

Governors' review of services

Radio

Overview

The radio landscape in Britain is changing fundamentally. There are strong new national digital stations. People are listening in new ways – via television, the internet or mobile phones. Some young music-lovers are turning from radio to downloading music online.

Against the landscape of change, how does BBC Radio continue to make the case for its public service role? The answer is that the BBC can make a difference: to individuals by giving them unique access to things they value; to citizenship and democracy by providing independent information; and to society by investing in the cultural and creative life of the UK. This is as true of BBC Radio's music output as its speech output. The BBC's support for music at its roots and across the board has helped public taste to grow – delivering value to individual listeners and to the wider music industry, both popular and classical. Similarly, the speech component of our music stations helps to push boundaries by tackling difficult issues.

The BBC's national radio services are holding up well. The BBC's new digital services are establishing valued and distinctive niches. BBC Radios 2, 3, 4 and Five Live all consolidated their positions. A new strategy has been put in place to bolster BBC Radio 1's long-term position.





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1 Newsbeat
Derren Lawford in the Radio 1
Newsbeat studio

2 Glastonbury Festival
Coverage of live music events
makes Radio 1 distinctive

4 Radio 2 Folk Awards
Kate Rusby live at the awards
ceremony

3

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3 The Green Room
Friday night arts with Mariella
Frostrup on Radio 2

5 The Jeremy Vine Show
Bringing newsmakers to
the Radio 2 audience

BBC Radio 1

Remit

BBC Radio 1 aims to offer an exciting, high-quality service for a young UK audience. It is committed to playing the best new music and delivering a comprehensive range of live studio sessions, concerts and festival broadcasts. The network aims to cover all young music genres with a wide-ranging playlist and a strong line-up of specialist DJs. Music programming is augmented by tailored speech output – including news, documentaries and advice campaigns.

Radio 1 is critical to the BBC commitment to reaching young audiences – and its health is central to the success of BBC Radio overall. In December 2002 we requested a review of Radio 1's strategy, recognising that although Radio 1 already operated in an intensely competitive market, technological and regulatory changes were likely to intensify this still further. A new strategy was developed and we approved this in May 2003.

Audience consultation played an important part. Research showed that some aspects of the Radio 1 offer were off-putting. For example, although nearly half of 25 to 30 year olds have children, the network was projecting a "relentlessly single" image. There was evidence that listeners wanted the network to be more relaxed and less intense about its music – and they also wanted some older music.

However there was much that was liked, and the BBC response has been evolutionary not revolutionary.

In its mainstream programming, the network is now focusing more clearly on its target audience of 10–30 year olds. This has meant making the daytime content more engaging without diminishing the network's public service commitment to news and new music. In the specialist programming, the aim is to bring listeners new talent and genres that meet the demands of knowledgeable enthusiasts, but do it in a way that is welcoming to the network's broader audience.

In 2003/2004, Radio 1 began to deliver the mainstream component of this strategy including changing some key presenters. Chris Moyles took over the weekday breakfast show in January 2004 when Sara Cox moved to weekday afternoons, and Colin & Edith took over the weekday 1–3pm slot. Work has also been done to ensure that DJs connect more widely. The demand for older music has been met.

It will take time to refresh the entire schedule and at present it is too early to make an informed assessment of its success. We recognise that increased competition is likely to impact on share but are anxious to ensure that Radio 1 continues to deliver its unique reach.

The distinctiveness of Radio 1 is sometimes challenged by critics. In response to this the BBC has set up an independent quantitative research programme to provide data on the distinctiveness of the music mix, including the amount of new music. The analysis carried out in 2003/2004 demonstrated that Radio 1 plays a greater number of different songs across the week than any of its nearest competitors. More than 460 tracks on Radio 1 were not heard on any competitor measured during a sample week in each of May and October 2003. Radio 1 also played more live music than its competitors. The network is now committed to devoting at least 40% of its mainstream programming to new music – defined as unreleased, or less than one month since release.

Across Radio 1 the commitment to a distinctive public service remit will continue, including bespoke news (through the *Newsbeat* strand), documentaries, social action programming and live music events.

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BBC Radio 2

Remit

BBC Radio 2 aims to bring a broad range of popular and specialist music, with particular support for new and established British artists; live music, through concerts and studio sessions; and song-writing. The network also offers news, current affairs, documentaries, comedy, readings, religious output and social action, designed to appeal to a broad audience.

In a crowded marketplace, Radio 2 has held its audience, retaining its position as the UK's most listened to radio station with an average weekly reach in 2003/2004 of 12.9 million (13.0 million in 2002/2003).

The music played – including live music – continues to cover an extremely broad range. As with Radio 1, the BBC now collects quantitative data to monitor the distinctiveness of the music content of the network. The analysis was conducted twice during 2003/2004 and shows that in each sample week well over 1,000 songs played on Radio 2 were not heard on any other competitor measured. In addition, Radio 2 played a broader range of genres and more live music than its competitors.

Radio 2's commitment to encourage song-writing in the UK has been delivered through *Sold on Song*. This imaginative initiative aims to provide informed insight into the craft of the popular song through events including masterclasses with established songwriters such as Sir Paul McCartney and Elvis Costello, and a competition for new songwriters. *Sold on Song* is supported

by a website containing comprehensive information on topics ranging from the history of the key popular music genres to advice on how to get started as a songwriter.

The network has maintained its commitment to making news and current affairs a key part of the mix. *The Jeremy Vine Show*, launched in 2003, continues to develop well. The interactive second hour (1–2pm) on topical subjects has been successful in generating a large amount of listener interaction. Other notable speech output included the music documentary on Stevie Wonder, *40 Years of Wonder*, and *The JFK Generation*, marking the 40th anniversary of President Kennedy's assassination. The network's arts programme has been relaunched as *The Green Room* and extended from 90 minutes to two hours.

BBC Radio 3

Remit

BBC Radio 3 aims to provide a broad spectrum of classical music, jazz, world music, drama and arts discussions. It focuses on presenting live and specially recorded music from across the UK and beyond, including contributions from the BBC's own performing groups.

Radio 3's audience has marginally increased, with an average weekly reach in 2003/2004 of 2.2 million (2.1 million in 2002/2003). The summer Proms season attracted a particularly strong audience and – following schedule changes in the autumn informed by audience consultation and research – the network achieved a record reach in the first quarter of 2004.

Notable output has included Berlioz day – a complete Radio 3 day devoted to the life and influences of the composer; coverage of the Radio 3 Awards for World Music, staged outside London for the first time; and an Arabian night, a special evening featuring the cultural and political life of the Arabian Peninsula.

We note that classical music remains at the heart of the schedule and the current remit requires that core to be complemented with other serious music genres including jazz and world music. We are aware some listeners are unhappy with the share of output given to non-classical music on Radio 3 and will remain mindful of this in continuing to assess the network's performance.



1	2	4
	3	

1 Today
Presenter Sarah Montague gets ahead of the day's news

2 Adam and Jason Barron
Brothers collaborating on Radio 4's detective drama *Shut Eye*

4 Last Night of the Proms
Hope, glory, and real passion for music

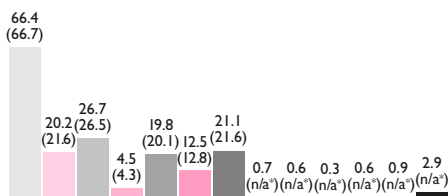
3 The Winter's Tale
Cast members from Radio 3's Shakespeare production

45%

of Radio 1's playlist was UK artists last year

For more broadcasting facts and figures, see pages 58 to 67 and 136 to 146

Weekly reach of BBC Radio services 2003/2004 (% all homes)



- BBC Radio
- BBC Radio 1
- BBC Radio 2
- BBC Radio 3
- BBC Radio 4
- BBC Radio Five Live
- BBC National/Local Radio
- BBC Five Live Sports Extra
- 1 Xtra
- 6 Music
- BBC 7
- BBC Asian Network
- BBC World Service

Source: RAJAR, age 15+, average 15-minute weekly reach for 2003/2004 * BBC digital services have only been measured since quarter three, 2003
Note: Figures for 2002/2003 appear in brackets
In quarter two 2003, RAJAR's population was adjusted in line with the latest Census figures

BBC Radio 4

Remit

BBC Radio 4's remit is to use the power of the spoken word to offer programmes of depth which are surprising, searching, revelatory and entertaining. The network aims to offer in-depth and thoughtful news and current affairs and seeks to engage and inspire its audience with a rich mix of factual programmes, drama, readings and comedy.

Audiences to Radio 4 are slightly down, with reach at 9.6 million in 2003/2004 (9.8 million in 2002/2003). In London, the most competitive radio marketplace, the network remains top for reach and share.

News and current affairs provide the spine for Radio 4 and the network has maintained its strong position in this genre. Audience research shows that six out of ten radio listeners consider BBC Radio to be the best source of radio news – and Radio 4 leads the other BBC radio stations in being considered the best provider of news.

These figures were not significantly affected by the Hutton Inquiry, which stemmed from a report on Radio 4's *Today*.

Notable pieces of journalism include the hour-long special marking the end of the Iraq war; Edward Stourton's series on the history and future of the UN, and the interview with 'Witness Bromley', the 12 year old who was the main witness at the trial of the boys accused of killing Damilola Taylor.

The network continues to deliver across a broad range of genres, including drama, comedy and religion. *The Archers* has maintained its strong grip on its audience with storylines – sometimes controversial – that, as our recent study of impartiality (see page 21) indicates, fairly represent a range of contemporary rural issues.

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BBC Radio Five Live

Remit

BBC Radio Five Live broadcasts live news and sport 24 hours a day, aiming to present events as they happen in a modern, dynamic and accessible style. It sets out to cover national and international subjects in depth, using wide-ranging analysis and debate to inform, entertain and involve news and sports fans of all ages, with particular emphasis on 25–44 year olds. The network also provides extensive live events coverage, supported by the BBC's global newsgathering operations and portfolio of sports rights.

Five Live celebrated its tenth birthday in 2004. Audiences remain broadly stable, with a small drop in average reach to 6.1 million in 2003/2004 (from 6.3 million in 2002/2003 – which included the Football World Cup). It reached 6.5 million in quarter one of 2004, and audience approval scores remain well above the BBC average.

The network's output in both its genres of news and sport has been strong. In November, vivid commentary on England's victory over Australia in the Rugby World Cup in Sydney was matched by memorable coverage of the homecoming and the victory parade the following week when Five Live had exclusive access to the players' bus. With news, good progress has been made in refreshing *Breakfast*, *Morning*, and Julian Worricker's Sunday morning programme. The network did well in covering breaking stories such as the capture of Saddam Hussein.

We are pleased to note that Five Live has secured Premiership football rights until the end of the 2006/2007 season.

BBC Five Live Sports Extra

Remit

BBC Five Live Sports Extra is a part-time extension of BBC Radio Five Live, aimed at bringing a greater choice of action to sports fans. It extracts more value for licence payers from sports rights already owned by the BBC by offering alternative commentaries to those provided on Five Live.

Five Live Sports Extra was launched in February 2002 as part of the BBC's portfolio of digital channels and it has rapidly established itself as a valued sister station to Five Live, delivering extra value to licence payers from existing BBC sports rights.

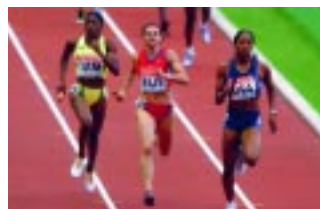
It has enabled the BBC to continue to broadcast radio sports commentaries when – as happened during the Iraq war – sports coverage on Five Live is curtailed to enable full coverage of big breaking news stories. It also enables the BBC to offer sports fans a greater choice of matches and events. A good example came in August when Five Live majored on football, while Five Live Sports Extra offered uninterrupted coverage of the World Athletics Championships in Paris.

38%

of Radio 2 was dedicated to speech

60

new classical music pieces commissioned for Radio 3



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	3	

1 Five Live
Children interview the presenters on Five Live's tenth birthday

2 IExtra
First birthday celebrations for the black music station

4 Rugby World Cup
Commentary from England's triumph

3 World Athletics Championship
Expert coverage from the Paris event

2,123
hours of current affairs, business and politics on Radio 4

2,106
hours of sport on Five Live

For more broadcasting facts and figures, see pages 58 to 67 and 136 to 146

IExtra

Remit

IExtra aims to play the best of contemporary black music, with a strong emphasis on delivering high-quality live music and supporting new British artists. IExtra also brings listeners a bespoke news service, regular discussion programmes and specially commissioned documentaries, plus information and advice relevant to the young target audience, particularly – although not exclusively – those from ethnic minorities.

IExtra was launched in August 2002 as part of the BBC portfolio of digital channels. The station is building a following among a young audience that had felt it got nothing from the BBC. It offers a service unavailable elsewhere on UK network radio and gives strong backing to the contemporary black music industry in the UK across the full range of genres. It showcases important black music events such as the Notting Hill Carnival and Southport Weekender. It is also finding and developing new black African/Caribbean broadcasting talent on air and behind the scenes.

The main challenge ahead is engaging the target audience with speech programming. Listeners come for music and the station has to find innovative ways to capture their attention for quality speech. In 2003/2004 IExtra missed its commitment that around 10% of its output should cover news, documentaries and social action programming. However this will be achieved next year.

We have underlined the importance we attach to the quality of the speech output, not just the quantity, and will pay particular attention to this in future assessments.

BBC 6 Music

Remit

BBC 6 Music offers lovers of popular music current releases outside the mainstream, new concert and session tracks, and unique access to the work of artists from the last 40 years through the BBC Sound Archive. It aims to provide a social and cultural context through music news, documentaries and debate, and is committed to providing interactive content.

BBC 6 Music was launched in March 2002 as part of the BBC's portfolio of digital channels. It targets 25–44-year-old music-lovers, previously underserved by the BBC.

In a crowded radio music market it has established itself as a distinctive service valued by listeners. The music output is supported by news bulletins from a dedicated team of journalists focusing on issues relevant to the target audience, and a music newsgathering team has been established.

The next step is to heighten the level of interactivity, develop use of the archive and strengthen the station's relationship with its audience. Initiatives will include high-profile outside broadcasts and events.

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BBC 7

Remit

BBC 7 is a speech-based service providing pure entertainment to attract a new audience to speech radio. The network offers comedy, drama and readings, mainly from the BBC archive. It also aims to be the home of children's speech radio, with daily live programming for youngsters.

BBC 7 was launched in December 2002 as part of the BBC's portfolio of digital services. It has delivered on its commitments and has found an appreciative audience, largely by exploiting the resources of the BBC speech archive. In December 2003, in response to many requests from listeners, BBC 7 began broadcasting 24 hours a day.

The network has also provided a valuable service by broadcasting four hours a day of speech programming for children of a kind unavailable for the past decade.

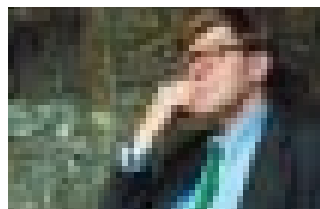
BBC 7 has played a significant role in developing the market for DAB Digital radio. Research in the latter part of 2003 showed that 68% of people who had bought a DAB Digital radio had done so to receive new services, and when asked if there was a particular service they wanted to receive, 26% – more than for any other service – mentioned BBC 7.

A condition of the DCMS consent was that the service must not be developed at the expense of programming on Radio 4. This has been met by appointing the Controller of Radio 4 as the Controller of BBC 7. Scheduling complements Radio 4 to avoid editorial clashes and, where possible, joint events are promoted on both stations. The two networks have entirely separate budgets.

The next step is to further refine the offering to make it more attractive to the target audience and to find more ways to provide information and context around the archive.

2,852
hours of comedy on BBC 7

73
Proms concerts on Radio 3



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	3	

1 BBC Asian Network
Adil Ray at Mega Mela in Leeds

2 BBC 7
Fun and games in the Big Toe studio

4 BBC 6 Music
Breakfast presenter Phill Jupitus and producer Phil Wilding

3 Alan Bennett
His *Last of the Sun* for BBC 7 gave Thora Hird her final role

163
hours of religion on Radio 2 in peak time

66%
of BBC Asian Network's output was speech-based

For more broadcasting facts and figures, see pages 58 to 67 and 136 to 146

BBC Asian Network

Remit

BBC Asian Network offers music, news, sport, debate, entertainment and drama for British Asians. It broadcasts primarily in English but also in a range of languages spoken by UK Asians. It aims to be the main forum for debating issues concerning British Asian communities.

As part of the launch of its portfolio of digital services, BBC Asian Network was relaunched as a national network in October 2002. Research had shown that the Asian community was more likely to listen to speech radio than the rest of the population, yet there was no national speech-based service regularly addressing issues of specific interest to British Asians.

The BBC's commitment to a previously underserved audience has proved justified. The network tripled its audience by going national and now reaches one in five British Asians.

The BBC's continuing commitment has been demonstrated by the investment of more than £1million in a new daily drama for the network, *Silver Street*.

The needs of first-generation Asians are met through 2,730 hours of programming in Punjabi, Mirpuri, Bengali, Gujurati and Hindi-Urdu.

There has already been significant investment in a dedicated news service – the network has 45 journalists and its own staff of sports journalists. The network provided a valuable platform during the war in Iraq for Muslim communities to debate the issues. We note the intention to widen the network's news agenda to give a better sense of the importance and involvement of the Asian community in, for example, business.