

# BBC Trust Service Review

## Radio 4, Radio 4 Extra, Radio 5 live and Radio 5 live Sports Extra

August 2015



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# BBC Speech Radio Service Review: summary

## Introduction

The BBC Trust is the governing body of the BBC and it is our responsibility to get the best out of the BBC for licence fee payers. One of the ways we do this is by carrying out an in-depth review of each of the BBC's services<sup>1</sup>.

A service review considers how well each service is performing against the terms of its service licence<sup>2</sup>. It also considers whether any changes should be made to the service or its service licence.

As part of our evidence gathering for this review, we carried out a public consultation between December 2014 and February 2015 and received 5,256 responses from licence fee payers. In addition, we received a number of responses from the radio sector and other stakeholder organisations, some of whom we also met. We also commissioned quantitative audience research and interviewed staff at Radio 4 and Radio 5 live. This new evidence, together with existing performance and financial data, has given us a clear picture of how these services are fulfilling their remits and serving licence fee payers.

## Headline conclusions

**Each of the BBC's network speech radio stations is high quality and, with strong audience reach, each makes a significant contribution to delivering the BBC's public purposes.**

Radio 4, Radio 5 live and their sister digital stations are the BBC's only UK-wide speech stations. However, there is a considerable amount of speech offered by the BBC's stations in each nation and region: Radio Scotland, Radio nan Gaidheal, Radio Wales, Radio Cymru, Radio Ulster Foyle and BBC Local Radio in England. There are also documentaries and other speech programmes delivered by the BBC's music stations, although, outside of Radio 4 and 5 live, there is limited provision of drama, comedy and investigative journalism.

We have found that audiences consider the four stations we have reviewed to be high quality and distinctive. Their listeners praise the calibre and range of their programmes and the varied content. Many stakeholders also told us that the BBC's speech radio offer is distinctive and high quality, and that Radio 4 and 5 live both demonstrate public service broadcasting at its best.

### Radio 4

Radio 4 sets the standard for high-quality, intelligent speech radio programming. It is highly thought of by its audience, many of whom regard it as a "national institution".

Radio 4 creates a great deal of public value by producing news, drama, comedy and factual programming on a range of topics. By doing so, it delivers the BBC's public purposes<sup>3</sup> to nearly 11 million listeners, who tune in on average for over 11 hours each week<sup>4</sup>.

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<sup>1</sup> Previous reviews can be found at: [http://www.bbc.co.uk/bbctrust/our\\_work/services/radio/service\\_reviews.html](http://www.bbc.co.uk/bbctrust/our_work/services/radio/service_reviews.html)

<sup>2</sup> The service licences can be found at: [http://www.bbc.co.uk/bbctrust/our\\_work/services/radio/service\\_licences.html](http://www.bbc.co.uk/bbctrust/our_work/services/radio/service_licences.html)

Radio 4's audience profile has changed very little in recent years. Its younger listeners remain a stable part of its overall audience. The station has worked to improve its ability to reflect the diversity of life across the UK; as this diversity grows, this is an ongoing challenge.

News and current affairs are central to the Radio 4 offer and are highly regarded by listeners for quality, range and trustworthiness. Radio 4's comedy and drama are highly appreciated by audiences. We consider that, given ongoing budget pressures, the quality and range of these genres should be protected, as they are not generally offered by other UK radio stations.

Radio 4 has been developing and extending its online presence in order to build its reputation as a source of varied, intelligent speech content amongst a wider group of people. Listeners are increasingly taking up new ways to immerse themselves in Radio 4 content. Podcasts are currently particularly popular. In order to allow Radio 4 to develop its online presence further, we have approved a proposal to allow speech content to be premiered online up to seven days before broadcast.

Radio 4's content costs are higher than other BBC radio stations due to the volume of short programmes with relatively high production costs. Radio 4's programming has been largely protected from BBC budget cuts to date, although, like other services, it has had to find efficiency savings. It is important that future budget plans do not affect the quality of Radio 4's output, particularly in new drama and comedy, where it has a unique role on UK radio.

## **Radio 4 Extra**

Radio 4 Extra provides speech-based entertainment, mainly from the BBC archive, for which listeners have great affection.

Despite cuts to its originated programmes, 4 Extra has built its audience to around 1.8 million listeners each week, the second most listened to BBC digital radio station after 6 Music. Against a downward trend in overall radio listening, 4 Extra has also increased its average listening hours to just under 6 hours a week<sup>5</sup>.

Archive comedy and drama programming is at the core of 4 Extra's appeal, and listeners are very appreciative of this content, which is almost unique on UK radio.

## **Radio 5 live**

Radio 5 live appeals to almost 6 million listeners who value its high-quality live news and sport. Total listening has declined a little in recent years, particularly amongst younger, lighter listeners.

Listeners appreciate 5 live's accessible and informal news, and most agree that the balance is right between serious and less serious news on the station. Current affairs are also performing well and 5 live's investigative journalism now creates more impact than a few years ago.

Many listeners are attracted to 5 live for its live sports coverage. We have asked 5 live to consider how its reputation for news can be balanced more evenly with that for sport.

In our last review we asked 5 live to provide more regular coverage of a range of sports alongside football. The station now covers a very wide range of sports, both live and in other

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<sup>3</sup> The public purposes can be found at: <http://www.bbc.co.uk/corporate2/insidethebbc/howweare/publicpurposes>

<sup>4</sup> Source: RAJAR 2014-15

<sup>5</sup> Source: RAJAR 2014-15

forms. Together with 5 live Sports Extra, it covered 51 sports in 2014, the highest level ever. Whilst listeners told us that football is by far their favourite sport on the station, we expect 5 live to maintain its commitment to a wide range of sports.

5 live's breaking news and live sports coverage both now compete with many 'live' online sources of this information, and this is leading to some pressure on listening figures. 5 live is responding to these changes in audience habits by evolving its own broadcast and online offer and changing the way it positions itself as more than an outlet for breaking news.

## Radio 5 live Sports Extra

5 live Sports Extra is valued by listeners for bringing them a greater choice of live sport. Listeners noted that its sports commentary – particularly *Test Match Special* – is of the highest quality and they praised its informal, yet knowledgeable, tone.

The BBC Executive has proposed an extension to 5 live Sports Extra's remit to provide a more regular service, including some new sports programming. We are in the process of conducting a regulatory assessment on the proposal and will publish the Trust's decision in the autumn.

## Actions

These are the principal actions we are asking the BBC to take as a result of this review.

**Action 1:** With ongoing pressure on BBC budgets, Radio 4 should aim to protect quality and range within genres that are not generally offered by any other UK radio station. This applies particularly to comedy and drama.

**Action 2:** Radio 4 and Radio 5 live have both worked to improve their ability to reflect the diversity of the UK; they will need to continue this as the diversity of their core audience grows.

**Action 3:** We will amend all the service licences for any BBC station broadcasting speech radio to allow for some speech programmes to be made available online up to seven days in advance of broadcast.

**Action 4:** We are asking the BBC to consider how it promotes Radio 5 live, and to give greater emphasis to news so that its reputation can strengthen in this area.

**Action 5:** We are in the process of conducting a regulatory assessment of the proposals to extend the remit of Radio 5 live Sports Extra and will announce a decision in autumn 2015.

# BBC Music Radio service review: full report

## Radio 4

The remit of Radio 4 is to be a mixed speech service, offering in-depth news and current affairs, and a wide range of other speech output, including drama, readings, comedy, factual and magazine programmes.

The service should appeal to listeners seeking intelligent programmes in many genres that inform, educate and entertain.

### Quality and reach

#### **Radio 4 sets the standard for high-quality, intelligent speech radio and is very highly thought of by its audience**

- 1 Radio 4 is highly appreciated by its audience. The vast majority of the listeners that we heard from during the review talked about the station with great affection and praised its varied output.
- 2 Our research found that Radio 4 is highly regarded by its listeners, with 87% favourable towards the station. It is most likely to be described as informative, high quality and intelligent. The station is held in high regard by the majority of those responding to our consultation, and regarded as thought-provoking, intelligent and a national institution – even a lifeline for many. All aspects of the service are praised: content, presentation style, presenters and schedule. Our Audience Councils found that listeners have no significant appetite for change on the station.
- 3 This feedback is supported by the BBC's tracking surveys: the station generates the highest "general impression" score of any BBC network station at 8.4 out of 10<sup>6</sup>, and this has been stable over the past 3 years. It also has a consistently high AI (Appreciation Index) score of 80.4<sup>7</sup>.

***'We asked, you said': "I would happily pay my full licence fee for Radio 4 alone – it's a life-enhancing station!" (Female 65-74)***

- 4 Commercial radio broadcasters Global and UTV mentioned Radio 4's high level of funding as the reason why it is able to provide content that would not be affordable for commercial broadcasters. They note that the station performs well against its service licence and demonstrates public service broadcasting at its best. Radio Centre said that the tone and style is distinct from commercial speech radio and that it strengthens the quality of UK radio as a whole.

#### **Audiences appreciate Radio 4's distinctive range and tone**

- 5 Our audience research shows that there is a high level of satisfaction with the output on Radio 4, with 92% appreciative of the variety on offer on Radio 4 and 84% rating the style of presentation

<sup>6</sup> Source: BBC Audience and Reputation Tracker 2014-15

<sup>7</sup> Source: BBC Pulse Survey. The Appreciation Index (AI) scores are calculated at an individual programme level. Respondents in the survey are asked to rate the programme they watched out of 10. This is then aggregated into an index out of 100. 2014-15

as good. Some 95% said that Radio 4 has programmes they want to listen to and 91% told us that there are programmes that make them think. A large majority agreed that they would miss the station if it were not there.

***'We asked, you said': "Without Radio 4 our lives would be empty! We wake up to it and go to sleep with it – programmes rarely disappoint and we hope the variety of what is broadcast will never change. Well done Radio 4!" (Anon - details not given)***

- 6 Whilst regular listeners are extremely loyal to the station, Audience Council England noted that, for some people, the station's assumption that its listeners are familiar with programmes can be frustrating.
- 7 We also found a small proportion of avid listeners who are critical of any perceived slip in the standards of presentation, particularly the wrong use of language and grammar and regional accents that some listeners find hard to understand.

### **Radio 4 maintains a very large and loyal audience and makes a significant contribution to the reach of BBC Radio**

- 8 Just under 11 million people in the UK listen to Radio 4 each week. Its reach has remained stable since 2011-12 and stood at 19.3% of all individuals in 2014-15. This makes it the BBC's third most popular station, behind Radio 2 and Radio 1.<sup>8</sup>
- 9 Radio 4 makes a strong contribution to overall BBC Radio reach, with 28%, or 3.1 million, of its listeners using no other BBC station. This level of unique reach is lower than Radio 1 and Radio 2 but high compared to other stations.<sup>9</sup>
- 10 The average weekly hours of listening have declined for Radio 4 in line with an overall decline in listening to network radio. They do, however, remain at a very high level. Average hours for Radio 4 have declined between 2011-12 and 2014-15 by 38 minutes per week from 11 hours and 56 minutes to 11 hours and 18 minutes. However, the audience to Radio 4 remains particularly loyal, with many considering it to be a constant companion. Therefore, the recent loss in listening hours is not a deep concern.<sup>10</sup>

### **Radio 4's audience profile has changed very little in recent years**

- 11 Radio 4's service licence states that it should reflect the diversity of the UK. In our last review of the station, we endorsed initiatives from BBC management which aimed to increase the levels of listening amongst audiences from different parts of the UK, and those from black, Asian and minority ethnic (BAME) backgrounds. We describe the steps it has taken in paragraphs 49-58 below. Here we assess the impact this has had on listening to the station.
- 12 As figure 1 (below) shows, Radio 4 listening has no skew in terms of gender, and its levels of listening amongst different age groups is roughly stable. Listening levels are much higher amongst higher socio-economic groups, which is unsurprising, given the type of programming offered.
- 13 In our last review of Radio 4, we supported the station's aim to target slightly younger listeners (35-54 year-olds) in order to maintain its audience in the future. Radio 4 reach has dropped a little amongst this age group but it still accounts for a quarter of the station's listenership.

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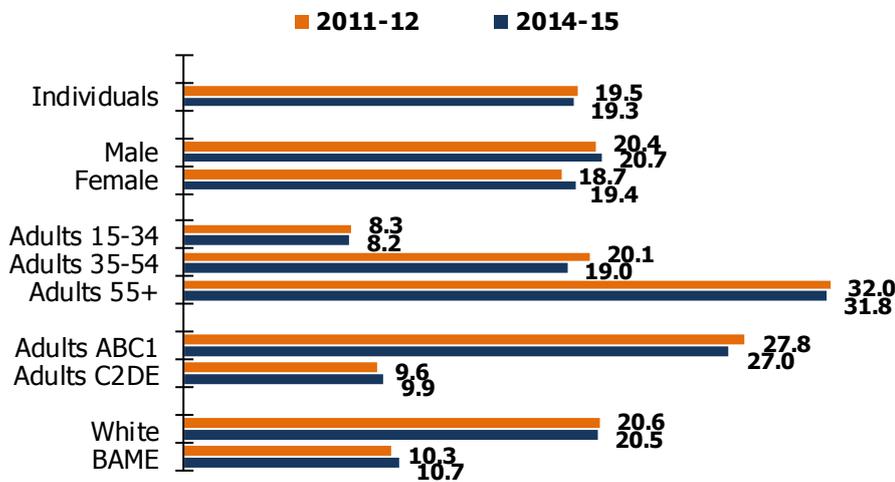
<sup>8</sup> Source: RAJAR

<sup>9</sup> Source: RAJAR 2014-15

<sup>10</sup> Source: RAJAR

- 14 In the other areas where Radio 4 has aimed to broaden its appeal in recent years, reach among white listeners has remained unchanged while reach amongst BAME listeners has increased slightly, although it remains at a much lower level. Radio 4 management is aware that more needs to be done here.

Figure 1: Weekly reach of Radio 4 by demographic group

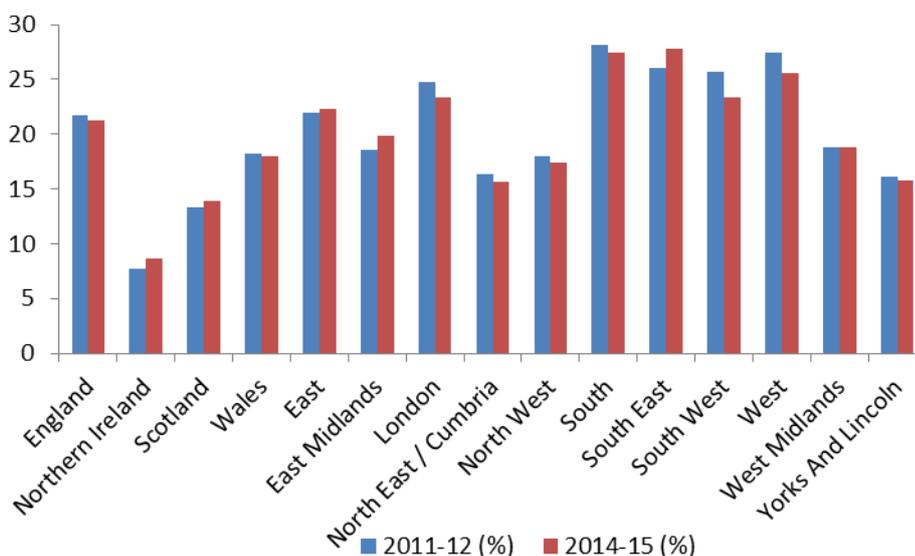


Source: RAJAR

**Radio 4's reach remains highest in England and it has grown strongly in the South East, where it was already highest**

- 15 As shown in table 1 (below), Radio 4 reach is much higher in England than in the devolved nations of the UK, although its reach has grown in Scotland and Northern Ireland over the past three years, which has reduced the overall disparity in levels of listening across the UK's nations a little.
- 16 Within England, Radio 4's reach continues to vary widely. Broadly it is much stronger across the southern regions of England and weaker in the Midlands and the northern regions. While reach levels have changed a little in each region over the past three years, it is notable that reach has grown most in the South East (together with the East Midlands). This leaves Radio 4's reach across England more uneven now than it was three years ago, with reach in Yorkshire, Lincolnshire, the North East / Cumbria lowest of all.

Table 1: Weekly reach of Radio 4 by nation and region



Source: RAJAR

- 17 There are many factors at play in the varying levels of listening across the UK. Socio-demographic factors could partly explain the variances as a higher proportion of Radio 4's core ABC1 audience is found in the South East of England (28%) and in London (30%) compared with an average across England of 23%<sup>11</sup>. The BBC also has speech-based stations in the devolved nations (Radio Scotland, Radio Wales, Radio Ulster/Foyle), which result in lower levels of listening to Radio 4. Despite this, Radio 4's remit is to be relevant across the UK. We assess Radio 4's performance in promoting its service licence commitment to "reflect the diversity of the UK" in more detail from paragraph 49 below.

**'We asked, you said':** *"It is the only station which carries any intelligent discussion of ideas. On the other hand, I think of it as Radio England – I live in Scotland, which gets only infrequent attention."* (Female 75+)

### **Impact – delivering the BBC's public purposes:**

#### **Listeners believe Radio 4 is public service broadcasting at its best and an essential part of the UK's cultural landscape**

- 18 Many regular listeners responding to our consultation feel that Radio 4 has a valuable and unique role in UK society and culture. In our consultation we found that, although listeners come to the station for various programmes and genres, they all find the content informative and engaging. Our Audience Councils found that listeners think the station is unique in terms of the variety, range and depth of topics covered and that they value the intelligent debate, high standards, innovation and creativity. Commercial radio body Radio Centre states that Radio 4 is an essential part of the UK cultural landscape, making a disproportionately high contribution to the BBC's mission to inform, educate and entertain.

**'We asked, you said':** *"Still a beacon of education and authority that holds to the original ideals of public broadcasting. This is what the BBC should be."* (Male 45-54)

*"Radio 4 is like no other station in the world. Its mix of news, documentaries, drama and humour is second to none...If stranded on a Desert Island it would be my luxury and constant companion, as it is now."* (Female 55-64)

#### **Radio 4 is meeting its service licence commitments**

- 19 Radio 4 is required to make a contribution to the delivery of the BBC's public purposes by meeting a number of output requirements as specified in its service licence. Table 2 shows that Radio 4 met all of these requirements in 2014-15, as it did in previous years.

Table 2: Radio 4's performance against its service licence commitments

<b>Purpose</b>	<b>Commitment</b>	<b>2014-15</b>
Sustaining Citizenship and Civil Society	Broadcast at least 2,500 hours of news and current affairs programmes each year	3358

<sup>11</sup> 2011 Census

Stimulating Creativity and Cultural Excellence	Broadcast at least 600 hours of original drama and readings each year	617
	Broadcast at least 180 hours of original comedy each year	263
	Contribute to BBC Radio's commitment to commission at least 10 per cent of eligible hours of output from independent producers	14%
Promoting Education and Learning	Broadcast at least 350 hours of original documentaries each year	413
Reflecting the UK's Nations, Regions and Communities	Broadcast at least 200 hours of original religious programming each year	227

## **Citizenship**

### **Radio 4's news is extremely highly regarded for quality, range and trustworthiness**

- 20 News and current affairs are central to the Radio 4 offer and are highly valued by listeners who feel that there is an excellent range of informative and trusted news output, including *Today*, *The World At One*, *PM* and *The World Tonight*, and distinctive current affairs such as *File on Four*. In our research, 9 out of 10 listeners rate Radio 4's news and current affairs as 'good' and believe that Radio 4 helps them understand what's going on in the world.
- 21 The BBC's tracking surveys show that audience appreciation of news on Radio 4 is high and stable with an AI of 81.7 in 2014-15.<sup>12</sup>

**'We asked, you said': "News is what Radio 4 does best." (Female 45-54)**

- 22 The Trust's recent review of the BBC's network news and current affairs across TV, radio and online<sup>13</sup> found that, although the average hours of listening to BBC radio news was falling, the reach of BBC radio news was still strong, and key Radio 4 strands such as *Today* and *PM* had done well to increase their listenership in recent years.
- 23 Our analysis showed that Radio 4 news continues to have the highest weekly reach on the station, with an average of 9.2 million listeners each week<sup>14</sup>. This has been stable over the past three years. Radio 4's flagship news and current affairs programme, *Today*, has the station's highest average audience of around 7 million listeners each week.
- 24 Our earlier review found that BBC radio current affairs output attracts almost 5 million listeners a week, with the majority of these listeners coming to Radio 4<sup>15</sup>. We found that Radio 4 current affairs programmes are very well-known and loved by their listeners, who are particularly positive about programmes on topics outside of the daily news agenda, such as international stories. The BBC's tracking surveys show that audience appreciation for these programmes is very high.

<sup>12</sup> Source: Pulse 2014-15

<sup>13</sup> [http://www.bbc.co.uk/bbctrust/our\\_work/services/television/service\\_reviews/news\\_current\\_affairs.html](http://www.bbc.co.uk/bbctrust/our_work/services/television/service_reviews/news_current_affairs.html)

<sup>14</sup> Source: RAJAR 2014-15

<sup>15</sup> Source: BBC Trust review of BBC News and Current Affairs 2014

### **The vast majority of listeners believe Radio 4 gives a broad range of perspectives, although some challenge for an even broader scope**

- 25 The vast majority (83%) of our research respondents say Radio 4 offers a broad range of perspectives on news stories. Audience Council Wales particularly praises Radio 4's political coverage, with *Any Questions* being noted as providing 'real people asking real questions'.
- 26 The International Broadcasting Trust (IBT), a body which promotes interest and support for global development on TV, on radio and online, also praises Radio 4 on the depth, range and quality of its news and current affairs output. However, it also claims that Radio 4's news coverage is dominated by the 'big story' of the day, and that more space needs to be found to better reflect the world through a wider range of stories.

### **Bringing the UK to the World and the World to the UK**

#### **Audiences appreciate the balance of international and domestic coverage**

- 27 In our last review of Radio 4, we asked the station to consider the balance of its international coverage, and address some listeners' perception that its international coverage was weighted in favour of America compared with Europe and the rest of the world.
- 28 Since then, Radio 4 has built a much closer working relationship with the BBC World Service – they are now co-located in London and share a commissioning editor role. This has led to a number of shared programmes: *The World Tonight* is a collaboration with World Service; *Witness* is a re-versioned World Service programme, and the *One to One* interview series has international interviewees.

**'We asked, you said':** "The coverage of Radio 4 news and current affairs is very good and usually well balanced. On the whole, the coverage is good both for domestic and foreign news." (Female 65-74)

- 29 Radio Centre says Radio 4 contributes well to this purpose and is distinctive and complementary to what World Service offers. IBT and Voice of the Listener and Viewer (VLV), an independent body who work for quality and diversity in broadcasting, also praise Radio 4 for striking an appropriate balance between domestic and global news. IBT notes that Radio 4 documentaries such as *Letters From Europe* successfully reflect life abroad beyond natural disasters, war and famine, and current affairs output such as *Costing the Earth*, *Crossing Continents* and *From Our Own Correspondent* also help to present a broader picture of the rest of the world. However, they do suggest that coverage of Africa can portray an unduly negative view of the continent.
- 30 Audience perceptions in this area are very positive: 92% of listeners in our research agree that Radio 4 helps them understand what's going on in the wider world, and most listeners who responded to our consultation believe that the station strikes an appropriate balance between its coverage of domestic and international news. We conclude that Radio 4 now offers the right volume and mix of international coverage.

### **Culture and Creativity**

#### **Radio 4's comedy is well liked and distinctive and it brings a slightly different set of listeners to the station**

- 31 Radio 4 broadcasts over 180 hours of comedy each year, ranging from quizzes and panel shows, such as *Just a Minute* and *The News Quiz*, to sketch shows and sitcoms.

- 32 Weekly reach for comedy has declined slightly from 5.7 million listeners in 2011 to 5.4 million in 2014<sup>16</sup>, but average audiences for the 6.30pm weekday comedy slot and *News Quiz* have been stable, with the latter also attracting high appreciation scores. Overall, the average appreciation score for Radio 4 comedy has declined very slightly from 79.8 to 78.9 between 2011-12 and 2014-15<sup>17</sup>, but we do not think this decrease is large enough to be a concern.
- 33 The slight decline in average audiences to live broadcasts may be linked to listeners accessing Radio 4 comedy online: although we can't accurately make this link, comedy podcasts are generally popular and the Radio 4 *Friday Night Comedy* is the single most popular BBC podcast, having been downloaded more than 73 million times in the UK and more than 100 million times internationally. Comedy programmes are also amongst the most requested on the BBC's radio iPlayer: in November 2014 *The News Quiz* was requested over 700,000 times and *The Museum of Curiosity* 180,000 times.
- 34 The vast majority (three quarters) of listeners in our research rate Radio 4's comedy as 'good' and nearly as many said that they found it original and entertaining. Listeners' views vary across age groups, with younger listeners being more positive. This shows how comedy is important in the station's appeal to its younger, 35-54 year-old audiences.

**'We asked, you said':** *"I love the comedy, particularly I'm Sorry I haven't a Clue and Just a Minute. There is no other station which has the variety and quality of programmes."* (Female 16-24)

- 35 Listeners responding to our consultation are also positive about comedy on Radio 4. They enjoy the variety and consider it to be humorous, diverse and intelligent. However, comedy can be divisive and people's tastes are very subjective: a minority of listeners strongly dislike the comedy output, either because the satirical and politically-focused comedy feels divisive to them or because it feels similar or stale.
- 36 Our Audience Councils praise Radio 4 comedy, particularly for its role in nurturing new talent and the VLV praises Radio 4 for taking risks with its comedy programmes while continuing to broadcast some of its popular, long running comedy series.
- 37 We note that there have been some cuts to the volume of new comedy on Radio 4 as part of its savings plans, although it still delivers well in excess of its service licence quota.

### **Radio 4's drama is extremely popular with listeners**

- 38 Weekly reach for Radio 4 drama is high and stable at 7 million listeners a week<sup>18</sup>. Long-running drama *The Archers* currently has an average weekly reach of 4.7 million listeners. Listening to drama on the iPlayer and on podcasts is also popular: in December 2014 there were a total of 7.9 million iPlayer Radio requests for drama from Radio 4 and 4 Extra, with *The Archers*, *Afternoon Drama*, *Good Omens* and *Home Front* the most popular titles.
- 39 While average appreciation remains high at 79.9 in 2014/15<sup>19</sup>, there has been a small decrease in it partly driven by a small fall in appreciation for *The Archers*. Evidence from our research is very positive, with 71% of listeners saying the station has engaging drama programmes and 60% wanting the station to do more drama.
- 40 Listeners responding to our consultation are also highly engaged with the station's drama, praising its depth and breadth. They mention their enjoyment of dramatisations of novels, book readings and serials – and *The Archers* is specifically mentioned by many. Expectations of this well-loved

<sup>16</sup> Source: RAJAR

<sup>17</sup> Source: Pulse

<sup>18</sup> Source: RAJAR 2014-15

<sup>19</sup> Source: Pulse

Radio 4 drama are very high, and some loyal listeners are worried about character changes and the quality of storylines. More generally, some listeners find Radio 4 drama a bit 'hit and miss', but due to the large volume – Radio 4 broadcasts over 600 hours of first-run drama each year – this does not affect their listening, because they know that, if there is a programme they don't like, there will be something different on the next day.

**'We asked, you said': "Excellent drama. Not all to my tastes, but still interesting."**  
(Male 55-64)

- 41 We heard some constructive criticisms of Radio 4 drama from stakeholders: our Audience Councils appreciate the drama but consider it unchallenging at times. VLV suggests strengthening drama output with more modern playwrights, although Radio Centre notes that the wide range of drama output is an important element of the overall theatrical output on the BBC; it states that the station should continue investing in original content, providing support for drama, book readings and comedy.

### **Writers and producers are concerned about the effect of budget cuts in drama**

- 42 We talked to some of the creative community who are involved in Radio 4's drama in order to understand their perceptions of the role of Radio 4 drama in the UK's culture and creative sector.
- 43 While they are generally very positive, stressing Radio 4's vital role in providing breadth and depth of quality radio drama, they do feel that there is pressure on drama budgets, which have fallen in real terms as the price per episode has been held steady for several years with no current plans to reduce the number of hours of drama. We were told that this is beginning to impact on the production process and threatens the quality and range of output. They also feel that the BBC's radio drama is kept low profile, compared to its television output.
- 44 Our drama stakeholders commented upon the cut in volume of short stories on Radio 4 over the past decade from 250 episodes per year to around 100 episodes, and note that this sub-genre particularly suits new writers. Independent producers group RIG also points to the decline in short story readings, despite them being well suited to radio. Whilst we appreciate budgets do not permit growth in this area, we note the addition of around 30 new short stories per year by Radio 4 Extra and support Radio 4's plans to make the most of its current short story output, such as by curating all short story output online to make it easier to find by listeners.
- 45 We agreed to a further slight reduction in the volume of new drama on Radio 3 earlier this year in order to enable savings. This leaves Radio 4 as overwhelmingly the main supplier of radio drama in the UK, and we think it important that serious consideration should be given to maintaining its quality and range in further BBC budget planning.

**Action 1: With ongoing pressure on BBC budgets, Radio 4 should aim to protect quality and range within genres that are not generally offered by any other UK radio station. This applies particularly to comedy and drama.**

We expect Radio 4 to be able to maintain a wide variety of high-quality drama in terms of subject matter, formats, the range of new and established writers and tone.

*Timing: ongoing*

## **Promoting Education and Learning**

### **Radio 4's factual programming is highly rated by listeners**

- 46 Our research respondents are very positive about Radio 4's provision of in-depth factual programmes. Science, in particular, is highly rated, with 82% of listeners saying it is 'good'. Listeners responding to our consultation also think that Radio 4 offers a wide variety of factual programmes, with a broad range of topics.
- 47 Some listeners would like even more of particular topics, such as history, digital and technology, and science. We think that, with Radio 4's high volume of new programming across a vast range of subject areas, it may be that listeners need more help with finding the programmes on topics they enjoy. Technology, such as the BBC's Radio iPlayer app, can help audiences with navigation, but we support Radio 4's plans to make it easier for listeners to find output from a particular topic, with umbrella branding of, for example, science programmes, whilst not losing sight of the role serendipity plays for listeners finding new and interesting content on the station. Our Audience Councils note how listeners trust Radio 4 to lead them into new topics in engaging ways or surprise them with unexpected content.
- 48 Radio Centre praises Radio 4 content as ambitious and being able to make complex subject matter accessible and interesting; it cites examples such as *History of the World in 100 Objects*, *Ulysses*, *Shakespeare Season*, *How Britain Went to War* and *War and Peace*. We also support Radio 4's ambitions for its factual programming to reflect an increasingly wide range of international thinkers and philosophical thoughts.

**'We asked, you said':** *"I enjoy the variety of topics covered and I have learnt so much over the years and have been inspired to research subjects I have heard talked about and didn't know anything about previously."* (Female 45-54)

## **Representing the UK, its Nations, Regions and Communities**

### **Radio 4 has done more to reflect the diversity of the UK in the past few years**

- 49 Radio 4's service licence states that it should reflect the diversity of the UK in its programming. In its last review of Radio 4 in 2011, the Trust endorsed initiatives from the station which aimed to increase levels of listening amongst younger audiences, audiences from different parts of the UK, and those from black, Asian and minority ethnic (BAME) backgrounds.
- 50 The Trust's support for these initiatives prompted concern amongst some loyal listeners that we were asking Radio 4 to change in ways that they would not like. In fact, the aim of both Radio 4

management and the Trust was to find ways that Radio 4's unique brand of intelligent and high-quality programming could reach more people who would appreciate it, rather than to change it.

- 51 Since 2011, the station has taken steps to increase the diversity of the experts who contribute to its programmes so that they include more women and people from BAME backgrounds. The aim is that greater diversity of contributors should enhance, not compromise, Radio 4's quality and depth. We have anecdotal evidence that this has had an impact, but there is no ongoing tracking of on-air diversity at present. We have asked Radio 4 to continue to monitor on-air diversity on an annual basis.
- 52 Radio 4 has also aimed to improve its appeal beyond London and the South East of England. For example, the station aims to be clear about the origin of programmes made out of London in its promotions and continuity announcements. It has given greater exposure to presenters and writers who focus on the north of England, such as Martin Wainwright, Jeanette Winterson and Tom Wrigglesworth. It has taken presenters to locations around the UK to reflect more diverse angles on national stories and it broadcasts programmes from high-profile northern events such as *Gardeners' Question Time* at Harlow Carr and *The Food Programme* at the Eat festival in Newcastle.
- 53 Radio 4 has connections with, and coverage of, a range of institutions and festivals in the nations and regions, and the arts programme *Front Row* has strong regional coverage, with a producer in Salford and one programme each month coming from outside London. This works well, as many items on *Front Row* are equally relevant across the UK: books, films and television. However, London has a high proportion of new theatre and is home to national collections and museums, so arts coverage is inevitably skewed geographically to some extent by that. Our research found that 83% of listeners rated arts and culture programmes as good.
- 54 We assessed Radio 4's levels of listening in different parts of the UK in paragraphs 15–17 and found that the concentration of listening in the southern regions of England is even greater than in 2011. When we asked listeners whether Radio 4 "reflects the issues relevant to the different nations and regions of the UK", three quarters of respondents felt that the station does this well and 22% felt that it could do more. In Scotland and Northern Ireland, larger minorities of 33% and 37% of listeners, respectively, felt that it could do more. Our Audience Councils explained that some listeners outside London find Radio 4 news programmes "metro-centric" and too focused on Westminster, with too little coverage of the Scottish, Welsh and Northern Ireland parliaments and assemblies. They also suggested that Radio 4 generally still appears to have an English or home-counties focus, which can lead would-be listeners from elsewhere to believe that the station 'isn't for them'. We are aware that audience perceptions of a well-established station like Radio 4 can be hard and slow to change, and we encourage the station to continue to find new ways to reflect life across the UK in its output.

### **Radio 4 has added new female and BAME presenters and contributors but needs to continue its efforts to reflect an increasingly diverse UK**

- 55 In response to the need to reflect and serve a more ethnically diverse UK population and to improve its gender balance, Radio 4 has increased the diversity of its presenters and contributors across a range of programmes, including *Today*, *The World Tonight*, *Saturday Live* and *Any Answers*. It claims that British Asian journalists now present flagship programmes on the station six days a week. However, Radio 4 is conscious that the station lacks Black British presenters on its main programmes and aims to address this. We do not have data to show how much the station has progressed in this respect statistically over the past few years and, in order that good progress is maintained, we urge Radio 4 to find ways to track its on-air diversity.
- 56 Our Audience Councils found that listeners would welcome a wider range and diversity of voices, both in terms of ethnicity and gender. Some consultation respondents also think that there should be a more diverse range of presenters on the station, and some say that they would like to hear more women on the station.

**'We asked, you said': "Where are the women on Just a Minute and I'm Sorry I Haven't A Clue – know you try but really? – When will there be more women than men – reflecting the population?" (Female 45-54)**

- 57 Some stakeholders also comment that diversity is an area of weakness for the station. The VLV warns against any attempts to "dumb down" in order to achieve a wider demographic audience. However, it encourages Radio 4 to continue its work to increase reach amongst younger and ethnically diverse audiences. IBT praises the diversity of presenters, but feels more could be done to involve BAME experts as programme contributors.
- 58 We conclude that Radio 4 has taken positive steps to reflect better the diversity of the UK today, but that, particularly as diversity increases, it will need to keep finding new ways in which it can evolve, while maintaining the core values of its programming.

**Action 2: Radio 4 and Radio 5 live have both worked to improve their ability to reflect the diversity of the UK and will need to continue this as the diversity of their core audience grows.**

The Trust has found that all of the main BBC Radio stations serve BAME listeners less well than they do white listeners. In this review, we have seen that this (and gender balance) is a challenge for both Radio 4 and 5 live, although one which both stations are already working to address.

Both stations must continue to reflect the diversity of the UK in their programming. This does not mean a change to the remits or core propositions of either station, but it does mean consideration of tone and relevance across all programming. On-air diversity is one way of addressing this challenge and the BBC has broader responsibilities and targets, which we support to represent the changing UK in its staff and on-air talent.

We will assess Radio 4's appeal across the UK and amongst white and BAME listeners as part of our annual performance assessment of the station.

**Timing: Radio 4 will report progress annually to the Trust**

**Radio 4 broadcasts a range of religious programmes, which are highly appreciated by their listeners**

- 59 Radio 4 broadcasts a range of religious and ethics programming, including *Sunday*, *Thought for the Day*, *Prayer for the Day*, *Beyond Belief* and *Moral Maze*.
- 60 These programmes have steady levels of audience reach. However, our research found that, overall, programmes on religion are the least popular type of programming on Radio 4, with just 15% of listeners claiming they choose to listen to this genre.
- 61 For listeners of religious programming on Radio 4, individual programmes such as *Prayer for the Day* have high audience appreciation scores. Amongst the wider Radio 4 audience, our research found that programmes on religion were least well received, with just under two thirds of Radio 4 listeners rating them as good in our research.

- 62 Radio 4's religious output generated a range of strongly held opinions from listeners responding to our consultation: some feel that the station should not have religious programming on a Sunday morning, as religion is not relevant to many listeners; some feel the station should become secular and not feature religion at all; others suggest that *Thought for the Day* should have non-religious contributors.
- 63 We did not hear from a wide range of stakeholder groups representing the UK's religions, but the National Secular Society claims that the changing demographics of the UK mean that a focus on Christianity is increasingly anachronistic, and that too much resource is given to the provision of exclusively religious programming, despite fewer people listening to it.
- 64 Radio 4 is well aware of its listeners' range of views on this subject and has no plans for change to its output at present. It already brings contributors from different faiths to *Thought for the Day* and, while most of its programming covers Christianity, there is considerable coverage of other religions and views. For example, *The Sunday Programme* covers Muslim, Hindu, Jewish, Sikh, Buddhist and Bahá'í faiths.

### **Delivering the Benefit of Emerging Communications Technologies and Services**

#### **Radio 4 is developing its online activity and presence in order to build its reputation as a destination for high-quality and intelligent speech**

- 65 The majority of listening to Radio 4 comes from analogue radio, which brings an average of 7.8 million listeners per week. However, reach on digital platforms has grown to 5.8 million listeners, with DAB radio accounting for 4.6 million listeners and much smaller numbers listening online and on digital television. Most of its online use now comes from mobile and tablet devices rather than desktop or laptop PCs.
- 66 Audiences can interact with the station in a range of ways: its podcasts are downloaded an average of over 4 million times each week; the Radio 4 website is used by around 1.4 million browsers per week and there is growing social media activity, led by individual programmes (for example, *Today* now has over 400,000 Twitter followers).
- 67 Radio 4 also uses social media successfully for particular programmes: Twitter was used in conjunction with the ten hour broadcast of *War and Peace* and became the second most trending topic on Twitter after 'Happy New Year' on the day it was broadcast. However, Radio 4 listeners are not necessarily highly active on digital and social media: 26% of listeners in our research claim not to use any social media.
- 68 The BBC is keen to maximise the public value impact of its output by making it as widely available as possible. While our research suggests that Radio 4 listeners are less engaged with digital technologies compared to audiences for some other BBC services, we are encouraged that Radio 4 has been increasing the opportunities to allow people to engage with it digitally. For example, the 'Radio 4 in Four' short form content launched in 2014, offering news, comedy and other content of less than 4 minutes duration reaches people who would not normally listen to Radio 4, with digital short form content that is engaging and sharable. This has been reaching an average of 80,000 unique browsers a week, although some individual items have had much higher consumption.
- 69 Efforts in the curation of Radio 4 online to offer more content and better signposting, alongside partnerships such as with TED<sup>20</sup>, are helping Radio 4's ambition to be positioned as a leading destination for intelligent speech online.

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<sup>20</sup> TED is a global set of conferences run by the private non-profit Sapling Foundation,

## We are giving Radio 4 and other BBC speech radio permission to 'premiere' some content online

- 70 The BBC offers approximately 5,000 radio programmes online each month. Programmes are presently made available for catch-up streaming to listeners via iPlayer Radio for 30 days, and through podcasts in perpetuity. From summer 2015, all speech content will be made available to download as well as stream for up to 30 days after broadcast. However, live listening remains the main way listeners consume BBC speech radio content, with on-demand listening sometimes representing as little as 1% of hours to individual programmes.
- 71 In line with Radio 4's Service Licence commitment that "Radio 4 should use new technology to ensure its audiences have the maximum opportunity to access programmes as and when they want," BBC management has proposed making some speech programmes available to audiences online up to seven days before broadcast.
- 72 We support this proposal, as we feel this is likely to increase the range and depth of the BBC's on-demand offer and provide audiences with more opportunities to listen to high-quality programmes.
- 73 While permission to premiere online is likely to be of most benefit to Radio 4, with its greater range of speech programmes and genres, we are extending the permission to other BBC radio stations too.
- 74 Under the terms of the BBC's Charter, the Trust must carry out a public value test (PVT) before approving a significant change to the BBC's UK public services. Giving permission to premiere programmes online represents an amendment to the stated key characteristics of BBC radio services and so invokes a presumption that the Trust should carry out a PVT, unless it can show that the change is not significant. The Agreement provides four criteria for the Trust to consider when deciding whether a change is significant and we provide our findings on each of these below.
- *Impact on audiences and on others:* as on-demand listening of Radio 4 programmes forms less than 1% of overall listening and the proposal will not result in any new content being made available, we consider that online premiering will not result in any material increase in time spent on, or reach for, Radio 4 (or other BBC services). So we do not think there should be any tangible impact on other radio services and that the impact on audiences is only that they may choose to listen to speech radio programmes online, rather than on the radio.
  - *Financial implications:* the only specific cost associated with premiering content before transmission is that there may be some additional rights costs. However, these are expected to be minimal.
  - *Novelty:* we think this is novel in a very narrow way. We consider that premiered content would be the same as existing BBC material and would also be broadcast and available on a catch-up basis online. The BBC has permission to premiere BBC Three TV content online and is trialling premiere of TV content for other channels.
  - *Duration:* this change would be permanent.
- 75 Considering the proposal against these four criteria, our assessment is that the permission to premiere online some speech radio content is not a significant change, and, therefore, we are approving it without a public value test being conducted.

### **Action 3: We will amend the service licences for any BBC station broadcasting speech radio to allow for some speech programmes to be made available online up to seven days in advance of broadcast.**

Whilst it is anticipated that this permission will be used mostly by Radio 4, we are giving it to other BBC stations in order to maximise the potential audience impact of this initiative.

The new permission will:

- apply only to speech-led content across all genres (rights permitting);
- allow programmes to be available up to seven days before scheduled linear broadcast;
- allow programmes to be available through iPlayer Radio in browser and app formats to stream and, where appropriate, to download;
- apply to Radio 1; 1 Xtra; Radio 2; Radio 3; Radio 4; Radio 4 Extra; Radio 5 live; Radio 6 Music; Asian Network; Radio Scotland; Radio nan Gaidheal; Radio Wales; Radio Cymru; Radio Ulster/Foyle; BBC Local Radio;
- exclude 5 live Sports Extra, the output of which is live;
- apply to programmes produced by the BBC in-house and by independent producers, if rights are available;
- allow programmes to be available for 30 days from the date of the broadcast (rather than from the date of the premiere); when not possible for rights reasons, the programme will be available for 30 days from the date of the online premiere.

*Timing: With immediate effect*

### **The future of Radio 4 Long Wave**

76 Radio 4 transmits a few, highly appreciated programmes on Long Wave: *Act of Worship*, *Yesterday in Parliament* and *The Daily Service*, as well as providing an alternative way to listen to programmes on FM. (Long wave is also used to broadcast *Test Match Special* which is available on Radio 5 live Sports Extra.)

77 In 2012, the Trust considered the future of the BBC's investment in the Long Wave platform as part of its overall savings plans<sup>21</sup>. We supported a decision not to re-invest in Long Wave technology once the current infrastructure reaches the end of its life, as long as it committed to making any programmes broadcast on Long Wave available on other analogue BBC radio stations, so they remain as accessible to listeners as they are now. We maintain this position.

### **Value for Money**

78 A recent BBC benchmarking exercise has confirmed what we already know about Radio 4's content costs: that they are higher than any other BBC radio station due to the high volume of short

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<sup>21</sup> The BBC's savings plan agreed in 2012 was set out publicly in [http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/review\\_report\\_research/dqf/final\\_conclusions.pdf](http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/review_report_research/dqf/final_conclusions.pdf)

programmes with relatively high production costs, including original writing (comedy and drama), use of many contributors for factual, news and current affairs programmes, and a generally high level of resource needed to create these types of speech content. Radio 4's service licence budget in 2014/15 was £90 million.

**The station has made efficiencies, but further cuts are required. It is vital that these do not affect the quality of its unique output**

- 79 In common with all BBC services, Radio 4 has been required to find efficiency savings as part of the BBC's overall savings programme. However, it was agreed in 2012<sup>22</sup> that Radio 4's budget would be largely protected from cuts in recognition of its high public value and unique role.
- 80 In line with this, 69% of Radio 4's savings have been, or are expected to be, efficiencies. These have been mostly achieved by reducing or holding flat the station's commissioning budgets. So far audience reach and appreciation have not been affected, but there is a question as to how sustainable further savings in these areas are – we heard from drama writers and producers who feel that there is little room for further pressure on budgets without affecting quality.
- 81 However, like other BBC radio stations, Radio 4 may have to find further savings from cuts to its content. The Trust will monitor carefully the impact of these cuts on Radio 4's performance, particularly in terms of the quality of its programming, and ask for remedial action if there is a negative impact on the quality and range of Radio 4.

**Table 3: Breakdown of Radio 4's spend (£millions) 2011-12 to 2014-15**

	2011-12	2012-13	2013-14	2014-15
Costs incurred making Radio 4 programmes (1)	£69.2	£69.3	£68.0	£66.9
Content-making related overheads allocated to Radio 4 (2)	£18.8	£21.8	£23.8	£20.9
<b>Total content spend</b>	<b>£88.1</b>	<b>£91.1</b>	<b>£91.8</b>	<b>£87.8</b>
<i>Service Licence Budget</i>	<i>£91.3</i>	<i>£92.8</i>	<i>£94.0</i>	<i>£90</i>
<i>Actual spend vs. service licence budget</i>	<i>-3.5%</i>	<i>-1.8%</i>	<i>-2.3%</i>	<i>-2.4%</i>
Distribution	£8.6	£9.8	£9.0	£6.6
Infrastructure/Support	£19.2	£21.2	£19.8	£21.2
<b>Total</b>	<b>£115.9</b>	<b>£122.1</b>	<b>£120.6</b>	<b>£115.6</b>

Notes: (1) Programme costs include all direct costs of making programmes on Radio 4, including production and staff costs, commissioning and scheduling, and a contribution to the BBC's newsgathering costs.

(2) The BBC's central content-making related costs that are allocated to Radio 4. This includes Radio 4's contribution to rights payments and other overheads such as buildings, studios, insurance and training.

Source: BBC Annual Report and Accounts and BBC Finance. Note some small inconsistencies in totals and percentages are due to data rounding.

<sup>22</sup> *ibid*

## Radio 4 Extra

Radio 4 Extra has a service licence remit to provide speech-based entertainment. Its schedule should include comedy, drama, stories, features and readings. Most output should come from the BBC archive, but the station should commission some original content, particularly types of output rarely found on BBC Radio.

### Quality and Reach

#### **Radio 4 Extra is highly regarded by its audience**

- 82 Evidence from our review shows the great affection that Radio 4 Extra listeners have for the station. Our research has shown that Radio 4 Extra is highly regarded by its listeners, three quarters of whom are favourable towards the station. It is most likely to be described as entertaining, and listeners also feel that it is interesting and high quality.
- 83 There is a high level of satisfaction with the station: 87% of listeners consider the variety on offer on Radio 4 Extra to be good, and three quarters of listeners also rate the style of presentation as good. Some 90% say that Radio 4 Extra has programmes that are entertaining and programmes they want to listen to, and 82% agree that they would miss the station if it wasn't there.
- 84 According to the BBC's tracking surveys, the general impression listeners have of Radio 4 Extra has remained strong, averaging 8.3 out of 10 over the last three years. Despite being a predominantly archive station, it is seen to be highly "original and different" by its listeners. This possibly reflects the fact that 4 Extra's type of content can't be found anywhere else on radio in the UK.

***'We asked, you said': "I love listening to old programmes, part of our very rich audio heritage. You cannot get those programmes anywhere else ... This is what makes R4 Extra unique – the opportunity to hear again those programmes which have been hidden away for so long and which deserve to be offered to new audiences as well as to those of us who have heard them before." (Female 65-74)***

- 85 Respondents to our consultation perceive the service to be a valuable complement to Radio 4, and many listen to both stations. They praise the variety and quality of 4 Extra's programmes and the way it makes use of the BBC programme archives. The absence of news bulletins is a positive for many, with some listeners regarding the station as 'an escape from real life'.
- 86 Radio 4 Extra has increased its reach despite cuts in its originated programming: it now reaches 3.2% of all individuals, which equates to 1.8 million listeners each week<sup>23</sup>. In the first quarter of 2015, it became the most listened to BBC digital radio station, overtaking Radio 6 Music.
- 87 Against the trend for loss of listener hours seen by most of BBC Radio, Radio 4 Extra has increased its average hours of listening since 2011-12 by 13 minutes to 5 hours and 44 minutes in 2014-15. Live listening to Radio 4 Extra does not peak at the conventional breakfast and drive times, but is highest in late evenings between 10pm and 11:30pm.

<sup>23</sup> Source: RAJAR 2014-15

## **Impact – Delivering the Purposes**

### **Radio 4 Extra meets its service licence commitments**

- 88 Radio 4 Extra is required to make a contribution to the delivery of the BBC’s public purposes, partly by meeting a number of minimum output requirements specified in its service licence. Table 4 shows that Radio 4 Extra met all of these requirements in 2014-15, as it did in previous years.

Table 4: Radio 4 Extra’s performance against its service licence commitments

<b>Purpose</b>	<b>Commitment</b>	<b>2014-15</b>
Stimulating Creativity and Cultural Excellence	Broadcast at least 55 hours of comedy each week (including repeats)	68
	Broadcast at least 55 hours of drama each week (including repeats)	66
	No more than 15% of output across the year should be Radio 4 catch-up programming	7%
	Contribute to BBC Radio’s commitment to commission at least 10% of eligible hours of output from independent producers	12%

## **Culture and Creativity**

### **Archive comedy and drama programming is the core of 4 Extra’s appeal**

- 89 An interest in classic radio comedy or drama draws a large proportion of listeners who responded to our consultation to the station, and many are very appreciative of 4 Extra’s archive comedy and dramas.
- 90 This view is backed up by our audience research, which found that 82% of listeners rate the comedy and 80% of listeners rate the drama programmes from the archives as good. Around three quarters rate original 4 Extra programming and extended versions of Radio 4 programmes as good.
- 91 There is a range of opinion on the mix of archive and catch-up programming among listeners: some listeners in our consultation say they would prefer fewer repeats from Radio 4. But for some listeners the older comedy programmes feel outdated.
- 92 Overall, stakeholders say that Radio 4 Extra provides a useful platform for BBC archive content and contributes effectively to the BBC’s public purposes.

***'We asked, you said': "R4 Extra gives me the chance to relive happy comedy and drama listening from years ago. Hancock, Kenneth Horne, Journey into Space and the Goons take me back, but I also like re-hearing more recent programmes, both comedy and drama. This is an excellent use of the R4 archive." (Female 55-64)***

#### **4 Extra's original content has been cut**

- 93 Radio 4 Extra is required by its service licence to produce some original programming, although the minimum amount of this is no longer specified in order to allow for budget cuts where necessary. In 2014/15 there was no new drama, although there were original productions of short stories. The previous year, the station broadcast the original drama *Ambridge Extra*, and a handful of original comedy titles also exist on the station, including coverage of the BBC Radio New Comedy Awards. Other originations are provided as part of a Saturday evening feature, providing context for some archive content. Radio 4 Extra's ability to 'push the creative boundaries further', as suggested by Radio Centre, is severely restricted by its available budget.
- 94 In September 2014 the Trust took a decision to allow Radio 4 Extra to change its remit to remove the obligation to carry dedicated children's content. BBC Radio notes that, following the discontinuation of children's programming, there were a handful of calls to the BBC and it was discussed on Radio 4's *Feedback*, but since then there has been no public comment. We had very limited feedback on this as part of our consultation, although we acknowledge that some people think dedicated speech radio programming for children is important. The VLV says that, whilst they understand the rationale behind the move, they encourage the BBC to continue to work hard to attract younger listeners to audio content.
- 95 According to our Audience Councils, listeners now find new material hard to find, with many assuming 4 Extra is purely an archive station. However, they heard praise for recent acquisitions on the station, such as *TED Radio Hour* and *Serial*.

#### **Education and Learning: Representing the UK's Nations, Regions and Communities and Delivering the Benefit of Emerging Communications Technologies and Services**

#### **The station provides factual programming, which has fewer listeners than drama or comedy, but is appreciated**

- 96 Although listeners in our research were less likely to listen to the factual programmes on Radio 4 Extra – just over half claim to, compared to 80% for comedy and 72% for drama – three quarters of listeners rate factual content as good.

#### **Radio 4 Extra gives listeners types of speech content which receives little or no coverage elsewhere**

- 97 Radio 4 Extra has limited requirements in relation to this purpose, but should represent the small communities of interest built around science fiction, fantasy, horror and stand-up comedy. We had limited audience feedback on this provision, but Audience Council England said that it found listeners appreciate the inclusion of sci-fi, comedy and horror on the station. Some listeners in our consultation also expressed their appreciation of science fiction.

#### **Radio 4 Extra currently has a small but growing online presence**

- 98 Radio 4 Extra is accessed by over 300,000 unique browsers each week on average, with the majority from tablet and mobile devices<sup>24</sup>. Whilst this number is small in absolute terms, it equates to a higher proportion of Radio 4 Extra's overall audience than the proportion of unique browsers reached by the Radio 2 audience. It has a small amount of content consumed via podcast and, given its lack of news and other topical content, it has a very small social media presence.

#### **Some listeners suggested that 4 Extra could be an online audio archive, rather than a linear service. Stakeholders also queried the role of the station**

- 99 Radio 4 Extra's popularity is still growing and there is no suggestion from the BBC that the station should not continue as a linear broadcast service. However, given its role as a way of accessing the

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<sup>24</sup> Source: ISTATS

BBC archive and catch-up programming, we would expect consideration to be given to its format at some point in the future. The Trust’s Audience Councils for Wales and England found that a number of listeners question the need for Radio 4 Extra, and suggest that a better use of the station’s resources would be to create an online archive so that listeners have access as and when they want.

## Value for Money

### Radio 4 Extra has improved its value for money

- 100 In line with the BBC savings plan agreed in 2012, Radio 4 Extra has taken a much bigger budget cut than Radio 4, and has done so by making scope cuts: its content spend has fallen from £5 million in 2011/12 to £3.9 million in 2014/15. The vast majority of its savings have come from reducing original programme commissioning.
- 101 It has held steady appreciation and quality scores and grown its reach. This indicates improving value for money and a cost per listener hour which has more than halved to just 0.8 pence.

**Table 5: Breakdown of Radio 4 Extra’s spend (£millions) 2011-12 to 2014-15**

	2011-12	2012-13	2013-14	2014-15
Costs incurred making Radio 4 Extra programmes (1)	£3.6	£2.6	£2.5	£2.5
Content-making related overheads allocated to Radio 4 Extra (2)	£1.4	£1.4	£1.5	£1.4
<b>Total content spend</b>	<b>£5.0</b>	<b>£4.0</b>	<b>£4.1</b>	<b>£3.9</b>
<i>Service Licence Budget</i>	<i>£5.8</i>	<i>£4.3</i>	<i>£4.0</i>	<i>£5.0</i>
<i>Actual spend vs. service licence budget</i>	<i>-13.8%</i>	<i>-7.0%</i>	<i>2.5%</i>	<i>-22.0%</i>
Distribution	£1.3	£1.5	£1.6	£1.6
Infrastructure/Support	£1.9	£1.7	£1.7	£2.0
<b>Total</b>	<b>£8.2</b>	<b>£7.2</b>	<b>£7.4</b>	<b>£7.5</b>

Notes: (1) Programme costs include all direct costs of making programmes on Radio 4 Extra, including production and staff costs, commissioning and scheduling, and a contribution to the BBC’s newsgathering costs.

(2) The BBC’s central content-making related costs that are allocated to Radio 4 Extra. This includes Radio 4 Extra’s contribution to rights payments and other overheads such as buildings, studios, insurance and training.

Source: BBC Annual Report and Accounts and BBC Finance. Note some small inconsistencies in totals and percentages are due to data rounding.

## Radio 5 live

The remit of Radio 5 live is to provide live news and sports coverage. It should be BBC Radio's main outlet for breaking news by bringing its audience major news stories as they happen. It should provide context to its news and sports coverage through wide-ranging analysis and discussion.

Programming should be designed to inform, entertain and involve. The service should appeal to news and sports fans of all ages and from all ethnic backgrounds and areas across the UK.

### Quality and Reach

#### **Audiences value 5 live for its high-quality, accessible news and live sports**

- 102 Our research shows that 68% of listeners are favourable towards 5 live, with the station most likely to be described as informative, entertaining and interesting. 82% of listeners are satisfied with the variety of programmes on 5 live and 73% say that they would miss the station if it were not there.

***'We asked, you said': "A good station for news and sport, especially if you fancy something a bit less formal than Radio 4." (Male, 35-44)***

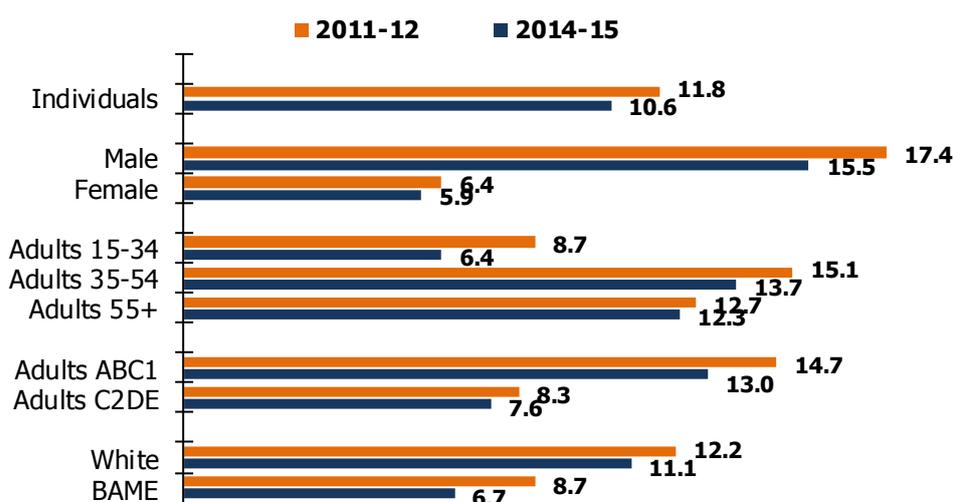
- 103 These positive findings are supported by the BBC's tracking surveys: 5 live's general impression score is 8.1 out of 10; its average appreciation score is 78.3 and has risen in recent years.

#### **Audience reach has fallen a little and the profile of the audience has changed in the past few years**

- 104 Radio 5 live reaches around 5.8 million listeners each week. Its reach has declined from 11.8% of all adults in 2011/12 to 10.6% in 2014/15, and its average hours of listening have fallen from 7 hours and 21 minutes to 6 hours and 26 minutes over this time period. The fall in average listening hours reflects a decline across all radio in the last two years, although 5 live's fall has been slightly steeper.
- 105 We noted in our last review of the station in 2012<sup>25</sup> that 5 live was heavily skewed towards male listeners. Since then, changes in listening have led to a slightly different audience profile:
- reach has fallen amongst all age groups, but most amongst younger listeners, so the station's audience profile has become older;
  - reach has fallen amongst men, while remaining unchanged amongst women who now make up a slightly higher proportion of the audience (28% up from 26%);
  - reach has fallen much more amongst ABC1 listeners than it has amongst C2DEs, although ABC1s remain the majority of the audience;
  - reach has fallen amongst both white and BAME listeners, but more amongst BAME listeners, making the station more skewed towards white listeners.

<sup>25</sup> [http://www.bbc.co.uk/bbctrust/our\\_work/services/radio/service\\_reviews/five\\_live.html](http://www.bbc.co.uk/bbctrust/our_work/services/radio/service_reviews/five_live.html)

Figure 3: Weekly reach of Radio 5 live by demographic group



Source: RAJAR

**5 live has worked to increase the appeal of its programming amongst women and BAME listeners, but there is more to do**

- 106 5 live’s management recognises that the station should aim to reflect the diversity of the UK population on air. It has found it challenging to find the right on-air BAME talent, although it has recently been developing presenters such as Nihal from Asian Network and Nomia Iqbal from Radio 1 *Newsbeat* as regular deputy presenters on the station.
- 107 The profile of presenters has changed a little in favour of women: in 2012, there were 24 male presenters, 8 female and 4 BAME; in 2015 there are still 24 male presenters, but 11 female and just 3 BAME. However, the departure of two high-profile female presenters on the station in autumn 2014 was noted by listeners in our consultation, which took place soon afterwards, and has given an impression that women are less well represented on the station. As the presenter changes were made shortly before our public consultation began, the issue appeared to be a priority for some respondents, including organisations such as the VLV, when asked about this subject.
- 108 Some listeners responding to our consultation felt that listener phone-ins can be dominated by male callers and would like to hear the views of more women. We analysed a single week of *Your Call* programmes in April 2015 to test this and found that 75% of callers were male. The station is aware of the disparity in contributors and has made efforts to encourage more women to take part in phone-ins – for example, by contacting those who text the station and encouraging them to phone in. It has also worked with the production teams to ensure that the tone of programming is accessible to all potential listeners and not skewed towards men or any other demographic group.

**(Please refer to Action 2) Radio 4 and 5 live have both worked to improve their ability to reflect the diversity of the UK and will need to continue this as the diversity of their core audience grows.**

For Radio 5 live, we think the focus should be to continue to find ways to appeal to women and BAME listeners, particularly within news programmes and to improve participation from women in phone-ins and as expert contributors.

We will assess 5 live’s appeal amongst different demographic groups as part of our annual performance assessment of the station.

*Timing: 5 live should report to the Trust on improvements in the diversity of audience debates in 6 months and will report progress on reaching different demographic groups annually to the Trust.*

## **Impact – Delivering the Purposes**

### **Radio 5 live meets its service licence commitments**

109 Radio 5 live is required to make a contribution to the delivery of the BBC’s public purposes and does so partly by meeting two output requirements specified in its service licence. Table 6 shows that Radio 5 live met all of these requirements in 2014-15, as it did in previous years.

Table 6: Radio 5 live’s performance against its service licence commitments

<b>Purpose</b>	<b>Commitment</b>	<b>2014-15</b>
Sustaining Citizenship and Civil Society	News and current affairs programming represents around three-quarters of output each year	75%
Stimulating Creativity and Cultural Excellence	Contribute to BBC Radio’s commitment to commission at least 10 per cent of eligible hours of output from independent producers	13%

Notes to figures:

Across the calendar year 2014, (76.5%) of hours were news; 20.7% of hours were sport and 2.7% of hours were ‘other’ content such as Kermode and Mayo, Danny Baker, Fighting Talk, Men’s Hour and 7 Day Sunday.

Programmes that contribute to 5 live’s news commitment are: Morning Reports; Wake up to Money; 5 live Breakfast; Breakfast Your Call; 5 live Daily; Afternoon Edition; 5 live Drive; Late Nights – Phil Williams/Stephen Nolan; Up All Night; Weekend Breakfast; Pienaar’s Politics; 5 live Investigates; 5 live Science; Saturday Edition; Question Time Extra Time; 5 live Hit List

The independent quota is for Radio 5 live and 5 live Sports Extra combined

## **Citizenship**

### **Listening to news programming has fallen but its perceived quality has been maintained**

- 110 Radio 5 live's remit is first and foremost to provide live news. Evidence from our review suggests that the quality of news on 5 live is good and that listeners see it as different to, and more accessible than, news from other BBC stations.
- 111 Radio 5 live's service licence commits that three quarters of its output should be news and current affairs. In 2014, 76.5% of its output was news, compared with 20.7% of sport and 2.7% of "other" content, such as *Kermode and Mayo, Danny Baker, Fighting Talk, Men's Hour* and *7 Day Sunday*.
- 112 In line with overall trends in listening to Radio 5 live, weekly reach has fallen for daytime news programmes on weekdays since 2011/12, with the main declines in the last two years. Reach for news has declined from 4.7 million weekly listeners in 2011/12 to 4.4 million in 2014/15.
- 113 5 live's breakfast and drivetime programmes are two of its key daily news shows. The average weekly reach for *5 live Breakfast* has fallen from 2.4 million to 2.1 million since 2011-12, while *Drive* fell from 2.4 million to 2 million<sup>26</sup>.
- 114 While reach has fallen a little, the audience appreciation score for news has remained steady since 2011 at 77.6 and the appreciation scores for *Breakfast* and *Drive* have been steady (and up in the case of *Breakfast*).
- 115 Evidence from our review supports these figures: listeners feel that the quality of news on 5 live is good and that it is different to, and more accessible than, news from other BBC stations. Listeners responding to our consultation consider 5 live news as up-to-date and reliable. It is also praised for being able to give time to full analysis of major news stories. Many say they enjoy 5 live's 'lighter' approach, compared to the 'heavier or 'more serious' tone of Radio 4. Seven in ten of listeners in our research agree that 5 live has the right balance of serious and less serious stories. Radio Centre claims that, at its best, the news from 5 live is exemplary public service broadcasting.

***'We asked, you said': "I like the in-the-moment and informality of presentation. I like that it's live and topical." (Male 45-54)***

- 116 Part of Radio 5 live's remit is that it should be BBC Radio's main outlet for breaking news. The station delivers breaking news through the day and is an important BBC output when major news events are unfolding. Over three quarters of listeners in our research rate 5 live's delivery of breaking news as good and our Audience Councils found that 5 live is still many listeners' favourite source of breaking news.
- 117 However, in recent years, the increasing availability of news via digital platforms and social media, means the station faces more competition than ever before as a source of breaking news.

### **Listeners enjoy the level of participation in 5 live's programming**

- 118 Audience participation has been a core part of Radio 5 live's remit since its inception, and evidence from our review found that listeners enjoy being able to interact with 5 live and enjoy hearing other listeners' views.

***'We asked, you said': "Interactive, phone-in type shows are fantastic, with great opportunities given for audience participation. You always get the feeling that this input from listeners is respected and appreciated." (Male 45-54)***

<sup>26</sup> Source: RAJAR

- 119 Listeners responding to our consultation say that interaction is in keeping with the rest of the station in tone and output, and that it enables them to hear a broad range of different opinions. In our research, 7 out of 10 listeners thought the amount of listener participation is about right, while 12% felt that there is too much and 8% said there was not enough. Younger listeners are more likely to feel there's too little audience participation. Those who feel there is too much participation believe that content should be generated by the presenters rather than by the public.
- 120 Commercial radio broadcasters responding to our public consultation tended to think that 5 live should do fewer phone-ins and participation, but we think there is clear value added to the programming by this and do not think it reduces 5 live's distinctiveness from commercial stations. Our research shows that the station is getting the balance right in this respect and that listener interaction is a key part of 5 live's distinctive approach to news.

### **5 live's news programming has larger audiences than sport but listeners are still more likely to say that they come to the station for sport**

- 121 The average audience for Radio 5 live's news programming is considerably larger than its audience for sport, and it has a reputation amongst listeners for high quality in both. However, the reputation and appeal of the station still appears to be weighted towards sports: our research shows that listeners are more likely to come to the station for live sport (73%) than regular news programmes (53%), and our Audience Councils found that listeners and non-listeners believe that 5 live is primarily a sports station.
- 122 This is a view held by UTV, the owner of the talkSPORT radio station, which quotes research conducted on their behalf by YouGov. This shows that the public perception of 5 live is that it is only 40% news and that it has an over-emphasis on lighter news and entertainment. UTV feels that the station is overwhelmingly aimed at sports fans.
- 123 Whilst sport is clearly an essential part of 5 live's proposition and is highly valued by its listeners, we feel that regular on-air promotion of the station as '*the home of football*' might help to weaken the perception of the station as a news outlet amongst listeners.

#### **Action 4: We are asking the BBC to consider how it promotes 5 live, and to give greater emphasis to news, so that the station's reputation can strengthen in this area.**

In order for listeners and stakeholders to have greater clarity about the role and remit of 5 live, which is primarily as a news service, we ask the BBC to consider the positioning of the station, both in cross-promotion from other services and within the station itself, in order to challenge the perception that its role is primarily as a sports broadcaster.

*Timing: We will ask management to report back to the Trust in 3 months with its plans for addressing this and we will measure audience perceptions again when these have had time to take effect.*

### **5 live's current affairs programming performs well**

- 124 Our review of 5 live in 2012 concluded that current affairs was an important part of the news service on 5 live, was a distinctive offer from BBC radio overall and that a dedicated current affairs offer on 5 live should be retained in the face of plans to cut it.

- 125 Since 2012, Radio 5 live has introduced more political programmes, such as its *Question Time* link-up. Current affairs content is also rooted in the wider schedule with, for example, the *Afternoon Edition* focusing on different topics each day, such as health or technology.
- 126 Current affairs content on 5 live has stable reach and 67% of listeners in our research rate the output as good. Several listeners in our consultation said that 5 live's current affairs are well researched and reliable, although a few feel that it could have more depth. Radio Centre suggests that current affairs should have a greater prominence in the schedule.

### **5 live's investigative journalism creates more impact**

- 127 In 2012, the Trust rejected BBC plans to cut investigative journalism on 5 live as we felt this was a highly distinctive part of the station and in short supply across radio generally. The *5 live Investigates* programme moved to a more prominent place in the Sunday schedule in 2013 and is broadcast around 30 times each year. 5 live has improved the follow up to stories delivered by *Investigates* by showcasing them in other programmes. This leads to much greater awareness of the story and its impact.
- 128 *5 live Investigates* now has a stable reach of just below 350,000 listeners each week and a strong average appreciation score of 80. Our news review found that perceptions of *5 live Investigates* are positive.
- 129 In addition to *Investigates*, 5 live commits to delivering investigative journalism within its main news programmes, in particular *Breakfast* and *Daily*, and is working with other parts of the BBC to maximise the impact of investigative journalism within BBC news. There are many good examples of high impact journalism on 5 live, with stories being picked up by other BBC and external news outlets, leading to real change in the areas covered.

### **Bringing the UK to the World and the World to the UK**

#### **5 live has strong international news coverage**

- 130 Radio 5 live's service licence says that when major international stories break, the station should present live from the scene if possible, with access to BBC radio news reporters and producers. Its ability to do so – such as during the French terror attacks in early 2015 – was praised by listeners in our public consultation.

**'We asked, you said':** *"The coverage of the events in France re: the Charlie Hebdo bombings was OUTSTANDING, both the continuing news updates and the range of specialist speakers giving comments – with intelligent, non-condescending and well-informed interviewing."* (Female 55-64)

- 131 We would encourage 5 live to explore whether there may still be potential to gain more benefit in terms of greater access to foreign correspondents following the closer integration of the World Service with BBC newsgathering.

### **Reflecting the UK's Nations, Regions and Communities**

#### **There has been a decline in the audience for sport on 5 live but listeners' perceptions of its quality remain very high**

- 132 Radio 5 live's main commitments in promoting this public purpose are to provide high-quality, trusted sports broadcasting and sports journalism, including using a UK-wide network of reporters and producers to reflect events and opinion.

- 133 Radio 5 live's sports programming reached an average audience of 3.7 million listeners per week in 2014/15 compared to 4.1 million in 2011/12. The decline in average audience was greatest in 2014. In particular, average audiences for 5 live's sports programming on Saturday afternoons has fallen by nearly 20% in the past two years. This decline does not appear to be affecting other sports broadcasters such as talkSPORT or Sky Sports.
- 134 While reach has fallen, the average appreciation score for 5 live's sports coverage has risen slightly since 2011-12 to 79.3<sup>27</sup>. Our research shows that sport on 5 live is highly thought of, with 82% of listeners rating it as 'good' and 76% rating its sports discussion programmes as 'good'. Listeners responding to our consultation and those spoken to by our Audience Councils praise the quality of sports broadcasting, particularly the live football commentary.

***'We asked, you said': "Listening to live football coverage on 5 live is better than watching the game on TV. You can hear the commentator get excited and it is almost as good as being at the stadium." (Audience Council Wales outreach)***

- 135 As listeners' perceptions of the quality of 5 live's sport are strong, the reduction in size of audience may be the result of some more casual listeners shifting their consumption to one of the many 'live' online sports streams, such as the BBC's own offer. In the last two years, the number of unique browsers accessing BBC sport online increased by 26%, and BBC online had record consumption of its coverage of the Six Nations rugby, football, Grand National and the golf Masters in the first quarter of 2015. We can also speculate that this behaviour could be more pronounced amongst 5 live's audience of mostly ABC1 men than it has been for other broadcasters who have a broader audience profile or appeal to more committed sports fans.

### **5 live covers a very wide range of sports, both live and in other forms**

- 136 Radio 5 live is required by its service licence to cover at least 20 live sports each year. In 2014, it covered 23 live sports and a total of 51 sports were covered by 5 live and 5 live Sports Extra. This was the highest ever number of sports broadcast on the stations.
- 137 Table 7 shows the total hours of sports broadcast across 5 live and 5 live Sports Extra in 2014. This highlights the prominence of football on 5 live (and cricket on Sports Extra). It also shows that Sports Extra is the main outlet for several sports: cricket, rugby union and rugby league, tennis, cycling and Formula 1 motor racing, although our audience research showed us that, as with 5 live, a large majority of Radio 5 live Sports Extra listeners are attracted to the station by coverage of football.

Table 7: Hours of sports coverage on 5 live and 5 live Sports Extra

	5 live hours	%	5 live Sports Extra hours	%
Football Commentary	719	44	176	8
Football discussion	182	11		
Cricket reports and debate	40	2		
Cricket commentary			1278	58
Rugby Union commentary and debate	80	5	151	7
Rugby League commentary and debate	12	1	170	8
Commonwealth Games (multi-sport)	140	9		
Tennis	98	6	326	15
Golf	89	5	18	1
Athletics (non-Commonwealth Games)	20	1	2	0*
Boxing	18	1	10	0*
Horse Racing	29	2	8	0*

<sup>27</sup> Source: Pulse 2014-15

Cycling	14	1	26 <sup>28</sup>	1
Winter Olympics	7 <sup>29</sup>	0*		
Formula One	71	4	75	3
Moto GP	2	0*		
Extreme Sports	4	0*		
Non-League Football	41	3		
Sportsworld (multi sports programme)	48	3		
Sports Documentaries ( not listed above)	15	1		

Notes to figures:

These figures are not a precise breakdown due to the nature of 5 live multi-sport programming. The data is based on airtime of at least half an hour, which was specifically built around these sports. Live football output was higher in 2014 due to the World Cup.

\*Percentage less than 0.5 but greater than zero

- 138 Our Audience Councils feel there has been an improvement and expansion in the coverage of a wider variety of sports on 5 live since the Olympics and Commonwealth Games, as exemplified by programmes such as *BeSpoke*, a magazine-style cycling show that launched in late 2012, which reflects the continuing growth of the sport in the UK in the wake of the London Olympics.
- 139 Radio Centre also praises the Olympic legacy on 5 live, noting that much has been done to promote minority and women's sport since 2012. UTV feels there is some evidence that 5 live has sought to diversify its sports coverage since 2012. However, both stakeholders query whether 5 live could do more still to exploit its sports rights and provide a greater range of live sports commentaries in weekday evenings, rather than focusing on football discussion. We understand that often the best way to broadcast a wider range of sport to listeners is to integrate more minority sports within programmes focusing on more popular sports. However, we would urge 5 live to continue to find ways to maximise the impact of a range of sports.
- 140 We will hold 5 live to its current commitment to 20 live sports each year and to maintaining the current mix of sports within its main sports programmes. We do not currently think there is any need to reduce the level of football coverage, as the station should aim to get best value from the live rights it buys; however, sports discussion programmes represent a good opportunity to mix minority interest sports with mainstream sports in order to grow listener awareness and interest in the former.

**Football remains the biggest driver of listening to 5 live, although there is some appetite for more coverage of other sports**

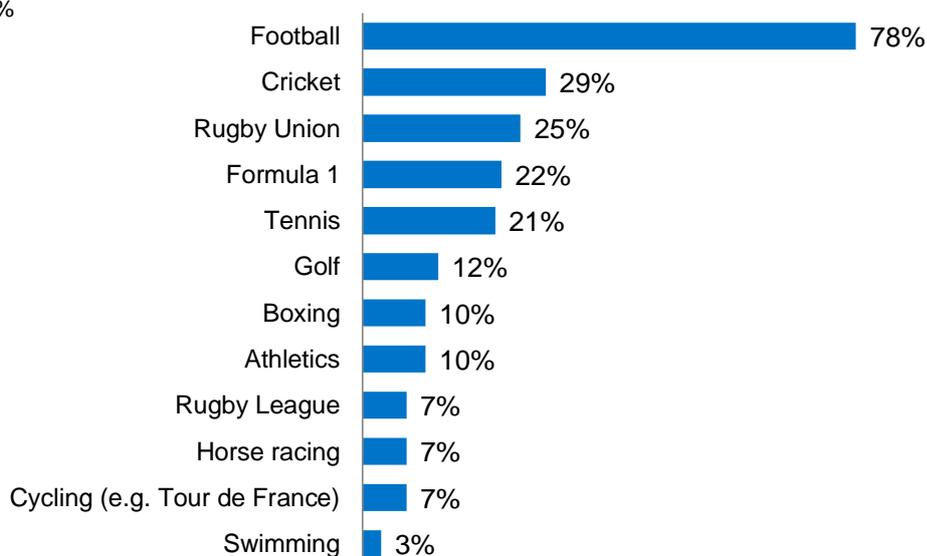
- 141 Football clearly has the most live coverage and discussion on 5 live, and we have undertaken research to test the levels of interest amongst 5 live's listeners in a range of sports. It could be argued that the findings reflect the current output of the station – i.e. that football is bound to be the most popular, but the results are interesting nonetheless.
- 142 The research showed that football is the most popular sport amongst 5 live's listeners by some margin: nearly four in five listeners say they follow football, with much smaller proportions following other sports.

Figure 4: Radio 5 live listeners' preferences for individual sports

<sup>28</sup> Includes new monthly magazine show in 5 live sport

<sup>29</sup> Plus a significant amount of live reports into 5 live news programmes

All responses over 3%



Q28. Which, if any, of the following sports coverage do you choose to listen to on Radio 5 live?  
Base: All Radio 5 live respondents (n=601)

143 There is some variation in sporting interests by gender, with much stronger interest levels in most sports amongst men. Just over a quarter of women say they don't follow any sports on 5 live, compared to just 8% of men:

- 84% of men say they follow football compared to 56% of women;
- 32% of men say they follow cricket, compared to 18% of women;
- However, 30% of women follow tennis compared to 19% of men.

144 We also found some variance in sporting interests by age, with 35-64 year-old listeners significantly more likely to follow football on 5 live, while those aged 18-34 are more likely to follow rugby league or swimming.

145 In our public consultation, some listeners say they would like less mainstream and more minority or women's sports on 5 live. Whilst this is not strongly supported by our research findings, 5 live is committed to greater representation of women's sport. It has recently been broadcasting live coverage of the 2015 Women's football World Cup, and the station took part in BBC Women's Sport Week in June 2015.

***'We asked, you said': "I'm a keen football fan and feel having 5 live as my football source is a MUST. The programmes always interest me. Commentaries are both informative and funny; it brings you right into the games taking place."  
(Male 35-44)***

146 We also asked listeners which sports, if any, they would like to hear more coverage of on 5 live. The most frequently mentioned sport was football, with around a third of listeners saying they would like more, compared with 15% who would like to hear more cricket and 12% who would like more coverage of Formula 1. However, nearly 40% feel that there is no need for an increase in coverage of any particular sport. Men and C2DEs are most likely to say they would like to hear more football, while women were more likely to say they would prefer more tennis. Younger listeners are interested in having more of a range of sports, including Formula 1 and tennis.

## **Listeners mostly agree that the station provides coverage of sporting events across all nations and regions of the UK**

147 5 live is required to broadcast sports from the UK's nations and regions, and the station meets this requirement across a range of sports and serves an audience need: 69% of listeners in our research agree that 5 live provides coverage of sporting events across all nations and regions of the UK, with others mostly having a neutral opinion. Interestingly, listeners in Wales are most positive, with 84% agreeing, whilst listeners in Scotland are least likely to agree, with just 58% doing so.

## **5 live's Salford location has yet to translate into greater appeal in the North of England but this may take more time**

148 Radio 5 live moved from London to Salford in 2011 and has aimed to capitalise on being based in the North West rather than London, particularly in respect of its news programming. It has a service licence commitment to regularly broadcast on-location coverage of news and sport from the nations and regions, and its daily phone-ins encourage debate and reflect opinion from across the UK.

149 There has so far been little change in the profile of its listening across the UK with reach remaining highest in the East and West of England and not yet growing in the North. It may be that change in listening habits takes longer than three years to take place, and we think there is value in 5 live's ongoing efforts to build its 'sense of place' in Salford. We found no particular reference to 5 live's Salford location or its ability to better represent the nations and regions of the UK within responses to our public consultation. However, our Audience Councils did say that listeners feel that 5 live news is better at reflecting the whole of the UK than Radio 4. Nonetheless, it is still considered to be primarily focused on England, particularly in its sports coverage.

## **150 Culture and Creativity**

### **Collaboration with other BBC services has increased creative opportunities for 5 live**

151 Radio 5 live has commitments to this purpose through reflecting significant developments in the arts, and by reporting and reflecting on theatre, film, music, art, books, television and radio. It does this mainly in its weekday news programme *Afternoon Edition*.

152 Evidence from our review shows that, while 5 live is not widely known for its cultural content, listeners are highly appreciative of some programming, such as *Kermode and Mayo's Film Review* show, and enjoy the sport-related humour of *Fighting Talk*.

153 Radio 5 live also has a number of recent examples of initiatives in this area. For example, during the 2014 World Cup, 5 live joined forces with 6 Music for a live performance to bring the sounds of the Rio Carnival to the station. It also joined with the Royal Philharmonic Orchestra to offer a soundtrack to 5 live's story of the 2012 Ryder Cup, with presenters narrating clips and poetry. These initiatives clearly add much value to the regular programming on 5 live and are creative ways to help deliver this public purpose. We encourage the station to continue with such initiatives and to ensure it achieves maximum impact amongst listeners and others who may be interested.

## **Promoting Education and Learning**

### **5 live's documentary output is well regarded by listeners**

154 Beyond its live sports coverage, 5 live has a strong offer of sports journalism and documentaries. These are highly appreciated by listeners, with 8 out of 10 people in our research rating them as good.

155 5 live occasionally runs special events to focus attention on a particular issue, such as Energy Day in 2013, a day of output dedicated to the energy debate, with a studio powered by renewable energy. As with the cultural initiatives, we encourage the station in this activity.

## **Delivering the Benefit of Emerging Communications Technologies and Services**

### **5 live's online strategy is evolving to meet audience demand**

- 156 Radio 5 live programming is available in a number of ways online and consumption of these is growing: it has an average of 1.7 million live listening requests, an average of 1.1 million audio downloads (podcasts) and is accessed by 620,000 unique browsers each week. Our consultation respondents are divided in their opinions on the ease of navigation of 5 live's website, but are mostly complimentary about podcasts and iPlayer Radio as a way of accessing the station<sup>30</sup>.
- 157 On social media, Radio 5 live has 83,000 Facebook followers and a larger number of Twitter followers than Radio 4. Twitter gives a strong platform for the station to give breaking news and sport updates, and its large following may be linked to the rolling news focus and interactive nature of the station.
- 158 Radio 5 live's management has actively encouraged staff at the station to spend more time on digital initiatives in order to find ways to better serve listeners and, in particular, to serve younger audiences better. This has included making sports commentaries available to users of the BBC Sport app. 5 live has also launched 'In Short', a collection of short-form audio and video content which now gets 1 million hits a month.

### **Medium wave is still an important platform for 5 live**

- 159 Radio 5 live is available on AM as well as DAB and other digital platforms. Most listening is still on AM, which reaches 3.6 million listeners per week; reach on digital platforms has grown to 3 million listeners, with DAB accounting for 2.2 million listeners and online and digital TV at much lower levels.
- 160 Radio Centre suggests that, as Radio 5 live has a relatively high digital audience, it should consider the possibility of relinquishing its AM frequency. However, given that most listeners still access 5 live on analogue radio, this feels unfeasible to us at this stage.

## **Value for Money**

### **5 live's content spend has fallen in both real and nominal terms**

- 1 Radio 5 live's service spend was £49.1 million in 2014/15. This is the second highest of the BBC network radio stations, after Radio 4, due to the cost of news and sports programmes. The level of spending and 5 live's direct programme-making costs have fallen since 2011/12, which represents an achievement given the rate of inflation over this period.

### **Sports programming costs have been reduced since our last review, but spending on sports rights has slightly increased**

- 2 In our last review of 5 live, we found that spending on sports was slightly higher than spending on news in 2010-11 (54% of attributable spend was on sports vs 46% on news). As sport accounted for less than a quarter of the station's output, we asked 5 live's management to shift the balance of spending towards news. Spending on sports programming has been reduced since 2011/12, although spending on sports rights has increased and now represents over a quarter of 5 live's total content costs. As a result, by 2014/15 the overall balance between news and sports has shifted very slightly more towards news, with 52% spent on sport and 48% on news. We continue to urge the station to consider whether the balance can be moved further in this direction.

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<sup>30</sup> Source: IStats 2015

Table 8: Radio 5 live's spending on news & sport, 2010-11 to 2014-15

	2010-11 (%)	2011-12 (%)	(%) 2012-13 (%)	2013-14 (%)	(%) 2014-15 (%)
News	46.4	51.6	49.6	49.5	47.6
Sport	24.4	22.8	20.7	21.7	20.7
Sports Rights	29.1	25.5	29.6	28.7	31.7

### Cost per user hour is increasing despite savings made

- 3 5 live's savings have mostly been from efficiencies, with only a small proportion of the savings from scope cuts. Savings have been made primarily in the area of talent and also from a range of initiatives, such as reducing engineering support at sports events, multiplatform working by staff and changing the allocation of resources to events depending on their impact. Savings were also made by cutting the number of regional journalists and a reorganisation within BBC news that included closer working between network journalists and the BBC's English regions and local radio.
- 4 As with other stations, 5 live still has savings to make in the next two years of the BBC's savings plan, and some of these are yet to be identified.

Table 9: Breakdown of Radio 5 live's spend (£millions) 2011-12 to 2014-15

	2011-12	2012-13	2013-14	2014-15
Costs incurred making Radio 5 live programmes (1)	£32.6	£35	£29.3	£30.0
Content-making related overheads allocated to Radio 5 live (2)	£18.5	£20	£19.9	£19.1
<b>Total content spend</b>	<b>£51.1</b>	<b>£55</b>	<b>£49.2</b>	<b>£49.1</b>
<i>Service Licence Budget</i>	<i>£58.4</i>	<i>£58.1</i>	<i>£51.5</i>	<i>£49.8</i>
<i>Actual spend vs. service licence budget</i>	<i>-12.5%</i>	<i>-5.3%</i>	<i>-4.5%</i>	<i>-1.4%</i>
Distribution	£5.8	£6.8	£5.7	£4.7
Infrastructure/Support	£12.4	£14.2	£11.6	£12.2
<b>Total</b>	<b>£69.3</b>	<b>£76</b>	<b>£66.5</b>	<b>£66</b>

Notes:

(1) These include all direct costs of making programmes on Radio 5 live, including production and staff, commissioning and scheduling, and a contribution to the BBC's newsgathering costs.

(2) The BBC's central content-making related costs that are allocated to Radio 5 live. This includes Radio 5 live's contribution to rights payments and other overheads such as buildings, studios, insurance and training.

Source: BBC Annual Report and Accounts and BBC Finance. Note some small inconsistencies in totals and percentages are due to data rounding.

- 5 Radio 5 live's cost per user hour has increased to 2.5 pence from 2.3 pence in 2013/14. This is due to the fall in listener numbers, which has been steeper than the fall in costs. 5 live's cost per listener hour remains higher than other network radio stations, except for Radio 3.

## Radio 5 live Sports Extra

The remit of BBC Radio 5 live Sports Extra is to bring a greater choice of live action to sports fans by offering a part-time extension of BBC Radio 5 live. The service should aim to provide increased value for licence fee payers from the portfolio of sports rights already owned by the BBC by offering alternative coverage to that provided on other UK-wide BBC services. All output on 5 live Sports Extra should be live sports coverage.

### Quality and Reach

#### **The greater choice offered by Sports Extra is valued by listeners**

- 6 5 live Sports Extra is regarded by listeners as a valuable alternative offer to 5 live. Sports Extra has a strong general impression score of 8, although this is subject to fluctuation due to the station's seasonal focus on cricket, as well as lower sample sizes in the tracking survey.
- 7 The station is praised by listeners in our consultation for its uninterrupted coverage of live sports and the high quality of its sports commentary and style of presentation, its tone described as informal but knowledgeable. Many listeners specifically praise presenters and commentators on the station. Over three quarters of listeners in our research said they would miss the station if it were not there. Our Audience Councils also say that the commentary is of the highest quality.

***'We asked, you said': "I like sports extra because it allows uninterrupted coverage of major sports events such as cricket, which is just not possible on other stations. This, along with the range of sports covered, makes it stand out."***  
***(Male 35-44)***

#### **Stable reach with a slight increase in listening hours**

- 8 Sports Extra's reach has been stable since 2011, although fluctuations are seen due to a variable schedule. Average hours of listening have risen over the last 3 years by 51 minutes per week to 3 hours and 59 minutes. The station's peaks in listening between 11am and 6:30pm correlate with the hours of cricket, and the station has seen an increase to average audiences during these hours.

### Impact – Delivering the Purposes

#### **Reflecting the UK's Nations, Regions and Communities**

##### **Significant listener appreciation for commentary, particularly cricket coverage**

- 9 There is a great deal of appreciation and praise from listeners for cricket and football coverage in our consultation. Cricket is frequently mentioned, and *Test Match Special* in particular is highly regarded as being informative and entertaining.
- 10 Our Audience Councils found that cricket and golf fans 'wouldn't be without it'. The VLV notes that the service provides welcome live coverage of sports not available elsewhere, such as club rugby and cricket, including county championship cricket.

**'We asked, you said':** "Test Match Special *is an absolute British Institution. I love everything about it. I love the light-hearted aspect of it; I like the information side of it. Most of all I love the banter between the commentators and I love their skill in striking the perfect balance between commentating and talking about cricket...Brilliant!*" (Female 25-34)

### **5 live's role is to exploit sports rights already owned by the BBC**

- 11 Sports Extra's remit is to bring a greater choice of live action to sports fans by offering a part-time extension of 5 live. From its launch, it has had a firm commitment to use sports rights already held by the BBC and not to acquire its own rights or to originate programming beyond live or near-live sports coverage.
- 12 Output hours increased in 2012/13, particularly with additional coverage during the Olympic Games. Since then, output hours have been maintained at this higher level with 5 live exploiting more of its rights in cricket, rugby league and women's football.
- 13 UTV has suggested previously that the BBC may have acquired sports rights aimed for broadcast on Sports Extra rather than 5 live, while remaining technically within its commitment by, for example, using a very small amount of the rights on 5 live and the bulk on Sports Extra. As table 7 shows, there are several sports, including cricket, rugby union, rugby league and tennis, where a higher proportion of the rights are used on Sports Extra than on 5 live. For some sports, such as cycling or tennis, the duration of coverage means that it would not be possible to broadcast it in full on 5 live without reducing its news output. BBC management has assured us that no sports rights packages have been acquired exclusively for broadcast on Sports Extra, although we have underlined with BBC management that, under the terms of Sports Extra's approval, sports rights should only be obtained for 5 live or other BBC stations, and coverage provided on Sports Extra must be overspill. We encourage BBC management to be as transparent as rights deals allow about its use of sports rights.

### **Future Developments**

#### **Some listeners would like more content on Radio 5 live Sports Extra**

- 14 Our research asked Radio 5 live Sports Extra listeners to provide feedback on how the station could be improved in the future. A small number of people suggest that there should be more sports coverage in general, or specifically more coverage of live sports, or of football in particular (12%); others suggest that the station should have more range and variety and fill its airtime better (5%), or that there should be a greater variety of sports (4%). A majority of listeners suggest that either no improvement is needed and that the station should stay the same (27%) or don't know what the station could do to improve (26%).
- 15 Some listeners in our consultation suggest that Sports Extra is an underused resource and should broadcast a greater variety of sports programming. Minority sports, sport from outside the UK and sports-related programming are mentioned as possible alternatives that could be included in the station's broadcasting.

#### **Sports Extra management has proposed an extension to the service's remit**

- 16 The BBC Executive has brought the Trust a proposal to extend the remit of 5 live Sports Extra and this has been made public. The proposal sets out that some new 'magazine' programmes and some repeats of BBC sports journalism would be introduced to create a more regular daily schedule. The Trust is undertaking a regulatory assessment of this proposal, with Ofcom advising on its potential impact on the market. We will publish a decision as soon as our assessment is complete.

- 17 Stakeholders such as UTV, Global and Radio Centre all stated that they believe Sports Extra's remit should remain as a live 'overspill-only' station.

**Action 5: We are in the process of conducting a regulatory assessment of the proposals to extend the remit of Radio 5 live Sports Extra**

We have begun a regulatory process to assess the significance on the market of extending the remit of 5 live Sports Extra. We will publish the results in due course on the BBC Trust website.

*Timing: In progress, reporting in late summer/early autumn.*

**Value for Money**

**Cost per listener hour is decreasing**

- 18 5 live Sports Extra content spend hasn't altered significantly in the past 4 years. In this time the hours of content have increased along with marginal uplifts on listener hours. Reach has been relatively stable, although fluctuates considerably across the year dependent on output. As a consequence, cost per listener hour has also fallen from 1.8 pence in 2011/12 to 1.3 pence in 2014-15.

**Table 10: Breakdown of Radio 5 live Sports Extra's spend (£millions) 2011-12 to 2014-15**

	2011-12	2012-13	2013-14	2014-15
Costs incurred making Radio 5 live Sports Extra programmes (1)	£2.3	£2.5	£2.2	£2.2
Content-making related overheads allocated to Radio 5 live Sports Extra (2)	£0.3	£0.1	£0.2	£0.2
<b>Total content spend</b>	<b>£2.6</b>	<b>£2.6</b>	<b>£2.4</b>	<b>£2.5</b>
<i>Service Licence Budget</i>	<i>£2.6</i>	<i>£2.6</i>	<i>£2.6</i>	<i>£2.5</i>
<i>Actual spend vs. service licence budget</i>	<i>0%</i>	<i>0%</i>	<i>-7.7%</i>	<i>0%</i>
Distribution	£1.2	£1.4	£1.4	£1.5
Infrastructure/Support	£1.5	£1.5	£1.4	£1.7
<b>Total</b>	<b>£5.3</b>	<b>£5.5</b>	<b>£5.2</b>	<b>£5.7</b>

Notes: (1) Programme costs include all direct costs of making programmes on Radio 5 live Sports Extra, including production and staff costs, commissioning and scheduling, and a contribution to the BBC's newsgathering costs.

(2) The BBC's central content-making related costs that are allocated to Radio 5 live Sports Extra. This includes Radio 5 live Sports Extra's contribution to rights payments and other overheads such as buildings, studios, insurance and training.

Source: BBC Annual Report and Accounts and BBC Finance. Note some small inconsistencies in totals and percentages are due to data rounding.