence fee and other public sources. These offers make an important contribution to the public purposes and generally perform well among their small target audiences.

However, Radio Cymru, Radio nan Gàidheal and BBC ALBA face a tough challenge: while their potential audience is small, it is also demographically very broad. The extent to which minority language TV and radio services can be used by family groups who do not all speak these languages adds further complexity. With some evidence of falling reach of these services and as licence fee funding becomes tighter in real terms over the next few years, the BBC will have to consider carefully how best to serve these audiences across TV, radio and online.

Key findings by nation

Northern Ireland

Strong performance in Northern Ireland is underpinned by the huge popularity of Radio Ulster/Foyle. The BBC also has considerable strength in its TV news and current affairs offer, all of which helps to serve the Northern Ireland audience's very large appetite for news. The digital news offer for Northern Ireland, however, is less well developed.

BBC Radio Ulster/Foyle

Radio Ulster/Foyle makes a very strong contribution to the overall BBC offer in Northern Ireland. In 2015, the station reached 35.2% of adults each week – much higher than any other nations' radio station. Its popularity is reflected in a general impression score, which has remained high

⁵ Source: BARB (2016)

⁶ Measurement of the BBC's content on social media is still not reliable

and stable at eight out of 10. Average hours of listening are high – 10 hours a week in 2015 – although this has fallen by 18% since 2011.⁷

The station combines a local feel with strong coverage of UK and international affairs. While its news is highly valued, some listeners felt that social issues were not covered to the same extent as political ones, and there was an appetite for a wider range of issues which would reflect Northern Ireland today.

News and current affairs on TV and online

Audiences in Northern Ireland have a strong appetite for news and BBC television news continues to reach a significant proportion of people, although, as with the rest of the UK, reach is declining among younger viewers. BBC News NI is regarded as high quality and impartial. However, some viewers feel that too much news is reported through a political lens, with a heavy focus on legacy issues. BBC Northern Ireland is working to broaden the range of its news agenda and to find new voices for its coverage.

BBC Northern Ireland's current affairs perform well, reaching around 20% of adults and maintaining a good approval score with Spotlight held in particularly high regard. Viewers agree that programmes are informative and high quality, and there is particular praise for the focus on major issues affecting Northern Ireland and the range of subjects covered.

With a very strong radio and TV offer, BBC Northern Ireland accepts that its challenge is now to further develop its online presence. BBC Northern Ireland has increased its use of social media to deliver news, but agrees that there is more to be done in this area, in particular to serve younger audiences better.

Wales

BBC Wales serves audiences in both the English and Welsh languages, with two speech-led radio stations, and news and current affairs on TV and online. BBC Wales also provides news and other Welsh language output to S4C, which is not covered by this review.

While overall BBC performance in Wales is strong, with reach levels and perceptions often above the UK average, services made in and for Wales face some particular challenges, partly driven by the popularity of BBC network services.

BBC Radio Wales

As the only national radio station for Wales in the English language, Radio Wales serves Welsh listeners in a way that UK stations cannot, with a range of high-quality nationally focused output. Since our last review, it has made various changes to strengthen its portrayal of contemporary Wales, with greater prominence for journalism and sport and some very popular comedy.

The station reached 16% of adults each week in 2015 and general impression scores are high, but reach is under pressure and has fallen since 2011.⁸ Unlike the BBC's other nations' radio stations, Radio Wales is still not available universally on FM. It faces strong competition from commercial music stations and also from BBC Radio 2, which has grown strongly in popularity in recent years in Wales.

⁷ Source: RAJAR (2015)

⁸ Source: RAJAR (2015)

Given a limited supply of news about Wales on BBC network radio and from commercial media, the BBC faces a challenge in connecting a higher proportion of people in Wales with news about their nation.

In considering how to broaden its appeal, BBC Wales has strengthened its online presence and is now considering the balance of music and speech output on Radio Wales.

The development of editorial strategies that best deliver the public purposes is, in the first instance, a matter for the BBC Executive. We encourage fresh thinking to address the challenges set out above, although it will be important that any more music-focused service remains clearly distinctive from BBC network radio and from other stations available to Welsh listeners.

BBC Radio Cymru

Radio Cymru is the only Welsh language radio station for Wales. The station makes an important contribution to the public purposes through a range of high-quality output. It plays an important role in supporting and strengthening the Welsh language and the nation's culture, which is particularly valued by its listeners.

Radio Cymru reaches 30% of fluent Welsh speakers, equivalent to 4.6% of all adults in Wales. While general impressions of quality are strong and average listening hours are high, its reach has declined since 2011.⁹

Since our last review, Radio Cymru has extended its range of programmes and changed its schedule in order to improve its appeal beyond the traditional older, heartland audience. The station is affected not just by general trends in radio listening, which affect many other stations, but by a small drop in the number of adult Welsh speakers and fully Welsh-speaking households and a broadening of the range of Welsh speakers with different needs. In response to the challenge, BBC Wales plans to trial an alternative offer this autumn which may have a different appeal. We encourage the BBC to try new approaches, but, if the remit of the permanent service is to change, this would represent a change to the scope of the current offer and will require regulatory consideration.

News and current affairs on TV and online

In line with trends for BBC TV overall, the reach of BBC Wales' news and current affairs output fell from 54% in 2011 to 50% in 2015. Over the same period, the weekly reach for *Wales Today* fell from 52% to 49%, while the reach of BBC Wales' current affairs programmes dropped from 15% to 12%.¹⁰

While impressions and perceptions of BBC Wales' news are strong, the average AI for BBC Wales' news fell a little. Current affairs output is particularly well regarded and audience perceptions of how it covers and analyses politics in Wales are very strong. However, as in the other UK nations, Welsh audiences consider that the BBC could do more to hold decision-makers in Wales to account.

BBC Wales has strengthened its online offer in the last few years and performance has improved, particularly for news and sports. Welsh news app *Cymru Fyw* continues to see strong growth since its launch in 2014. This represents a positive example of the BBC embracing the growing use of mobile devices to deliver relevant content for audiences in the devolved nations.

⁹ Source: RAJAR (2015)

¹⁰ Source: BARB (2015)

Scotland

Perceptions of the BBC in Scotland have traditionally been less positive than in most other parts of the UK, due to a complex mix of reasons, some cultural. There is a wide range of opinion about the BBC within Scotland, with some people very critical of it, while others are very supportive. This was reflected in our public consultation for this review, in which responses were largely from people who were highly engaged with, but critical of, the BBC's offer.

BBC Radio Scotland

Radio Scotland reached 21% of the Scottish population each week in 2015¹¹ and we found that listeners are generally satisfied with its quality and believe that it provides a distinctive mix of programming that they cannot find elsewhere. While reach has declined a little in recent years, there are now signs of recovery following a series of schedule changes.

Audiences in Scotland have a range of views on the extent to which the BBC is impartial, and this affects their perceptions of Radio Scotland, as well as other BBC news services. However, most listeners consider Radio Scotland to be informative and high quality. There is a general perception, however, that there is scope for improvements in how the BBC helps audiences understand news, topical issues and the political situation in Scotland.

Radio Scotland's sports coverage, and its arts and music programming, are all highly valued. Listeners enjoy hearing a diverse range of voices on the station, and also welcome the opportunity to contribute and get involved with Radio Scotland.

News and current affairs on TV and online

BBC Scotland's news on television performs strongly in terms of reach, although, as with all news, it is finding it increasingly hard to reach younger adults.

Our quantitative research found that seven out of 10 viewers think the BBC Scotland television news is high quality and relevant to them, and eight out of 10 agree that it is informative. However, we also found that there are some unmet audience expectations in Scotland, evidenced by some significant performance gaps.¹²

Reach to BBC Scotland's current affairs is relatively low, at 10% in 2015, although it has increased from 6% in 2013.¹³ In particular, news analysis programme *Scotland 2016* has a very small audience and this programme is now to be cut. Investigative strand *BBC Scotland Investigates* is seen as strong and has impact.

Audience approval of current affairs has fallen, and some viewers think their expectations are not being fully met by these programmes. We have, therefore, set an action in this area.

BBC Scotland's online news attracts a large number of users and this is increasingly from people using mobile devices. While there was no increase in usage levels in the past year, audiences

¹¹ Source: RAJAR

¹² Performance gap is the difference between the audience's perceived performance and importance of a service in delivering the public purposes

¹³ Source: BARB (2015)

consider the service to be high quality and informative, and are positive about how it is presented. BBC Scotland is increasingly using social media to reach audiences with its journalism, and we would expect this strategy to evolve further.

Gaelic language services

BBC Radio nan Gàidheal

Radio nan Gàidheal is a well-established Gaelic language service, with a loyal core audience. Its claimed reach among Gaelic speakers is extremely high, at 69% in 2015¹⁴, and listeners hold the station in high regard and praise its important contribution to Gaelic citizenship and culture, particularly through its news, music and sports output.

The station is seen to play a significant role in sustaining the Gaelic language, and is valued as a learning resource. The station's use of online and social media will be increasingly important to maintaining its role, especially for younger Gaelic speakers, who some feel could be better served by Radio nan Gàidheal.

BBC ALBA

Since its launch in 2008, BBC ALBA has served the Gaelic audience well with claimed reach of 75% among Gaelic speakers in 2015. Its reach within Scotland is quite high, at 15%, although it has fallen in the past couple of years.¹⁵

Audiences hold the channel in high regard and consider that it strengthens Gaelic cultural heritage through its wide mix of programmes, including children's, factual, music, drama, comedy and sport. News and, in particular, current affairs output was highly praised by viewers.

The channel has a high level of repeat programming compared to BBC One and BBC Two, but a similar level to many digital channels. The BBC believes that the low volume of new programming (including the lack of news provision for some of the weekend), together with the audience opinion that some learning output is very dated in style, threatens ALBA's high-quality reputation and broad appeal.

As stated above, once the licence fee funding is finalised, the BBC will need to consider how its services for indigenous minority language speakers are scoped.

Actions

1. All BBC TV and radio services are facing a challenge from the audience shift to online consumption. The BBC will need to offer more of its content online, including on mobile and social media, in order to continue to deliver its public purposes to a broad audience. However, it will also have to maintain the quality of its TV and radio offer as these media remain important to many adults. While this challenge is widely understood within the BBC, we suggest that clearer plans to address it are made in each nation when the licence fee funding is finalised.

¹⁴ Source: Leirsinn survey

¹⁵ Source: BARB (2015)

Timing: we expect this to be part of the next round of financial planning at the BBC.

2. News and current affairs are core to the nations’ radio offer and highly valued by the audience. Each station now significantly outperforms its service licence quotas for news and current affairs output. We have, therefore, adjusted the quotas to reflect more recent levels of delivery, while still allowing sufficient operational flex for changes to the schedule.

Service and genre	old condition	output in 2015/16	new condition
Radio Scotland news and current affairs	43	62	50
Radio Wales news and current affairs	24	53 ¹⁶	32
Radio Cymru news and current affairs	16	36	23
Radio Ulster news and current affairs	27	44	35
Radio Foyle news and current affairs	8	27	20

Timing: immediate

3. While audience perceptions of BBC news are very strong overall, the evidence gathered for this review shows that audiences have extremely high expectations of the BBC. Their opinions vary on how well the BBC delivers across its network and nations’ output, and expectations are not always met. This is a complex area, with variations in opinion both within nations and between them. The BBC is currently reviewing the scope of its news offer for the devolved nations, considering how both network and nations’ news might serve audiences better. The evidence and findings of this review should feed into that work.
 - a. The challenge is most acute in Scotland, where most audience perceptions of the BBC are lower on average and where we heard a very critical opinion of the BBC from some members of the audience. We found that current affairs could do more to focus on issues of relevance to Scotland and offer in-depth analysis of Scottish issues. Alongside the review of news outlined above, BBC Scotland is already making some changes to news and current affairs. It will be important for BBC Scotland to track whether these changes have the desired outcome.
 - b. In Northern Ireland, while BBC TV and radio services perform well, audiences want the local news agenda to keep pace with changes in society and to offer a wider range of topics and voices within news coverage. BBC Northern Ireland is aware of this challenge and is working to address it, with some notable success already, but it still has further to go.
 - c. In Wales – particularly within the context of a deficit of other sources of Welsh news – the BBC will need to find ways to ensure audiences are kept informed about Welsh matters, and that their expectations in areas such as Welsh political coverage and holding decision-makers to account are fully met.
 - d. Across all nations our quantitative research found that the audience’s very high expectations of how well the BBC holds decision-makers to account were not being met. We have found this in previous research on other BBC services. As this is a core aspect of the BBC news remit, we recommend that the BBC undertakes further work to understand how it can meet audience expectations better in this area.

Timing: the extent to which BBC nations’ news output meets audience expectations should be part of the BBC’s future annual performance assessment.

¹⁶ A schedule change in February 2016 has reduced the projected annual average to 40 hours a week

4. The BBC has indigenous minority language services with BBC Radio Cymru, BBC nan Gàidheal and BBC ALBA, as well as programming on Radio Ulster/Foyle. Many of these services are affected by the general trend of declining TV and radio reach which is more acute given their small but diverse target audiences. Once BBC funding for the next licence fee period is finalised, we recommend that the BBC agrees how its indigenous minority language offers should evolve in the future, including the mix of broadcast and online media that will best meet audience needs.

Timing: we expect this to be part of the next round of financial planning at the BBC.