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Introduction

Purpose and scope of this review

The BBC exists to serve the public interest and its main objective is the promotion of the public purposes. The BBC is publicly funded by the licence fee and has a unique obligation to serve all audiences.

The 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 reviews of each BBC service. A service review considers how well each service is performing against the terms of its service licence, and whether any changes should be made to the service or its service licence in order to deliver greater public value in the future.

This review covers BBC nations’ radio stations, as well as news and current affairs made in and for each nation on television and online. It includes the following radio and TV services: Radio Wales, Radio Cymru, Radio Scotland, Radio nan Gàidheal, Radio Ulster/ Foyle and BBC ALBA. This is the second time that the Trust has reviewed the BBC nations’ radio stations, but the first time we have looked at the whole of the BBC nations’ news and current affairs together. It is also the first time we have undertaken a full review of BBC ALBA.

This review does not cover all of the BBC’s content made in and for the nations: non-news and current affairs opt-out programming on BBC One and BBC Two made specifically for each nation is excluded as well as the BBC’s network news provision, which sits alongside its nations’ news. S4C output is also not covered.

Methodology

The review used the standard BBC performance measurement framework to assess performance of the respective services.

- **Reach**: the extent to which the services are used by audiences
- **Quality**: audience perceptions of the quality of the services
- **Impact**: the extent to which the services deliver the public purposes
- **Value for money**: the level of spending on the services and a consideration of performance alongside cost

In undertaking this review, we have drawn on a wide range of evidence: feedback to a public consultation and from stakeholder organisations; especially commissioned qualitative and quantitative audience research; submissions from the Trust’s Audience Councils in Wales, Scotland and Northern Ireland; and a range of BBC performance and financial data.

A full range of supporting evidence for this report is published on the [BBC Trust website](https://www.bbctrust.org.uk).

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1 The terms of reference were published on the [BBC Trust website](https://www.bbctrust.org.uk).
Executive summary

Introduction

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

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

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

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

The nations’ radio services

The BBC nations’ radio services operate alongside 10 network radio stations.2 The weekly reach of the full BBC radio portfolio ranges widely, from 59% in Scotland and 60% in Northern Ireland to 73% of adults in Wales. For the nations’ radio stations, weekly reach ranged from 35% for Radio Ulster/foyle to 21% for Radio Scotland and 16% for Radio Wales in 2015.

The two indigenous language stations have high reach among their target audiences: Radio Cymru reaches 30% of fluent Welsh speakers and Radio nan Gàidheal has claimed reach of 69% among Gaelic speakers.3

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

Peak-time programming on the stations is focused on high-quality journalism and other speech-led output. Programmes about the life, culture and affairs of the devolved nations meet the

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

3 Sources: Radio Cymru - RAJAR (2015) and Radio nan Gàidheal, claimed reach from Leirsinn survey
audience demand for news about their individual nations in a way that pan-UK stations generally cannot.

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

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

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

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

**News and current affairs on TV and online**

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

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

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

Television remains the most effective way for the BBC to deliver its news output to large audiences – BBC TV news is used by 65% all adults each week. But television faces a similar challenge to radio: as online becomes a more important source of news for all adults, and in

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4 Source: RAJAR (2015)
6 Source: BARB (2016)
particular for younger ones, audience reach of television news falls and the online news offer in each nation needs to develop. To date, online has not compensated in measurable terms for the decline in reach of BBC TV and radio news services. While maintaining the quality of TV and radio programming, the development of online, particularly for mobile use and on social media, will be a key part of the BBC’s future strategy in each nation.

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

The indigenous minority language services and content

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

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

Key findings by nation

Northern Ireland

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

BBC Radio Ulster/Foyle

Radio Ulster/Foyle makes a very strong contribution to the overall BBC offer in Northern Ireland. In 2015, the station reached 35.2% of adults each week – much higher than any other nations’ radio station. Its popularity is reflected in a general impression score, which has remained high and stable at eight out of 10. Average hours of listening are high – 10 hours a week in 2015 – although this has fallen by 18% since 2011.

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7 Measurement of the BBC’s content on social media is still not reliable
8 Source: RAJAR (2015)
The station combines a local feel with strong coverage of UK and international affairs. While its news is highly valued, some listeners felt that social issues were not covered to the same extent as political ones, and there was an appetite for a wider range of issues which would reflect Northern Ireland today.

**News and current affairs on TV and online**

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

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

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

**Wales**

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

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

**BBC Radio Wales**

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

The station reached 16% of adults each week in 2015 and general impression scores are high, but reach is under pressure and has fallen since 2011. Unlike the BBC’s other nations’ radio stations, Radio Wales is still not available universally on FM. It faces strong competition from commercial music stations and also from BBC Radio 2, which has grown strongly in popularity in recent years in Wales.

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

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9 Source: RAJAR (2015)
In considering how to broaden its appeal, BBC Wales has strengthened its online presence and is now considering the balance of music and speech output on Radio Wales.

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

**BBC Radio Cymru**

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

Radio Cymru reaches 30% of fluent Welsh speakers, equivalent to 4.6% of all adults in Wales. While general impressions of quality are strong and average listening hours are high, its reach has declined since 2011.\(^{10}\)

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

**News and current affairs on TV and online**

In line with trends for BBC TV overall, the reach of BBC Wales’ news and current affairs output fell from 54% in 2011 to 50% in 2015. Over the same period, the weekly reach for *Wales Today* fell from 52% to 49%, while the reach of BBC Wales’ current affairs programmes dropped from 15% to 12%.\(^{11}\)

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

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

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\(^{10}\) Source: RAJAR (2015)

\(^{11}\) Source: BARB (2015)
Scotland

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

**BBC Radio Scotland**

Radio Scotland reached 21% of the Scottish population each week in 2015\(^\text{12}\) and we found that listeners are generally satisfied with its quality and believe that it provides a distinctive mix of programming that they cannot find elsewhere. While reach has declined a little in recent years, there are now signs of recovery following a series of schedule changes.

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

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

**News and current affairs on TV and online**

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

Our quantitative research found that seven out of 10 viewers think the BBC Scotland television news is high quality and relevant to them, and eight out of 10 agree that it is informative. However, we also found that there are some unmet audience expectations in Scotland, evidenced by some significant performance gaps.\(^\text{13}\)

Reach to BBC Scotland’s current affairs is relatively low, at 10% in 2015, although it has increased from 6% in 2013.\(^\text{14}\) In particular, news analysis programme *Scotland 2016* has a very small audience and this programme is now to be cut. Investigative strand *BBC Scotland Investigates* is seen as strong and has impact.

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

BBC Scotland’s online news attracts a large number of users and this is increasingly from people using mobile devices. While there was no increase in usage levels in the past year, audiences consider the service to be high quality and informative, and are positive about how it is presented. BBC Scotland is increasingly using social media to reach audiences with its journalism, and we would expect this strategy to evolve further.

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\(^\text{12}\) Source: RAJAR
\(^\text{13}\) Performance gap is the difference between the audience's perceived performance and importance of a service in delivering the public purposes
\(^\text{14}\) Source: BARB (2015)
Gaelic language services

BBC Radio nan Gàidheal

Radio nan Gàidheal is a well-established Gaelic language service, with a loyal core audience. Its claimed reach among Gaelic speakers is extremely high, at 69% in 2015\(^{15}\), and listeners hold the station in high regard and praise its important contribution to Gaelic citizenship and culture, particularly through its news, music and sports output.

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

BBC ALBA

Since its launch in 2008, BBC ALBA has served the Gaelic audience well with claimed reach of 75% among Gaelic speakers in 2015. Its reach within Scotland is quite high, at 15%, although it has fallen in the past couple of years.\(^{16}\)

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

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

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

Actions

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

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

\(^{15}\) Source: Leirsinn survey
\(^{16}\) Source: BARB (2015)
2. News and current affairs are core to the nations’ radio offer and highly valued by the audience. Each station now significantly outperforms its service licence quotas for news and current affairs output. We have, therefore, adjusted the quotas to reflect more recent levels of delivery, while still allowing sufficient operational flex for changes to the schedule.

<table>
<thead>
<tr>
<th>Service and genre</th>
<th>old condition</th>
<th>output in 2015/16</th>
<th>new condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio Scotland news and current affairs</td>
<td>43</td>
<td>62</td>
<td>50</td>
</tr>
<tr>
<td>Radio Wales news and current affairs</td>
<td>24</td>
<td>53(^{17})</td>
<td>32</td>
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<td>36</td>
<td>23</td>
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<tr>
<td>Radio Foyle news and current affairs</td>
<td>8</td>
<td>27</td>
<td>20</td>
</tr>
</tbody>
</table>

**Timing**: immediate

3. While audience perceptions of BBC news are very strong overall, the evidence gathered for this review shows that audiences have extremely high expectations of the BBC. Their opinions vary on how well the BBC delivers across its network and nations’ output, and expectations are not always met. This is a complex area, with variations in opinion both within nations and between them. The BBC is currently reviewing the scope of its news offer for the devolved nations, considering how both network and nations’ news might serve audiences better. The evidence and findings of this review should feed into that work.

a. The challenge is most acute in Scotland, where most audience perceptions of the BBC are lower on average and where we heard a very critical opinion of the BBC from some members of the audience. We found that current affairs could do more to focus on issues of relevance to Scotland and offer in-depth analysis of Scottish issues. Alongside the review of news outlined above, BBC Scotland is already making some changes to news and current affairs. It will be important for BBC Scotland to track whether these changes have the desired outcome.

b. In Northern Ireland, while BBC TV and radio services perform well, audiences want the local news agenda to keep pace with changes in society and to offer a wider range of topics and voices within news coverage. BBC Northern Ireland is aware of this challenge and is working to address it, with some notable success already, but it still has further to go.

c. In Wales – particularly within the context of a deficit of other sources of Welsh news – the BBC will need to find ways to ensure audiences are kept informed about Welsh matters, and that their expectations in areas such as Welsh political coverage and holding decision-makers to account are fully met.

d. Across all nations our quantitative research found that the audience’s very high expectations of how well the BBC holds decision-makers to account were not being met. We have found this in previous research on other BBC services. As this is a core aspect of the BBC news remit, we recommend that the BBC undertakes further work to understand how it can meet audience expectations better in this area.

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

\(^{17}\) A schedule change in February 2016 has reduced the projected annual average to 40 hours a week
4. The BBC has indigenous minority language services with BBC Radio Cymru, BBC nan Gàidheal and BBC ALBA, as well as programming on Radio Ulster/Foyle. Many of these services are affected by the general trend of declining TV and radio reach which is more acute given their small but diverse target audiences. Once BBC funding for the next licence fee period is finalised, we recommend that the BBC agrees how its indigenous minority language offers should evolve in the future, including the mix of broadcast and online media that will best meet audience needs.

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

1.1 Context

Northern Ireland is the smallest of the UK nations, both in terms of landmass and population: the 2011 census recorded a population of 1.8 million (2.9% of the UK), over a third of whom live in the Belfast metropolitan area.\(^{18}\) Non-white ethnic groups comprise a relatively small proportion of the total population: in the 2011 census, 2% of the population described their ethnic group as other than white, compared to a UK average of 12%.

The population profile in Northern Ireland has a slight skew to women and C2DE groups compared with the UK average. It is also younger, with an average age of 37, compared with the UK average of 40, although this has increased from 34 in 2001. The number of people aged 85 and over also increased by 35% in the 10 years to 2011.\(^{19}\)

Northern Ireland has a distinctive culture and identity within the UK, not least due to its physical separation from the rest of the UK and open land border with the Republic of Ireland. Alongside English, the two indigenous minority languages, Irish and Ulster-Scots, are protected under the European Charter for Regional or Minority Languages.

Adults in Northern Ireland have an extremely strong appetite for news and current affairs, and in particular for local news. They also tend to use a higher number of news sources (an average of 4.3) than people in other UK nations.\(^{20}\)

One of the most prominent features of the media landscape in Northern Ireland is the strength of its local media. Radio Ulster/Foyle has one of the highest reach figures in its transmission area of any UK radio station, and there is a relatively strong newspaper sector and a popular ITV offer from UTV.

While television in general (and BBC One in particular) is the most commonly used source for news about Northern Ireland, a shift in news consumption is underway: audiences in Northern Ireland spend marginally less time watching television (fewer than four hours a day) and more time online (on average 21.6 hours a week, the highest of all the nations).\(^{21}\) They are also more likely to use the radio (33% versus 26% in Scotland and 23% in Wales).\(^{22}\)

BBC Northern Ireland provides television, radio and online content. We have assessed its news and current affairs output across radio, television and online, including:

- Radio Ulster/Foyle
- News and current affairs on television: BBC Newsline, Spotlight, Stormont Today, Sunday Politics and The View
- News and current affairs online

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\(^{18}\) Source: 2011 census

\(^{19}\) Source: 2011 census

\(^{20}\) In Wales, the average is 3.6, in Scotland 3.8; Source: Ofcom (2015) News Consumption in the UK

\(^{21}\) Source: Ofcom (2015) News Consumption in the UK: the report found that use of the internet for news was higher in Northern Ireland than in England and Wales (49% vs 41% and 38%)

\(^{22}\) Source: Ofcom (2015) News Consumption in the UK
This review does not cover the other local (opt-out) content produced for BBC One and BBC Two and it does not cover BBC network news provision in the nation.

### 1.2 BBC Radio Ulster/Foyle

Radio Ulster/Foyle’s remit is to be a speech-led service for listeners seeking programmes about the life, culture and affairs of Northern Ireland. Its programming should combine extensive coverage of local issues, interests and events with coverage of national and international developments.

In 2016-17, the station had an annual budget of £16.9m

The schedule for Radio Ulster/Foyle consists of three blocks that target broad segments of the audience: daytime talk shows, news and current affairs; evening news and specialist music programmes; and weekend factual, mixed-genre broadcasts including lifestyle, religion, comedy, gardening, nature and consumer programmes. The station tends, on the whole, to be more varied than other nations’ radio stations, with a greater number of shorter programmes.

Radio Foyle provides an opt out service for the north west of Northern Ireland, carrying its own programmes for much of the weekday schedule and to a lesser extent at weekends. At other times the schedule reverts to Radio Ulster.

### 1.2.3 Reach

**Radio Ulster/Foyle has very high reach and is a very important part of the BBC offer in Northern Ireland**

Radio Ulster/Foyle’s weekly reach among adults was over 35% in 2015. This makes it by far the most popular station in Northern Ireland and also the most popular of the nations’ radio stations. High reach provides an opportunity to deliver significant public value.

BBC network radio is much less popular in Northern Ireland than it is in the other UK nations, with a share of 24%, compared with the 46% average across the UK. Only Radio 1 reaches over 20% of the population in Northern Ireland. This gives Radio Ulster/Foyle a high unique reach. Around half of its listeners consume no other BBC radio and just under 20% consumes no other radio at all.

As reach to all BBC radio has declined to around 60% in Northern Ireland, from 65% in 2011, the importance of Radio Ulster/Foyle grows further. While reach to the station has declined by 6% since 2011, the rate of decline has been more gradual than the other nations’ stations.

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23 Source: RAJAR, 15+
24 Source: RAJAR, 15+
Reach is falling among younger listeners

While Radio Ulster/Foyle has considerably higher reach among younger adults than the other nations’ radio stations, its demographic profile skews to older listeners, with a mean age of 55, compared with 45 for all radio in Northern Ireland.

Figure 2: Radio Ulster/Foyle’s audience profile

Source: RAJAR and 2011 census
The decline in reach is not evenly distributed between different demographic groups. There was a 14% drop in reach among ABC1 adults but only small declines among C2DEs. Similarly, reach among young people fell by more than it did among those aged over 55. There was a similar level of decline between male and female listeners, leaving the station still skewed towards male listeners.

Some of the changes in reach among different groups are linked to broader trends in media consumption. Small declines among older listeners may be grounded in demographic changes – as the population ages, reach as a percentage may fall, but actual reach is still stable and very high.

**Average hours of listening are very high, although there has been some decline, particularly among female and younger listeners**

Radio Ulster/Foyle has a loyal audience with average hours of listening of 10 hours and 10 minutes per week in 2015. Despite this, average hours of listening have declined by around 10% since 2011, with notable variations between demographic groups.

While the average hours of male listeners held steady, among women (who had previously been heavier listeners) it fell by 20%. Average listening also fell by 17% among those aged 15-54 and by 15% for those aged over 55. There were smaller but still significant declines in listening among ABC1 and C2DE groups (figure 4).
1.2.2 Quality

Listeners regard Radio Ulster/Foyle as very high quality

Radio Ulster/Foyle is seen to be very high quality by its listeners, who gave it a general impression score of 8 out of 10 in 2015, higher than any other nations’ radio station (with the exception of Radio nan Gàidheal). This has risen slightly in recent years, across most sections of the audience (figure 5).  

Figure 5: General impression scores for Radio Ulster/Foyle

Source: BBC ART survey (2015)
The general impression tends to be higher among women, C2DE adults and older people. The higher scores may be linked to longer average listening hours. Older listeners and C2DEs listen for longer on average and this may drive better overall perceptions of the service.

The other main quality measure used by the BBC – the appreciation index (AI) – has fallen from 85 in 2011 to 74 in 2015. While AI scores tend to fluctuate (and can be linked to the news agenda or coverage of national events), in this case the drop appears to be based on scores for news, current affairs, talk shows and comedy, and may well be linked to recent changes in the schedule, as these typically disrupt appreciation levels as listeners adjust to the change. We would, therefore, expect the scores to rise over time, but clearly BBC Northern Ireland will want to monitor this26.

In our quantitative research, we found a high level of satisfaction: 87% of listeners think the station is informative, 76% consider it high quality, 75% consider it distinctive, and 73% find it entertaining. This is fortified by our qualitative research, which found that even light listeners considered its output generally high quality, with a good range of programmes.

1.2.3 Impact

We measure impact by considering the contribution made by a service to the public purposes, as set out in its service licence. Radio Ulster/Foyle is required to make a particularly strong contribution to the two public purposes of sustaining citizenship and civil society, and reflecting the nations, regions and communities of the UK.

**Sustaining citizenship and civil society**

**Radio Ulster/Foyle makes a very strong contribution to this public purpose**

Radio Ulster/Foyle’s service licence commits it to providing accurate, impartial and independent news and current affairs with political coverage of events in Northern Ireland and beyond.

It is required to provide at least 27 hours of news each week on Radio Ulster and 8 hours on Radio Foyle. It exceeds both of these weekly commitments by some margin, with 44 hours of news on Radio Ulster and 27 hours on Radio Foyle in 2015. In order to underpin the future delivery of this important public purpose, we will amend the Radio Ulster/Foyle service licence to reset this condition at closer points to the actual output: 35 and 20 hours, respectively.

Radio Ulster/Foyle has broadened its range of news and factual output since our last review and made over 40 schedule changes that have been very well received, including the introduction of a business strand and changes to its agricultural programming.

News output is considered by listeners to be a particular strength, with a high level of respect for its journalism and investigations. News programmes at peak time attract the largest audiences to the station (figure 6).

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26 Pulse survey, all adults
In both outlook and output, the station has a local feel, while also covering pan-UK and international news. Listeners in our qualitative research consider that it achieves this balance very well.

These perceptions were supported in our quantitative study. In particular, the vast majority of listeners (82%) agree that the station provides high-quality news and 81% consider that it gives them a better understanding of news in Northern Ireland. Their assessment of the station in these respects is reasonably close to their expectations (figure 7). While fewer people agree that the station offers the right balance of serious and lighter news (67%), or that it gives them a better understanding of UK (60%) and international issues (57%), these areas are also seen as less important for the station.

In our qualitative research, audiences praised the quality of news on the station and the accuracy and impartiality of its reporting. They consider that programmes such as The Nolan...
Show are good at explaining and scrutinising political issues, while presenting them in a comprehensible way. However, there is a sense among some listeners that social issues do not receive adequate coverage and that too much time is spent on politically-based discussion.

Voice of the Listener and Viewer praised the station for its wide range of engaging and relevant content, while Audience Council Northern Ireland (ACNI) commended news and current affairs output for representing core BBC editorial values.

While ACNI values the high-quality coverage of local issues, it notes the risk that coverage can sometimes feel insular and that a broader perspective is needed. Political coverage was praised and ACNI highlighted the importance of explaining events linked to the Troubles. However, it also noted that some listeners felt that too much of the local news agenda was reported through a political lens, with a focus on legacy issues. Linked to this, the Council pointed to a significant appetite for new ways into reporting the range of social and public policy issues and for a wider range of voices and contributors.

We asked, you said: there is too much focus on The Hill and not enough from the street (Audience Council Northern Ireland outreach sessions)

Audience participation is a core feature of the schedule, and this reinforces the traditionally strong link that the station has with the local community. We found that listeners are generally satisfied with the level of engagement on the station – 71% think it is about right, compared with 12% who consider there is too much and 10% who want more.27

Listeners feel that Radio Ulster/Foyle works hard to encourage participation, and phone-ins are seen as an effective way to provide immediate reaction to breaking stories. However, for some, the presence of regular callers, several of whom were known to presenters by nicknames, seemed to exclude new callers.

We asked, you said: the only thing about the phone-in is that it does get repetitive in that it’s the same people. I can tell you, there’s Birdie, there’s Norman, there’s George, and every day the same callers will phone in, you know, and it’s vexing (Qualitative Group: Belfast, age 30-65)

While our quantitative research showed a positive performance for Radio Ulster/Foyle in terms of listeners being able to hear a range of voices from around Northern Ireland, ACNI noted that, alongside listener contributions, the right balance of presenters and expert guests was needed, and some new voices could help to broaden discussions and better reflect Northern Ireland today. A similar point was made by VLV, which suggested that the BBC could work harder to represent the new, more complex demographic of Northern Ireland and to explore a broader range of issues more fully. BBC Northern Ireland already works to address this issue by aiming to cover a range of relevant topics in its programming and finding new guests and contributors to its programming.

Radio Ulster/Foyle has worked hard to inject variety into the schedule and introduce new contributors. Shows such as Talkback, The Nolan Show and the weekday afternoon show with

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27 ICM Unlimited (2016) quantitative research for this review
Kerry McLean, use social media to involve the audience. Such introductions point to progress in this area.

**Representing nations, regions and communities**

**The station makes a strong contribution to this important public purpose in a variety of ways**

Radio Ulster/Foyle is committed by its service licence to reflect the communities, cultures and faiths of Northern Ireland, to provide significant coverage of sport, and of cultural and community events. It must also provide programmes in the Irish and Ulster-Scots languages.

This purpose has a particular significance in Northern Ireland given the pace of social and political change, and part of the role of Radio Ulster/Foyle is to reflect this in its output. Audiences place a very high value on content that reflects Northern Ireland to itself, and the ability of Radio Ulster/Foyle to respond to this is undoubtedly one of its strengths. Certain strands of the schedule, such as *Your Place and Mine*, outside broadcasts, agriculture and business programmes, and coverage of community events play a particularly important role in supporting this purpose and strengthening the connection with listeners.

There is a demand among listeners for coverage of a wider range of stories that reflect the shifts in society and for new ways to cover stories on education, the economy, health and other policy areas. The station’s coverage of business and the economy was particularly valued, as one listener noted:

*We asked, you said: the BBC is leading the way in business coverage. It sets the BBC apart (Audience Council Northern Ireland outreach sessions)*

We also found demand for a wider range of perspectives and voices, particularly those that go beyond established political positions, and represent a less vocal but substantial middle ground. There was a widespread view that a historical community divide does not have to be its defining feature.

*We asked, you said: audiences are weary of coverage that perpetuates this bilateral narrative. It’s the same voices and the same views (Audience Council Northern Ireland outreach sessions)*

The demand for more positive news coverage was widespread but this did not mean trivial, lighter or less challenging topics. Rather, audiences want more stories at community level that can shed light on wider news themes and to find news of the issues that impact their lives.

*We asked, you said: the news can seem relentlessly negative We’ve spent 20 years building community relations in a town that wasn’t known for*

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28 Around 35 outside broadcasts a year, excluding live sports events, from locations throughout Northern Ireland
good relations and all we seem to hear from are people who want to bring us back to the past
(Audience Council Northern Ireland outreach sessions)

These general themes were reflected in our quantitative research. In most areas, the station performs very well: 83% of listeners consider that it offers a range of voices; 74% agree that it provides content for the people of Northern Ireland; and 65% believe that it reflects their local interests and concerns. In most cases there is little difference between the performance of a particular area and the importance that people attach to it.

**Figure 8: Performance and importance scores for Radio Ulster/Foyle related to the ‘nations, regions and communities’ public purpose**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>I hear a range of voices from around Northern Ireland</td>
<td>83%</td>
<td>69%</td>
<td>+14</td>
</tr>
<tr>
<td>...highlights to me important social issues</td>
<td>76%</td>
<td>80%</td>
<td>-4</td>
</tr>
<tr>
<td>...provides content and programming that caters for the population of Northern Ireland</td>
<td>74%</td>
<td>79%</td>
<td>-5</td>
</tr>
</tbody>
</table>

Source: BBC Trust ICM Quantitative Audience research. All who listen to BBC Radio Ulster Foyle (194)

Listeners also considered that the station reflected the different faiths, cultures and communities of Northern Ireland very well. However, in two areas we found large performance gaps: reflecting local interests and concerns, and portraying particular cultures and communities, which had gaps of -17 and -9 respectively. The first of these was considered by listeners to be especially important, and management may want to consider this area further.

**Figure 9: Performance and importance scores for Radio Ulster/Foyle related to the ‘nations, regions and communities’ public purpose**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflects the diverse faiths, cultures and communities of Northern Ireland</td>
<td>68%</td>
<td>68%</td>
<td>-</td>
</tr>
<tr>
<td>Reflects my local interests and concerns</td>
<td>65%</td>
<td>82%</td>
<td>-17</td>
</tr>
<tr>
<td>Is good at portraying my particular culture or community to other people in Northern Ireland</td>
<td>58%</td>
<td>67%</td>
<td>-9</td>
</tr>
</tbody>
</table>

Source: BBC Trust ICM Quantitative Audience research. All who listen to BBC Radio Ulster Foyle (194)
Stakeholders told us that they would like more BBC coverage of their areas of interest: the Federation of Small Businesses suggested that the BBC could give more priority to coverage of economic growth and development; and other stakeholders called for more coverage of agricultural, environmental and economic issues; while the Londonderry Chamber of Commerce would like Radio Ulster/Foyle to give more coverage to business news from the north west.

**Sports coverage**

Radio Ulster/Foyle is required to provide significant coverage of sport, and listeners see this as one of its key strengths. In our quantitative research, provision exceeded listeners’ expectations (figure 10) with a performance gap of +14.

**Figure 10: Performance and importance Sport scores for Radio Ulster/Foyle**

<table>
<thead>
<tr>
<th>Sport</th>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>...provides coverage of a variety of sport</td>
<td>69%</td>
<td>55%</td>
<td>+14</td>
</tr>
</tbody>
</table>

Source: BBC Trust ICM Quantitative Audience research. All who listen to BBC Radio Ulster Foyle (194)

Gaelic Athletic Association (GAA), football, rugby and motorsport are widely followed in Northern Ireland and are covered by *Sportsound*, the Saturday magazine programme on Radio Ulster/Foyle. For sports where BBC Northern Ireland does not own TV rights – such as football, boxing and golf – its radio coverage is extremely important.

Sports provision was felt by listeners to be extensive, and the station was praised by listeners in our qualitative research for its coverage. However, we found that many sports fans are interested in sports beyond Northern Ireland (and in particular in the English Premiership). For this group, the exclusive focus on Northern Ireland – aside from English soccer updates in the Saturday afternoon sports programme - meant that they had to use other sources, such as Radio 5 Live, to meet their needs.

For some listeners, coverage of niche or local sports was of no interest, and some were critical of this – for example, when coverage of golf or rugby was only from a Northern Ireland perspective. Nevertheless, these sports do have a following, and the station serves a need that BBC network services cannot.

**Language programming**

Radio Ulster/Foyle is required to provide 220 hours of indigenous minority language programmes a year, including Ulster-Scots and Irish. In 2015/16, it exceeded this commitment by 41 hours.

*Blas* is an established part of the station’s Irish language output, providing conversation and coverage about what is happening within Irish language communities. It is complemented by other programmes, including music and documentaries. Ulster-Scots events, activity and history is reflected in *A Kist o Wurds.*
BBC NI has sustained the additional investment in Irish and Ulster-Scots that was approved by the Trust in 2008, following a consultation process.

**Stimulating creativity and cultural excellence**

**Radio Ulster/Foyle contributes to this public purpose in a range of ways and is valued for doing so**

While Radio Ulster/Foyle has a lower level of commitment in its service licence in this area, it should support music and the arts in Northern Ireland, offer daily specialist music and a minimum of 20 hours of new comedy each year, which it exceeded by six hours in 2015. BBC Northern Ireland estimates that a third of its music output is from Northern Ireland, across all genres.

Audiences consider that the station makes a significant contribution in this area, particularly in its coverage of arts and culture. Reflecting a widely held view, Audience Council Northern Ireland noted that listeners place a high value on the station’s contribution to arts, culture and sport.

The station is valued for forging a strong connection with listeners and for placing itself at the heart of local culture and creativity, as exemplified by its support for Derry/Londonderry UK City of Culture in 2013.

This overall impression is fortified by our quantitative research, which found that the station is rated positively for its support for music, arts and culture in Northern Ireland, and new talent, and that it exceeds audience expectations in some of these areas. (figure 11).

**Figure 11: Performance and importance scores for Radio Ulster/Foyle related to the ‘creativity and cultural excellence’ public purpose**

<table>
<thead>
<tr>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>70%</td>
<td>67%</td>
<td>+3</td>
</tr>
</tbody>
</table>

Our qualitative research showed that there was broad appreciation for the quality and range of output in this area. However, we found that the specialist music shows were largely unknown, even to regular listeners. And among some younger listeners, there was a sense that arts programming did not cater to their tastes. However, they valued the focus on local talent – as one noted:
**We asked, you said:** The Arts Show definitely ticks a huge box in [my] listening needs...It also showcases some incredible local talent that wouldn’t get picked up on any other radio station. I do, however, feel it is lacking in an up-to-date and modern show based on tech news, gaming, online media etc. (Qualitative Group: Belfast, age 20-25)

**Delivering the benefits of emerging technologies**

The public purpose on emerging technologies is ancillary to the others for Radio Ulster/foyle, but, as listeners begin to consume more online, it is an important area, particularly in terms of how the station serves younger listeners.

Listening online to Ulster/Foyle currently accounts for around only one per cent of total listening, and catch-up listening is at a low level, although it is growing.²⁹ Over half of listeners (56%) claim to use the station’s website, but perceptions of it are not strong, with nearly half of its users having a neutral view of the service, while half are favourable. (figure 12).

**Figure 12: Overall impression of Radio Ulster/Foyle’s website**

The station’s digital offer is relatively undeveloped. As a consequence of the strength of Radio Ulster/foyle as a station, BBC Northern Ireland has focused less resource on developing its digital offer, despite high levels of online use for news and other content in Northern Ireland.

**1.2.4 Value for money**

The BBC spent £17.7m on Radio Ulster/foyle in 2015-16. The total cost of the service, including its allocated costs of distribution, infrastructure and support, was £24.5m. Content costs comprise direct costs incurred by the station locally and allocations of central BBC costs, including music rights payments and some central news and sports costs.

As shown in table 1, since 2011-12, both programme-making spend and the central costs have remained constant in nominal terms.

²⁹ Source: BBC Management
In 2015-16 Radio Ulster/Foyle’s cost per listener hour was 5.7 pence. This has increased very slightly from 5.5 pence in 2011-12, but it is the lowest of any BBC nations’ radio station, mainly due to its very high level of audience consumption. We, therefore, conclude that the station offers its listeners very good value for money.

**Table 1: Breakdown of BBC Radio Ulster/Foyle spend (£m), 2011-12 to 2015-16**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Costs incurred making programmes (1)</td>
<td>16.4</td>
<td>16.1</td>
<td>16.5</td>
<td>16.3</td>
<td>16.7</td>
<td>0.3</td>
</tr>
<tr>
<td>Content-making related overheads allocated to BBC Radio Ulster/Foyle Copyright (2)</td>
<td>0.7</td>
<td>0.8</td>
<td>0.8</td>
<td>0.8</td>
<td>0.8</td>
<td>0.1</td>
</tr>
<tr>
<td>Newsgathering (3)</td>
<td>0.2</td>
<td>0.2</td>
<td>0.2</td>
<td>0.2</td>
<td>0.2</td>
<td>0.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>17.3</td>
<td>17.1</td>
<td>17.5</td>
<td>17.3</td>
<td>17.7</td>
<td>0.4</td>
</tr>
<tr>
<td>Service licence budget</td>
<td>16.1</td>
<td>15.9</td>
<td>18.2</td>
<td>18.0</td>
<td>17.4</td>
<td>1.3</td>
</tr>
<tr>
<td>Actual spend vs. SL budget</td>
<td>7.5%</td>
<td>7.5%</td>
<td>-3.8%</td>
<td>-3.9%</td>
<td>1.7%</td>
<td></td>
</tr>
<tr>
<td>Distribution costs</td>
<td>2.0</td>
<td>2.1</td>
<td>1.3</td>
<td>1.6</td>
<td>1.8</td>
<td>-0.2</td>
</tr>
<tr>
<td>Infrastructure/support costs</td>
<td>4.5</td>
<td>4.7</td>
<td>4.9</td>
<td>5.1</td>
<td>5.0</td>
<td>0.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>23.8</strong></td>
<td><strong>23.9</strong></td>
<td><strong>23.7</strong></td>
<td><strong>24.0</strong></td>
<td><strong>24.5</strong></td>
<td><strong>0.7</strong></td>
</tr>
</tbody>
</table>

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

(1) Programme costs include all direct costs of making programmes on Radio Ulster/Foyle, including production and staff costs, plus any associated centrally incurred costs of studios, training, etc.
(2) Rights payments made to music artists etc., which are managed within the TV division and allocated to Radio Ulster/Foyle using a standard formula
(3) Covers the research and reportage of news from a centralised pooled resource and is not, therefore, programme specific.
1.3 BBC Northern Ireland TV news

The BBC offers news made in, and for, Northern Ireland on TV on BBC One, as well as on radio and online. On TV, there are three BBC Newsline bulletins on weekdays: a 15-minute bulletin following the 1pm network news, a half-hour programme at 6.30pm, and a 15-minute late bulletin following the 10pm news; additionally, there are news bulletins during BBC Breakfast and some at weekends.

1.3.1 Reach

BBC television news in Northern Ireland is viewed by 57% of adults. BBC Newsline performs strongly

The total weekly reach for BBC news and current affairs in Northern Ireland was 55.2% in 2015, having fallen from 58.9% in 2011. Weekly reach for BBC Newsline was nearly as high, at 53.8%, with the 6.30pm bulletin reaching 24.5%. BBC Newsline’s reach has fallen slightly in recent years, but the 6.30pm bulletin reach has been steady, which is impressive, given that the reach of BBC news programmes is generally falling31.

Figure 13: Trends in combined bulletin reach (%) of BBC network32 and Northern Ireland news, adults 16+ in Northern Ireland

![Graph showing trends in combined bulletin reach of BBC network and Northern Ireland news, adults 16+ in Northern Ireland.]

Source: BARB / TRP / BBC management data, 3+ minute reach, adults 16+ in Northern Ireland

The BBC’s news programming sits alongside UTV’s popular news offer UTV Live, but the BBC has higher reach across the day. In fact, around one fifth of the UTV Live audience at 6pm will also watch BBC Newsline at 6.30pm. The slight decline to the weekly reach of BBC Northern

31 Source: BARB, all adults
32 Network news broadcast at 1pm, 6pm and 10pm
Ireland’s news and current affairs is concentrated among younger viewers, women and C2DE viewers (figure 14).

**Figure 14: Reach (%) of BBC News NI and current affairs on TV by demographic group**

Source: Source: BARB / TRP, 3+ minute reach, adults 16+ in Northern Ireland

### 1.3.2 Quality

The vast majority of viewers find BBC Northern Ireland’s TV news to be high quality.

On the whole, audiences have strong perceptions of BBC Northern Ireland’s TV news: 85% of viewers agree that it is informative, 76% find it relevant and 75% agree that it is high quality. Only 49% agree that it is different from other providers, but this is not surprising given the similar format of daily news from the BBC and UTV (figure 15).

Audience engagement carried out by Audience Council Northern Ireland suggests that the quality of journalism on BBC Northern Ireland is highly regarded, and viewers are confident that it delivers all the main news of the day whilst remaining impartial, accurate and trustworthy. This was mirrored in responses to our public consultation, in which respondents praised the news as reliable, informative and relevant, and presented in an analytical and professional manner.
The BBC’s tracking surveys also show that perceptions of the BBC News NI are strong, at 7.6, but they show a decline over the past five years from 7.9 out of 10 in 2011. This gives is a similar score to similar programmes across the UK.  

1.3.3 Impact

BBC Northern Ireland has a commitment set in the BBC One service licence to broadcast at least 280 hours of news and current affairs programmes each year. It has consistently met this commitment in recent years, and in 2015/16 broadcast 355 hours of news and current affairs.

Viewers rate BBC Northern Ireland’s news highly, although their expectations are even higher

Our quantitative research showed that the majority of viewers agree that BBC Northern Ireland’s news is up-to-date and accurate (81%), and high quality and independent (74%). While these performance scores are all very high, audience expectations are higher still, as around nine out of ten viewers agree that it is important for BBC News NI to provide these things, as shown in figure 16. However, the audience’s perception of BBC Northern Ireland’s performance is higher than BBC Scotland’s news and in line with BBC Wales’ news performance.

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33 Source: BBC ART survey, adults 16+ in Northern Ireland
Our qualitative research found that audiences feel that news from BBC Northern Ireland is trustworthy, impartial and of a high quality. BBC Northern Ireland’s journalists are highly respected, and many viewers like the fact that they are well established and so appear to really understand the context of topical issues. However, younger viewers feel less represented by them.

Our quantitative research shows that three quarters of the audience believe that BBC news represents Northern Ireland and gives viewers a better understanding of news and topical issues. However, the issue of representation is important to audiences (86%) and their expectations are not fully met in this area, with a performance gap of -11.

Audience Council Northern Ireland found that some audiences, particularly those in rural areas, wished for more coverage outside the larger towns and cities. They felt that this should not be parochial coverage, but stories from communities across Northern Ireland that are relevant to the whole population and can shed light on wider news themes.
There is an increasing desire for news to reflect a contemporary view of Northern Ireland

We heard from audiences in our qualitative research and through the engagement work carried out by Audience Council Northern Ireland that there is a need for BBC Northern Ireland’s news and current affairs to continue to develop to meet changing audience expectations, given the ongoing political, cultural and demographic changes taking place. Some viewers feel that the news agenda on the BBC is not matching the pace of change in Northern Ireland.

Audience Council Northern Ireland suggested that audiences feel too much news is reported through a political lens. This does not mean that audiences want less political coverage; rather they want more focus on other ways into stories about public policy areas that impact upon their lives, such as education, health and the environment.

Our consultation and qualitative research respondents agreed that less focus on conflict and confrontation, which they associated with the past, and more coverage of a wider range of subjects would signal that life in Northern Ireland, and the BBC’s reporting of it, were moving on.

\[ \text{We asked, you said: I am tired of the same old rhetoric and well-worn arguments. I am looking for something fresh. I feel that the BBC could tap into the real local issues i.e. the state of the roads, what is happening in a particular town council, anti-social behaviour, community groups, churches, schools and good news stories (Consultation: Male, 45-54)} \]

BBC Northern Ireland is clear that it has a duty to report a serious news agenda, even when audiences may not enjoy all aspects of it. We agree that this must be the case.

Audiences are content with the balance between network UK and Northern Ireland news

When asked to consider BBC network news alongside its news for Northern Ireland, 85% of the audience agreed that they received a good balance of UK, international and Northern Ireland news and that this news felt relevant to them.

The Audience Council Northern Ireland found some audience concerns about network news’ accuracy when reporting issues which may be devolved outside of England. The Trust has examined this area in other work and we do not cover it further here.
1.4 BBC Northern Ireland TV current affairs

The BBC broadcasts current affairs programming on BBC One and BBC Two in Northern Ireland. The main programme strands are *Spotlight*, *The View*, *Stormont Today* and a Northern Ireland opt out in *Sunday Politics*.

1.4.1 Reach, quality and impact

**BBC Northern Ireland’s current affairs programming performs consistently well**

BBC Northern Ireland’s current affairs programming reached on average 16.8% of adults each week in 2015. Reach of this programming is higher in Northern Ireland than it is in Wales or Scotland, although it has fluctuated in the past few years.\(^{34}\)

The main strands, *Spotlight* and *The View*, have maintained their audiences of 82,000 and 69,000 respectively, and these have been stable over the last few years. However, *The View* has a low average appreciation score of 71,\(^{35}\) although political programming often attracts lower appreciation scores.

*Sunday Politics Northern Ireland*, broadcast on a Sunday morning, has a lower but stable audience of 28,000, unchanged from 2013 and 2014. The late evening political programme *Stormont Today* reaches an even lower audience of 12,000, but generates a strong approval figure of 83.

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\(^{34}\) Source: BARB, all adults

\(^{35}\) Source: Pulse, all adults
BBC Northern Ireland current affairs are well respected by audiences

The approval scores for BBC Northern Ireland’s current affairs remain strong, with just a small decline from 80.8 in 2011 to 80.2 in 2015. Similarly, our bespoke research found that 60% of viewers had a good general impression of this programming – a higher level than Scotland and similar to that in Wales.

**We asked, you said:** often, BBC coverage of current affairs is the most reliable and easy to access source for impartial news and analysis. Programming is usually of a high standard and doesn’t take a significant editorial bias...I always find the BBC’s explanation of sectarian or political issues informative and understandable

(Consultation: Male, 16-24)

As shown in figure 18, BBC Northern Ireland’s current affairs programming scores very well in terms of the main characteristics of being informative (84% agree), of a high quality (79%), relevant (78%) and engaging (76%).

**Figure 18: Audience opinions of BBC Northern Ireland’s current affairs and political programmes**

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informative</td>
<td>84%</td>
</tr>
<tr>
<td>High-quality</td>
<td>79%</td>
</tr>
<tr>
<td>Relevant to me</td>
<td>78%</td>
</tr>
<tr>
<td>Engaging</td>
<td>76%</td>
</tr>
</tbody>
</table>

Source: BBC Trust ICM Quantitative Audience research. All who watch BBC current affairs programming (228)

**Audiences find BBC Northern Ireland’s current affairs relevant to them**

Viewers consider BBC Northern Ireland’s current affairs to be strong: as shown in figure 19, 83% of viewers agree that Northern Ireland current affairs ‘reflects local issues and concerns’ and 79% agree that it ‘gives me a better understanding of topical issues in Northern Ireland’. Their expectations are even higher in these areas, but we do not think the gaps are a concern.
Our research shows that Radio Scotland’s arts coverage is meeting audience expectations. 58 per cent agree that the station performs well in this area and 57 per cent believe it important to support arts and culture in Scotland. Whilst few consultation respondents chose to discuss arts and culture, those that did offered general praise of the station’s output, with particular appreciation of the station’s efforts to reflect and promote Scotland’s cultural heritage. Our qualitative respondents gave particular praise for Radio Scotland broadcasting a significant arts programming regularly in a prime daytime slot.

We asked, you said:

- **Spotlight** is my favourite current affairs programme by far. It covers a great range of topics and is high quality. Excellent researchers and interviewers. Even if it is a topic I know little about, by the end of the programme I feel well informed. Well done Spotlight’ (Consultation: Male, 45-54)

The majority of people (81%) agree that the current affairs programmes cover a wide range of topics and subject matter. BBC Northern Ireland has extended its leading current affairs programme, Spotlight, which was widely praised by audiences. For many, this is an ‘appointment to view’ programme, that is well-researched with a good range of subjects. The journalists are described as being high quality, and audiences appreciate the focus on broader, non-political issues that have wide interest.

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**Figure 19: Performance and importance scores for BBC Northern Ireland’s current affairs**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>...covers the important political stories in Northern Ireland</td>
<td>89%</td>
<td>88%</td>
<td>+1</td>
</tr>
<tr>
<td>...reflects local issues and concerns</td>
<td>83%</td>
<td>91%</td>
<td>-8</td>
</tr>
<tr>
<td>...provides political analysis</td>
<td>82%</td>
<td>82%</td>
<td>-7</td>
</tr>
<tr>
<td>...investigates and scrutinises issues and institutions</td>
<td>81%</td>
<td>88%</td>
<td>-7</td>
</tr>
<tr>
<td>...covers a wide range of topics and subject matter</td>
<td>81%</td>
<td>89%</td>
<td>-8</td>
</tr>
<tr>
<td>...gives me a better understanding of topical issues in Northern Ireland</td>
<td>79%</td>
<td>88%</td>
<td>-9</td>
</tr>
<tr>
<td>...are relevant to me</td>
<td>77%</td>
<td>87%</td>
<td>-10</td>
</tr>
<tr>
<td>...explains complex issues</td>
<td>77%</td>
<td>86%</td>
<td>-9</td>
</tr>
<tr>
<td>...holds decision makers in Northern Ireland to account</td>
<td>69%</td>
<td>88%</td>
<td>-19</td>
</tr>
</tbody>
</table>

Source: BBC Trust ICM Quantitative Audience research: All who watch BBC Current Affairs programming (228)
BBC Northern Ireland has strong investigative journalism and is regarded by viewers, and from within the BBC, as a centre of excellence in investigation, which has impact beyond broadcast. Although BBC journalists in Northern Ireland work on *Panorama* and other programmes, *Spotlight* is rooted in issues for and about Northern Ireland, and audiences appreciate the relevance and quality of this programming.

Audiences in Northern Ireland have historically been more engaged with political output than those in the other nations due to the direct impact politics has had on them. In our research, viewers praised *Stormont Today* although this was more for its presence than its content. It was felt to be an important programme to have, but the format – reporting procedural business from the Northern Ireland Assembly – was considered to be rather unengaging and provided a difficult view.

In our research, some viewers also felt that the Northern Ireland element of *Sunday Politics* did not necessarily cover any issues that were not also being reported on by the View or *Stormont Today*.

Some respondents to our public consultation considered that BBC Northern Ireland offers too many programmes on politics. A number of organisations which responded to our consultation also suggested that a broader range of topics should be covered by BBC Northern Ireland, instead of politics, including business, agriculture and the environment. The Audience Council sees this as an evolving picture: BBC Northern Ireland has clearly improved its breadth of coverage on business and the economy but there remain opportunities for further development.

**We asked, you said: the BBC is leading the way in business coverage. It sets the BBC apart (Audience Council Northern Ireland outreach sessions)**

BBC Northern Ireland is considering these challenges and how best to serve the range of interests. They point out that, although audiences often say they are tired of political coverage, viewing figures show there is still a huge appetite for politics in Northern Ireland, both on TV and on other platforms such as social media.

Audiences rightly expect that BBC Northern Ireland will hold decision-makers to account, and investigate and scrutinise issues and institutions. A relatively high 69% agree that it does this well, but there appears to be some unmet expectations in this area.

BBC Northern Ireland considers *The Nolan Show* on Radio Ulster/Foyle as a major contributor in this area, as it has accountability at its heart. However, this style of programming can divide opinion among audiences; for those who do not like it, it may not satisfy their expectation in this area. Younger adults were more critical of any argumentative and antagonistic approach, rather than one that sought to challenge and seek resolution.

Whilst *The View* had more limited awareness among our viewers in our research, it was highly regarded for successfully explaining the context around issues and holding politicians to account. It was also praised for sometimes finding agreement between the two sides of a debate.
1.5 BBC News NI online

The BBC offers a single BBC News NI site – unlike in Wales or Scotland, it does not also have regional sites. Around 15-20 stories are produced for the site each day. There is also a 'local live’ stream, which gives more stories and publishes them faster, by combining short news updates with links to BBC stories and to external news sources.

Audiences in Northern Ireland have a strong appetite for online news, with higher levels of news consumption via computers and mobile devices than in the other nations.36

1.5.1 Reach

There are two sources of data on usage of BBC Northern Ireland’s online news: claimed reach (via a survey) and the measurement of the number of devices (unique browsers) that access the site. Unfortunately, these sources do not give us a clear story on reach: audiences in Northern Ireland are more than twice as likely as those in Scotland or Wales to claim to visit their respective nations’ news site, with 17% of adults in Northern Ireland claiming this in 2015, compared to 7.5% in Wales and 7.2% in Scotland. The survey suggests that reach is highest among men and ABC1s, and with a good spread among age groups.

However, the average weekly unique browsers accessing the BBC Northern Ireland online offer are relatively low and fell in 2015 to 1.7 million, down from 2.2 million the previous year. Unique browser fluctuation tends to be driven by the appeal of stories, but the BBC believes that recent changes to the BBC’s websites may also have made them less engaging to audiences, and so led to this drop.

Figure 20: Average weekly reach (millions of unique browsers) for BBC News Online and BBC News NI Online

Source: BBC iStats / BBC management

36 Source: Ofcom (2015) News Consumption in the UK
Use of the more recent Local Live offer varies considerably, peaking when a major story breaks or a big event is taking place. The service is not yet available on some platforms and is not constantly updated. There are also some concerns within BBC Northern Ireland over its funding. It is seen by the BBC as a key digital investment for the future.

People are increasingly accessing BBC Northern Ireland online news pages from mobile devices, with computer usage falling. In addition, a steadily increasing proportion of use comes through the BBC News app: in 2013, 34% of BBC News NI’s online traffic came from the app, while in 2015 it was up to 37%.

**Figure 21: BBC News NI sites’ usage by device**

![Bar chart showing usage by device for BBC News NI](source: BBC iStats survey)

### 1.5.2 Quality and Impact

**Audiences see BBC Northern Ireland online news as high quality, although their expectations are unmet in some areas**

Our audience research showed that audiences are, on the whole, positive about BBC Northern Ireland’s online news, with 85% agreeing that it is informative (in line with news on television). And 77% agree that it is high quality and independent, although their expectations are particularly high on this point, giving a performance gap.
The research also found that users consider that BBC News NI online offers a good range of content, which is updated regularly and appropriately.

ACNI agreed that the key issues are covered well and major stories are updated quickly. However, it also heard from many users who expected a wider range of news coverage, and more development of stories throughout the day. Users were also critical of the reduced coverage in evenings and at weekends.

**We asked, you said:** working in the community you hear things that are happening from others, then you go to the BBC website for more information
(Audience Council Northern Ireland outreach sessions)

It is plain to see that the content is not updated as regularly over the weekend
(Consultation: Male, 45-54)

**Social media is growing in importance as a way of serving audiences**

Social media is a growing part of this online news mix for many people. BBC Northern Ireland uses Facebook and Twitter for news and for some other programmes, and reaches relatively
large numbers of people on these: BBC NI news has 140,000 followers on Twitter; BBC 
Newsline has 85,000 followers and 219,000 on Facebook.

Audiences connecting with BBC Northern Ireland on social media are younger than those 
viewing its TV news. Those who ‘like’ the BBC Newsline Facebook tend to be 18 to 34-year-old 
men and 25 to 44-year-old women.

It is clear that social media now plays a major role in spreading news, and the BBC is clear that 
it would like to do more on these platforms, particularly those aimed at younger users, such as 
Snapchat. Social media will need to be a part of how the BBC delivers its content in the future, 
although we note the challenges of measuring its use and gaining any kind of recognition or 
attribution for the content.

1.5.3 Value for money

TV news and current affairs expenditure increased by 14% in 2012-13 and subsequently 
remained high due to increased investment in key programmes. Overall, the increase in cash 
spend and in percentage terms has remained relatively low.

Table 2: Northern Ireland spend on TV and online news and current affairs (£m), 2011 to 
2016

<table>
<thead>
<tr>
<th></th>
<th>2011/12</th>
<th>2012/13</th>
<th>2013/14</th>
<th>2014/15</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV news and current affairs</td>
<td>13.2</td>
<td>15.0</td>
<td>14.5</td>
<td>14.7</td>
<td>14.7</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11%</td>
</tr>
<tr>
<td>Online news and current affairs</td>
<td>0.8</td>
<td>0.8</td>
<td>0.8</td>
<td>0.8</td>
<td>0.8</td>
</tr>
<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0%</td>
</tr>
</tbody>
</table>

In cash terms, expenditure on online news and current affairs has remained stable since 
2011/12. It remains significantly below the levels of spending in Scotland (which has averaged 
£1.7m) and Wales (£2.1m).
2. Scotland

2.1 Context

Scotland is the largest of the UK devolved nations, both in terms of size and population: it covers 32% of the UK landmass and the 2011 census recorded a population of 5.3 million (8.3% of the UK). Just over a quarter of Scots live in the cities of Glasgow and Edinburgh and around 2% of Scotland’s population live on one of its 93 inhabited islands.

The population is less ethnically diverse than the UK as a whole, with non-white (including mixed) ethnic groups accounting for 4% of the population, compared with around 13% across the UK. However, the non-white population is higher in urban areas such as Glasgow. Scotland also has an ageing population: the 2011 census showed that 36% of its population was under 30, compared with 41% in the 1991 Census.

English is by far the most commonly spoken language, although in 2011, some 57,602 people (1.1% of the population) said they could speak Gaelic which is protected under the European Charter for Regional or Minority languages. The largest proportion of Gaelic speakers lives in the Outer Hebrides, where 52% speak the language. There are also 6,000 Gaelic speakers in Glasgow, and they represent over 10% of Scotland’s Gaelic speakers.

While consumption of BBC services in Scotland is high, audiences in Scotland tend to have more negative perceptions of the BBC and this was also shown in our audience research. This found that most opinions of the BBC are lower in Scotland than in other UK nations and responses from Scotland to our public consultation for this review included a wide range of strong opinions, many of which were from people who were highly engaged and very critical of the BBC’s offer.

Audiences in Scotland have a strong appetite for news and current affairs. Television in general (and BBC One in particular) is the most commonly used source for news about Scotland, although audiences are more likely than the UK average to get their news from newspapers (39% vs 31%). Usage of the internet for news consumption is similar to that of the UK as a whole.

When asked about their most important news source, BBC research suggests that the differences are more apparent by people’s age. As expected, the internet and social media are most important for those aged under 35, while television and newspapers are more important to the over 55s.

Radio listening overall is lower in Scotland: at an average of 18.5 hours a week, it is 0.7 hours less than the UK average. And audiences in Scotland spend more time than the UK average with commercial radio stations, accounting for just over half (51%) of all listening hours in Scotland in 2015, four percentage points higher than the UK average.

BBC Scotland provides television, radio and online content. We have assessed its news and current affairs output across: radio, television and online, including Radio Scotland, Radio nan

37 Source: 2011 census
38 Source: Ofcom (2015) News Consumption in the UK
39 Source: RAJAR, 2015, all adults
Gàidheal; news and current affairs on television, including Reporting Scotland, Scotland 2016, BBC Scotland Investigates and Sunday Politics Scotland; and news and current affairs online. The review also covers BBC ALBA, which the BBC provides in partnership with MG ALBA.

This review does not cover the other local (opt-out) content produced for Scotland on BBC One and BBC Two and it does not cover the BBC’s network news provision in the nation.

### 2.2 BBC Radio Scotland

Radio Scotland’s remit is to be a speech-led service for all adults seeking programmes about the life, culture and affairs of Scotland. In addition to local and national concerns, output should also address matters of UK and international significance from a Scottish perspective. The station has a service licence budget of £21.7 million.

#### 2.2.1 Reach

**Radio Scotland reaches a large number of people, including many who consume no other BBC radio**

In 2015 Radio Scotland reached, on average, some 20.9% of the adult population, or 940,000 adults, each week. Radio Scotland reaches more listeners than any other station in Scotland with the exception of Radio 2. Without Radio Scotland, it is likely that overall BBC reach would be even lower, as 29% of Radio Scotland’s listeners tune in to no other BBC radio.

**Figure 23: Trends in reach (%) of BBC radio in Scotland**

![Graph showing trends in reach of BBC radio in Scotland](image-url)
The BBC radio portfolio as a whole reached 59% of the Scottish population in 2015. This is significantly lower than the 65% average for the UK, due to the strength of commercial radio and the high consumption of television in Scotland.

At 7.01 hours a week in 2015, the average length of time each listener stays tuned to Radio Scotland is up from 6.35 hours in 2011, but still low compared with other BBC stations (10 hours a week for Radio Ulster/Foyle and 11 hours a week for Radio 4).

However, average listener hours for all BBC Nations’ stations, with the exception of Radio Scotland, have declined during this period. Radio Scotland’s continued lower levels of listening is likely to be due, at least in part, to the station’s eclectic mixture of programmes, designed to appeal to different audiences, and to the way listeners use the station by tuning in for news or sport. However, listeners aged 55+ increased their listening during this period from 8 hours 15 minutes to 9 hours. There were also increases for women and C2DE audiences.

Radio Scotland’s audience is skewed towards older adults and men

Over the last five years, Radio Scotland’s reach has declined from 22.7% to 20.9% with reductions among all demographic groups. Radio Scotland’s remit is to appeal to all adults who are interested in programming about Scotland. In fact, weekly reach is higher among older listeners; however, there were also declines in reach among this age group. The greatest decline was among adults aged 35-54\(^41\).

Radio Scotland’s audience profile is skewed towards listeners from higher social grades (ABC1) and older listeners. The average age of a Radio Scotland listener in 2015 was 53, which has not changed since 2011. This is higher than the average age for all radio listening in Scotland, at 45, although is slightly lower than the average age for Radio Wales, at 56, and Radio Ulster/Foyle, at 54\(^42\).

BBC Scotland considers, informally, that Radio Scotland should aim to appeal to those aged 35 and older, and, as we state in our Executive Summary, we don’t believe the BBC should include specific age targets of 55 or 65 and over in the service licence, as suggested by RadioCentre in their response to our consultation. The BBC’s only radio service reflecting the news and interests of the Scottish nation should not be constrained by having an older target age group.

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\(^{41}\) Source: RAJAR (2015), adults 15+

\(^{42}\) Source: RAJAR (2015), adults 15+
Figure 24: Weekly reach of Radio Scotland among different demographic groups

<table>
<thead>
<tr>
<th>Demographic Group</th>
<th>2011</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Men</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Women</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults 15-34</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults 35-54</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults 55+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults ABC1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adults C2DE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BAME</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: RAJAR, all adults

In 2015 the station reached 26% of men in Scotland, compared with 16% of women. The male/female split of audience has been stable at 60/40% since 2011. Analysis indicates that the male bias in listening is influenced to a large extent by sports coverage, which attracts a much larger male audience.

Since our last service review, where we highlighted a need for a greater appeal to female listeners, Radio Scotland has aimed to attract them with changes to presenters, such as introducing Kaye Adams on weekday mornings, and some new lifestyle programmes, such as Out for the Weekend, Personal Best and Kitchen Garden. In addition, Music Match is a programme which tries out new female music presenters.

We can see that Radio Scotland has tried various editorial initiatives to increase the proportion of female listeners to the station. However, the station retains a strong skew to male listeners, and we conclude that the station should continue to find ways to appeal to female listeners, particularly in its core news programming.

Our qualitative research showed that there is some evidence that listeners to Radio Scotland are often not aware of the full range of its content and we think the station should do what it can to address this. Since our review in 2011, Radio Scotland has sought to increase awareness through on and off-air promotion and using presenters to direct listeners around the schedule. They have also focused their editorial strategy on making the station more relevant to the daily concerns of a greater proportion of the potential audience by broadening the station’s range within the structure of daytime speech and evening music programming. Audience Council
Scotland notes that the Radio Scotland schedule now has greater logic through editorial changes and believes that this has been welcomed by listeners.

### 2.2.2 Quality

**A high proportion of the audience is satisfied with Radio Scotland, but audience approval scores are slightly lower than for other BBC nations’ radio stations**

Our research indicates that most listeners have a positive impression of Radio Scotland, with 70% agreeing that it provides high-quality programming and 52% having a strong overall impression of the station. However, these scores are lower for Radio Scotland than comparative scores for the BBC’s other nations’ radio stations; although scores for perception are generally lower in Scotland.

One of the aims of the schedule changes made since 2011 was to improve audience approval by steering listeners away from programmes not relevant to them. In fact, the approval score of 7.6 has not changed since 2011 and is still lower than comparative scores for Radio Wales, Radio Cymru, Radio Ulster/Foyle and Local Radio in England.

**Radio Scotland gives listeners content which they cannot receive anywhere else**

Radio Scotland’s unique reach (some 29% of its listeners tune in to no other BBC radio and 11% tuned in to no other radio at all) is evidence that it provides content that cannot be found elsewhere. We found that 61% of listeners agree that Radio Scotland is distinct from other radio stations – a lower score than for Radio Wales and Radio Ulster/Foyle. However, Radio Scotland is the only English language radio service with a remit to address all adults in Scotland and to cover the whole of Scotland. The station, therefore, has a unique role in providing listeners with Scottish culture and a national perspective on local, national, UK and international affairs.

In our qualitative research, listeners were generally positive about the programming on BBC Radio Scotland and agreed that the station is informative, high quality and entertaining. On this evidence, we do not believe that Radio Scotland’s lower survey scores are caused by the quality of its programmes.

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**We asked, you said:** I think that Radio Scotland manages to achieve superb quality in all aspects of its remit (Consultation: Female, 45-64)

The Ofcom Advisory Committee for Scotland responded to our consultation with the opinion that Radio Scotland’s remit is too broad and the station lacks an identity, falling between speech and music, national and local. Our view is that, while Radio Scotland does have a broad remit, with a wide range of different types of programme and catering for a wide range of demographic groups, this is actually part of its distinctiveness and gives it value to listeners. We do not agree that it presents a problem.

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43 Source: BBC ART survey
44 Source: RAJAR (2015)
Most listeners think the station broadcasts informative or entertaining programmes

Our quantitative audience research asked listeners whether Radio Scotland provides high-quality programmes and programmes that are entertaining. Some 80% of listeners agreed that Radio Scotland is informative and 60% thought the station had programmes which were entertaining.

Radio Scotland meets its requirement to be speech led in daytime

BBC Radio Scotland is required by its service licence to provide an all-speech breakfast show and be speech led in the daytime until 7pm on weekdays and 2pm at weekends. As well as complying with the condition regarding breakfast, its level of daytime speech (versus music) is high overall, with music only featuring as a small part of the Janice Forsyth arts show.

In its response to this review, RadioCentre states that speech content should make up all output during weekday daytime for the English language Nations’ radio services. We are confident that BBC Radio Scotland has a sufficiently high proportion of speech in daytime and that having some music is editorially relevant to the afternoon arts programme. We do not think that any change is currently needed to Radio Scotland’s service licence conditions regarding speech output.

2.2.3 Impact

We measure impact by considering the contribution made by a service to the public purposes, as set out in its service licence. Radio Scotland is required to make a particularly strong contribution to the two public purposes of sustaining citizenship and civil society and to reflecting the UK’s nations, regions and communities.

Radio Scotland listeners believe it is making an important contribution to the public purposes

Through our audience research we asked a representative sample of listeners to tell us whether the station was meeting the various public purpose objectives set out in its service licence, and whether they felt these commitments were important. Comparing performance and importance scores for each objective tells us whether the station is meeting audience expectations in that area.

We found that the station was meeting audience expectations in the delivery of sports, arts and culture. In some areas, while performance scores are high, audience perceptions of importance, particularly for priorities relating to news, are even higher. While this leads to a gap, we do not think it suggests poor performance.

Sustaining citizenship and civil society

Radio Scotland has delivered its service licence commitments relating to news and current affairs programming

BBC Radio Scotland should make a very important contribution to the BBC's public purpose of sustaining citizenship and civil society among its audience. Its delivery of high-quality, independent news is one of the most important aspects of the service.
Underpinning its delivery of this purpose, Radio Scotland is required to broadcast at least 43 hours of news and current affairs each week. It has met this condition consistently with, in 2015, an average of 62 hours of news and current affairs each week. Given the large gap between the commitment and the actual level of output, we will amend the Radio Scotland service licence to reset this condition at 50 hours a week, which is closer to actual output.

News programming includes Good Morning Scotland, John Beattie, Newsdrive and news bulletins broadcast throughout the schedule. Recent schedule changes to reflect better the changing political and cultural landscape in Scotland have resulted in the introduction of new weekend editions of Good Morning Scotland.

Some 17 hours of current affairs coverage is provided every week by the Kaye Adams Programme, the Stephen Jardine Programme, and previously by Shereen and the Big Debate. These allow audiences to contribute to the discussion and interact with decision-makers. Additional content is provided when major stories and events take place. There are also opt-out bulletins broadcast from Inverness, Aberdeen, Selkirk, Dumfries, Kirkwall and Lerwick.

**Radio Scotland listeners generally consider the news to be of high quality**

Our research shows that three quarters of the audience agree that Radio Scotland provides high-quality news, although the very high level of perceived importance for this attribute gives a performance gap.

![Figure 25: Radio Scotland’s performance and importance scores: news](source)

Responses to our public consultation showed that there are strong views on Radio Scotland’s delivery of high-quality news, particularly relating to its impartiality. Some consultation respondents argued that that Radio Scotland lacks impartiality, but, among those who considered there to be a bias, there were strong divisions in opinion over whether this was pro-Unionist or nationalist, with no consensus either way.

However, listeners taking part in our qualitative research cited *Good Morning Scotland* and *Newsdrive* as good examples of Radio Scotland being impartial (as well as accurate). They felt that the station successfully avoided being obviously pro or anti-independence, or supportive of the SNP or any other political point of view.

The very high level of scrutiny over whether the BBC is impartial in Scotland highlights the need for Radio Scotland to consider and respond quickly to any allegations of bias, and to be
very sensitive to the issue. It is possible that the lack of any consensus around this issue may point to a desire from audiences for deeper analysis and discussion of Scottish issues and, as Audience Council Scotland notes, less emphasis on party politics.

**Listeners perceive that there could be improvements in helping them understand the news and topical issues in Scotland and the wider world**

In our research, 70% of listeners say they feel that Radio Scotland gives them a better understanding of news and topical issues in Scotland. However, their expectations are very high in this area and they are not quite met. We found no similar performance gap for Radio Wales and only a small gap for Radio Ulster/Foyle, despite having this attribute being seen as equally important in those nations.

While these characteristics are not seen as quite so important by listeners, Radio Scotland also does not quite meet audience expectations with regard to how well it provides listeners with a better understanding of issues across the UK and wider world.

**Radio Scotland’s political coverage is praised, although listeners would like it to do even more to help them understand issues**

Scotland saw an increase in audience interest in politics around the Scottish referendum, and that has generally been maintained. Several respondents to our public consultation praise Radio Scotland’s political coverage, and our qualitative research also showed that many listeners felt Radio Scotland was effective in reporting and scrutinising Scottish political life – more so than the BBC’s television news. Both the Kaye Adams Programme and John Beattie were mentioned as good examples of this, giving ‘appropriate challenge’ to decision-makers and good handling of those who phone in to express their views.

**We asked, you said:** There are several insightful political programmes (Male, 55-64)  
Politics is well covered (Consultation: Male, 35-44)

However, as highlighted in Figure 26, audience perceptions of how well BBC Radio Scotland helps them to understand politics in Scotland and across the UK are quite low and do not meet expectations, leaving a performance gap.

A recurring complaint among our consultation respondents was that news and current affairs coverage focuses too heavily on Westminster politics, rather than news from the whole of the UK, including the other devolved nations. This was an opinion shared by listeners in our qualitative research, who also expressed an interest in the whole of the UK rather than Westminster.

**We asked, you said:** I’d rather listen more broadly to what happens in the UK (Consultation: Female, 65-74)

**Figure 26: Radio Scotland’s performance and importance scores: politics**
Radio Scotland is expected to encourage audience participation in its programmes. The main phone-in programme takes place between 9am and 10am on weekdays and there is a music request programme and a football forum. RadioCentre felt that having phone-ins suggests a more populist output and creates a sense that news programmes are too ‘soft’. They also felt that this style of programming duplicates other BBC and commercial offerings.

Our research showed that 70% of the audience say there is just the right amount of listener participation on the station, with roughly equal amounts saying they would like more (10%) or that there is too much (9%). And our qualitative research backed this up, with listeners saying that phone-ins are a strength of the station, with a good range of voices and respect from presenters for a variety of views. Certainly, in our own content analysis over one week to Kaye Adams’ and Stephen Jardine’s phone-ins, there was a range of Scottish, UK and international topics covered and input came from a wide spectrum of listeners, depending on the topic being discussed.

The respondents to our consultation agreed with this, although some queried whether there was a sufficient breadth of views, or too many combative callers, or presenters appearing to not accept all opinions. Clearly some listeners prefer to hear from presenters and experts rather than the public.

We conclude that Radio Scotland plays an important role in providing a voice to listeners and that this is part of the public value it provides. It will always be important to ensure that there is a breadth of views, be that through the subject matter chosen for discussion or the choice of experts and guests.

**Reflecting the nations, regions and communities**

**Audiences think Radio Scotland could do more to reflect their local interests and concerns**

Radio Scotland’s service licence states that the station should make a ‘very important contribution’ to this purpose. Our research showed that there is a performance challenge for Radio Scotland in how it reflects listeners’ local interests and concerns: just under a half of

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**BBC Radio Scotland provides good listener interaction**

Radio Scotland is expected to encourage audience participation in its programmes. The main phone-in programme takes place between 9am and 10am on weekdays and there is a music request programme and a football forum.

RadioCentre felt that having phone-ins suggests a more populist output and creates a sense that news programmes are too ‘soft’. They also felt that this style of programming duplicates other BBC and commercial offerings.

Our research showed that 70% of the audience say there is just the right amount of listener participation on the station, with roughly equal amounts saying they would like more (10%) or that there is too much (9%). And our qualitative research backed this up, with listeners saying that phone-ins are a strength of the station, with a good range of voices and respect from presenters for a variety of views. Certainly, in our own content analysis over one week to Kaye Adams’ and Stephen Jardine’s phone-ins, there was a range of Scottish, UK and international topics covered and input came from a wide spectrum of listeners, depending on the topic being discussed.

The respondents to our consultation agreed with this, although some queried whether there was a sufficient breadth of views, or too many combative callers, or presenters appearing to not accept all opinions. Clearly some listeners prefer to hear from presenters and experts rather than the public.

We conclude that Radio Scotland plays an important role in providing a voice to listeners and that this is part of the public value it provides. It will always be important to ensure that there is a breadth of views, be that through the subject matter chosen for discussion or the choice of experts and guests.

**Reflecting the nations, regions and communities**

**Audiences think Radio Scotland could do more to reflect their local interests and concerns**

Radio Scotland’s service licence states that the station should make a ‘very important contribution’ to this purpose. Our research showed that there is a performance challenge for Radio Scotland in how it reflects listeners’ local interests and concerns: just under a half of
listeners agreed that it does this well, while 72% thought it was important. This was the largest performance gap for the station across all characteristics.

There was a suggestion from listeners in our qualitative research that the station focused a little too heavily on news and issues from Edinburgh and Glasgow. People also accepted, however, that this was to be expected, given that this is where a large proportion of the population – and the Scottish government – resides.

Reflecting local interests and concerns is a challenge for Radio Scotland, which is primarily a national station with some local content from Selkirk, Dumfries, Aberdeen, Inverness, Orkney and Shetland. It also has programmes such as Out for the Weekend and Personal Best, which are clearly broadcast from Aberdeen and Inverness, and some programmes broadcast live from around Scotland when appropriate.

Audience engagement carried out by Audience Council Scotland indicates that despite the Scottish focus of the station, listeners perceive it as providing better coverage of local issues than BBC Scotland does on TV. The Council also feels that, whilst there is an adequate reflection of the nation’s diversity, there is still scope to make this more comprehensive, given the budgets afforded to the station.

**We asked, you said:** The Highland news slot on the radio is very welcome – it’s good and should be expanded (Audience Council Scotland engagement event, Elgin)

**Audiences are mostly positive about the range of voices on Radio Scotland**

Both our qualitative and quantitative research showed that listeners are very positive about the range of voices from across Scotland that they hear on Radio Scotland. Our research showed that 73% of listeners feel it provides a good range and that it exceeds their expectations in this respect. However, listeners also said that the station appears to reflect a ‘middle class’ perspective of Scotland, based on the voices they hear during phone-ins and the relatively serious tone that they perceive the station to have.

**We asked, you said:** I imagine the listeners sitting in their conservatories and listening to the radio (Qualitative Research: Inverness, 45 plus)
Figure 27: Performance and importance scores for Radio Scotland related to the 'nations, regions and communities' public purpose

Some listeners feel Radio Scotland could go further in meeting the needs of a range of communities

While it is not seen as a priority for the station, our audience research showed that some listeners would like BBC Radio Scotland to do more to reflect the range of faiths, cultures and communities of Scotland: 48% think it does this well, while 57% think it is important that it does so, as shown in figure 27.

In their response to our public consultation, Bòrd na Gàidhlig felt that coverage of Gaelic culture and matters was too limited on Radio Scotland. We note that Radio Scotland, Radio nan Gàidheal and BBC ALBA collaborate on a number of initiatives, although these are mainly music related events and outside broadcasts.

It is clearly important for BBC Radio Scotland to reflect a wide range of audiences throughout its output in order to be relevant to them. Whilst the presence of Radio nan Gàidheal and BBC ALBA lessens the need for comprehensive coverage of Gaelic culture on Radio Scotland, as we set out in our review of Radio nan Gàidheal, closer collaboration with Radio Scotland could help raise awareness of Gaelic language and culture, particularly for non-speakers or new learners of the language.

Sports coverage

The service licence for BBC Radio Scotland states that it should provide significant coverage of a range of sports in Scotland, including minority sports.
Radio Scotland is the only radio station to offer coverage of Scottish sport to all listeners in Scotland, and the station aims to offer live coverage of a wide range of sports in Scotland, across regions and performance levels. In 2015/16, it broadcast over 1,500 hours of sports, including main competitions in football, rugby, tennis and shinty. It also offers discussion and coverage of a wide range of other sports including golf, Olympic and Commonwealth sports and complementary coverage of minor leagues, regional events and minority interest sports.

As far as we can measure it, sports programmes perform well on Radio Scotland: it has its highest share of those listening to the radio (19.8%\textsuperscript{45}) on Saturday afternoon, when football is usually broadcast. Many listeners’ prime interest is in Scottish football, although others feel that coverage is too concentrated on football to the exclusion of minority Scottish sports, like shinty. BBC Radio Scotland has been working on offering more sports other than football within its weekend edition of the main sports programme, Sportsound. This transmits around 25 hours per week during key sports seasons, including a high volume of live coverage, but the station would agree that there is more work to be done in building awareness of output for sports other than football among its listeners.

Our research also suggests that BBC Radio Scotland is performing very well in its provision of sport. A majority of listeners agree that it provides good coverage of a variety of sports and this exceeds their expectations. Respondents to our public consultation also felt that sports coverage was a strength of the station, with high-quality commentary and a good breadth of coverage. In our qualitative research, even those listeners who did not express a particular interest in sport praised Off the Ball as an entertaining programme.

\textbf{Figure 28: Performance and importance score for sport on Radio Scotland}

\begin{figure*}[h]
\centering
\includegraphics[width=\textwidth]{figure28.png}
\caption{Performance and importance score for sport on Radio Scotland}
\end{figure*}

\begin{footnotesize}
\begin{itemize}
\item Performance: 66%  
\item Importance: 60%  
\end{itemize}
\end{footnotesize}

\textsuperscript{45} Source: RAJAR, adults 15+ (2015)

In its response to our public consultation, RadioCentre raised concerns about the BBC’s competitive impact in buying sports rights. RadioCentre feels that the BBC should not bid for sports (and live music events) rights on an exclusive basis. The BBC has told us that none of its current contracts give it exclusivity, but that it is often the only radio station to broadcast the sports, so they become, in effect, exclusive to it. The BBC also notes that commercial stations in Scotland often offer some football coverage, whether or not they hold any rights. On the basis of this evidence, we do not think that the BBC needs to change its practice in sports rights acquisition at this point.
**Stimulating creativity and cultural excellence**

**Most listeners are content with the music and arts on Radio Scotland**

While Radio Scotland’s output is 75% speech, it also offers music. It mostly offers speech in daytime and music programmes in the evening.

It is expected to broadcast a distinctive, wide-ranging music proposition of broad appeal, including a significant proportion of music of cultural importance to Scotland, such as music made in Scotland. In doing this, it focuses on live performance, new talent and specialist music. The station has a range of music programmes, which are either general or specialist music, such as traditional Scottish and Celtic music.

As seen in figure 29, our research shows that, whilst music and arts content is not as important as news to the audience, listeners are content with Radio Scotland’s role in supporting Scottish music, arts and culture, and in introducing the audience to new presenters, performers and artists from Scotland.

RadioCentre has called for Radio Scotland to be fully speech during daytime and that, where music is played, it should be distinct from that available elsewhere on radio. In fact, Radio Scotland is predominantly speech during daytime, with some music on the afternoon *Janice Forsyth Show*, which complements the arts focus of the programme, as it has some focus on emerging Scottish music talent. In fact, our qualitative research showed that many regular listeners are unaware of music on the station. Those who were aware of it appreciated its role in encouraging new Scottish talent. We conclude that it is very valid for Radio Scotland to offer some music and that its role in encouraging new talent and supporting Scottish music is valuable.

Radio Scotland also has a commitment to broadcast at least 200 hours of arts coverage each year. These commitments have been consistently met across the review period, with, in 2015, 436 hours of arts coverage, mostly provided by the *Janice Forsyth Show*. There is additional arts coverage in news strands and during festival events programming.

*We asked, you said: I feel the radio is the only part of the BBC that accurately and proportionately reflects Scottish culture (Consultation: Male, 25-34)*
Figure 29: Performance and importance scores for Radio Scotland related to the ‘creativity and cultural excellence’ public purpose

- supports Scottish music
  - Performance: 60%
  - Importance: 63%
  - Gap: -3

- supports arts and culture in Scotland
  - Performance: 58%
  - Importance: 57%
  - Gap: +1

- introduces me to new presenters, performers and artists from Scotland
  - Performance: 50%
  - Importance: 52%
  - Gap: -2

Source: BBC Trust ICM Quantitative Audience research. All who listen to BBC Radio Scotland (142)

BBC Scotland is considering trialling a split frequency for Radio Scotland. This would offer news, current affairs and sport on one service (available on FM, DAB and online), and arts, music and culture on a second service (available only on DAB and online). BBC Scotland believes this would enable it to improve its coverage of the Scottish news agenda, while giving greater flexibility for non-news programming. RadioCentre has expressed concern at this idea due to its potential competitive impact. At this stage, no formal proposal has been received by the BBC Trust, but if it were to do so, the regulatory procedures for running a trial and subsequently any approvals process would be followed.

**Emerging communications**

Over a quarter of all listening to Radio Scotland in 2015 was on a digital platform, with nearly 20% on DAB. However, our research showed that Radio Scotland’s digital activity was less important for most listeners than its broadcast content: 57% of listeners had used Radio Scotland’s website, and while 29% were favourable towards it, 26% were neutral.
The ability to listen again to programmes through the BBC’s Radio iPlayer is appreciated by audiences, but, because of the long length of many programmes, few listeners felt they would do this regularly.

Radio Scotland has been experimenting with social media as part of its audience interaction, and listeners in our research were positive about this in terms of promoting programmes. Many, however, did not feel that they would wish to connect with programmes or the station in this way.

Despite the lower importance placed by many listeners on digital media, BBC Scotland is aware that it plays a key role in its future relationship with listeners – particularly younger adults – and also that it can create some impact beyond Scotland.

2.2.4 Value for money

**Spending on Radio Scotland has fallen in both nominal and real terms in the last few years**

The BBC spent £22.9m on Radio Scotland in 2015-16. When the station’s allocation of the distribution and infrastructure and support costs were added in, its total cost in 2015-16 was £32m. Content costs comprise direct costs incurred by the station locally and allocations of central BBC spending, including music rights payments and some central news and sports costs.

As shown in table 3, since 2011-12, Radio Scotland’s programme-making spend has remained fairly constant in nominal terms. With central content-making related costs also remaining fairly constant, the station’s total expenditure has reduced marginally over the period.
## Table 3: Breakdown of Radio Scotland’s spend (£m), 2011-12 to 2015-16

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<tr>
<td>Costs incurred in making programmes</td>
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<td>21.1</td>
<td>20.3</td>
<td>21.5</td>
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<td>allocated to BBC Radio Scotland:</td>
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<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
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<td>0.2</td>
<td>0.2</td>
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<td></td>
<td>23.3</td>
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<td>22.5</td>
<td>21.7</td>
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<td>Actual spend vs SL budget</td>
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<td>1.3%</td>
<td>-0.9%</td>
<td>3.3%</td>
<td>4.6%</td>
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<td>Distribution costs</td>
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<td>3.2</td>
<td>3.1</td>
<td>2.9</td>
<td>-0.1</td>
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<td>32.2</td>
<td>32.8</td>
<td>32.1</td>
<td>31.4</td>
<td>32.0</td>
<td>-0.2</td>
</tr>
</tbody>
</table>

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

(1) Programme costs include all direct costs of making programmes on BBC Radio Scotland, including production and staff costs, plus any associated centrally incurred costs of studios, training etc.

(2) Rights payments made to music artists etc., which are managed within the TV division and allocated to BBC Radio Scotland using a standard formula.

(3) Covers the research and reportage of news from a centralised pooled resource and is not, therefore, programme specific.

In 2015-16 BBC Radio Scotland’s cost per listener hour was 6.6 pence, which has been stable since 2011-12, despite the reduction in listening hours. This is a little higher than Radio Ulster/foyle’s (which has a lower budget), but is much lower than Radio Wales’ level, mostly due to the relative size of Radio Scotland’s audience.
BBC Scotland TV news and current affairs

The BBC One Scotland service licence commits BBC Scotland to providing accurate, impartial and independent daily news services. Its current affairs output should document civic and political life, provide context for Scottish issues, and facilitate debate representing the diversity of opinion in Scotland. It should place special emphasis on authoritative reporting and analysis of elections in Scotland.

BBC Scotland has a commitment to broadcast at least 265 hours of news and current affairs programmes each year. It has consistently met this commitment across the review period, and in 2015/16 broadcast 368 hours.

BBC Scotland broadcasts three daily Reporting Scotland news bulletins on BBC One: on weekdays there is a 15-minute bulletin following the 1pm network news, half an hour at 6.30pm, and a 15-minute bulletin following the 10pm news. It also provides news bulletins during BBC Breakfast and some bulletins at weekends.

2.3 BBC Scotland TV news

2.3.1 Reach

BBC Scotland’s TV news reaches over half of the adult audience in Scotland

Audiences in Scotland have a strong appetite for news: 93% of adults claim to consume news each day, and claimed interest in news ‘about your nation’ is higher in Scotland than in any other UK nation.\(^{47}\) This translates to strong viewing figures for BBC news in Scotland: in 2015, 53% of adults in Scotland watched BBC Scotland news and current affairs each week; this is in line with viewing in Northern Ireland and higher than viewing in Wales.

Viewing figures to the individual programmes are also relatively strong, with a weekly average of 1.3 million people watching Reporting Scotland at 6.30pm. Reach has, however, been in decline at a similar rate to reach for BBC TV news overall, as shown in figure 31. Weekly reach for news and current affairs dropped a little from 56.9% to 52.6% between 2011 and 2015. Within this, current affairs reach rose while the reach of Reporting Scotland fell from 58% to 52%.\(^{48}\)

\(^{47}\) Source: Ofcom (2015) News Consumption in the UK

\(^{48}\) Source: BARB, adults 16+
Reporting Scotland’s share of viewing has remained stable, at around 30% overall and 32% for the 18:30 programme. The time people are spending with BBC Scotland news is steady, with the average viewer watching for around 26 minutes per week.

Across the Reporting Scotland bulletins, the 6.30pm programme has the highest weekly reach, at 31% of adults in Scotland, followed by the late bulletin, at 23%, while the lunchtime bulletin reaches 17%.

The programmes bring BBC news some unique reach in Scotland: 9% of viewers who watch Reporting Scotland at 6.30pm, 6% of those who watch the late bulletin and 3% of those who watch it at lunchtime do not watch any other BBC news.

BBC Scotland’s news and current affairs reach is evenly balanced between male and female viewers and across social grades. However, it varies considerably by age: it rises to 76.3% among adults aged 55 and over, compared to just 23% among 15-24 year olds (figure 32).

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49 Source: BBC management from TRP and BARB, 3+ minute reach, adults 16+ in Scotland

50 Source: BARB (2015), adults 16+
In our qualitative research, younger adults said that they relied mainly on online news (with some radio in the morning), so did not feel the need to watch TV news programmes. This is supported by survey data that shows, as in Figure 33, online and social media are far more effective at reaching young people, but much less effective than TV and radio as a means of reaching older audiences.

Figure 33: BBC Scotland news reach by media and age group

Source: BBC from BARB/Rajar/CMI (2015)
The BBC is well aware that serving all adult audiences well when their media habits are diverging so widely is a significant challenge, particularly given constraints on funding. The BBC is increasing activity on social media and it targets some news content specifically towards young audiences at key times, such as during elections. There is already some positive feedback on these initiatives.

2.3.2 Quality

**Viewers of BBC Scotland’s television news find it informative and high quality**

As seen in figure 34, a very high proportion (81%) of viewers consider the BBC’s Scottish television news to be informative, and 71% believe it is relevant, 69% say it is high quality and 64% engaging. Only 40% believe that it is different from other providers, but this is normal for regional news bulletins due to the similar format of ITV’s news.

![We asked, you said: BBC news and current affairs on television in Scotland are professionally produced and cover a wide range of topics and subject matter. Most of the programmes are high quality and reliable (Consultation: Male, 55-64)](image)

![Figure 34: Audience perceptions of BBC Scotland’s television news](image)

The BBC’s regular tracking surveys show that perceptions of BBC Scotland’s news are high but have fallen in recent years and are below those for other UK nations: in 2015 the average appreciation score for regional news in Scotland was 78.1, down from 80.4 in 2011.

Perceptions of the BBC’s news were affected by the Scottish independence referendum in 2014. Figure 35 shows how this impacted on the public’s general impression of BBC news in Scotland: by September 2014, it had dropped significantly from 2013, when it was in line with the UK average. It has subsequently risen and has throughout the period been at a fairly positive level, but it has not recovered to its previous level and remains below the UK average.
Figure 35: General impression of BBC News in the UK and in Scotland (mean approval score)

Source: BBC ART survey, adults 16+

Our qualitative research explored perceptions of BBC news in Scotland today. We found that viewers believe BBC Scotland news aims to be impartial, trustworthy and presented in a professional manner. BBC journalists were believed to be high quality and the presenters were respected. BBC Scotland was also felt to be good at attracting high-quality interviewees and this was seen as a mark of its quality. Some viewers felt the presentation seemed austere and did not engage them, compared to STV's regional news. From other research, we are aware that this is a common perception of BBC television news among some viewers across the UK.

BBC news drew some passionate responses in our public consultation. There was praise for its overall quality, but many people had reservations and criticisms too. However, suggestions for how it could improve were often conflicting and this highlights the challenge for BBC Scotland in trying to satisfy all Scottish viewers.

Our quantitative research asked viewers if both the BBC’s network and Scottish national news on BBC One served them well. As shown in figure 36, 81% agreed that it was high quality and trustworthy; 80% agreed that there was ‘a good balance of UK, international and Scottish news’ and 79% agreed that the ‘mix of UK, international and Scottish news feels relevant’ to them.
Those taking part in our qualitative research groups in Glasgow and Stornoway had a clear positive national identity, which they did not see reflected in the BBC's news for Scotland. For example, they felt that Scottish news was now more important relative to UK news, and that the BBC had not reflected this change in its output. Similarly, many of our consultation respondents expressed dissatisfaction with the balance of output from BBC news overall: they think there is too much news about England and specifically Westminster. This clearly relates largely to network news, but it clouds their perception of BBC Scotland's news too.

We asked, you said: I feel we have another country’s news first on [the] main news. I do not need to hear about English education, [its] police or health service – they do not reflect the country I live in. The main news is for England only, but the rest of us are forced to listen to it. Devolution changed things – the BBC remained, as always, out of step with the country and [it is] certainly not representative of Scotland, very much putting forward [the] establishment London view (Consultation: Female, 45-54)

Audience Council Scotland suggests that there is a need for the news schedule to be filtered according to its relevance to audiences in Scotland. They found that some people would like BBC Scotland to have more air time to report on Scottish news, and some are also keen to hear more about other parts of the UK. VLV’s response to our public consultation stated that it believes that the BBC could be more responsive to devolution in its news, but that the network news provision should not be undermined.

The issue of accuracy over devolved policy areas in network news reporting is also relevant here, as the Trust has carried out work in the past that shows that the BBC could do more in this area.51 We have not covered this area in this review.

While our quantitative research showed very high levels of satisfaction with the quality and trustworthiness of BBC news, responses to our consultation show that audience perceptions of impartiality clearly affect their perception of quality. In the consultation, many concerns around BBC impartiality and fairness of its reporting were voiced. But there is clearly no consensus:

51 BBC Trust Nations’ Impartiality Report
criticisms were made that the BBC was pro-nationalist and pro-unionist. Some respondents praise the BBC for maintaining impartiality across its television output.

The debate over whether the BBC has the right balance of network and nations news on BBC One in Scotland has become very high profile with a range of strong views amongst the public and within the press. The BBC is actively considering how it should serve audiences in Scotland and the other devolved nations with its news and whether any changes in output are needed to achieve a service that meets audience expectations. The Trust awaits the outcome of this work later this year.

2.3.3 Impact

**BBC Scotland news gives audiences a better understanding of issues in Scotland, but viewers seek better representation of contemporary Scotland**

On the whole, our audience research shows that BBC Scotland news represents the nation and gives viewers a better understanding of news and topical issues in Scotland. Its performance for key aspects, such as ‘provides me with accurate and up-to-date news’ and ‘it provides high quality and independent news’ is high. However, as seen in figure 37, audiences have even higher expectations of what the BBC should deliver across these characteristics, and these expectations were not fully met.

![Figure 37: Performance and importance scores for BBC Scotland news](source: BBC Trust ICM Quantitative Audience research, All who watch BBC Scotland’s television news (408))
Our consultation and qualitative research offer some insight into these gaps. For example, in relation to 'represents Scotland', we found that many people feel that BBC Scotland focuses too much on Edinburgh, Glasgow and the central belt, to the detriment of the rest of the country. Audience Council Scotland and the Ofcom Advisory Committee both support this view. However, many viewers recognise that the BBC faces a challenge in being equally relevant to viewers across a large nation, particularly in its television bulletins.

We asked, you said: ‘Can we see more presenters from the North’? 'Places like Moray are never reflected’ ‘Orkney and Shetland have a full half hour of news, why can’t we?’ (Audience Council Scotland engagement, Elgin)

In fact, STV, which offers more regional Scottish coverage, is concerned that, if BBC Scotland were to increase its localised reporting, it would then become more similar to STV, and so reduce the plurality and diversity of news programming if STV were damaged as a result. BBC Scotland aims to provide coverage from across the nation, although they are aware that it will not be evenly spread and they are not trying to replicate a local news service.

The BBC is developing some plans for improving local news reporting across the UK, including funding new local news reporters, creating a bank of local news content for others to use and setting up a data journalism centre.

**BBC Scotland does not always meet audience expectations in helping them understand politics and decision-making**

While 64% of viewers agree that BBC Scotland helps them 'understand politics and decision-making in Scotland', we also found that viewer expectations are not entirely being met in this area.

This aspect of news coverage has seen a clear change in audience expectation since the referendum. A small but vocal number of those responding to our consultation felt that the referendum was a turning point to them feeling that BBC television reporting is out of touch with the reality of political life in contemporary Scotland. With more powers for the Scottish Parliament, there will be more for BBC Scotland to report on and scrutinise. This will increase the expectation of BBC Scotland's reporting.

**2.4 BBC Scotland TV current affairs**

The BBC broadcasts current affairs programming on BBC One and BBC Two made in and for Scotland. The main programmes are Scotland 2016\(^\text{52}\), BBC Scotland Investigates and a Scotland ‘opt-in’ Sunday Politics. There were 10 editions of BBC Scotland Investigates in 2015, while Scotland 2016 and Sunday Politics are nearly year round.

**2.4.1 Reach, quality and impact**

**BBC Scotland’s current affairs is performing well overall**

\(^{52}\) Previously Scotland 2014 and Scotland 2015, which replaced Newsnight Scotland in 2014
During the last five years, BBC Scotland’s current affairs programmes increased their weekly reach from 9.6% in 2011 to 12.3% in 2015\(^{53}\).

Average appreciation scores for current affairs in Scotland have fallen by more than the BBC’s news, from 80.3 in 2011 to just 75.7 in 2015\(^{54}\). These are lower scores than any other UK nation. Our research also showed that the overall impression audiences have for BBC Scotland’s current affairs is below that of its news, with only 49% giving a favourable view – again, a much lower score than in Wales or Northern Ireland.

Our research showed strong impressions of a range of characteristics of the BBC’s Scottish current affairs programming: for example, 70% agreed that it ‘explained complex issues’ to them. However, expectations of the programming were even higher, leaving some performance gaps.

**Figure 38: Performance and importance scores for BBC Scotland current affairs**

![Figure 38](image)

As shown in figure 38, the majority of people (82%) agree that BBC Scotland’s current affairs programmes cover a wide range of topics and subject matter. Slightly fewer (71%) agree that BBC Scotland’s current affairs programming is relevant to them, and fewer still (65%) agree that BBC Scotland’s current affairs ‘reflects local issues and concerns’.

\(^{53}\) BARB / TRP, 3+ minute reach, adults 16+ in Scotland

\(^{54}\) Source: BBC Pulse survey, adults 16+
Our research also shows that audiences have high expectations that BBC Scotland will hold decision-makers to account and investigate and scrutinise issues and institutions. This is a central part of the BBC’s news and current affairs output, yet expectations are not being met. A similar picture emerges across all of the other nations, including England. We have identified this area for further investigation in our actions for this report.

We have not carried out this research before, but it may well be that these gaps are linked to changed audience perceptions and expectations since the Scottish referendum – since then, viewers have wanted more coverage of Scottish politics and issues.

At individual programme level, performance is more mixed

*BBC Scotland Investigates* broadcast 10 programmes in 2015, with a combined reach of 36%, or 1.5 million adults in Scotland. It has some high impact and important investigations, which are valued by audiences. It is also one of the ways in which BBC Scotland brings Scottish stories to a wider UK audience. While it performs strongly, our qualitative research found that some viewers felt that some of the issues covered were of UK-wide significance rather than being specific to Scotland.

*Scotland 2016* replaced *Newsnight Scotland* in 2014. It has a small audience of around 32,000 viewers and a fairly low average appreciation score of 77. Average viewing to the programme, which is scheduled at the same time as *Newsnight* on BBC Two and STV’s *Scotland Tonight*, has declined from 54,000 in 2014. STV’s *Scotland Tonight* consistently has a higher audience, at around 83,000.

People responding to our consultation had mixed views about *Scotland 2016*. Some praised the programme for its incisive and in-depth analysis, but some felt it is unbalanced, again referencing issues of impartiality, and that the analysis is too ‘lightweight’. There was also a suggestion that it should be extended to allow greater depth of analysis.

We discussed *Scotland 2016*’s perceived poor performance with BBC management. BBC Scotland announced in June 2016 that *Scotland 2016* will end and be replaced with an hour-long weekly analysis programme, which will aim to address the needs of the Scottish audience better.

*Sunday Politics Scotland* was watched by an average of 108,000 in 2015, having risen from 82,000 viewers in 2014. The Scottish ‘opt-out’ slot within the programme attracts a similar audience. Viewers in our qualitative research commented that *Sunday Politics Scotland* was the only significant coverage of Scottish politics on BBC television, yet they did not find the Scottish opt-out satisfactory in many ways, including its scheduling on a Sunday.

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**We asked, you said:** In political discussions, the spectrum of people is too narrow and establishment voices are dominant – it stifles real debate (Audience Council engagement, Elgin)

We are pleased to see that BBC Scotland is making changes to the current affairs offer as there have clearly been some areas where programmes have not performed satisfactorily. It will be important for BBC Scotland to track whether the changes it is now making have the desired outcome.

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55 Source: BARB. All adults
56 Source: BARB / Pulse, adults 16+
2.5 BBC Scotland News Online

BBC Scotland offers news on a main Scotland site, as well as on some more localised pages (Glasgow and West, etc.). News items may also appear on other parts of the BBC News online offer, depending on their scale and relevance. Therefore, users of BBC Scotland news online are a mix of those who seek out any stories for Scotland or their Scottish region and those who read a Scottish story when it appears on other parts of BBC News online.

2.5.1 Reach

**BBC Scotland online attracts a large number of users, although there has been little growth in the past year**

Use of the BBC Scotland news online is steady, although a little below the peak levels of 2014: in 2015 a weekly average 4.2 million UK ‘unique browsers’ used the BBC Scotland News pages. Use in early 2016 is similar to 2015 levels. Use of BBC Scotland news online does not appear to be growing as constantly as use of BBC News online [figure 39].

**Figure 39: Average weekly unique browsers (millions) of BBC News Online and BBC Scotland News Online**

![Graph showing average weekly unique browsers](source)

People are increasingly accessing BBC Scotland online news pages from mobile devices. In 2015, an average of 2.5 million unique browsers accessed BBC Scotland news sites via mobile or tablet devices every week, and this has increased further at the start of 2016, to 2.8 million. An increasing proportion of use is through the BBC News app – in 2015 average weekly unique browsers from mobile apps were 1.2 million (29%). The trend in use by device is shown in figure 40.

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57 The number of ‘unique browsers’ to BBC Online is measured via the BBC’s internal iStats system, which counts the number of different internet browsers accessing the site. It is not equivalent to the number of people using BBC Online, as people may access BBC Online from more than one device (for instance a desktop computer, or a smartphone or tablet).
The BBC offers a Scotland Live online stream to provide a more dynamic and up-to-date news offer. It combines short news updates with links to longer-form BBC and external content. The pages are linked from the local news ‘index’ pages, as well as from individual local news stories.

Use of Scotland Live so far is fairly low, although it fluctuates depending on the coverage of individual stories. In March 2015 the BBC updated its online site to a more responsive design. At this point, access to the Scotland Live site became less visible from the main news site, resulting in a drop in audience interaction. In 2015-16 an average of around 60,000 unique browsers used the Scotland Live pages each week. We understand from BBC management that the Scotland Live site is now being cut back to cover only big events.

In responding to our consultation, STV suggested that the BBC was not delivering the online service licence commitment to work in partnership with other providers. As well as the Local Live service, BBC Scotland points out that it offers external links (to newspapers, etc.) on each of its regional websites, and BBC Scotland has the “from other local news sites” section. The BBC has further plans for partnership in local news provision across the UK.

**BBC Scotland is increasingly providing output on social media sites**

A range of social media platforms are now widely used in Scotland, particularly among younger adults. Facebook is by far the largest platform. Several studies also now show that social media is a key source of news for a large minority of all adults and a majority of younger ones.

Use of BBC Scotland’s Facebook pages has grown rapidly throughout 2015, with around 2.8 million using the main BBC Scotland page by end of 2015 and a smaller, but growing number, using BBC Scotland’s news page. BBC Scotland has increased engagement with its main page by publishing more video, encouraging more comment and posting more regularly. BBC Scotland finds Facebook a good way to engage with women in particular.
We note that social media is not covered by the BBC’s regulatory regime, beyond its editorial standards guidelines, and think this merits consideration for the next Charter, as social media has growing importance in how the BBC delivers its mission and public purposes.

2.5.2 Quality and impact

Audiences view BBC local news online as high quality and informative, but not always up to date

Our audience research showed that audiences are, on the whole, positive about BBC Scotland Online News, with 82% agreeing that it is informative – this figure is marginally higher than for radio and television news in Scotland. However, audiences have very high expectations of the quality, relevance and timeliness of BBC Scotland online news, and these expectations are not met.

We asked, you said: Online has become my ‘go-to’ source of news. I can select the areas and stories that interest me and there is usually good depth of coverage and links to external sources [for] more information (Consultation: Male, 45-54)
Users of the website believe that it usually reflects key issues in Scotland, and is fast in reacting to, and reporting on, events. However, a few make a comparison between the speed of Scotland Live and the main website, feeling that the main site is not updated enough.

Our research and consultation showed that there was specific praise for the user-friendly format of the website, which is thought to be clear and easy to navigate. The ability to personalise content was also seen as a benefit.

Audience Council Scotland also praised the ‘steady innovation and experimentation’ of BBC Scotland online. However, their audience engagement found that some users thought the online journalism to be somewhat ‘thin’ on a regular basis, compared with what was offered by the BBC during the Scottish referendum.

In terms of relevance, some users thought that BBC Scotland News online suffers from the same issue as TV and radio, in that its coverage of the more northerly and rural parts of Scotland is insufficient. However, others felt that news items from some of these places did not feel like Scottish national news. Overall, there was praise for the service’s delivery of locally relevant news, something that online tends to do better than television.

We asked, you said: On the whole I like it for headlines. I like the fact that it is regionalised and I can choose local news (Consultation: Female, 55-64)
Our research also found that audiences felt news online for Scotland tackles national issues from a Scottish point of view. We would expect BBC Scotland to take full advantage of the space that BBC online allows for deeper analysis, beyond the broadcast media, including telling national and international news stories from the perspective of audiences in Scotland.

People responding to our consultation who were familiar with BBC Scotland on social media were favourable towards it, appreciating how it enabled them to stay up to date. Some also appreciated that it can be entertaining, as well as informative.

We asked, you said: I follow BBC Scotland News on Twitter and find it useful. I have the BBC News app on my iPad and find the Scottish news to be of high quality (Consultation: Male, 45-54)

A few people felt that social media is outside the BBC’s remit and not an appropriate use of the licence fee; whilst others say that they prefer to follow commentary on topical issues from individuals, rather than from companies and corporations. Social media raises some new challenges for the BBC, as it operates within an environment with no impartiality requirements (unlike TV or radio) and demands a high degree or relevance and authenticity.

The BBC has set out plans to make its online offers more relevant to audiences in each nation by, for example, having a nations’ edition for various genres, including news and sport. In addition to this, BBC Scotland is keen to offer more news content online and on social media, particularly to increase its reach to younger people and women.

2.5.3 Value for money

Expenditure on TV news and current affairs has increased slightly since 2011. This is partly due to increased allocations in news to cover the Scottish election in 2011 and the Scottish independence referendum and Commonwealth Games in 2014. The level of spending on news in Scotland is higher than in Wales or Northern Ireland, which is to be expected, given the relative size of the nation.

Online news and current affairs expenditure has also increased a little with a peak in 2014.

Table 4: BBC Scotland spend on TV and online news and current affairs (£m), 2011 to 2016

£ millions

<table>
<thead>
<tr>
<th></th>
<th>2011/12</th>
<th>2012/13</th>
<th>2013/14</th>
<th>2014/15</th>
<th>2015/16</th>
<th>Change 2011/12 to 2015/16</th>
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<td>TV news and current affairs</td>
<td>16.8</td>
<td>15.6</td>
<td>16.4</td>
<td>21.4</td>
<td>18.1</td>
<td>1.3 (8%)</td>
</tr>
<tr>
<td>Online news and current affairs</td>
<td>1.6</td>
<td>1.6</td>
<td>1.7</td>
<td>2.0</td>
<td>1.9</td>
<td>0.3 (19%)</td>
</tr>
</tbody>
</table>

Source: BBC Finance
2.6 Radio nan Gàidheal

The BBC offers services for Gaelic speakers and learners in Scotland: Radio nan Gàidheal, the mixed-genre TV channel BBC ALBA, which is operated in collaboration with MG ALBA, and some online provision.

The BBC coordinates a Gaelic news service across radio, TV and online, with bases in Glasgow, Edinburgh, Inverness and Stornoway, and some presence in Skye, Oban and Uist. Due to resource constraints, there is no Gaelic news provision from Saturday lunchtime until Monday morning.

Since BBC ALBA was launched in 2008, the two services have been seen to contribute to Gaelic culture together, although they may also compete with each other for Gaelic speakers’ time.

Radio nan Gàidheal’s remit is to deliver a comprehensive speech and music service for listeners seeking programmes in Gaelic about the life, culture and affairs of Scotland.

In 2016-17 the station has a service licence budget of £3.8 million.

2.6.1 Reach

Radio nan Gàidheal reaches a very high proportion of its target audience

In 2015, Radio nan Gàidheal had claimed weekly reach of 69% of the Gaelic community, and its listeners consume, on average, 8.3 hours a week of the station. This is a high proportion of the station’s target audience, although the total size of the target audience is small, at 57,375 (1.1% of the Scottish population over 3 years old).58 This means that the station’s reach in absolute terms is low.

Due to a change in measurement in 2015, reach trends over time are hard to track, but look to be broadly stable, with a possible slight decline.

| Table 5: Weekly reach and average time spent listening |
|----------------|--------|--------|--------|--------|--------|
|               | 2011   | 2012   | 2013   | 2014   | 2015   |
| Weekly Reach (%) | 72.6   | 69.5   | 65.4   | 62.1   | 68.9   |
| Weekly Reach (000’s) | 56,200 | 53,800 | 50,600 | 48,000 | 53,300 |
| Listener Hours    | 8.6    | 7.2    | 7.5    | 7.6    | 8.3    |

Source: Leirsinn/TRP in 2015. Note, there was a change of measurement system in 2015, so figures for this year may not be comparable with previous years.

The listenership of Radio nan Gàidheal in an average week during 2015 was evenly split between men and women, with a higher proportion of listeners over 45 tuning in (73%) than those under 45 (62%).

58Source: 2011 census
2.6.2 Quality

Radio nan Gàidheal’s broad range of content is highly distinctive

While there are other local radio stations that broadcast some Gaelic content, Radio nan Gàidheal is the only regular source of Gaelic language news, features, current affairs, religion and sport on the radio.

Radio nan Gàidheal aims to serve the breadth of the Gaelic language community, which ranges from pre-school children to the elderly. Gaelic speakers’ interests are as diverse as those of any other group, so the schedule aims to incorporate all genres of programming – news, current affairs, children’s, factual, arts, drama and comedy, education, religion, music and entertainment.

Listeners generally hold the station in high regard

When we last reviewed the station, Radio nan Gàidheal’s objectives were to maintain reach, listening hours and audience appreciation. To do this, the BBC planned to refresh programming in order to bring in the next generation of listeners, whilst continuing to meet the needs of existing listeners. They aimed to fill the gaps in the weekend schedule when the service switched to Radio Scotland, increase the amount of news on Saturday and introduce news to the Sunday schedule. However, due to budgetary constraints, these have not all been achieved.

In 2015 Radio nan Gàidheal received a high overall audience appreciation score of 8.5 out of 10\(^5\). This is higher than all other nations’ radio stations and has been constant in recent years, as set out in figure 43.

\[\text{Figure 43: General impression score of Radio nan Gàidheal among listeners}\]

![Graph showing general impression scores of various radio stations from 2012 to 2015. Radio nan Gàidheal has the highest scores.]

Source: Leirsinn (Radio nan Gàidheal) / ART (all other stations). NB: Use of two surveys makes comparison less robust.

\(^5\) Source: Leirsinn
These appreciation scores are consistent with findings from our public consultation and audience research. These both indicated that its listeners consider Radio nan Gàidheal to be a very high-quality radio station. However, as our qualitative research shows, the quality of the programming is almost secondary to audience appreciation of the station’s existence. It is also important that listeners know it is widely consumed by most other Gaelic speakers in the Western Isles and across Scotland, as this creates a sense of community.

**We asked, you said:** Excellent – good morning news programmes and debate, other fun lunchtime shows and music, good programmes for children and teens, with easy to understand Gaelic (Consultation: Female, 35-44)

In our consultation and research, listeners praised the station for the breadth of its programming and for covering all aspects of Gaelic culture. We had a significant number of Gaelic organisations that responded with praise for the station’s comprehensive music and speech offer. Audience Council Scotland notes that it goes beyond its remit, by covering UK and international news and broadcasting programmes of general interest to potential listeners.

### 2.6.3 Impact

Radio nan Gàidheal is required to make a contribution to each of the public purposes by meeting commitments set out in the station’s service licence, but it has no minimum conditions regarding the volume of its provision of any genre.

**Radio nan Gàidheal makes an important contribution to citizenship**

Radio nan Gàidheal broadcasts weekday news programmes *Aithris na Maidne* between 7.30 and 9am and *Aithris an Fheasgair* between 5 and 5.30pm.

Our qualitative research showed that audiences praise the accuracy and impartiality of its news, with the news brand of the BBC providing general reassurance. Both of the main news programmes are felt to be high quality, with *Aithris na Maidne* a daily listen for many.

While quality perceptions are generally strong, listeners raised a few specific points where they felt the station’s journalism was limited:

Audience engagement work carried out by Audience Council Scotland found that some listeners queried whether the station’s news was sufficiently different from *Good Morning Scotland* in its agenda. They asked for UK stories to be retold with a greater local perspective.

The station’s commitment to offer political scrutiny was queried by some listeners. And some thought that this role was an uneasy fit with Gaelic culture’s natural good manners.

There was also a call by some listeners, both among the core audience in the Western Isles and in the cities, for more challenging journalism.

In our research, some listeners said that they found it hard to follow complex news stories in the Gaelic language, particularly when new topics are being covered. However, this use of the Gaelic language and the development of new Gaelic vocabulary drew praise from some stakeholders.
We asked, you said: There’s too many press release stories, there’s not enough questioning (Audience Council Scotland Gaelic Engagement Event, Stornoway)

Whatever the issue, they seem to be able to find a Gaelic speaking expert in it somewhere in the world (Qualitative Research: Stornoway, 30+)

We conclude that Radio nan Gàidheal clearly covers a wide range of topical discussion and current affairs in its output, and does so on a limited budget.

Listeners recognise that Radio nan Gàidheal makes a very important contribution to Gaelic cultural heritage through its music and sports

The majority of Radio nan Gàidheal’s output is music, with around 55 hours a week of programming. The station uses music to support Gaelic culture, particularly with its offer of traditional music and song, which make up over half of its music output, alongside a broad range of other music. The station plays some new music and a very small amount (due to budget constraints) of live music. Rapal, its new music show for younger audiences, was praised by listeners in our research as a way of attracting new listeners.

Listeners are very satisfied by the station’s music offer, particularly traditional Gaelic music, and they feel that the station covers this part of Gaelic culture very effectively. Coverage of Gaelic arts beyond music is felt to be more limited by listeners.

Sport is another significant strength of Radio nan Gàidheal. It offers some linked coverage with Radio Scotland on Saturday afternoons and some dedicated sports programmes. Across the year, it broadcasts 52 hours of sport, including rugby, football, tennis, shinty and motor racing; its output includes some live football and shinty coverage.

The station manages to find Gaelic sports presenters, and this, together with the breadth of coverage, is appreciated. Some thought its football coverage was of an even higher standard than that on other Scottish stations.

We asked, you said: [Spòrs na Seachdain is] great – it’s different from the sports coverage on Radio Scotland (Audience Council Scotland Gaelic engagement event, Stornoway)

We also heard from some non-Gaelic speakers who enjoy listening to the station. Some mention music programmes as a particular highlight, whereas others appreciate the Gaelic language learning and education services.

We asked, you said: [Although I don’t listen to it, I think it is a hugely important radio station to encourage the Gaelic language after decades of neglect and lack of encouragement of the language. This is exactly the sort of thing that the BBC licence fee should be used for. If the BBC does not do it, then I doubt if anybody else will (Consultation: Female, 55-64)
Radio nan Gàidheal is a valued learning resource

Many listeners in our consultation and research mentioned using Radio nan Gàidheal as a learning resource. There is a consensus among listeners that the station plays an important educational and cultural role by promoting the Gaelic language. The station’s factual programmes are appreciated for teaching listeners about Gaelic culture and history, and its language learning programmes, particularly Beag air Bheag, are widely known.

For people who are the only Gaelic speaker in their household, Radio nan Gàidheal is an important way of maintaining their language skills.

We asked, you said: I don’t have Gaelic at home, so it’s great to listen to it, because I actually think I need to hear more words and things, just like spoken. That’s how I would learn, I would be hearing a phrase and then I would use it (Qualitative Research: Inverness, 20-25)

Bòrd na Gàidhlig, the Scottish government agency whose aim is to promote and improve the status of the language, acknowledges that Radio nan Gàidheal is an important resource for learners, but suggests that the station could do more to encourage young people to listen.

A weekly children’s programme, Aileag, provides informal support for Gaelic formal education. The programme broadcasts at 2pm during school hours (as well as being available on-demand), but teachers consider it too long to use in school lessons.

We conclude that Radio nan Gàidheal has a strong role in supporting Gaelic language learning, although it could potentially do more for younger learners. BBC Scotland might also do more to promote the most accessible parts of the station to new listeners.

Radio nan Gàidheal is extremely effective in serving the Gaelic community

Radio nan Gàidheal is committed by its service licence to reflect the diverse communities, cultures and faiths of Scotland. In practice, this means serving the breadth of the Gaelic community.

The station sometimes has an almost local community role in terms of its coverage of birthdays, marriages and special occasions through its music request shows and death notices within its news programmes, as the core of the Gaelic community is small, with people known to each other. However, beyond that, we found that the station was strong at making listeners feel part of one large community. For example, Gaelic-speaking listeners who live in Glasgow were very clear about how much they valued the link Radio nan Gàidheal provided to the Gaelic community in the Western Isles. The use of outside broadcasts plays an important role in involving the Gaelic community in the station’s output, and this is becoming easier through portable broadcast technology.

We asked, you said: Radio nan Gàidheal allows me to feel part of the Gàidhlig community even though I don’t live in the Gàidhealtachd (Qualitative Research: Glasgow, 30+)

The station faces a challenge in accessing Gaelic-speaking contributors across the range of its programmes, but listeners appreciate hearing a range of Gaelic voices from across Scotland and beyond on the station.
Listeners recognise that the station mainly represents the breadth of Gaelic culture, but not of all other communities, cultures and faiths of Scotland. While some younger listeners feel that the station could have a broader outlook, which would make it more relevant to their lives.

**The station is beginning to use social media to deliver its remit**

Digital media has become a more important part of the BBC’s Gaelic offer in the last few years, and audiences now have some expectations here. The station now recognises that digital delivery and social media are vital.

The station uses Twitter and Facebook for some programmes and presenters, and aims to increase its level of social media activity as this kind of engagement with the station grows. We found that younger audience members appreciate this.

### 2.6.4 Value for money

The BBC spent £3.9m on Radio nan Gàidheal in 2015-16. When the allocation of the BBC’s distribution and infrastructure and support costs are added, the total cost of BBC Radio nan Gàidheal in 2015-16 was £6.2m. Content costs comprise direct costs incurred by the station locally and allocations of the BBC’s central costs, including music rights payments and some central news and sports costs.

As shown in table 6, since 2011-12, BBC Radio nan Gàidheal’s programme-making spend has remained constant in nominal terms. Both central content-making related and centrally allocated costs have also changed little over the period, so that overall costs for the station have reduced by 1.6%.

#### Table 6: Breakdown of Radio nan Gàidheal spend (£m), 2011-12 to 2015-16

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<td>6.2</td>
<td>6.0</td>
<td>6.2</td>
<td>0.2</td>
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</table>

Source: BBC Annual Report and Accounts and BBC Finance.

Note some small inconsistencies in totals and percentages are due to data rounding.

(1) Programme costs include all direct costs of making programmes on BBC Radio nan Gàidheal, including production and staff costs plus any associated centrally incurred costs of studios, training etc. Rights
payments made to music artists etc., which are managed within the TV division and allocated to BBC Radio nan Gàidheal using a standard formula.

In 2015-16 BBC Radio nan Gàidheal’s cost per listener hour was 16.3 pence.60 This has increased from 12.9 pence in 2011-12. Due to its small target audience, it is higher than Radio Scotland or any other English-language nations’ radio station, but lower than Radio Cymru, which has a cost per listener hour of 22.3p.

While the majority of feedback we received in this review was supportive of the BBC’s Gaelic language investment, some non-Gaelic speakers object to it as poor value for money, given the small number of speakers.

2.7 BBC ALBA

BBC ALBA’s remit is to offer a mix of genres, including television news and weather. It should aim to serve Gaelic speakers, those learning the language, those that might wish to learn, and those interested in the language and culture. It should aim to reflect and support Gaelic culture, identity and heritage.

BBC ALBA is funded jointly by the BBC and by MG ALBA. The BBC’s contribution to BBC ALBA’s budget was £5.7 million in 2016-17.

2.7.1 Reach

**BBC ALBA reaches a very high proportion of Gaelic speakers and many other viewers too**

BBC ALBA has claimed reach of 75% of Gaelic speakers in Scotland. This has been broadly steady in recent years, taking a change in measurement in 2015 into account.61 Beyond Gaelic speakers, it attracts many other viewers, giving it a total reach in Scotland of 15% of adults in 2015. This has fallen from a high of 18% in 2013.62

Reach to both audiences exceeds the targets set by the Trust for the service when it became available on Freeview in 2011.63 We also note that awareness of the service is very high, at 82% of adults in Scotland in 2015. Among the wider Scottish audience, the most popular genres of programming are football, traditional music and factual/documentaries. These appear to bring a broad audience to the channel. Reach is highest among men, older audiences and, as expected, those living in the Highlands and Islands.

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60 Source: BBC Annual Report and Accounts
61 Source: TRP (2015)
62 Source: TNS SOS
63 Source: These targets were that it should reach 70% of Gaelic speakers and 10% of total audiences in Scotland
Figures 44 and 45: BBC ALBA reach trends – Scotland and the Gaelic community

The average length of time viewing the channel was 4 hours 43 minutes a week for Gaelic speakers in 2015, which fell from 5 hours 7 minutes in 2011. Among the Scotland-wide audience, average time spent viewing increased from 1 hour 45 minutes in 2011 to 1 hour 59 minutes in 2015.

2.7.2 Quality

**BBC ALBA is highly appreciated among Gaelic speakers**

BBC ALBA has a high approval level among Gaelic speakers: 8 out of 10 in 2015. Among all viewers across Scotland, approval is steady, at 7 out of 10.
These high scores are supported by our consultation and qualitative research, in which its viewers praised BBC ALBA enthusiastically. For a small budget, the channel is felt to offer a good range of programmes that are largely of a high quality and appeal to a broad range of interests. Non-Gaelic speakers particularly enjoy the sport, and also some documentaries and cultural programming.

We asked, you said: This has been a transformative experience for my whole family of four generations. Great local news. Great music. Great documentaries. Great drama. Great Sports coverage. Even the weather reports are spell-binding. This is our TV channel (Consultation: Anon)

BBC management and MG ALBA are concerned that the channel’s high level of repeats threatens the quality of the service

BBC Scotland believes that BBC ALBA’s reach is beginning to fall due to the high level of repeat programming it offers. Our research showed some awareness of this among viewers, although it was not a major concern to them.

BBC ALBA broadcasts seven hours of output per day, which includes around 1.7 hours of new programming, including the daily news. Around 80% of the output is, therefore, repeat programming. This level of repeats is normal among English language digital channels, but creates a challenge for a channel which is expected to offer a wide range of genres for a broad range of viewers in the Gaelic language.

However, the channel is beginning to run out of the rights to some repeat programming, and this is affecting its selection of programming. It is also clear that the learning programming in particular is now looking dated. We address the overall challenge of funding the BBC’s indigenous language TV and radio services in the section on value for money, below. It is clear that BBC ALBA will have to consider a long-term programme strategy on the basis of available funding, once this is decided.

2.7.3 Impact

Weekday news output is well regarded by the core Gaelic audience

Our research showed that the main news programme on BBC ALBA, An Là, is felt to be accurate and impartial. An Là is aimed at a Gaelic-speaking audience and is the most watched programme by them. It feels ‘local’ to its viewers, and its mostly Gaelic contributors are appreciated, even though some viewers struggle to understand all of it. We found a similar issue with Radio nan Gàidheal.

Some viewers claim that they do not watch An Là to find out the news, as they use more rapidly updated news sources. This is now a common issue for TV news bulletins, particularly among younger adults. However, Audience Council Scotland suggests that the lack of news coverage for most of the weekend, due to resourcing constraints, is a problem for the core audience.

Audiences also appreciate the channel offering live discussions: the referendum debates in 2014 were particularly appreciated by viewers for covering the independence issue from a Gaelic perspective.
Gaelic audiences highly praise BBC ALBA’s current affairs coverage

BBC ALBA offers a weekly current affairs programme covering European issues called Eòrpa. Our research and consultation showed that Gaelic viewers were proud of this programme, as it is unique to BBC ALBA and shows an outward-looking approach.

We asked, you said: Although I’m not a native speaker, I enjoy ALBA for many of its news and current affairs programmes, such as Eòrpa – much better in content and balance than BBC Scotland radio or TV’ (Consultation: Anon)

Children’s output on BBC ALBA is praised, but viewers see gaps in provision for teens

Children’s programming on BBC ALBA is aimed solely at the core Gaelic audience and has no English subtitles. Our research showed that children’s programming was seen as particularly important for helping children develop their language, as many do not live in Gaelic-speaking households.

However, viewers pointed out that ALBA has limited programming for teenagers, and MG ALBA has suggested that, in the absence of a developed broadcast proposition for this age group, the channel should focus on digital means to build a relationship with teenagers and younger adults.

Viewers feel that the learning programming looks dated

BBC ALBA carries language learning programmes such as Speaking Our Language, but the service in its entirety is undoubtedly seen as a learning resource by its Gaelic-speaking and learning audience. Responding to our consultation, Bòrd na Gàidhlig notes BBC ALBA’s key role in developing Gaelic literacy skills, with its own research showing that television was the most commonly used resource for learners to consolidate or improve their Gaelic language skills.

However, the main criticism of the learning content on BBC ALBA by our respondents is that it is dated. Audiences particularly said this of Speaking our Language, the Gaelic language learning programme which was originally broadcast in the mid-1990s. Our research respondents were put off from learning rather than encouraged by this programme.

The BBC has worked in partnership with MG ALBA and others to develop a Gaelic learning website, Learn Gaelic. Use of this has grown, and there is some positive audience feedback on it. Beyond BBC ALBA itself, this is a positive example of the benefits of partnership between the BBC, MG ALBA and other agencies and bodies.

We suggest that BBC ALBA and BBC nan Gàidheal review their approach to learning, with particular focus on younger audiences, and consider what refreshment there can be to the schedule with limited additional resources.

There are strong and mixed views on BBC ALBA’s use of subtitling and English language

BBC ALBA’s service licence commits it to the provision of output in the Gaelic language, but does not specify that all programming must be in Gaelic. The remit states that the service has a role to serve Gaelic speakers, as well as those learning the language, those that might wish to learn, and those interested in the language and culture. The channel includes some English in its programming and English subtitles aimed at non-Gaelic speakers. The amount of English present in any particular programme depends on the target audience, programme genre, scheduling, talent and programme contributors. For example, the daily news is largely aimed at fluent speakers. Subtitles are used for pre-recorded programmes aimed at adults, for some live events and as short text summaries for live news.
There is an ongoing debate within the Gaelic community between those who believe that BBC ALBA has too much English language and English sub-titling and those who feel it is important in making the channel (and language) accessible to a wider audience. We had a strong response from both sides of the debate to our public consultation.

**We asked, you said:** I think BBC ALBA fulfils its remit very well. However, there does seem to be a lot of programmes which are just English programmes with a Gaelic overlay (Consultation: Male, 45-54)

As a Gaelic learner I am happy with the output. I wonder if I would be so happy if I were fluent, but I am sure that the decision to favour learners is the right one in view of the parlous state of the language (Consultation: Female 65-74)

There is a linked debate surrounding the use of automatic English subtitles on the channel. The BBC feels they are useful to make ALBA accessible to its large audience of non-Gaelic speakers, particularly those in households with a Gaelic speaker.

In line with its service licence, we believe that the use of English alongside Gaelic on BBC ALBA is important in enabling the channel to portray Gaelic culture to a broad audience, and to help Gaelic language learners. While, ideally, subtitles would be optional, we understand this is not possible for budgetary reasons, so we think the current approach should be maintained.

**BBC ALBA is widely seen to strengthen Gaelic culture and heritage**

Viewers in our research praise BBC ALBA for its role in reflecting and strengthening Gaelic culture and heritage. Although there was felt to be a bias towards a more historical view of Gaelic culture, *Gach Creutair Beo* was given as an example of how modern Gaelic life is reflected on the channel, as were some contemporary stories on *Trusadh*.

**We asked, you said:** I watch very little television at all – however, on occasion I very much enjoy watching the programmes about Gaelic cultural heritage (including music) on BBC ALBA, which are excellent (Consultation: Male, 65-74)

**Music on BBC ALBA is core to its contribution to Gaelic culture**

Viewers appreciate ALBA’s music coverage and feel it covers a broad range of both Gaelic and other Scottish musical genres. ALBA’s coverage of cultural events, such as the Mod, Celtic Connections and the Tiree Music Festival, were considered to be high quality. In our research, some younger viewers said they would like more coverage of new music, and some viewers felt that ALBA’s music programming is stronger than its arts output.

**We asked, you said:** I think that, because of the musical talents on the island here, there could be a lot more programmes with young talent. It provides coverage but I am not convinced it supports it…you need programming that supports the up and comings (Qualitative Research: Stornoway, 30 plus)
BBC ALBA has offered some new drama, which has been highly popular and appreciated

In its early years, BBC ALBA’s drama and comedy were limited to archive broadcasts. However, in 2015, BBC ALBA offered 15 hours of new comedy and drama alongside 124 hours of repeats. A partnership between MG ALBA, Creative Scotland and an independent producer, Young Films, allowed a new Gaelic TV drama *Bannan* to be made. This programme achieved very high reach among Gaelic speakers and did well among young adults who are less regular viewers of ALBA. Our research reflected the high level of appreciation for the programme.

**Viewers praise ALBA’s sports coverage**

Sport has brought a larger audience of non-Gaelic speakers to BBC ALBA, particularly as it has been able to acquire the rights to show top Scottish league and club football. Football made up the majority (127 hours) of the channel’s total of 217 hours of sport in 2015/16. ALBA also shows rugby, shinty and other sports, such as orienteering.

Many viewers responding to our consultation and in our research praised the quality of BBC ALBA’s sports coverage and commentary, as well as its range of sports, events and teams. Many said that the station offers uniquely well-balanced coverage.

**We asked, you said:** *The football output on BBC ALBA is excellent...and while I do not understand the commentary, the half time interviews and reflections are always interesting to hear (Consultation: Male, 25-34)*

**BBC ALBA is seen to make a contribution to the creative economy of the Western Isles**

PACT\(^{64}\), in their response to our consultation, urged BBC ALBA to play a more positive role in stimulating creativity and cultural excellence by helping to create a more sustainable production sector in Scotland.

MG ALBA, in its submission to the BBC Trust’s Charter Review consultation, also called for the BBC to do more to facilitate economic growth and to stimulate the creative industries in the devolved nations.

There is now some research\(^{65}\) to show that Gaelic can be seen as making a contribution to the economy of the Highlands and Islands, directly, via the BBC and MG ALBA’s activities, and more broadly, by supporting Gaelic as an economic asset in Scotland.

**BBC ALBA is increasing its digital engagement with audiences**

As with Radio nan Gàidheal, BBC ALBA has been steadily increasing the amount of digital engagement with its audience In 2014-15, the *Learn Gaelic* website increased its traffic by 104% and Gaelic short film competition, *FilmG* by 679%\(^{66}\). Although these increases are from a low base, it does highlight an emerging interest in accessing Gaelic culture and information through digital platforms, and suggests the impact of the BBC’s involvement in these projects.

There were on average, 104,000 weekly UK requests to view of BBC iPlayer for BBC ALBA in 2015, with the trend for accessing iPlayer recordings on mobile devices increasing. @BBCALBA is the leading Gaelic Twitter account. However, sporting updates in English rather than Gaelic tweets drive engagement with the service. Whilst this is helping to build the BBC ALBA brand and presence on social media, digital communications and social media are likely to have an

\(^{64}\) PACT is the trade association representing the commercial interests of UK independent television, film, digital, children’s and animation media companies

\(^{65}\) Source: MG ALBA research and Highlands and Islands Enterprise research

\(^{66}\) Source: MG ALBA Annual Report 2014/15
increasing role in supporting and growing the Gaelic community. BBC ALBA should have a clear strategy on how best to promote Gaelic in this way.

### 2.7.4 Value for money

This section covers the BBC’s licence fee funding of BBC ALBA, but not the further £10m each year that is provided by the BBC’s partner, MG ALBA, from the Scottish and UK governments.

The BBC’s spending on programme making was £5.5m in 2015/16. When its allocation of distribution and support costs are added, its total cost from the BBC was £7.8m in 2015/16. The BBC’s spending on BBC ALBA has been relatively stable, apart from in 2014/15 when more investment was made in news and current affairs in order to provide coverage of the Scottish independence referendum and the Glasgow Commonwealth Games.

**Figure 7: BBC ALBA expenditure solely from BBC licence fee funding (£m), 2011-12 to 2015-16**

<table>
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</thead>
<tbody>
<tr>
<td>Costs incurred in making programmes (1)</td>
<td>5.0</td>
<td>4.9</td>
<td>5.1</td>
<td>5.9</td>
<td>5.4</td>
<td>0.4</td>
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<td></td>
<td>5.0</td>
<td>4.9</td>
<td>5.1</td>
<td>5.9</td>
<td>5.4</td>
<td>0.4</td>
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<tr>
<td>Service licence budget</td>
<td>4.7</td>
<td>4.8</td>
<td>5.0</td>
<td>5.7</td>
<td>5.7</td>
<td>1.0</td>
</tr>
<tr>
<td>Actual spend vs SL budget</td>
<td>6.4%</td>
<td>2.1%</td>
<td>2.0%</td>
<td>3.5%</td>
<td>-5.3%</td>
<td></td>
</tr>
<tr>
<td>Distribution costs</td>
<td>1.7</td>
<td>1.5</td>
<td>1.3</td>
<td>1.4</td>
<td>0.9</td>
<td>-0.8</td>
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<tr>
<td>Infrastructure/support costs</td>
<td>1.3</td>
<td>1.4</td>
<td>1.5</td>
<td>1.6</td>
<td>1.4</td>
<td>0.1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>8.0</td>
<td>7.7</td>
<td>7.9</td>
<td>8.9</td>
<td>7.7</td>
<td>-0.3</td>
</tr>
</tbody>
</table>

Source: BBC Finance

(1) Programme costs include all direct costs of making programmes, including production and staff costs, plus any associated centrally incurred costs of studios, training, etc. In addition, the station incurs rights payments made to music artists etc., which are managed within the TV division and allocated to BBC ALBA using a standard formula. The station also incurs a proportion of the cost of research and reportage of news from a centralised pooled resource, which is not programme specific. These latter costs total less than £400,000 across the five years noted above, but do not register to one decimal place for reporting in individual years.

**There are some polarised views on the value for money of BBC ALBA**

In 2015/16, BBC ALBA had a cost per viewer hour of 7.8p. This is similar to the levels for BBC One, Two and Four, and reflects both the popularity of BBC ALBA and its low cost.
MG ALBA has stated publicly that the BBC should invest more in BBC ALBA, as it sees the current level of new programming on the channel as unsustainable and the lack of news provision at weekends as unacceptable.

Most Gaelic speakers agree strongly that BBC ALBA is a worthwhile use of the licence fee, with an agreement score of 9.3 out of 10 in our quantitative research. However, when this is asked of all audiences in Scotland, the score is lower, at 6.3. Although this shows broad support of BBC ALBA by non-Gaelic speakers, some Scots strongly oppose the licence fee being used to fund a service that is only accessible for a small number of people.

When the BBC’s future funding is finalised as part of the Charter review process, we believe that it will be important for the BBC to reach agreement with MG ALBA on the future funding and scope of BBC ALBA.
3. Wales

3.1 Context

Wales has a population of 3.1 million, representing 4.8% of the UK population. Its demographic profile, in terms of gender and socio-economic groups, reflects that of the UK. However, Wales is less ethnically diverse than the UK, with non-white (including mixed) ethnic groups accounting for 4% of the population, compared with around 13% for the UK overall. This figure tends to be higher in urban areas and reaches 16% in Cardiff.

In some parts of the west and north of Wales, Welsh is spoken by a majority of the population. The 2011 census found that 19% of the Welsh population was proficient in speaking Welsh and that 15% can speak, read and write the language. The census showed that there has been a small drop in the total number of Welsh speakers, along with an increase in the number of children who speak Welsh, due to the growth of Welsh-medium primary education.

Welsh speakers are more likely than the overall population to be ABC1 (61% vs. 48%) and to live in rural areas (33% vs. 22%). In terms of geography, Welsh has become a minority language in two historic heartlands, Carmarthenshire and Ceredigion, and only in Gwynedd and Anglesey do over half the population now speak Welsh.

The changing demographics of the Welsh-speaking population raise a challenge for the BBC’s Welsh language services (as well as for Welsh broadcaster S4C). With a decrease in the number of households where all members speak Welsh, there is less demand for Welsh language TV and radio services, which aim for shared consumption. In addition to this, and perhaps more pertinent, there are differing expectations amongst older people and the mainly younger people who may have learnt Welsh recently and have different needs.

Demand for news about Wales is strong, with 80% of adults either very interested or quite interested in this area, according to research by Ofcom. Television is, by some margin, the most popular way of accessing news specifically about Wales, and is used by 66% of adults according to the same research; this compares with radio at 23%, social media at 21%, and websites and apps at 7%.

Our quantitative research found that television was also the most commonly used BBC source for Welsh news and current affairs, with claimed use by 83% of adults, some way ahead of BBC online (36%), Radio Wales (27%) and Radio Cymru (12%).

Nevertheless, radio listening holds up well and tends, on average, to be higher than the other nations: 94.5% of the adult population listen to the radio every week, compared with a UK average of 89%; and the average listener tunes in for over 22 hours a week.

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67 Source: 2011 census
68 Education wholly delivered through the medium of the Welsh language, as distinct from teaching the Welsh language as an academic subject.
70 Source: Ofcom (2015), News Consumption in the UK
Wales also has the highest share of listening to BBC network radio services (and, in particular, to Radio 2) compared with the other UK nations: at 49%, it is more than double the figure for Northern Ireland (24%). BBC Radio Wales and BBC Radio Cymru accounted for a 9% share of radio listening in Wales in 2015.\(^{72}\)

The BBC occupies a particularly important position in Wales, as there is a low level of coverage of Welsh issues and events by commercial television, radio or newspapers, other than S4C and ITV Wales. A lack of media plurality for Welsh news means that audiences are dependent on the BBC to a greater extent than elsewhere in the UK and, perhaps because of this, they tend to consume a greater volume of its services. As Wales has become more distinct in policy terms, the role of the BBC in informing citizens about important local issues has grown.

Welsh people have a generally positive perception of the BBC and are more favourable towards it on most measures than people in other parts of the UK.\(^{73}\) This may be due partly to strong support for public services in Wales, but it is also the case that BBC services perform well and are highly valued in Wales. Our quantitative research found that audiences in Wales consider that they are, on the whole, well served by the BBC, with just over 70% agreeing with this view. Nevertheless, the BBC’s TV and radio services face the same online shift in consumption patterns and their reach is declining, as in other parts of the UK.

BBC Wales provides television, radio and online content for audiences in Wales. We have assessed its two national radio stations, Radio Wales and Radio Cymru, and its news and current affairs output across television and online, including major strands Wales Today, the Wales Report, Week in Week Out and Sunday Politics.

This review does not cover other local (opt-out) programming produced for BBC One and BBC Two, the BBC’s network news provision, or BBC programmes produced for S4C.

### 3.2 Radio Wales

Radio Wales’ remit is to be an English language, speech-led service for listeners seeking programmes about the life, culture and affairs of Wales. Programmes should focus on local and national concerns but also address matters of UK and international significance.

In 2016-17, the station had a budget of £14m.

#### 3.2.1 Reach

While BBC radio’s reach is high in Wales, it has declined in recent years

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\(^{72}\) Source: RAJAR, all adults (2015)

\(^{73}\) Source: ICM Purpose remit Survey research for BBC Trust, 2015
BBC radio is popular in Wales: more adults listen each week than in England, Scotland or Northern Ireland. Weekly reach of BBC radio was 73% in 2015, considerably above the UK average of 65%. This high overall reach is mainly based on the strong performance of Radio 2, and Radio 1.  

Radio Wales reaches 15.7% of adult listeners each week in Wales. Reach has fallen gradually in recent years – from 18.4% in 2011. Despite strong growth for Radio 2 during this period, the total reach of BBC radio in Wales fell from 75% in 2011, with falls for both network and nations radio.

**Table 46: Trends in reach of BBC radio in Wales**

![Graph showing trends in reach of BBC radio in Wales]

Radio Wales’ reach is lower than either Radio Scotland or Radio Ulster/Foyle and this may be partly due to its lower FM coverage. While this has grown from 68% in 2011, it remains at 81% (and only 61% on stereo FM) - a much lower level than either Radio Scotland (98.5%) or Radio Ulster (98%)77. Lower FM coverage can create gaps in the signal for listeners, particularly when they are travelling. Table 8 shows how listening to Radio Wales breaks down by platform.

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74 Source: RAJAR, all adults
75 Source: RAJAR, all adults
76 Source: BBC Wales from RAJAR
77 Radio Foyle has FM coverage of 9% of households
While Radio Wales does not target listeners by age, it is undeniably the case that it attracts an older audience – the mean age of listeners is 56 compared with 45 for the typical radio listener. Those aged over 65 account for almost half of the audience, and younger adults, aged 15-44, make up just under a quarter of listeners (figure 47). Radio Wales’ audience is also skewed slightly towards men (54% of the listenership, compared to 49% of the population) and to C2DEs (54% of listeners, compared to 49% of the population).\(^{78}\)

Radio Wales brings some unique reach to the BBC radio portfolio: 17% of its listeners do not listen to any other BBC radio service. Unique reach has fallen since 2011, when it was around a third of listeners, and is now lower than both Radio Ulster/Foyle (just under 50%) and Radio Scotland (29%), but it is still important given the value of broadening the reach of listeners the BBC portfolio.\(^{79}\)

### Table 8: Radio Wales’ listening by platform: reach and hours spent

<table>
<thead>
<tr>
<th>Platform</th>
<th>RW reach: % of population</th>
<th>% of total RW hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>FM</td>
<td>71</td>
<td>61</td>
</tr>
<tr>
<td>AM</td>
<td>10*</td>
<td>13</td>
</tr>
<tr>
<td>DAB</td>
<td>23</td>
<td>18</td>
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<tr>
<td>DTV</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Online</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: RAJAR, all adults in Wales. * NB. Of those who listen on AM, the majority only listen in this way

The decline in Radio Wales’ reach is not evenly distributed among different demographic groups. Between 2011 and 2015, reach grew by 50% among listeners aged 15-34 (albeit from a low base), but fell among larger groups in the audience, with a decline of 23% among those aged 35-54 and 20% among those aged over 55.

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\(^{78}\) Source: RAJAR, all adults (2015)

\(^{79}\) Source: RAJAR, all adults (2015)
Radio Wales’ listeners are loyal: average listening is eight hours and 10 minutes a week. This is higher than Radio Scotland, but lower than Radio Ulster/Foyle and Radio Cymru.

But the average hours of listening is under pressure and has fallen by 24% since 2011. The fall is most pronounced among those aged over 55, female listeners and C2DE groups, all of whom used to have the highest levels of listening. Against these declines, average listening has increased among younger adults. While this has balanced out the station’s performance a little, older age groups are still, by quite some margin, the most loyal listeners.
These changes are slightly at odds with general trends in radio listening, whereby average listening hours are falling among younger adults. For this reason, we think they may be linked to changes made by the station since 2011 (such as new sport and comedy, which appeal to younger people), as well as to the growing popularity of Radio 2 in Wales, which is most popular among those aged 35 and over.

While Radio Wales appears to be growing slightly in popularity among younger listeners, research undertaken by the BBC suggests that it is still seen primarily by Welsh audiences as a station for older people. Nevertheless, demand for news about Wales is strong. As a speech based service with a focus on news and national affairs, this is an area in which Radio Wales can serve well. But its role as a major news source is challenging: only 12% of adults in Wales nominate radio as their single most important news source, some way behind television (53%) and online (23%). This is similar to other UK nations.

While a general shift to online platforms may account for at least part of Radio Wales’ challenge in reaching listeners, other factors are at work. BBC Wales undertook research to better understand what listeners want from radio at breakfast time. They found that, while news and current affairs are important, music is also a driver of listening, particularly for younger audiences.

Of course, there are many music-led stations (including BBC Radio 2) for listeners, and the addition of music is not the only option available to the station. We note that BBC local radio is evolving its all-speech programming to make it more entertaining without losing the focus on

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Source: Ofcom (2015), News Consumption in the UK
news and topical information. BBC Wales will have to consider what editorial approach will enable it to continue to deliver its public purposes to a broad audience.

The reach of Radio Wales may also be affected by its level of awareness: the BBC’s tracking survey suggests that only 54% of adults in Wales are aware of Radio Wales, and our research suggested that many existing listeners were not aware of the range of its programming outside their normal listening hours. While we do not think that light listeners to Radio Wales, or those who do not listen at all, will necessarily change their listening habits radically, there may be some opportunities to raise awareness of the station and to encourage more live or on-demand listening.

3.2.2 Quality

Listeners consider that Radio Wales is a high-quality service

Radio Wales is considered by listeners to be of high quality: its audience appreciation score is 7.9, which compares well with the other nations’ radio stations, although it has dropped a little in recent years, from 8.2 in 2012.

Our quantitative research found that over 60% of listeners have a favourable overall impression of Radio Wales, and 19% have an extremely favourable impression. Listeners praise the station across a range of measures: the vast majority agree that its output is informative (88%), high quality (84%), entertaining (83%) and distinctive (73%).

3.2.3 Impact

Radio Wales makes a strong contribution to the public purposes

We measure impact by considering the contribution made by a service to the public purposes, as set out in its service licence. Radio Wales is required to promote the public purposes and to make a particularly strong contribution to sustaining citizenship and civil society. It is also required to reflect the UK, its nations, regions and communities.

Following our review in 2011, BBC Wales embarked on a strategy to strengthen its portrayal of contemporary Wales, with a greater commitment to strong journalism, together with cultural and sports content within a schedule that focused on distinctive, speech-led content.

Our quantitative research suggested that news is still the most popular genre, with discussion, music and sports programming attracting similar, but lower, levels of listening, due mostly to their scheduling outside the main listening peaks. A range of other genres, including comedy, documentaries, drama and arts all attract niche audiences (figure 50).

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81 This compares with 69% in Northern Ireland for Radio Ulster/Foyle and only 33% in Scotland for Radio Scotland
**Sustaining citizenship and civil society**

Radio Wales is expected to make a very important contribution to this public purpose, with at least 24 hours of news and current affairs output each week. In 2015, it substantially exceeded this commitment, with 53 hours of output. The level has risen in recent years, from 43 hours in 2011/12, but a schedule change in February 2016 has now reduced the annual average to around 40 hours a week. As the output of news and current affairs is set to remain well above the service licence condition, however, we will amend the condition to 32 hours a week.

The station makes an important contribution to the citizenship purpose, and is particularly valued for its high-quality news output and coverage of important social issues. We asked listeners about news provision on Radio Wales and their feedback was very positive across a range of measures. The station delivers its main commitments in line with audience expectations, generating only minimal performance gaps. Our quantitative research found that, in two areas in particular, providing high-quality news and giving listeners a better understanding of news and topical issues in Wales, performance is especially strong.
Radio Wales’ daily news and discussion programmes include news bulletins and *Good Morning Wales*, *Jason Mohammad*, *Eye on Wales*, *Wales at Work* and *Country Focus*. The station aims to tackle big news issues with a Welsh focus and, overall, audiences consider it does this very well: 89% agree that the station provides high-quality news; 86% consider that it gives them a better understanding of news and topical issues, and 83% believe it has the right balance of serious and lighter news stories. These positive perceptions were supported by listeners in our qualitative research.

**We asked, you said:** *It covers a nice span, you know – it covers Wales nicely, and it draws out the issues that affect the Welsh people in the national news’* *(Qualitative Research: Swansea, 30-49)*

Radio Wales is also valued for its coverage of UK and international issues: 80% of listeners consider that the station gives them a better understanding of news and topical issues in the UK and 78% agree that it helps them to understand what is happening in the wider world. The station meets most audience expectations in these areas.

Stakeholders recognise the vital role played by both Radio Cymru and Radio Wales in reflecting life in contemporary Wales and are keen to underline the importance of provision in this area, given a general lack of media plurality. The station is also valued for its coverage of devolved issues.

**We asked, you said:** *You hear quite a bit more about the Welsh Assembly and the laws they are talking about, [which] you don’t hear on other stations – they seem to be Parliament based* *(Qualitative Research: Swansea, 30-49)*

Because of this, there is a general sense among many listeners that the station occupies a unique position in the broadcasting landscape:
In particular, listeners in our qualitative research felt that a Welsh focus, especially in relation to news and sport coverage, set the station apart. The ability to be objective and reflect a wide range of views was seen as a particular strength.

Radio Wales is also valued for its strong emphasis on audience participation. Generally, listeners are satisfied that it offers the right amount of engagement. In our quantitative research, some 70% feel the current level is just right, 16% think there is not enough listener participation, and 6% feel there is too much.

**Representing nations, regions and communities**

Radio Wales is expected to make an important contribution to this public purpose, with output that reflects the diverse communities, cultures and faiths in Wales. It should provide comprehensive coverage of Welsh sport and use outside broadcasts to cover events, ceremonies and anniversaries of national significance.

Radio Wales broadcasts around 55 live shows from around the nation throughout the year, which helps to strengthen its connection with listeners. It also offers wide-ranging sports coverage, which accounts for a greater proportion of output since our last review and includes football, rugby, cricket, track and field events, golf, boxing, cycling, tennis and snooker.

In our qualitative research, we found that the ‘Welshness’ of the station is a strong pull for many listeners, who see it as providing unique support to Welsh life and culture. For listeners with a strong interest in devolved issues, it helped them to ‘feel more Welsh’, and there was general agreement among listeners that its output was grounded in Welsh affairs. For some listeners, the constant focus on Wales was limiting, but, overall, it is clear to us that the main value and distinctiveness of Radio Wales is located in this characteristic.

This point was picked up by the Welsh Government: its response to the UK Government’s public consultation on the BBC Charter, noted the importance of both Radio Wales and Radio Cymru in reflecting as wide as possible a picture of life in Wales.

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82 In 2015, it broadcast 22 live shows in south Wales, three in west Wales, 20 in mid Wales 20, three in north Wales 3 and seven outside Wales
83 11% on weekdays in 2015 compared with 2% in 2011
84 Source: Welsh Government response to DCMS consultation on BBC Charter review
Our first review of Radio Wales in 2011 found that the station did not adequately reflect local interests and concerns across Wales. While it is a national and not a local station, there has been a sustained effort to improve localness, with the creation of new posts in Carmarthen and Bangor, and a producer in Wrexham. The new ‘all Wales’ team is tasked with finding stories from north and west Wales, and it delivers four or five each week for daytime strands, such as Jason Mohammad and Wynne Evans.

For listeners, the station is at its best when programmes are rooted in the local community, and the ‘all Wales’ approach appears to have paid off. Our quantitative research found that, for the vast majority of listeners (85%), the station caters for the population of Wales, while 79% agree that they hear a range of voices from around Wales, and 77% believe that it reflects their local interests and concerns. Listeners’ expectations were mostly matched in these areas, leaving very little performance gap.

Despite this, some familiar perceptions endure: Audience Council Wales pointed to a concern among some listeners that coverage did not always adequately represent Wales, and that the station’s sense of national borders was too rigid. This was most notable in north Wales and for those living near the border with England. Our qualitative research also found a perception that the news agenda had a south Wales bias, although, when asked to look at this more closely, listeners accepted that coverage was more balanced.

While overall performance in this area is strong, Radio Wales records a slightly larger performance gap in the portrayal of different cultures and communities. In our quantitative research, while two thirds (67%) agree that the station is good at portraying their particular culture or community, 78% ranked this measure as important, resulting in a performance gap of -11, the largest recorded in this area.

**Figure 52: Performance and importance scores for Radio Wales related to the ‘nations, regions and communities’ public purpose**

- Reflects my local interests and concerns: Performance 77%, Importance 82%, Gap -5
- Is good at portraying my particular culture or community to other people in Wales: Performance 67%, Importance 78%, Gap -11
- Reflects the diverse faiths, cultures and communities of Wales: Performance 65%, Importance 71%, Gap -6

Source: BBC Trust/ICM Quantitative Audience research. All who listen to BBC Radio Wales (131)

**Stimulating creativity and cultural excellence**

Radio Wales is expected to broadcast music with cultural value to Wales, support Welsh artists and make a contribution to the creative economy in Wales.
In terms of its music, there is clear evidence of a focus on Welsh artists, who account for 23% of the music output on weekdays and 26% on weekends. Live music is integral to the station, with performance opportunities for emerging artists, live shows across the schedule and festival coverage. Listeners recognise and value the station’s contribution: 76% agree that it supports arts and culture in Wales; 75% say it introduces them to new Welsh presenters, performers and artists; and 74% consider it supports Welsh music (74%). Listeners in our qualitative research also valued the support provided for music at grassroots level.

**Figure 53: Performance and importance scores for Radio Wales related to the ‘creativity and cultural excellence’ public purpose**

- **...supports arts and culture in Wales**
  - Performance: 76%
  - Importance: 71%
  - Gap: +5

- **...introduces me to new presenters, performers and artists from Wales**
  - Performance: 75%
  - Importance: 74%
  - Gap: +1

- **...supports Welsh music**
  - Performance: 74%
  - Importance: 79%
  - Gap: -5

Source: BBC Trust ICM Quantitative Audience research. All who listen to BBC Radio Wales (131)

**Delivering the benefits of emerging technologies**

Radio Wales has strengthened its online offer since our last review and benefits from online listening, with catch-up now having overtaken live listening online. It receives 37,000 unique browser visits a week, and uses Facebook and Twitter to deepen engagement and build reach among listeners. It also produces one of the BBC’s most popular podcasts, Rhod Gilbert’s Best Bits which has 33,000 downloads each week.85

Our research found that 55% of listeners claim to use the station’s website and 37% have a favourable overall impression, considering it easy to use and well designed. However, while their overall view of the website is positive, audiences consider more could be done online to help them find programmes and specific content within them online.

85 Source: BBC Wales
Younger adults in our focus groups mentioned using podcasts and online catch-up in general, but had little awareness of Radio Wales’ offer. And while social media (particularly Facebook) is widely used by listeners, our research showed that Radio Wales’ Facebook page was not seen as relevant amongst younger listeners. The exceptions to this were the station’s sport output and the Rhod Gilbert Saturday programme, both of which were popular on social media.

With the growing use of social media sites to access, share and comment on breaking news, we would expect its importance to Radio Wales to increase. We have raised this as a challenge facing all nations’ services, which will need to be addressed – as set out in our list of actions in section two of this report.

### 3.2.4 Value for money

The BBC spent £15m on Radio Wales in 2015-16, including its allocation of central overheads. When the costs of distribution, infrastructure and support are included, the total cost was £20.8m.

Since 2011-12 Radio Wales service licence spend has risen by 15%, or £1.9m. The increase is driven by a greater allocation of BBC overheads, including the cost of property. The funds available for programme making have remained broadly flat over this period, reflecting a combination of productivity and scope savings offset by inflation.

The cost per listener hour is 9p, significantly higher than that for Scotland (6.6p) or Radio Ulster/Foyle (5.7p), although lower than the BBC’s indigenous language stations.
Table 9: Breakdown of Radio Wales’ spend (£m)

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<td></td>
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<tr>
<td>allocated to BBC Radio Wales:</td>
<td></td>
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<tr>
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<td>12.0</td>
<td>12.7</td>
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<td>1.9</td>
</tr>
<tr>
<td>Newsgathering</td>
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<td>0.4</td>
<td>0.4</td>
<td>0.5</td>
<td>0.6</td>
<td>0.2</td>
</tr>
<tr>
<td>Commissioning and Scheduling</td>
<td>0.4</td>
<td>0.3</td>
<td>0.3</td>
<td>0.3</td>
<td>0.3</td>
<td>-0.1</td>
</tr>
<tr>
<td>Service licence budget</td>
<td>12.9</td>
<td>14.6</td>
<td>14.1</td>
<td>14.3</td>
<td>15.1</td>
<td>2.2</td>
</tr>
<tr>
<td>Actual spend vs SL budget</td>
<td>0.8%</td>
<td>-4.8%</td>
<td>-5.7%</td>
<td>-1.4%</td>
<td>-0.7%</td>
<td></td>
</tr>
<tr>
<td>Distribution costs</td>
<td>3.2</td>
<td>3.7</td>
<td>3.8</td>
<td>4.2</td>
<td>4.2</td>
<td>1.0</td>
</tr>
<tr>
<td>Total</td>
<td>17.7</td>
<td>18.8</td>
<td>18.5</td>
<td>19.9</td>
<td>20.8</td>
<td>3.1</td>
</tr>
</tbody>
</table>

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

(1) Programme costs include all direct costs of making programmes, including production and staff costs, plus any associated centrally incurred costs of studios, training etc.
(2) Rights payments made to music artists etc., which are managed by BBC Television and allocated to Radio Wales using a standard formula
(3) Covers the research and reportage of news from a centralised pooled resource and is not, therefore, programme specific
3.3 Radio Cymru

Radio Cymru’s remit is to be a comprehensive speech and music radio service for listeners seeking programmes in Welsh about the life, culture and affairs of Wales. Programmes should focus on local and national concerns, but also address matters of UK and international significance.

In 2016-17, Radio Cymru had an annual service budget of £13.7m

As the only dedicated Welsh language radio service in the world, Radio Cymru has a unique role to play for the BBC and a vital role for Wales and the Welsh language. Welsh-speaking audiences also have the Welsh language television broadcaster S4C, to which BBC Wales supplies 10 hours a week of programming.

Radio Cymru broadcasts from 5.30am to midnight throughout Wales from studios in Cardiff, Bangor, Aberystwyth and Carmarthen. It is similar in format to Radio Wales, with news programmes at breakfast, lunchtime and drive time, and with presenter-driven sequences, which mix music with speech, phone-ins and competitions. The station also offers drama, features and current affairs, as well as youth and sports programmes.

3.3.1 Reach

Radio Cymru’s reach has fallen, driven mainly by changes in consumption patterns and changes in the demographics of Welsh speakers

In 2015, Radio Cymru reached 30% of fluent Welsh speakers, 19.9% of those who say they can understand Welsh (around 104,000 listeners) and 4.6% of all listeners in Wales. Its reach among those who understand Welsh fell from 24% in 2011 and amongst all radio listeners in Wales, its reach fell from 5.5% during the same period.

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86 Source: RAJAR (2015)
While Radio Cymru does not have a target age group, the audience profile skews towards older listeners (those over 65 make up 41% of its audience but only 23% of Welsh speakers). It has a younger audience profile than Radio Wales (those aged 15-24 represent 16% of its audience, compared with 6% of Radio Wales’ audience), it still under-performs with young adults generally as they represent 25% of the Welsh speaking population. Its audience is well balanced by gender, and slightly skewed to ABC1s over C2DEs and geographically to listeners in the north of the country, where a large part of the Welsh-speaking community is concentrated.  

**Figure 56: Welsh speakers versus Radio Cymru listeners**

Sources: RAJAR and census

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87 Source: BBC Wales from RAJAR (Q3 2015)
The fall in reach is not evenly distributed between different demographic groups, however. It is more pronounced among female listeners, where it fell by 24%, ABC1 adults (a 26% fall) and those aged 35-54 (a 32% fall) (figure 57).

Figure 57: Radio Cymru reach by demographic group

Source: RAJAR, base: those who understand Welsh

While lower radio listening levels in general and some growth in listening to other BBC and commercial radio stations have impacted Radio Cymru’s reach, its performance is also shaped by the changing demographics of Welsh speakers, with a decrease in the number of households where all members speak Welsh, where Radio Cymru listening is at its highest, and differing expectations amongst its traditional older listeners and newer listeners who may have learnt the language and have different needs.

The 2011 census recorded a small drop in the number of Welsh speakers of 2%, to 562,000, or 19% of the population. While there has been an increase in children who speak Welsh, they do not all live in households with fluent adult speakers, and so the potential for Radio Cymru to offer programmes for shared listening to these families is limited.

Since our last review in 2011, Radio Cymru has extended its range of programmes in order to appeal to those beyond its traditional older, fluent heartland. There has been a sustained effort to target particular audiences and also to ensure that regular listeners do not encounter content that is not aimed at them. The station serves its heartland audience during daytime and aims to serve younger listeners off-peak and online.

We asked, you said: It needs a lot more life in the mornings. Chris Evans on Radio 2 is good. He’s lively and keep me going (Consultation: Anon)
In our qualitative research, most regular listeners claim to tune in for news, sport, weather and travel, driven by bulletins in the morning and afternoon peaks. Welsh music is also a strong driver for listening, and many consider that Radio Cymru has a unique offer in this respect. In Welsh-speaking heartlands, audience participation is a key driver, and listeners enjoy it when people they know phone in. Overall, listeners value both the quality and breadth of output, and appreciate the difficulty in serving a broad audience.

We asked, you said: It has to be a station for everyone, not like Radio 1 or Radio 2 that can appeal to different groups and ages.

They are trying to provide something for everyone (Qualitative Research: Swansea, 50+)

BBC Wales is piloting an alternative ‘pop-up’ station for three months in autumn 2016, as part of a wider effort to maintain the appeal of Welsh language content. The pop up which will be available across Wales online and in south east Wales on DAB, will have an editorial focus on music and entertainment and aims to test the viability of split frequencies which would allow it to provide a music-led schedule on DAB, alongside the main FM offer of Radio Cymru. We support efforts to find new approaches to deliver Welsh language radio and broaden its reach, but note that any change to the remit of the permanent Radio Cymru service would need regulatory approval.

Our research found that Radio Cymru (like other nations’ radio stations) has a general lack of awareness among listeners of the breadth of its schedule, and this is compounded by a perception among young adults that its offer is for older people. These factors may also contribute to the general challenge in reaching younger listeners.

We asked, you said: I’m shocked at how many different programmes there are. I thought it was still old fashioned, so maybe there is a need to get the message out there about the amount of variety available (Qualitative Research: Caernarfon, 25-30)

Radio Cymru has the highest average listener hours of all the nations’ radio stations, at 10 hours and 57 minutes, and this has grown in recent years. We find this impressive, particularly given the wide range of media that competes for listener hours.
Table 58: Radio Cymru average listening hours by demographic group

<table>
<thead>
<tr>
<th>Demographic Group</th>
<th>2011</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Adults</td>
<td>10:40</td>
<td>10:57</td>
</tr>
<tr>
<td>Adults 15-34</td>
<td>08:35</td>
<td></td>
</tr>
<tr>
<td>Adults 35-54</td>
<td>04:28</td>
<td></td>
</tr>
<tr>
<td>Adults 55+</td>
<td>13:11</td>
<td>15:45</td>
</tr>
<tr>
<td>Men</td>
<td>09:30</td>
<td>11:35</td>
</tr>
<tr>
<td>Women</td>
<td>10:25</td>
<td>11:37</td>
</tr>
<tr>
<td>ABC1 adults</td>
<td>09:58</td>
<td>11:48</td>
</tr>
<tr>
<td>C2DE adults</td>
<td>09:26</td>
<td>13:10</td>
</tr>
</tbody>
</table>

Source: RAJAR, 15+. Sample size too small to give figure for 15-34 year olds

Despite a small uplift in overall average listening, there were some notable variations between demographic groups. An increase in listening hours among older listeners was offset by a decline in listening hours by the under 55s. Increases among male listeners were matched by lower than average listening among women. Similarly, increases among C2DEs accompanied losses among ABC1s. These changes may owe something to recent schedule changes, as outlined above.

3.3.2 Quality and distinctiveness

Listeners consider that Radio Cymru provides a high quality and distinctive service

As the only Welsh language station for Wales, Radio Cymru is undoubtedly distinctive – in fact, it is unique.

In terms of quality, listeners give the station a strong score of 78. This is supported by our research, which found that 59% of listeners have a favourable overall impression and 18% have an extremely favourable impression. This overall score is a little lower than Radio Wales (63%) but higher than Radio Ulster/Foyle (57%) and Radio Scotland (52%).

3.3.3 Impact

We measure impact by considering the contribution made by a service to the public purposes, as set out in its service licence. Radio Cymru is required to make a particularly strong contribution to sustaining citizenship and civil society, and to representing the UK, its nations, regions and communities. It should also support education and learning, and stimulate creativity and cultural excellence. The service delivers its public purposes with a varied schedule that includes news, music, factual programmes and sports coverage.

*Sustaining citizenship and civil society*

Radio Cymru makes a very important contribution and news is considered by listeners to be a particular strength, with a good range and depth of reporting

Radio Cymru should make a very important contribution to this purpose, with accurate, impartial and independent news and current affairs. Its political coverage should focus on Welsh affairs but also cover UK and international affairs.

News and current affairs are a particular strength and account for around a quarter of output. In 2015, the station substantially exceeded its commitment of 16 hours of output a week, with an average of 36 hours, including news and sport. We will amend the service licence condition to 23 hours to underpin this higher level of news output.

Radio Cymru covers a wide range of news stories, from international and UK affairs, Welsh news and more local stories. The station offers a Welsh perspective, using an international network of Welsh speakers who can provide depth and authority. We consider this a particular strength of the station and an area where it adds considerable value. The station aims to balance expert opinion with local views, but encounters a general challenge in holding decision-makers to account when they do not speak Welsh. While lack of confidence in Welsh can hamper potential contributors, we found that political debates and interviews were highly regarded by Radio Cymru listeners.
Stakeholders recognise the vital role played by both Radio Cymru and Radio Wales in reflecting life in contemporary Wales and have underlined the importance of provision in this area given a general lack of media plurality. On the whole, news is perceived to be of very high quality by listeners, and delivered impartially and independently. Audiences particularly value the range of stories. Reflecting a widely held view, one respondent to our public consultation noted:

**We asked, you said:** I feel Radio Cymru is reliable and independent in its view and scrutinises national political life well. The station is much less parochial than Radio Wales, much more internationally focused, while also providing great coverage of important local issues (Consultation: Male, 16-24)

This was reinforced by our qualitative study. As one listener noted:

**We asked, you said:** They cover the news really well, locally and all over Britain (Qualitative Research: Caernarfon, 30-49)

### Representing nations, regions and communities

Radio Cymru is expected to make a very important contribution to this purpose, with a range of original output that should reflect the diverse communities, cultures and faiths of Wales. It should provide comprehensive coverage of sports in Wales and events of national significance.

For many listeners, this area is a key strength. Listeners recognise that the station embraces a range of voices and viewpoints, including those of new presenters and contributors, and that it creates strong links with local communities and is very close to its listeners. This is fortified by BBC surveys, in which the station scores strongly for ‘keeping me company’ and ‘keeping me in touch’.

Radio Cymru broadcasts around 50 live shows from around the country throughout the year, which helps to strengthen its connection with listeners. These are from a range of locations – from areas where the core audience is strong to those where Radio Cymru wants to reach new listeners. Despite a concentrated effort to represent the whole of Wales, we found a general perception among listeners that Radio Cymru focused primarily on south Wales, with insufficient attention to issues affecting the rest of the country. However, many listeners considered that this was reasonable, given the location of the Welsh Assembly and the clustering of businesses and the population around Cardiff and Swansea.

For regular listeners, a chief motivation to tune in to Radio Cymru is to hear and engage with the Welsh language and culture.

**We asked, you said:** It is personal to us because of our language. If we lose Radio Cymru, we won’t have anything (Qualitative Research: Swansea, 50+)

Others felt less strongly about the commitment to Welsh culture, but we are clear that this is a core strength of the station. This particular point was picked up by the Welsh Government,
which underlined the importance of both Radio Cymru and Radio Wales in reflecting as wide as possible a picture of life in Wales.88

Radio Cymru covers a wide range of sports, from rugby and football to cricket, track and field athletics, golf, boxing, triathlon, cycling, half-marathons and snooker. Regular listeners value the range and quality of its output, and, in particular, its coverage of live rugby and football matches, with commentary singled out for specific praise.

**Education and learning**

Unlike BBC ALBA, Radio Cymru does not have a specific commitment to help Welsh language learners in its service licence; it is primarily a service for fluent Welsh speakers. Nevertheless, Radio Cymru is a valuable service for learners, yet we found that some struggle to understand it unless concentrating hard. Some listeners consider that the language used by presenters is sometimes rather formal, and several called for ‘more everyday’ Welsh, which would have broader appeal. Fluent listeners want Welsh to be of a good standard and spoken naturally.

**We asked, you said:** I sometimes listen to Radio Cymru waiting in the car outside school and I have some time to try to understand and learn a bit, but I couldn’t listen if I was driving or had the kids in the car as I really have to concentrate on it (Qualitative Research: Swansea, 30-49)

Radio Cymru believes that learners do not want special provision so much as clear dialogue in all programmes. But it has taken steps to support the learner community more directly. In 2014, it introduced presenter Andrew Thomas (broadcasting as ‘Tommo’) to the schedule, specifically to persuade less confident Welsh speakers – and in particular younger listeners – to participate by choosing songs and presenting parts of the programme. It also provides a weekly round-up podcast (Pigion), which provides clear and simple presentations for Welsh learners and has been very successful.

While these measures are welcome, we found some demand for output that supports learners more directly. Parents who took part in our qualitative research were keen to get support for the Welsh language in order to preserve it culturally, even if they were not fluent speakers themselves. Some send their children to Welsh medium schools because the language is important to them. Several listeners felt that short, entertaining programmes aimed directly at learners would be beneficial, and a few called for more provision for young children to be expanded beyond the existing slot.

**Stimulating creativity and cultural excellence**

Radio Cymru is expected to broadcast distinctive, wide-ranging music, primarily in the Welsh language. It should support new and established talent and make some contribution to the creative economy in Wales.

The station makes an important contribution to this purpose, primarily through its music offer but also with its arts programming. It offers around three studio sessions each month in

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88 Source: Welsh Government response to the DCMS consultation on the BBC Charter review, which was shared by the Welsh Government with the Trust as part of our public consultation
daytime and evening programming, as well as some other live music that supports the Welsh music scene.

Welsh music is a strong motivator for many listeners to tune in to the station. In our qualitative research, we found that listeners value the strength and variety of the music offer, and consider that it provides strong support for new and established talent. For some, Radio Cymru is the only way to hear Welsh music. An appetite for more Welsh artists and music on the station is also expressed by some consultation respondents.

**Delivering the benefits of emerging technologies**

Since our last review, Radio Cymru has developed its online presence and uses social media to deepen its engagement with listeners and to try to reach younger adults. The Radio Cymru website receives 13,000 unique browser visits every week, and the station has 18,400 followers on Twitter and a presence on Facebook.

Radio Cymru is also beginning to produce content designed not just for radio, but for online and social media platforms too. Its strategy is to offer greater choice to its core audience, with podcasts and on-demand content, and to reach lighter listeners and younger adults on social media platforms.

Listeners in our qualitative research used both the station’s website and its social media pages to a limited degree, and there were some suggestions for improvements to the website, which was thought by some to have too many images and not enough narrative. We note the success of the Welsh news app, Cymru Fyw and the effective use of podcasts by the station, and encourage Radio Cymru to do more in this direction.

### 3.3.4 Value for money

The BBC spent £14.1m on Radio Cymru in 2015-16, including the full allocation of central overheads. When the costs of distribution, infrastructure and support are included, the total cost was £19.7m.

Since 2011-12 Radio Cymru’s service licence spend has risen by 12%, or £1.3m. The increase is largely driven by a greater allocation of BBC overheads, including the cost of property. The funds available for programme making have remained broadly flat over the period, reflecting a combination of productivity and scope savings offset by inflation.

At 22.3p in 2015-16, the station has the highest cost per listener hour of any BBC radio station. This is due to it being a high-quality, speech-led service, aimed at a small target audience.
### Table 10: Breakdown of Radio Cymru spend (£m)

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<td>Costs incurred in making programmes (1)</td>
<td>10.5</td>
<td>11.6</td>
<td>10.8</td>
<td>11.8</td>
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<td>Content-making related overheads allocated to BBC Radio Cymru:</td>
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<td>Copyright (2)</td>
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<td>0.2</td>
<td>0.2</td>
<td>0.0</td>
</tr>
<tr>
<td>Newsgathering (3)</td>
<td>0.2</td>
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<td>0.2</td>
<td>0.2</td>
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<tr>
<td>Commissioning and Scheduling (4)</td>
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<td>0.4</td>
<td>0.5</td>
<td>0.4</td>
<td>0.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>11.3</td>
<td>12.4</td>
<td>11.6</td>
<td>12.7</td>
<td>14.1</td>
<td>2.8</td>
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<tr>
<td><strong>Service licence budget</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual spend vs SL budget</td>
<td>-6.6%</td>
<td>-8.1%</td>
<td>-4.9%</td>
<td>2.4%</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td><strong>Distribution costs</strong></td>
<td>1.6</td>
<td>1.6</td>
<td>1.6</td>
<td>1.5</td>
<td>1.5</td>
<td>-0.1</td>
</tr>
<tr>
<td><strong>Infrastructure/support costs</strong></td>
<td>2.9</td>
<td>3.5</td>
<td>3.5</td>
<td>4.0</td>
<td>4.1</td>
<td>1.2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>15.8</td>
<td>17.5</td>
<td>16.7</td>
<td>18.2</td>
<td>19.7</td>
<td>3.9</td>
</tr>
</tbody>
</table>

Source: BBC Annual Report and Accounts and BBC Finance.

Note some small inconsistencies in totals and percentages are due to data rounding.

(1) Programme costs include all direct costs of making programmes, including production and staff costs, plus any associated centrally incurred costs of studios, training etc.

(2) Rights payments made to music artists etc., which are managed within the TV division and allocated to Radio Cymru using a standard formula.

(3) Covers the research and reportage of news from a centralised pooled resource and is not, therefore, programme specific.
3.4 BBC Wales’ news and current affairs on TV and online

BBC Wales provides a range of news, politics and current affairs output on television, including regional news bulletin *BBC Wales Today* and current affairs opt-out programmes *Week in Week out* and *The Wales Report*.

In 2015/16, BBC Wales broadcast 360 hours of news and current affairs programmes specifically for Wales, substantially exceeding its service licence commitment of 250 hours. Television remains by far the most popular way that audiences claim to access news about Wales – at 85%, TV is some way ahead of local newspapers (55%), and the internet (49%).

*Figure 60: Ways of accessing news and information for Wales*

Our research also found that television is also, by some margin, the most commonly used BBC news source in Wales, it being used by 83% of adults. With a general shift online, however, websites, social media and apps play a gradually more important role in the delivery of BBC content (figure 61).
3.4.1 Reach

While reach fell among younger adults, it increased slightly among those aged over 55

In 2015, BBC Wales’ television news and current affairs reached 50% of the audience in Wales. This is lower than for nations’ news in Scotland and Northern Ireland, and is surprising, given BBC television’s overall high reach in Wales.89

Reach to BBC Wales’ television news and current affairs was 54% in 2011, meaning a drop of 7% to its 2015 level. The weekly reach for the regular news programme Wales Today fell a little to 49%, while current affairs opts dropped marginally to 12.3%.90

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89 Source: BARB, all adults
90 Source: BARB, all adults
The fall in reach has been driven not only by younger adults but also by those aged 35-54. (Reach actually increased slightly among those aged 55 and over.) These changes have exacerbated the skew of news and current affairs to older viewers: 74% of those aged over 55 watch each week, compared with only 23% of those aged under 35. There were small differences in reach trends among men and women and by social grade, but age is by far the most notable driver of change.
This decrease is within the context of an overall fall in reach for news on TV in Wales: BBC network news also saw a decline in reach among audiences in Wales of 6% over the same period, as did ITV. Further, despite the small decline in reach, *Wales Today* brings unique reach to the BBC news portfolio: 9.2% of the audience for the early evening bulletin watch no other BBC news. This compares with 6.5% of the audience for the late evening bulletin and 2.6% of the audience for the lunchtime news.91

### 3.4.2 Quality

**Audience impressions of quality are strong, relative to the other devolved nations, and viewers have a positive overall impression of news and current affairs programmes**

Audience impressions of the quality of BBC Wales’ news and current affairs are strong, relative to the scores in other devolved nations, but have fallen since 2011. The AI (Appreciation Index) for BBC Wales’ news fell from 81.6 to 79.4, while the AI for current affairs has been more stable, with a small fall to 80.5 from 81 during the same period.

**Figure 64: BBC Wales’ news and current affairs AI scores**

The tracked score for ‘the BBC’s news from Wales is relevant to me’ also fell marginally during this time, as did the proportion of those who agreed that ‘the BBC provides high-quality news programmes from Wales’ (from 42% to 39%).

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91 Source: BARB (2016)
Our quantitative research found that 64% of viewers have a positive overall impression of BBC Wales’ TV news, and 18% are extremely favourable. The vast majority of viewers (82%) find the news programmes informative, 75% consider them high quality, 72% find them relevant and 68% consider them engaging. While only 51% consider them different to other providers, this is usual, given the similar format and timing of ITV’s regional news bulletins.

When considering what BBC Wales offers alongside the BBC network news, audience perceptions are also very strong: 89% agree that the programmes, taken together, are high quality and trustworthy, 83% consider that they provide a good balance of international, UK and Welsh news; and 81% find the news stories relevant to them (figure 67).
These findings are supported by our qualitative research, which found that viewers consider BBC Wales’ TV news to be impartial, accurate and timely, with a strong focus on Wales.

**We asked, you said:** it is about Wales and all things Welsh, ranging from current affairs, big world news stories from a Wales perspective, to localised stories, sport and culture. It is also about putting Wales on the international stage...a lot of discussion lately about the potential impact of the EU Referendum on Wales and how Wales works with the EU (Qualitative Research: Wrexham, 25-65)

A similar picture emerges for BBC Wales’ current affairs and political output: 61% of viewers have a favourable overall impression and 16% have an extremely favourable overall impression. Programmes score highly on the four main performance metrics: 88% consider that they are informative; 82% think they are high quality, and 75% find them both relevant and engaging (figure 68).

**Figure 68: Audience perceptions of BBC Wales’ current affairs and political programmes**

Source: BBC Trust ICM Quantitative Audience research. All who watch BBC current affairs programming (185)
3.4.3 Impact

**BBC Wales news and current affairs performs very well with only small performance gaps in most areas**

The impact of BBC news and current affairs grows directly out of its contribution to the public purpose. For news and current affairs, the most relevant public purposes are sustaining citizenship and civil society, and representing the UK, its nations, regions and communities. The provision of accurate, impartial and independent news and the rigorous reporting of political life contribute directly to the first purpose, while coverage of local issues and events delivers the second.

**BBC Wales’ TV news**

BBC television news in Wales generally performs very well, recording only small performance gaps in most areas. For 82% of viewers it provides accurate and up-to-date news; 77% feel that it represents Wales and gives them a better understanding of news and topical issues; and 75% consider that it provides high-quality, independent news. However, we found that viewer expectations are even higher on the measure of ‘high quality and independent’, generating a performance gap of -11 points – and this was true of other nations too. We think this is because the provision of high-quality, independent news is a core part of the BBC mission, and so, even when performance is considered very good, audience expectations may not be fully met.

**Figure 69: Performance and importance scores for BBC Wales’ TV news**

<table>
<thead>
<tr>
<th>Description</th>
<th>Performance</th>
<th>Importance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides accurate and up-to-date news</td>
<td>82%</td>
<td>88%</td>
<td>-6</td>
</tr>
<tr>
<td>Represents Wales</td>
<td>77%</td>
<td>81%</td>
<td>-4</td>
</tr>
<tr>
<td>Gives me a better understanding of news and topical issues in Wales</td>
<td>77%</td>
<td>83%</td>
<td>-6</td>
</tr>
<tr>
<td>Provides high-quality, independent news</td>
<td>75%</td>
<td>86%</td>
<td>-11</td>
</tr>
<tr>
<td>Relates national and international news to my region</td>
<td>71%</td>
<td>81%</td>
<td>-10</td>
</tr>
<tr>
<td>Helps me understand politics and decision-making in Wales</td>
<td>67%</td>
<td>77%</td>
<td>-10</td>
</tr>
<tr>
<td>Provides content online e.g. video clips</td>
<td>52%</td>
<td>43%</td>
<td>+9</td>
</tr>
<tr>
<td>Provides additional content on social media such as Facebook and Twitter</td>
<td>38%</td>
<td>33%</td>
<td>+5</td>
</tr>
</tbody>
</table>

Source: BBC Trust ICM Quantitative Audience research. All who watch BBC Wales’s television news (422)
Audiences want stories that reflect and explore the changing political landscape and decision-making processes in Wales, and the majority of viewers (67%) consider that the BBC does well in this regard. This is a considerably higher level than either Scotland or Northern Ireland (both 59%)\(^{92}\), although it still leaves a performance gap of -10.

As part of a wider effort to help audiences understand Welsh politics and decision making on their daily lives, BBC Wales launched *How Wales Works* programming and content on TV and online. Among those who have used it, an impressive two thirds consider that their knowledge has improved as a result. Given the high audience expectations in this area, this appears to be a useful editorial initiative.

The ability to reflect Wales to itself is a core requirement of television news. Audiences value stories that are rooted in the local community, but they also expect the coverage of national and international news stories to relate in some way to their region. The BBC performs less well in this area, with an importance score of 81% but a performance score of 71%, generating a gap of -10.

Some viewers in our qualitative groups thought that the news agenda had a south Wales bias, with insufficient focus on north and mid-Wales. These claims are long-standing, and BBC Wales has monitored the geographic location of contributors on *Wales Today* to understand whether they have any substance. In January 2016 (a fairly typical month), it found that 51% of stories were from the south east, compared with 8% from the north west and 9% from the north east. On the one hand, this lends support to the criticism. But, with 20% of the Welsh population residing in north Wales, many viewers recognize the need to focus coverage on Cardiff and Swansea, where the population is concentrated, along with a clustering of businesses and universities, as well as the location of the Welsh Assembly itself. Further, when viewers in our qualitative study were invited to examine the TV schedule, they then considered it to be more balanced in its coverage of different parts of Wales.

On the whole, viewers in our qualitative research considered that *The Wales Report* was good quality, wide-ranging and relevant, with a good level of analysis. Commenting on a recent episode, a viewer noted:

*We asked, you said: [it is an] excellent programme, with some really good, well research journalism, and nicely presented by Huw Edwards (Qualitative Research: Wrexham, 25-65)*

**BBC Wales’ TV current affairs**

Current affairs output is also well regarded by viewers, and BBC Wales is particularly strong in its coverage of important political stories in Wales: 83% of viewers think it does this well. The vast majority of viewers also consider that the programmes give them a better understanding of topical issues in Wales (81%); investigate and scrutinise issues and institutions (79%); and reflect local issues and concerns (78%). However, the high importance that viewers attach to these last three areas suggests that their expectations are still not being fully met.

\(^{92}\)Source: ICM Unlimited (2016) Purpose Remit Survey for BBC Trust, Autumn 2015
While performance is generally strong for other measures, such as relevance (72% agreed with this) range of topics (77%) and analysis (75%), very high audience expectations have resulted in performance gaps (figure 70). The largest of these (-23 points) is recorded in an important area, holding decision-makers to account, where performance is also weaker. Crucially, a similar picture emerges across all of the other nations. The reason for the gap is not immediately clear in Wales, and we have identified this area in our list of actions (as set out in the Executive Summary).
As news consumption patterns change, online and social media have become increasingly more important to BBC Wales, both as a means to deepen audience engagement and to extend reach, particularly among younger adults.

As in the other nations, our research found that social media is much more commonly used as a news source by younger people. Almost two thirds (64%) of 16-34 year olds claim to use social media sites to access news for Wales, compared with less than 20% of those aged over 55. Those aged 16-34 are also more likely to use news websites, apps and blogs, although the difference with those aged over 55 is not as pronounced: 56% of those aged 16-34, compared with 41% of those aged over 55.

In response to the shift online, BBC Wales has developed its digital offer with a greater focus on visual journalism and social media content. It has also increased its focus on long-form news features and political coverage. In 2014, it launched BBC Cymru Fyw, a Welsh language news app. Cymru Fyw receives around 42,000 unique browser visits each week and is credited with attracting a younger audience than the main BBC Wales news site, with two thirds of users under the age of 45.

BBC Wales news online is increasingly accessed via mobiles, which in 2015 overtook PCs as the main access device. In 2015, 1.4 million unique browsers accessed the site from a mobile or tablet device, compared with 1.3 million in 2014.

But, despite a greater focus online, the number of unique browser visits to BBC Wales online has fallen steadily in recent years, against continued growth for BBC news online.

**Figure 71: Average weekly unique browsers (millions) for Wales News and total BBC News**

Source: BBC management from BBC iStats

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93 Source: ICM Unlimited (2016) Quantitative Report
94 It is not possible to assess browsers by the age of user
95 Source: BBC Management
96 Source: BBC iStats survey, 2015
Despite this, our research found that the majority of users (62%) have a favourable overall impression of the site (figure 72) and 14% have an extremely positive view. The mean audience impression (7.8) is similar to Northern Ireland and higher than in Scotland.

**Figure 72: Audience favourability of BBC Wales’ news online**

![Bar chart showing audience favourability](image)

Perceptions across a range of measures are very positive: 91% think it is informative, 83% feel it is relevant, 81% think it high quality and 71% consider it provides the right amount of news for their area. This suggests that the offer meets the main needs of its audience.

**Figure 73: Audience impression of BBC Wales’ news online**

![Bar chart showing audience impression](image)

This positive overall impression was also shared by users in our qualitative research: they thought the site gave comprehensive coverage of Wales. For younger adults, its Facebook page was particularly relevant, with content that was ‘highly shareable’ and seen to complement other sources of news that they used.
3.5.1 Value for money

Expenditure on BBC Wales’ TV news and current affairs was £12.3m in 2015-16, including the full allocation of central overheads. Online expenditure in 2015-16 was £3.6m. Since 2011-12 TV spend has risen by £3.7m. The increase is primarily driven by a greater allocation of BBC overheads, including the cost of property. Spend in 2015-16 was also boosted by the cost of covering the general election.

The increase in Online spend reflects not only the increased allocation of overheads but also the impact of a strategic decision to increase focus on delivery of both Welsh and English language content online, which we fully support.

Table 11: Wales spend on TV and online news and current affairs (£m), 2011 to 2016

<table>
<thead>
<tr>
<th></th>
<th>2011/12</th>
<th>2012/13</th>
<th>2013/14</th>
<th>2014/15</th>
<th>2015/16</th>
<th>Change 2011/12 to 2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV news and current affairs</td>
<td>8.6</td>
<td>9.3</td>
<td>9.5</td>
<td>10.8</td>
<td>12.3</td>
<td>3.7 43%</td>
</tr>
<tr>
<td>Online news and current affairs</td>
<td>1.8</td>
<td>1.9</td>
<td>2.2</td>
<td>2.6</td>
<td>3.6</td>
<td>1.8 100%</td>
</tr>
</tbody>
</table>

Source: BBC Finance