



Public service radio in a digital world  
DCMS review of BBC analogue radio

*The process of reviewing the BBC's Charter rightly involves an appraisal of the performance and aspirations of the BBC's services. An Ofcom review of Public Service Television is ongoing, and reviews against the terms of their approval have been or are currently being undertaken for the BBC's online services, and its digital television and radio networks. It is appropriate that the BBC's analogue services – 51 in total comprising the UK-wide stations Radios 1,2,3,4 and Five Live, six services for the Nations including Gaelic and Welsh language stations, and the network of local stations which serve individual parts of the UK – should be subject to similar scrutiny.*

*The BBC has therefore provided for DCMS information relating to its analogue radio networks. This comprises financial and audience data, analysis of the content of each network, and of their distinctiveness within the UK radio market as a whole. An independent assessment of the market impact of the BBC's radio services has also been commissioned.*

*This paper is intended to provide an overview of the information that has been provided, and to describe the part that BBC Radio hopes to play in delivering the vision for the BBC as a whole which has been set out within Building Public Value.*

**Section 1. Introduction:** *reflects on the development of radio in the digital age (page 3).*

**Section 2. Building Public Value Through Radio:** *summarises the role played by the analogue radio services in delivering public value in the five areas identified by the BBC (page 7).*

**Section 3. The Audience Perspective:** *focuses on audiences, assessing the performance of the BBC's analogue radio portfolio in delivering to them (page 27).*

**Section 4. BBC Radio in the Second Digital Age:** *considers the part that BBC Radio might play in the new digital age (page 36).*

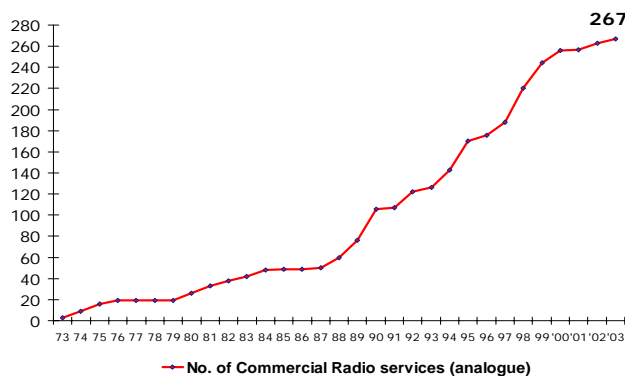
**Section 5. Conclusion:** *(page 46).*

# 1. Introduction

In a complex modern world, the love affair between the UK public and Radio has blossomed. The fragmentation of audiences across services, an explosion of choice, and the convergence of radio with other media have brought larger audiences to the wealth of services now available. The potential threat of the digital age has proved a huge opportunity for analogue radio, both for commercial radio and for the BBC.

Fifteen years ago, the average listener could hear six or seven services, 5 of them from the BBC. Today there are more than 300 analogue stations in the UK, giving the average listener a choice of 14 stations, of which 6 are from the BBC. That growth has seen the emergence of networks that cater for specialist music tastes and clearly identified audiences. However it has mainly delivered a greater range of stations serving those in the 15 to 44 age group with various mixes of popular, mainstream hits. Out of more than 200 stations which offer popular music of appeal to this age group, the BBC provides only two.

**Fig.1: Growth in Radio Channels 1970 to 2003**



In this changing world, the BBC's analogue radio stations have thrived, each remaining a broad church, welcoming listeners across the ages to a range of content which challenges them with the unexpected and the unfamiliar, as well as the familiar.

Whether the audiences are tuning in for the latest urban sounds, a bedtime story, or Welsh language drama, they will also find, on BBC analogue radio services, a spine of news and current affairs designed to meet the needs of the individual station audiences.

In every case this is woven into a rich mix of programming: The core of Radio 3 is classical music but listeners encounter jazz, world music, drama and poetry. Radio Five Live marries in-depth news and sport so that listeners eavesdrop on unfolding events in both domains. Radio 1 offers a huge diversity of music genres, both across peak-time programming and through specialist shows, alongside challenging documentaries and advice shops. Radio 2 encompasses a broader range of listening than any other music station in the UK - from organ music through rock and roll to folk - combining this with extensive religious programming, music-inspired

comedy, musical theatre, and insightful examinations of contemporary and music issues. Radio 4 is a station of journalistic record but also the home of cutting-edge comedy, original drama, and *The Archers*. The stations in Scotland, Wales and Northern Ireland offer news, drama, comedy, home-grown music, and sport tailored to listeners' tastes in each Nation. On the English local stations, music is mixed in with original journalism from around the station area, consumer programmes, invitations to volunteer within the community, and even a city soap opera (Radio Merseyside) or a regular archaeological investigation (Radio Lincolnshire).

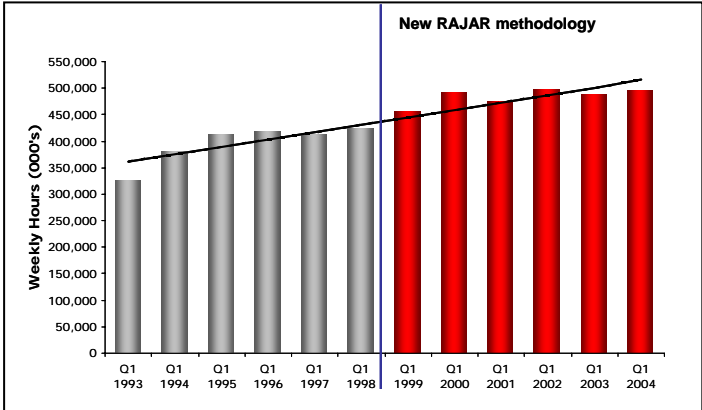
**Fig.2: BBC Network Radio Hours of Output 2003/2004**

	BBC Radio 1	BBC Radio 2	BBC Radio 3	BBC Radio 4	BBC Radio Five Live
Music	8,500	7,206	8,264	-	-
News and weather	270	533	19	2,404	6,486
Sport	30	-	-	542	2,106
Factual	15	26	-	1,254	-
Current Affairs	35	458	-	1,199	46
Drama	-	14	103	1,079	-
Arts	-	88	169	464	-
Entertainment	-	71	-	511	-
Religion	-	192	60	289	-
Schools	-	-	64	160	-
Leisure	63	-	-	-	-
Children's	-	-	50	26	-
Presentation	148	196	55	56	146
<b>Total</b>	<b>9,061</b>	<b>8,784</b>	<b>8,784</b>	<b>7,984</b>	<b>8,784</b>

Source: BBC Annual Report and Accounts 2003/2004  
 Notes: 1. Radio 1's additional hours reflect the national sessions which run simultaneously as opt outs on the network.  
 2. Music broadcast is routinely broken down by sub-genres for each station. On this basis, Radio 1 hours of music fall into eight sub-genres of dance music, 6 of urban, 2 of rock, and 6 other categories. Radio 2 broadcasts 18 different sub-genres.  
 3. Output on Nations and Local stations is not routinely categorised by genres across all stations, and therefore is not included.

The explosions of digital television and the Internet have done nothing to kill off radio. In the last five years, listening to radio has returned to 1940s levels, and 90% of the population now tunes in each week, using BBC services for over 17 hours each week an hour more than five years ago. BBC Radio is now responsible for 54% of all listening and viewing hours to the BBC.<sup>1</sup>

**Fig.3: Growth in Time Spent Listening to the Radio in the UK (weekly hours)**

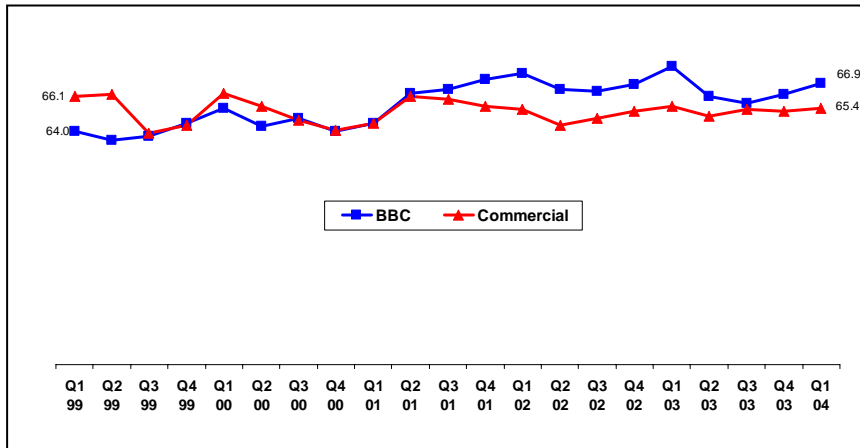


Source: RAJAR/IPSOS RSL

<sup>1</sup> RAJAR/IPSOS RSL & BARB Q2 2004 (this does not include New Media consumption).

While the digital age has transformed the radio market within the UK, the good health of both the sector as a whole and of BBC Radio within it can be attributed to a combination of continuity and the medium's inherent compatibility with the changing world.

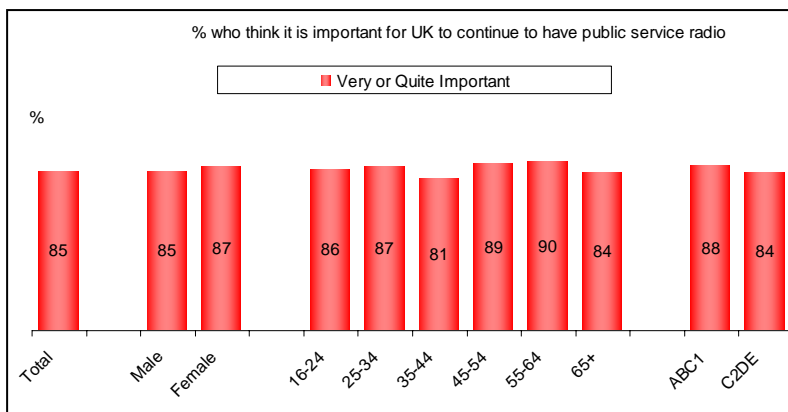
**Fig.4: Reach of BBC Radio Services Compared to Reach of Commercial Radio**



Source: RAJAR/IPSOS RSL

Despite leading busier lives, audiences can still find a place for radio, as a soundtrack alongside other activities, and as social isolation has grown, the role of radio in providing a meeting space across the airwaves appears to have strengthened. Technology has introduced texting, emailing and online communities alongside the phone-in to increase radio stations' interactivity with listeners, while the portable radio of the past has downsized with micro tuners finding their way into mobile phones and other devices.

**Fig.5: The Importance to the UK of Public Service Radio**



Source: Taylor Nelson Sofres Phonebus 12th-14th March 2004

BBC Radio has remained part of the fabric of listeners' lives in a way that many would not have predicted a decade ago. Two thirds of the population listen to BBC Radio each week, and the UK as a whole continues to believe that there is an

intrinsic value to public service radio. In a recent survey, 85% thought it very or quite important for the UK to have public service radio.

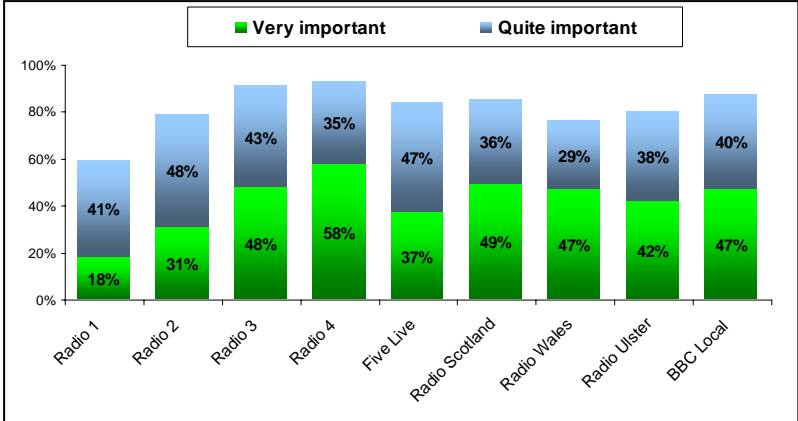
There have been changes. A decade ago Radio Five Live had just replaced Radio Five, and during the current Charter period new services have been developed from existing stations at local and regional level. In the last two years, five new digital-only stations have been launched, in addition to the rebroadcast of the World Service on digital frequencies across the UK. BBC Radio as a whole has tried to harness the power of emerging technologies to develop its relationship with its audience, allowing them to interact with programmes after broadcast via station websites, and through the listen-again facility offered through the BBC Radio Player.

Individual networks have also made adjustments to maintain their distinctiveness. All the music networks have reaffirmed their commitment to UK music and talent. There has been a renewed emphasis on new, live and UK music on Radio 1; Radio 2 has also committed to supporting UK music as it has evolved to keep pace with the changing tastes of the broad adult audience; and English local radio has refocused its programming on serving an older constituency.

Audiences' lives and interests have also changed: both Radio 3 and Radio 4 have reorganised their schedules to adjust to changing lifestyles – for example, Radio 3 extended *CD Review* on Saturday by an hour in order to reflect the increasing popularity of buying contemporary music CDs; Five Live has grown away from a mixture of 'live' and built programmes to an almost completely live format.

The second digital age which is coming will bring thousands of stations from around the world via the Internet into the majority of people's homes. It may transform the ways that radio is listened to. But throughout this transformation, as through the last, BBC Radio will continue to focus on the needs of audiences in the UK. However listeners choose to engage with them in the future, BBC Radio's analogue stations will aspire to embody the qualities of a real best friend: witty and funny, packed with advice and knowledge, sharing passions, pushing on tastes and interests, supportive, and always around, for everyone, whenever they are needed.

**Fig.6: The Importance of BBC Radio Stations to Audiences in the UK**



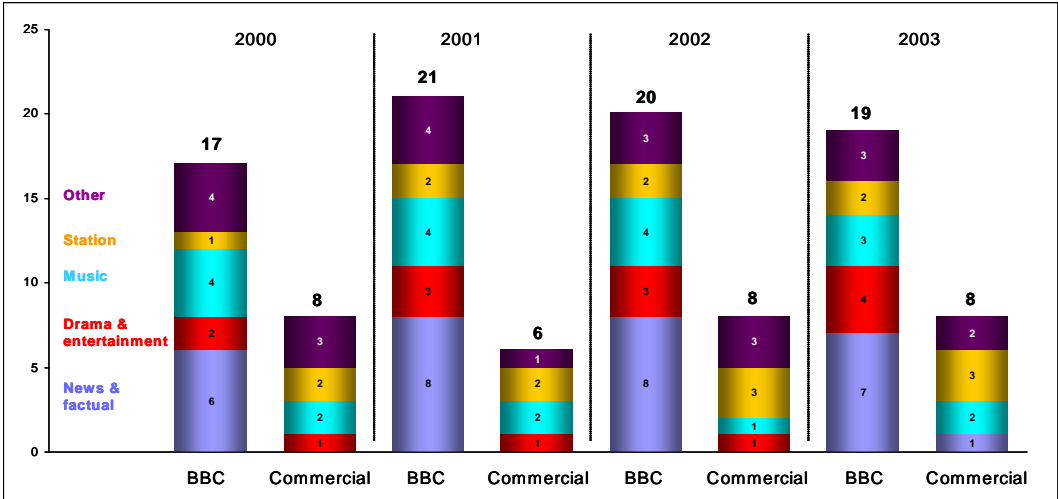
Source: Quest surveyDATE

## 2. Building Public Value Through Radio

BBC Radio is fully funded through the television licence fee. That privilege and the resulting freedom to focus on audiences without any obligation to deliver to shareholders and advertisers, brings with it immense responsibilities. In its radio stations, as in all other areas, the BBC works consistently to contribute to the lives of those who live in the UK, building public value in ways that satisfy them both as listeners and as citizens.

BBC Radio’s contribution to building democratic, cultural, educational, social and community and global value is indicative of the breadth of high quality programming that the 51 analogue stations (5 UK networks, 6 services in the nations and 40 services for the English regions) provide. The UK radio industry regularly recognises BBC Radio across the range of genres broadcasts, and across the networks that make up the portfolio, through the awards it bestows. However, delivering public value does not come at the expense of the fundamental remit of all broadcasters – to provide programmes of quality which audiences enjoy.

**Fig.7: BBC Sony Radio Academy Gold Awards, 2000 to 2003**



Source: Radio Academy; BBC Strategy (excludes some non-output categories)

### 2.1 Innovation

BBC Radio achieves this by consistently breaking new ground, providing audiences with programmes which help them develop new likes, rather than serving up only the familiar. This may be by mixing in new artists and new kinds of music with established talent and genres, commissioning new composers and writers, or by testing the potential of interactivity to engage audiences in different ways.

In recent years, the most significant innovation for which BBC Radio has been responsible is the BBC Radio Player, which allows listeners to hear programmes again within a seven day window. The system which was developed in-house was not the first opportunity to get radio programmes on demand, but it was one of the first legal ways to do so, and remains one of the most wide-ranging services for

offering radio content online. The rights agreements which supported it and allowed entire programmes to be served up again to listeners were also ground breaking. Since its launch they have underpinned the extension from BBC produced factual output to the Archers, specialist music programmes, drama and comedy, then to some sports programming, and most recently to programmes produced independently for the BBC. The results – in terms of rising requests for content through the Radio Player, the role of the service in extending the reach of individual programmes, and the feedback from those who have used it – suggest that this is something which listeners value hugely and which can allow the BBC to deliver its remit more effectively, to more people, thereby “provid[ing] genuine value for the licence-fee payer”.<sup>2</sup>

Technical innovation also comes on a smaller scale, often by looking and learning from others. The BBC Radio websites which support the analogue networks were not the first to be created, but by synthesising ideas from outside radio they have built unique spaces housing programme communities and offering interactive extensions to programmes to create a “happy symbiosis of radio and the Net”.<sup>3</sup> Sometimes such experiments will succeed spectacularly and create a programming style which is taken up by others – 606 on Radio Five Live is one example. At other times, as in *The Dark House*, a drama which allowed the audience to dictate the story that was broadcast by using interactive options, the pioneering move becomes more of a learning experience which can inform future developments by the BBC and others in the field. The project in fact won a BAFTA for innovation in 2003.

Within individual radio services, innovation is part of the routine business of programme-making. Ideas frequently come from collaborations across areas and stations, and from working with partners outside the BBC. Five Live has applied the sport treatment both to coverage of Prime Ministers’ Questions, and to opening up Parliamentary coverage more generally. The BBC digital buses – an entirely new way of taking BBC Local Radio to the population it serves – have been developed jointly by the BBC and a range of local partners.

Continuing innovation of this nature underpins the building of public value. It is critical to maintaining the relevance of BBC Radio for its audiences, and its contribution to the UK.

## 2.2 Building Democratic Value

The provision of news and current affairs programming sits at the heart of BBC Radio, from Radio 1 to Radio Five Live, from Radio Cornwall to Radio Nan Gaidheal. The five national analogue stations alone devoted more than 11,000 hours to news and current affairs last year. Fair, accurate, impartial and independent journalism underpins the BBC’s ambition to provide audiences with the most comprehensive schedule of news and current affairs programming available on UK radio. A range of original, in depth programmes based on extensive research is broadcast week in, week out by BBC Radio – from *Crossing Continents* and *Analysis* on Radio 4, to *Five*

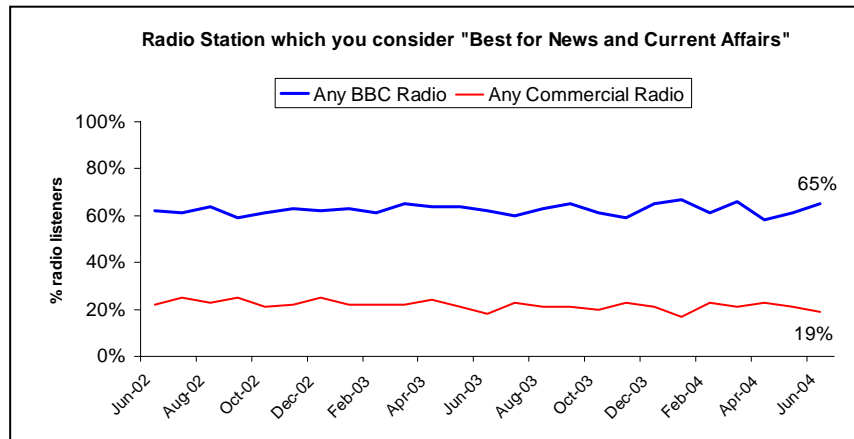
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<sup>2</sup> Owen Gibson, The Guardian, 6th January 2003

<sup>3</sup> Practical Internet, January 2003

*Live Report, to Eye on Wales* on Radio Wales. It is this which leads audiences consistently to rate the BBC as the best radio service for news and current affairs programming.

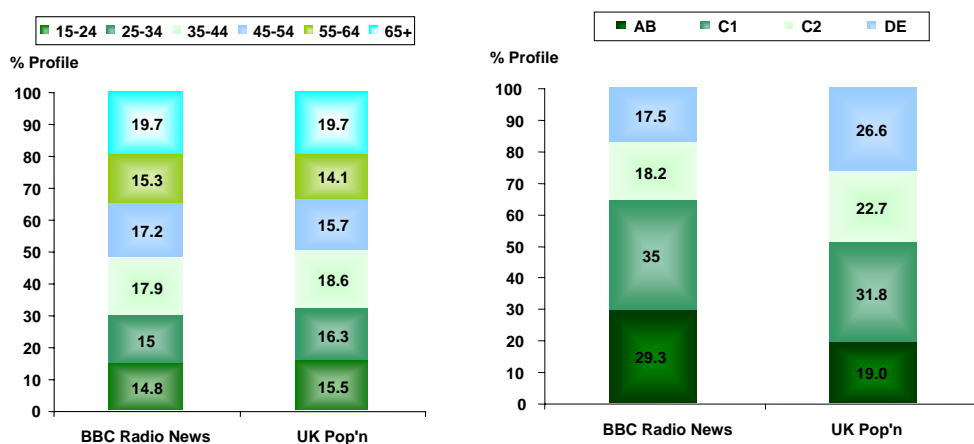
**Fig.8: Audience Evaluation of Radio News Delivery**



Source: Pan-BBC Tracking Study 2002/04

BBC Radio tries to offer a news service for the whole of the UK across its different services, adapting both content and style according to the audience for each network. It succeeds in part: BBC Radio News appeals across the age ranges (below left), but in common with other news services within the UK it reaches a disproportionately large number of those within higher social classes (below right).

**Fig.9: The Reach of BBC Radio News Across Age and Class, in Relation to the UK Population**



Source: RAJAR/IPSOS RSL

The network of 140 BBC network journalists across the UK, complemented by an additional 300 to 500 reporters who are out and about on behalf of the Nations and Local stations on any given day allows the BBC's radio services unique access to the country as a whole. No other broadcaster has a comparable ability to report the UK back to itself, taking stories gathered by local reporters, informed by their knowledge of the area in which they live and work, to a national audience, and providing live

coverage of national stories in turn back to local radio drivetime programming. A further 110 reporters feed into the stations from around the world.

Radio 4, Radio Ulster, Radio Scotland, and Radio Wales each act as a broadcast journal of record for the business of the UK and Scottish Parliaments, and the Assemblies in Wales and Northern Ireland. In addition, Radio Five Live broadcasts Prime Minister's Questions live from the UK Parliament week in week out, and individual debates and ministerial statements when they are of particular significance.

The investment BBC Radio makes in journalists and producers helps it to produce imaginative and wide ranging current affairs programmes. Radio 4's *File on 4* investigation into Sally Clarke's case made a significant contribution towards a national debate around inexplicable deaths of a number of babies within a single family. The network's research into the construction work on the Athens Olympics for *Face the Facts* revealed that more than 40 people had been killed on Olympic building projects, a far higher figure than on previous Olympic Games preparations. Radio Ulster's *Stephen Nolan Show* last May, alerted by an anonymous letter about unsterilised endoscopes, discovered that the issue affected hundreds of hospital patients in Northern Ireland. Its work in highlighting the problem triggered investigations in a number of different quarters.

*Today* and the other daily news programmes on Radio 4, as well as news programmes on Radio Five Live such as *Worricker* or Victoria Derbyshire's morning show hold decision-makers to account on behalf of a demanding and knowledgeable audience. The Radio networks also give listeners a platform to interrogate the leaders of the UK themselves, from the *Jeremy Vine Show* on Radio 2, to *The Ed Doolan Show* on BBC WM.

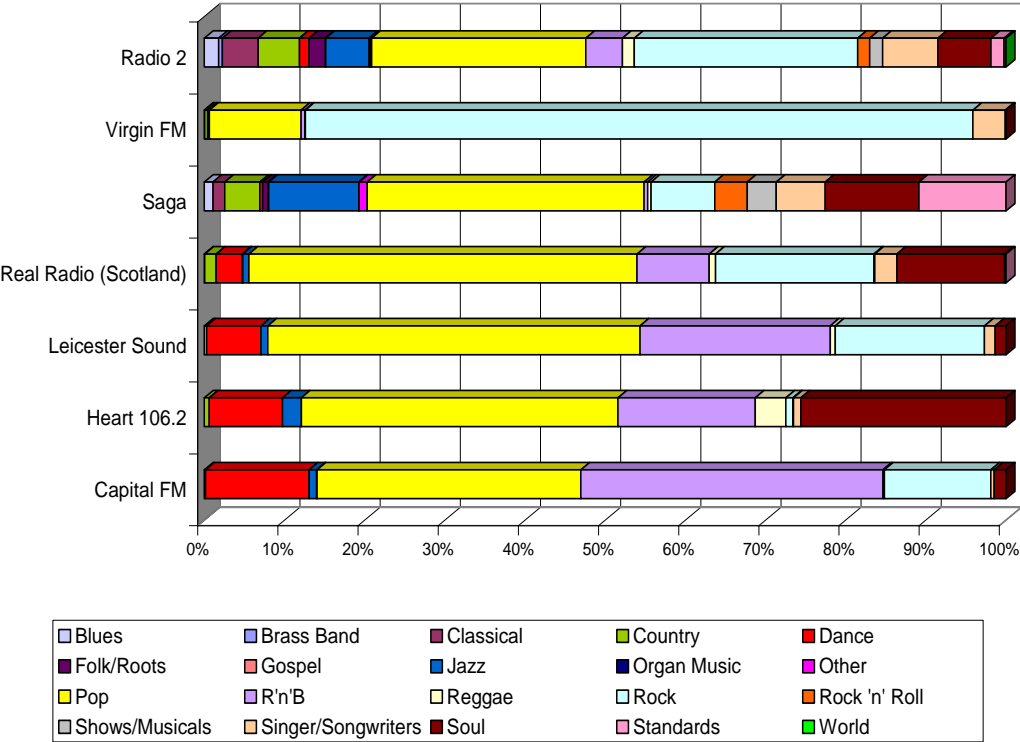
The broad base of BBC Radio's networks enables them to function as a forum for exchanging views. Radio 1's young audience does not seek out news, but attracted in by the musical mix joins in debates about the impact of rap lyrics on inner city violence. The Asian Network recently picked up on an academic study suggesting that children are no longer leaving home when they grow up, and brought together through the discussion both the older and younger generation of British Asian listeners. Radio Five Live's continuous mix of news and sport brings sports fans into discussions around the issues of the day. Days after black England players were racially abused during their Euro 2004 qualifier in Slovakia, Radio Five Live and the BBC digital station Radio 1Xtra simulcast an evening of programmes looking at whether racism was still a problem in British football. The discussion brought together current England players such as Emile Heskey with Lord Ousley, former chairman of the Commission for Racial Equality. Contributions from the audience were similarly diverse.

## **2.3 Building Cultural Value**

As an organisation owned and funded by the population of the UK, BBC Radio seeks to celebrate the creativity of the UK, and to take a lead in shaping the course of the UK's cultural life. Whether it is popular music, the classical repertoire, drama or

comedy, BBC Radio seeks to showcase the best alongside the new in ways that transcend the limits of physical performance spaces. In a typical week, over 50% of the new songs played by Radio 1 are by UK artists, while two thirds of songs played on Radio 2 – representing 20 different musical genres - are not played on other UK stations.<sup>4</sup>

**Fig.10: Genre Mix of Music on Radio 2 and Comparable Networks**



Radio 3 in the last year commissioned over 50 new classical works, and Radio 1 plays 79 new songs a week in its daytime output, 58% more than any other similar network. Among them are on average 11 tracks by unsigned artists.

**Fig.11: New Music in Daytime: Radio 1 and Relevant Competitors**

Station	New	New UK	% of new songs that were exclusive
BBC Radio 1	79	41	44.3%
Beat 106	50	25	26.7%
Capital FM	14	5	9.1%
Galaxy 105/6	48	21	27.2%
Key 103	14	8	0
Kiss 100	22	7	5.6%
Leicester Sound	13	7	1.6%
96.4 The Wave	20	10	2.3%
Virgin FM	11	6	4.4%
Xfm	34	16	6.9%

<sup>4</sup> Based on research carried out during May 2004 by Intelligent Media.

### Fig.12: Writersroom and BBC Radio

writersroom exists to help develop new drama writers across all parts of the BBC, but it has a special relationship with BBC Radio. A variety of different programmes and partnerships underpin this collaboration.

**Sparks** is an annual scheme for writers new to radio drama bringing writers together with radio drama producers for a series of workshops. It has led to some short form work broadcast on Radio 3's *The Verb* and a number of plays currently in development for both Radio 3 and Radio 4.

**Sports Shorts** was a nationwide competition run through Radio Five Live earlier this year inviting sports fans to write a 10 minute drama about a great sporting moment in their lives. It attracted over 1100 entries, with five short plays broadcast in May and another five to go out in December, all by writers new to radio.

**Two Timing**, a collaboration between BBC writersroom, BBC Comedy and BBC Radio Entertainment launched a national search for the funniest and most revolutionary half-hour character comedies for television or radio. Ideas in development include *Judas Kiss* for Radio 4.

**Broken and Blue** will launch this summer, inviting writers across the country to send in proposals for a music drama to be broadcast in the *Sunday Play* slot on Radio 3 next year. The competition is looking for collaborations between dramatists and composers.

**Five's a Crowd** was a three minute daily soap developed and broadcast on BBC Radio Newcastle last year as a three month pilot which used a team of new and experienced writers. The idea has now led to a similar daily soap at Radio Merseyside.

**The Spin** was a competition launched last year to develop short dramas about industrial life in the north of England, run in partnership with BBC local stations. It attracted 400 entries, mostly from writers new to radio. Six winning 10 minute dramas were broadcast on six BBC local radio stations in July 2003.

BBC writersroom also supports **writers in residence** within BBC operations. Those placed include Georgia Fitch with Radio Drama in London (her first play for radio has been shortlisted for the Prix Italia), a writer with the *Silver Street* team in the Asian Network in Birmingham, stand up comedian Tony Burgess in the Northern Comedy Unit in Manchester who is developing ideas for TV and radio, and a writer in residence with Radio 3 next year.

**Writers in the Margins** is a programme to support professional writers in different communities around England, working with a range of emerging writers who have included asylum seekers in Sheffield, gypsies in Liverpool and unemployed men in Hull. Some of the resulting work has been developed and broadcast for radio, including a six part series for Radio Humberside by the Hull Blokes and a short play by Asian Elders from Blackburn broadcast across six BBC Local Radio stations in the North of England.

A biennial award – the **Alfred Bradley Bursary Award** - has just been launched to encourage further development of radio drama writers based in the North of England. The winner will be offered a bursary of up to £6,000 and a commission for Radio 4.

Alongside its support for music, BBC Radio champions other content created in the UK. Radio 4 alone commissioned 350 new plays and 300 hours of original comedy last year at a time when these genres have almost disappeared from the radio schedules of other European public broadcasters. Over the past four years, the BBC has been investing in theatre and writing activities in the North of England, to mentor and nurture new writing talent on the ground, and to run skills-based workshops for

performers and writers. *Northern Exposure* has run alongside an online writing initiative, *writersroom*, to help thousands of writers develop their talent.

Radio's investment in innovation is increasingly bringing dividends for television as well. In recent years shows to have crossed over include *Dead Ringers*, *The League of Gentlemen*, *Goodness Gracious Me* and *Little Britain*. Programming and music that pushes out the boundaries of experience and taste often involves risk, and does not always succeed. However the constancy of public funding allows BBC Radio to fail on occasions, and therefore to engage in a level of risk-taking that can more often surprise and delight audiences, and push on the frontiers of UK culture and creativity.

The BBC also acts as a major promoter of live performance within the UK. Radio 3 offers listeners a recital every lunchtime and a concert every evening, almost all of them live, while the BBC's five orchestras provide 415 concerts per year, including a significant contribution to the Proms. Radio 3 also partners with most of the UK's independent orchestras, enabling their music to be heard live across the country. Radio 2 meanwhile provides opportunities for performers and audiences to experience music in new ways – an Elvis Costello masterclass, Lionel Richie alongside the BBC Concert Orchestra, or David Bowie doing a special performance in the BBC's Maida Vale studios.

**Fig.13: Commitment to Live Music by Radio 2 and Competitors**

Station	Live Tracks
BBC Radio 2	73
Capital	1
Galaxy	1
Heart	0
Leicester Sound	0
Real	0
Saga	4
Virgin	10

Source: *Intelligent Media*, May 2004

Radio 1 deliberately tries to take *One Big Weekend* to areas and venues which do not attract commercial promoters. In May this year the network went to Londonderry for three days – as one 14 year-old there put it, “It’s the biggest thing in Derry for I don’t know how long ... someone actually coming to Derry... Who ever heard of Derry?” The network spends a quarter of its budget on live music and programmes from live events, broadcasting 130 hours of specially recorded and live performances a year and 285 hours of live music from festivals like Glastonbury, Reading and Sonar.

All the stations within the BBC Radio portfolio actively try to use their output to take the cultural life of the UK into listeners' homes. Most of the significant literary or music festivals held in the UK are broadcast by BBC Radio services, a partnership which takes listeners to events they would otherwise have no access to, whether it is Guildford or the Hay on Wye Literary Festival, WOMAD or the National Eisteddfod. The relationship with BBC Radio is critical to the survival of many of these events, and of course BBC Radio is also responsible for the biggest festival of classical music in the world: The Proms.

Local Radio regularly transports listeners to exhibitions and local events which they might not otherwise know about or choose to access. At a UK level, the radio networks hugely extend the reach of some forms of cultural output. Four million people listen to Radio 4 drama across the week, compared to the 200,000 to 300,000 who go to the subsidised and London West End theatres. In 2003 250,000 people went to The Proms. Radio 3's live broadcasts increased this reach for each concert by an average of 250,000 listeners, with afternoon repeats regularly adding a further 140,000 people.<sup>5</sup>

Like the rest of the BBC, the radio services try to celebrate the diversity of cultures which make up the modern UK. Writers, presenters and musicians are found and encouraged by local staff in their home countries and then find a national outlet for their work. The nightly radio sequence *Across the Line* on BBC Radio Ulster has been helping to establish new Northern Irish music for the past 18 years. Major international bands such as Ash, The Divine Comedy and Snow Patrol all got their first radio support on the show. *Celtic Connections* on Radio Scotland has had similar impact. Radio 1 sessions from Scotland, Wales and Northern Ireland have also given UK prominence to the unique national music scenes.

The UK-wide networks have also developed specific initiatives to extend the range of voices that are heard, such as Radio 4's collaboration with East and West Midlands Arts, *Chasing the Rainbow*, which has resulted in the broadcast of plays by a number of writers from ethnic minorities based in the region. Series such as *A Sense of Place*, a celebration of the local area originally broadcast on the English local stations, have reached a national audience as well through a showcase on Radio 4.

Sport belongs with music and the Arts at the centre of UK cultural life, and as a result has an important role within a public service broadcasting offering. Radio Five Live offers live coverage of almost every sporting event in the calendar. The network's commitment and expertise in terms of commentary, sports news, and sports debate help it to play a significant role in turning events such as the Olympics, the European and World Football Championships, and the Rugby World Cup into occasions which bring the nation together to support national and UK representatives. But across the year, Radio Five Live provides coverage of more than 30 different sports with input from former sportsmen and women who have themselves competed at the highest levels.

Sport, especially football, is also an important part of the way that local communities define themselves. As well as commentary, some stations now include a specialist sports programme every weekday. While Radio Five Live through its sport forum 606 allows fans of every persuasion to engage with each other, Local Radio celebrates the passion and pride people feel for their local teams, wherever they are in the football hierarchy, in the case of stations such as Radio Leicester living through the cycle of triumph and disaster along with their fans. The Asian Network, broadcast on Medium Wave in the Midlands as well as digital, offered extensive coverage of India's recent ground-breaking cricket tour of Pakistan.

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<sup>5</sup> Royal Albert Hall ticket sales and RAJAR/IPSOS RSL

Meanwhile, Radio Cymru and Radio nan Gaidheal not only provide a service for Welsh and Gaelic speakers within the UK, but also play a key role in preserving the national heritage, nurturing the next generation of writers and production talent who do not have English as their mother-tongue. All the BBC's networks in the Nations help to sustain the distinctive cultural voices which make up the UK through their investment in new music, comedy and drama from across the communities which they serve. The Asian Network broadcasts in Hindi-Urdu, Punjabi, Gujarati, Mirpuri, and Bengali (as well as English) particularly for older Asian people whose command of English is more limited.

BBC Radio is well placed to act as broker of the artistic life of the UK – whether it be music, film, literature, theatre or fine art - and does so in styles and formats appropriate to the individual audiences. From *In Tune* on Radio 3, *Front Row* on Radio 4 to *The Green Room* on Radio 2, programmes of review, conversation and interview offer artists a platform for revelation and promotion, encouraging listeners towards an active involvement with and enjoyment of the arts.

Both through their direct input, and through the discussion and the participation which they try to stimulate, the different radio networks play a key role in developing the cultural tastes of the UK and shaping the course of the UK's cultural life. For example, Radio 3 commissioned John Tavener's *The Protecting Veil*, which has since become an established classic, influencing contemporary musical taste and composition. In doing so, BBC Radio tries to develop and extend that taste, through music selections which stretch the audience experience by mixing music from the mainstream with what may be new and challenging, by bringing established performers to new writing, scheduling *The Archers* alongside new comedy, or offering insightful documentaries to those who come to Radio Five Live for the latest sports news.

That does not preclude a degree of overlap between BBC stations and other networks, whether in music played, sports covered, or the geographic area served. But in every case, the BBC seeks to ensure that it both reflects and leads cultural life in ways that are relevant but are also distinctive. By doing so the radio networks try to enrich the cultural life of individual listeners and to add value to the artistic economy in general.

## **2.4 Building Educational Value**

BBC Radio still offers some formal education programmes, with schools radio programmes broadcast overnight on Radio 4's digital frequency. But informal learning through a passion to explain the world and to extend people's understanding and knowledge sits at the heart of every station's mission.

Nations and Local Radio services act directly to develop skills in the communities in which they work. 12 BBC learning buses have taken to the road in partnership with local councils and local education providers, combining mobile broadcasting studios with a suite of computers to help bring those who risk getting left behind into the digital world. Open Centres within local radio station buildings in Hull, Sheffield, Blackburn, Liverpool, Stoke and Gloucester do similar work to help people discover what computers might do for them, and even gain a qualification.

Nurturing creative skills in listeners is also a key goal. In Wales and in Scotland, the BBC's radio services have led national storytelling projects, using digital technology to help people tell their own stories. BBC Radio Leeds' *All Together Now* project has worked in one of Britain's most socially deprived areas to encourage community groups to make radio programmes for transmission on the local service. The station is giving schoolchildren and students access to high quality learning resources, helping them to understand the potential of new technology.

**Fig.14: Working Together to Build Value - BBC Music Live**

BBC Music Live was initiated by BBC Radio in May 1995 to try to bring together all the different ways in which the BBC supports live music, and to encourage people around the UK to experience the thrill of live performance and participate in music-making. The event has now become the UK's major celebration of live music celebrating all forms and genres of live music and bringing performances from world class musicians together with community music-making. While the BBC acts as the catalyst and organiser for the festival, it relies on a complex matrix of partnerships with local, regional and national government, cultural bodies and music promoters.

There have now been eight BBC Music Lives, with festivals in Birmingham, Manchester and Glasgow, regional festivals in Yorkshire and Northern Ireland, and UK-wide festivals for the Millennium and again in 2002 for The Queen's Golden Jubilee.

The Arts Council of England studied the impact of the Millennium BBC Music Live finding that some three million people attended over 8,000 different events across seven days. Of these, they found that approximately 600,000 people – or around 20% - were attending their first live music event. The trend was confirmed in similar research for the 2002 Golden Jubilee Music Live. While much of the national focus was on The Queen's Concerts at Buckingham Palace, BBC Music Live placed equal emphasis on the creation of a chain of 200 or more Music Live street festivals all around the UK. With strong emphasis on live music from all over the Commonwealth, more than a million people attended these events and they featured on more than 30 of the BBC's radio and television services.

BBC Music Live 2004 took place in Northern Ireland. The 11 day festival involved more than 10,000 musicians. There were over 200 hours of radio programmes broadcast, across Radios 1,2,3,4, Five Live, 1Xtra, 6 Music, Radio Ulster, Radio Foyle, and the BBC World Service. There were new commissions, community projects, education initiatives and masterclasses in rock and pop, jazz, traditional music and classical genres. A new talent initiative, in partnership with the Arts Council of Northern Ireland gave a platform to more than 50 new bands and ensembles.

BBC Radio worked with a huge number of organisations across Northern Ireland – from local authorities, the Arts Council and the Department for Culture, Arts and Leisure, to community groups. In fact, while the BBC was directly responsible for more than 100 of the concerts and events which made up the festival, Around 400 other concerts and events came from pubs, clubs, music and community groups within Northern Ireland.

BBC research, after the festival, suggests that two thirds of the Northern Ireland population engaged with the festival via broadcasts or live. Around one tenth of the population (nearly 300,000) attended a BBC Music Live event in person, and well over 90% of those surveyed thought the festival a good idea.

But informal learning is what BBC Radio specialises in, and the portfolio both in its entirety and within each service represents a listeners' library of remarkable range, whether it is a series on Islam, the weekly date with *Gardeners' Question Time*, *Any Questions* or *Composer of the Week*. The relative simplicity and economy of radio make it the ideal medium for the transmission of ideas and information. Radio 4 in particular exploits these advantages to the hilt, commissioning a unique mix of programmes which offer listeners insights on history, language, science and much else. Melvyn Bragg's *In Our Time*, for example, draws on academic expertise to create a compelling broadcast conversation and a learning resource of the highest quality. For a very different audience, Radio 1 tries to open up areas of interest beyond music, for example by using the D Day anniversary to explain to its audience how their counterparts 60 years ago helped to secure their future.

The three UK music services invite listeners to take a journey of discovery through their music too. Although each station includes a broad range of music that is familiar to its audience, the commitment to new talent and new work which is fundamental to the purpose of these services opens up new horizons for listeners. Increasing musical knowledge and appreciation is a key part of this mix, and whether it is Radio 1 on Kurt Cobain, Radio 3's *Jazz File* or *Between the Ears*, or Radio 2 on Frank Sinatra or the UK's Black music scene, the networks try to create spaces where depth complements breadth to inform and stimulate their listeners.

BBC Radio also tries to help people to find their musical voice, as songwriters through Radio 2's *Sold on Song* which offers support and insight into the creative process, and as musicians through *One Music* which offers advice on getting into the music industry as well as the chance for young people to have their work heard and reviewed by experts and in some cases played on air. The mainly web-based scheme is supported by *One on the Road*, a mobile interactive forum in local cafes in towns and cities across the UK which brings together live broadcasts, seminars and coaching sessions involving producers, presenters and local young people, schools and colleges. 33,000 people have used *One Music* to date.

The *New Generation Artists Scheme* on Radio 3 similarly helps young people to break into a different area of the music business. So far it has benefited 19 young artists from the UK. Every year it gives new performers within the scheme the chance to take part in 50 lunchtime concerts, and to make 70 appearances with the BBC and other professional orchestras, including ten performances at the Proms. All of those who have been involved now have major international careers. Programmes such as *Building a Library* and *Discovering Music* on Radio 3 aim to help build skills in listening to classical music. More recently they have been joined by *Making Tracks*, a daily programme for seven to 12 year-olds which is reinforced by a series of live concerts around the UK designed to introduce young people to their first experience of live orchestral music.

These initiatives, on and off air, point to different kinds of engagement with the radio audience which encourages learning in the broadest sense. BBC Radio will continue to be the traditional library of the air but also develop new ways of harnessing its skills and expertise to promote the learning society.

## 2.5 Building Community and Social Value

The BBC connects most directly with communities around the UK through its network of local and national radio services. The 46 stations in England, Wales, Scotland and Northern Ireland have been able to develop an intimate relationship with their audiences which goes beyond broadcasting. Both in times of crisis, as Radio Cumbria did during the Foot and Mouth crisis, and in times of celebration, local radio has been the glue that holds communities together. In their coverage of sport, their scrutiny of the Town Hall and other public institutions, in their reflection of the social, cultural, sporting and religious life of the towns and cities where they are located, the BBC's local services help to build a sense of identity in those communities, particularly in those that feel underserved and disenfranchised from the BBC.

All the radio networks play an explicit role in offering support to communities. Every BBC Radio station takes part in charity campaigns, from the pan-BBC *Children in Need* campaign to which Radio 2 alone contributed over £1million last year, to Radio Five Live's *Shirt Amnesty* which collected 25,000 football shirts for young people in South Africa. The stations also run social action programmes, from BBC Radio Cumbria's Lamb Bank which matches orphaned lambs and ewes in milk, through to Radio 1's development of a radio station at Feltham Young Offenders Institute, the BBC Philharmonic's work with the Chinese community in Manchester, or Radio 2's *Talking Teenagers* to encourage communication within families. Within every local radio service in England there is a social action desk, staffed by volunteers who are given access to the airwaves in order to encourage participation in community projects by listeners.

Religion remains central to the lives of many people in the UK, and a critical influence on national life. It has a similar centrality to BBC Radio with *Pause for Thought* on Radio 2 and *Thought for the Day* on Radio 4 both broadcast within peak listening times for the networks. *Good Morning Sunday* on Sunday mornings on Radio 2 attracts an audience of 2.19million to a mix of music, interviews and discussion.<sup>6</sup> Religious leaders believe it plays an important role within the UK – “As a popular programme, open to contributions from religious leaders from different faiths, it provides an almost unique platform to reach a great many people who might not otherwise be exposed to religious views” (Rt. Rev. Cormac Murphy O'Connor, Archbishop of Westminster). In total Radio 2 is responsible for around 190 hours of religious programming a year, including *Faith In The Nation*, a special week of programming exploring in depth one of the world's faiths, and documentaries such as *Anno Domini*, on the history of Christianity in the British Isles, and *Behold the Man*, on the figure of Jesus.

The weekly *Choral Evensong* broadcast on Radio 3 offers an hour of Christian worship as well as opening up the choral tradition of major cathedrals, colleges and churches in the UK and occasionally abroad. It is one of the network's most popular programmes for downloading. While Radio 4 offers a daily service of Christian worship on long wave, faith more generally forms part of a number of its programmes, from *Devout Sceptics* to *The Moral Maze* which interrogates contemporary issues through an ethical lens. All the local radio stations around

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<sup>6</sup> RAJAR/IPSOS RSL Q1 2004

England broadcast some religious programming, and reflect religion across output as part of the life of the communities they serve. Increasingly they are working with people from those communities to help them to produce content themselves – this summer Radio Leicester took a small group to the World Faith Conference in Barcelona for this purpose. This year, local stations in partnership with Radio 2 have initiated a search for new hymn writers across England, and also supported a nationwide Mosque Open Day.

But BBC Radio also tries to serve specific communities of interest within the UK, particularly those who may be neglected elsewhere. These groups may have fringe musical interests – in folk, in world music, or in grime – where BBC radio networks seek to create a space for enthusiasts to come together, with an open invitation for others to join them. Or they may be groups which society as a whole often places outside the mainstream but whom BBC Radio tries to include through programmes such as *In Touch*, a weekly magazine programme for the visually impaired, or *Silver Street*, the UK's first daily Asian soap broadcast on the Asian Network.

All BBC Radio services have a responsibility to foster understanding of the diversity of the different cultures across the UK. Raising understanding of Islam across the UK is currently the most significant issue in this regard, and one which each service has addressed in ways appropriate for its audiences (see case study).

BBC stations create their own communities of listeners. Radio 1 is a place for young people, wherever they are, to congregate for shared experience of music and information targeted at them. Radio 4 attracts people with a certain mindset from all age groups who want to rummage in this well-stocked store. It may be a particular interest that binds listeners together. *I'm Sorry I Haven't A Clue* addicts of *Mornington Crescent* or Big Band followers, devotees of *Fish on Five* or Terry Wogan come together to share a common passion on air, regardless of geography. These bonds have been strengthened by the growth of our network websites which add a powerful new dimension to programmes and allow kindred spirits to continue their research and conversation off air.

Over and above this, at a time when audiences are fragmenting and society as a whole appears to find it harder to unite around interests and issues, BBC Radio has an increasingly important role to play in providing shared space for the UK to come together. Having been granted the analogue spectrum for UK services to reach the whole of the country, and for individual local services to provide coverage across an entire region, the BBC tries to use its frequencies to connect people and communities across the UK. For this reason BBC Radio as a whole has a particular commitment to covering and creating national events spanning the Westminster debate over going to war in Iraq, the Queen's Golden Jubilee, England's Rugby World Cup victory, and of course The Proms. Over the course of the last charter, BBC Radio has also tried to come together to create its own national events, most conspicuously *Music Live*, an annual celebration of music around the UK.

## Fig.15: Covering Issues Across the Portfolio – Islam in the UK

All the radio networks try to address issues within their output that are relevant to the life of the UK today, in ways that reflect the different tastes and styles of their respective audiences. The relationship of the UK to Islam has been analysed in depth since 9/11 across all media. Some examples of BBC Radio's distinctive approach across its stations give a flavour of output as a whole.

### Asian Network

- *Ramadan Reflections* consisted of 25 ten minute programmes in which Muslim leaders discussed their faith in the context of the wider community.
- Shaikh Hamza Yousaf, former advisor to George Bush and one of the most respected scholars in the Muslim world, gave an exclusive extended interview.
- The network followed a group of pilgrims as they performed Hajj with daily reports in *Breakfast* and *Drive* from Makkah.
- In response to Asian schoolchildren saying that God lived in the sky, regional reporter Sanjiv Buttoo joined them with their Muslim RE teacher on a flight over Yorkshire during which they discussed religion, Islam, God, Allah and being near to Him.

### Radio 4

- *Farming Today* has looked extensively at the issue of Jewish and Muslim cultural approaches to the slaughter of livestock.
- In *A Mosque by the Mendips* the network investigated the row in Yeovil as the Muslim community put forward plans to build a mosque, using it as a frame to examine race relations in a part of rural Britain where 99% of the population describes itself as white.
- In the afternoon play, *The Mystic Life*, romance raises awkward questions about faith and commitment for Kassim and Dina, two Scots Muslims in Edinburgh
- *Hidden Voices Ten Years On* revisited a group of European Muslims first visited a decade ago. They included retired teachers from Liverpool who have opened an award winning bookshop, and Dr Mansour Escudero, a psychiatrist and Muslim leader in Spain.
- *The Lab and The Mosque* interviewed Muslim scientists and doctors about how their belief system embraces both science and religion.
- *Born in Yemen, Forged in Sheffield* told the story of thousands of Yemeni workers who came to Sheffield's steel mills in the fifties. Isolated from English society they developed a unique use of the language based on steelworks communication, a South Yorkshire accent, and Yemeni words. The programme celebrated their vital and unsung contribution to the city's industrial heritage.

### Radio 2

- *Ken Bruce* over the last year has looked at racist chants, celebrated Black History Month, and discussed the wearing of head scarves in France, arranged marriages, and whether religious schools should be abolished.
- *Cat Stevens – A Musical Journey* looked at Yusuf Islam (formerly Cat Stevens), his work as a role model for Muslims and international ambassador for Islam, and his work in London setting up Muslim schools.
- As part of the *Faith in the Nation* week this year, *Good Morning Sunday* broadcast a discussion about Christianity with people from other faiths, including a Muslim, a Buddhist, a Hindu and an orthodox Jew.
- *Good Morning Sunday* includes among its regular live guests Faris Badawi, administrator of the Muslim College in London, Iftaker Awan, member of the Muslim Council of Great Britain, Abdullah Trevathan, head teacher of the Islamia School, and the educationalist Yusuf Islam.

### **Local Radio**

- GMR's partnership with Whalley Range High School in Manchester has involved helping the largely Muslim pupils make a feature about reactions to their faith which was broadcast on the network. Pupils are now being encouraged to identify stories for the radio station and to continue to make their own features about them.
- BBC Radio Cambridgeshire was one of the catalysts in setting up the Peterborough Mela, now in its second year.
- BBC Radio Lancashire has tracked a swap between an Imam and a priest in Burnley.
- BBC Radio Leicester has worked with three young Muslims to support them in making a series of award-winning programmes which challenged stereotypes about their faith.
- BBC Three Counties Radio followed Bedford Hospital's Imam on his daily round.

### **Radio 3**

- The network cleared the evening schedule in February 2003 for *The Crusades: The Unfinished Story* which examined the latest scholarship on the crusades before moving on to a discussion of their continuing resonance.
- In *Belief*, Joan Bakewell's interviews with poet Imtiaz Dharker and artist Ahmed Moustafa have guided listeners through their respective creative processes and beliefs set in the context of Muslim and Western cultures.

### **Radio Scotland**

- A series to be broadcast in September on Sunday mornings will look at questions of faith and living for Muslims in Scotland today.
- A series explored attitudes to fasting and food in Islam, and other religions.

### **Radio Five Live**

- A recent *Five Live Report*, the live documentary strand within Sunday Morning's *Worricker* programme, gave a personal view from a young British Muslim about what he sees as a rising trend in radicalism amongst Muslim youth.
- Radio Five Live aims to reflect modern, multicultural Britain within all its programmes, both in terms of contributors and the places it goes to. In the run-up to the London Mayoral elections in May 2004, *Five Live Breakfast* came live from the East London Mosque in Tower Hamlets in East London.
- Radio Five Live covered the conference of Ahmadiya Muslims in Surrey, to which 30,000 people from around the world turned up.
- The network has also recently addressed the counteracting of islamophobia in schools through coverage of a project launched by the Lancashire Council of Mosques.

### **Radio 1**

- *Pillars of Faith* broadcast within *Lamacq Live*, looked at the reality of being a young Muslim in the UK after 9/11. Presented by the DJ Imran Khan it examined the beliefs of Islam and how they impacted on the lives of young British people as well as investigating racism and Islamophobia and the issues that had led to the radicalisation of some young Muslims. The programme won a Sony Gold Award.
- A *Sunday Surgery* on Islam discussed young people's preconceptions of what it meant to be a Muslim and how the media portrayed Islam. A member of the Young Islamic Sisterhood was a studio guest.
- *One Life*, a week long campaign in January 2002, spoke to young people from as many different cultures, races and faiths from across the UK as possible to celebrate and demystify the differences. A number of young British Muslims were involved.

## 2.5 Building Global Value

BBC Radio looks out to all parts of the world for people and perspectives to enrich its programmes, trying to bring the best, and the most significant of world culture and information back to audiences within the UK. Musicians, writers, commentators, sportsmen and women and many others provide output with an internationalism that adds immeasurably to the distinctiveness of many of our broadcasts and connects the UK to the wider world.

The *World Music Awards*, and Andy Kershaw's Radio 3 programme have helped to develop the world music genre as well as giving a platform to musicians from the developing world. On Radio 4, Alistair Cooke's *Letter from America*, over the 58 years for which it ran, symbolised for millions of listeners radio's ability to bring the outside world closer to home. *The World Tonight*, *From our Own Correspondent* and *Crossing Continents* on Radio 4, or on Radio Five Live, *Euro News* supplement the daily journalism to connect listeners to events overseas and develop a better understanding of global issues.

BBC Radio is at the same time able to share important elements of UK culture with international audiences. The Proms and much of the work of the BBC orchestras and Singers are heard in about 80 countries, including the USA. Radio 2 is actively involved in South by South West in Texas, where in addition to broadcasting coverage of the international music festival it tries to help British artists to gain recognition within the US marketplace.

The Internet reach of Radio 1 and Radio 2, combined with their commitment to broadcasting UK music, helps them to showcase the creativity of the UK to audiences and music executives across the world. Listeners to the BBC's Nations and Local services have been traced all over the world, connecting them back to the sounds of home. And Radio 3 every year devotes a season to the international Arts – China has been the most recent, while a *Berlin Weekend* a few years ago included live music performances from the city alongside discussion and debate around contemporary Germany.

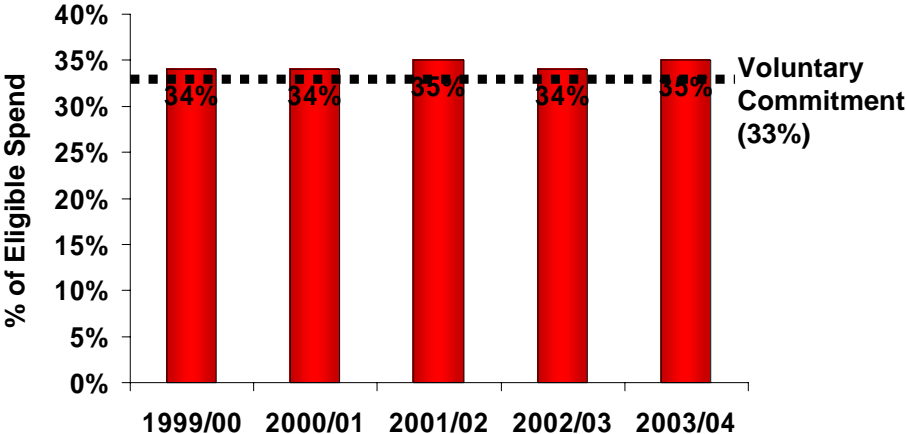
On Radio 4, the decision to make this year's Reith Lectures available as an experimental download was warmly welcomed by internet listeners, many of them living beyond the reach of the station's transmitters. An earlier series of lectures by Professor Anthony Giddens on Globalisation physically criss-crossed the globe; the international demand for the most recent series was both unexpected and an extremely encouraging indicator of the way in which BBC Radio's programme portfolio is becoming increasingly available to a global audience.

## 2.6 Economic Value

While BBC Radio's primary purposes are around entertaining and informing the people of the UK, the BBC's radio services are also leading investors in the creative economy of the UK.

BBC Radio tries to invest around the UK to stimulate regional centres of creativity. Over 50% of its direct programme spending, or £211.8million is spent outside London, using production centres in Belfast, Cardiff, Manchester, Birmingham, Glasgow and Bristol for parts of BBC Radio’s UK output alongside the investment in Nations and Local services. Over the last five years the UK-wide analogue networks have consistently exceeded the Hatch targets for commissioning a third of output from beyond the M25. In addition, all the networks take programmes on the road, from *Gardeners’ Question Time* (Radio 4) to Radio One’s *One Big Weekend*.

**Fig.16: BBC UK Network Radio’s Investment in Regional Production**



In addition to its specific support for the independent production sector through the quota, BBC radio invests significant sums in other creative businesses. In Radio 3’s case, just under 48% of spending on the service last year flowed through the station directly to musicians, composers, actors, writers, and performing groups (both BBC and independent), with a further 8% going to rights holders via the appropriate collecting societies.

BBC Radio issues more than 3,700 contracts to writers and 11,000 contracts to actors in a single year, working across original drama, comedy and entertainment programmes. Between April 1998 and June 2004, Radio 4’s *Afternoon Play* slot alone commissioned 1,562 new plays from 827 writers, including 247 writers who had never received a radio drama commission before. Every single year, the network commissions around 200 new plays, of which around a quarter come from writers who are new to radio.

Through its music services, the BBC is the biggest single commissioner of new work in the world. Radio 3 has worked with 250 composers in the last five years, more than 60 of them in the last financial year. These range from established composers such as Sir Peter Maxwell Davies and Sir Harrison Birtwhistle, through Jazz composers Brian Irvine and Gary Husband, to new young talent such as Joseph Phibbs who wrote a piece especially for the last Night of the Proms. The network, together with Radio 2, employs more than 420 musicians and singers within the BBC performing groups. It supports many more through its collaborations with other independent orchestras, and with festivals and venues from St Magnus in the Orkneys to Belfast, as well as its weekly co-promoted concerts from the Wigmore Hall in London.

Radio 1 and Radio 2 between them play more than 2,200 different tracks in the course of a week.<sup>7</sup> Together with the music broadcast on the BBC's other stations this results in rights payments to musicians, composers, lyricists and music publishers of more than £34million annually (2003/04). There is a consensus across UK music businesses that the networks' role in supporting new music and in extending the range of music in which people are interested is critical to the health of the music industry.

Talking specifically about Radio 1, Martin Mills, Managing Director of the UK's biggest independent label, Beggars Banquet, says:

*“New music in the UK without the BBC would be in trouble....The BBC takes risks with, and supports, new music – as indeed one would wish for and expect from a Public Service Broadcaster...Artists such as Dizzee Rascal were not only championed by the BBC, but remain largely ignored by the commercial sector, despite their now obvious worth and appeal...In the early days of an artist's career, this support, the weight it carries, and the revenue it generates is irreplaceable”.*

Tony Wadsworth, chairman of EMI Music UK and Ireland, believes that Radio 2,

*“has helped to make the official UK Album Chart a far more interesting and eclectic mix of music than ever before. The UK albums market has bucked the trend and remained strong, while all other markets around the world are suffering severe decline, and much of the credit for that has to be given to Radio 2.”*

Radio 2 also works with the British Phonographic Institute to promote the best new UK music, with the two combining to take a UK music showcase to the international Texas-based festival South by South West.

As well as its direct role in commissioning new work, BBC Radio works to encourage and recognise talent outside the BBC. Radio 2 alone is responsible for the Radio 2 Folk Awards, The Young Folk Awards (a weekend event which also involves master classes and tuition), The Young Brass Soloist Award, the Young Chorister Awards and the BBC Radio Jazz Awards, in partnership with Radio 3. Radio 3 also works in partnership with the British Academy of Composers and Song Writers to support the British Composer Awards.

The BBC recognises the need to work together with others to maximise the economic value that can be delivered by all those who work in creative businesses in the UK. BBC relationships with UK music festivals such as WOMAD, the London Jazz Festival, and the Cambridge Folk Festival, have helped to raise their profile, in turn helping them to attract sponsorship and musicians to the events, and have brought larger audiences to the festivals, both in person and over the airwaves. This interaction helps to underwrite the diversity of the UK's cultural scene, and to multiply the impact of what are relatively small, physically limited events.

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<sup>7</sup> Independent analysis of BBC Radio output by Intelligent Media.

BBC Radio tries to tread carefully in the market, using its power to benefit and to strengthen others. This year, Radio 3 will inaugurate *Listen Up!*, a national celebration of orchestral music lasting six weeks and involving professional, amateur and youth orchestras the length and breadth of the UK. Working in partnership with the Association of British Orchestras and Making Music, this festival will highlight the extraordinary range of musical activity which takes place routinely around the country, giving each orchestra participating at least one live broadcast live on Radio 3. While this is a particular showcase, Radio 3 helps support a wide range of UK orchestras and performing groups across its output through its commitment to broadcasting their concerts and inviting them to perform for the network. This is of course in addition to the work of the BBC performing groups.

**Fig.17: UK Performing Groups Broadcast on Radio 3 April 2002 to March 2004**

Academy of Ancient Music	Grand Union Orchestra	Orchestra of the Age of Enlightenment
Academy of St Martin in the Fields	Halle Orchestra	Orchestre Revolutionnaire et Romantique
Almeida Ensemble	Harmonieband	Orpheus Chamber Orchestra
Bach Festival Orchestra	His Majesty's Sagbutts and Cornetts	Palladian Ensemble
BBC Concert Orchestra	Ixion	Philharmonia
BBC National Orchestra of Wales	Jazz Orchestra of Great Britain	Royal Liverpool Philharmonic Orchestra
BBC Philharmonic	King's Consort	Royal Opera House Orchestra
BBC Scottish Symphony Orchestra	London Baroque	Royal Philharmonic Orchestra
BBC Symphony Orchestra	London Philharmonic Orchestra	Royal Scottish National Orchestra
Birmingham Contemporary Music Group	London Sinfonietta	Scottish Chamber Orchestra
Bournemouth Symphony Orchestra	London Symphony Orchestra	Scottish Opera Orchestra
Britten Sinfonia	Lontano	Sinfonia 21
BT (Scottish) Ensemble	Matrix Ensemble	Sonnerie
Chetham's School Orchestra	Music Projects, London	St James's Baroque
City of Birmingham Symphony Orchestra	Nash Ensemble	Symphony of Harmony and Invention
City of London Sinfonia	National Youth Brass Band of GB	Ulster Orchestra
Composers' Ensemble	National Youth Orchestra of GB	Welsh National Opera Orchestra
English Baroque Soloists	National Youth Orchestra of Scotland	West of England Orchestra
English Chamber Orchestra	National Youth Orchestra of Wales	Yorkshire Baroque Soloists
English Concert	National Youth Wind Orchestra of Great Britain	
English National Opera Orchestra	Northern Sinfonia	
Gabrieli Players	Orchestra of St John's Smith Square	
Glyndebourne Opera Orchestra	Orchestra of the 18th Century	

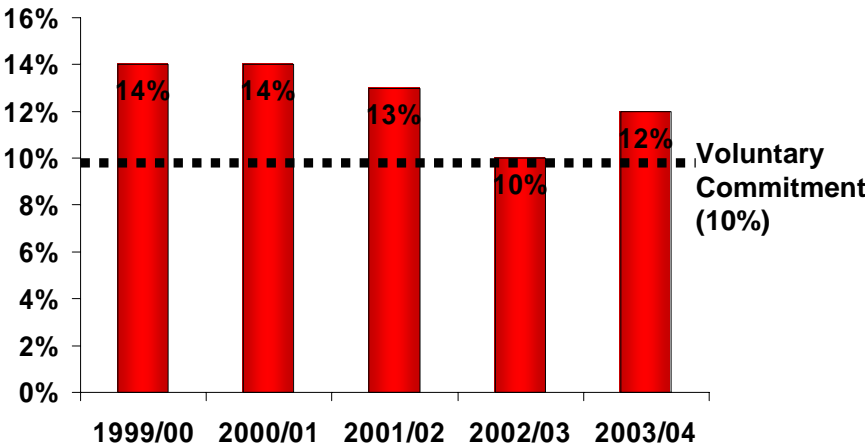
There are times when the BBC deliberately works to break new ground for the market as a whole. This was in part the aim behind the establishment of both the regional and independent production quotas for BBC Radio. It has also been the purpose driving the BBC's commitment to developing DAB Digital Radio, where the BBC has worked in partnership with commercial radio through the Digital Radio Development Board (DRDB). The BBC's on-air support for DAB has helped to grow awareness of the medium, while digital radio manufacturers have credited the BBC's promotional activity and its new digital radio services with directly driving DAB radio sales, which have now passed the half million mark.<sup>8</sup>

<sup>8</sup> BBC Digital Radio Overview, March 2004

BBC innovations such as the Radio Player which allows listeners to listen again to programmes they may have missed are helping to grow new markets in on demand radio content, with potential benefits for all radio providers over the years ahead. In developing these new markets, and in particular where the BBC invests in redistribution of existing content BBC Radio tries hard to create an appropriate framework which recognises the value of creators' and performers' input.

In 1991, BBC Radio committed itself formally to sourcing at least 10% of output from the independent production sector by 1996.<sup>9</sup> Its goal was to stimulate the development of a healthy radio production economy outside the BBC across a range of genres in which a number of broadcasters would invest. However, the BBC remains the only radio broadcaster to have made such a commitment and as such in many areas of programming it remains a monopoly purchaser.

**Fig. 18: BBC Radio Investment in Independent Production**



In the last year, BBC Radio worked with 67 different independent production companies. With the exception of 2002/03 when a key independent supplier went into voluntary liquidation and production had to move temporarily in-house, the BBC has sourced more than 3,300 hours across its UK analogue networks from the independent sector each year for the last five years, an investment of more than £12million annually. BBC Radio is currently working with independent producers to develop new terms of trade on which to carry the relationship forward.

BBC Radio is conscious of the need to act carefully in a market within which it remains a majority provider, showing sensitivity to other radio providers and producers. While the BBC may offer the same genres of content or target some of the same audiences, BBC Radio seeks to ensure that its output is at all times distinctive from competitors and that it operates within markets in ways that limit its impact on others. In the future, the public value test which the BBC is developing will be applied to any new radio propositions at an early stage in order effectively to assess their impact on competitors, both existing and potential, against the potential public value they may build.

<sup>9</sup> Eligible hours for the independent production commitment made by BBC Network Radio include all programming with the exception of live news and sport programming.

### 3. The Audience Perspective<sup>10</sup>

**Fig.19: Performance with Audiences of BBC Analogue Radio Services 2003/04**

	Weekly Reach (m)	Unique Website Users (m)	Live Listening Hours (m)	Audio on Demand Requests*(m)
<b>Radio 1</b>	9.76	1.4	82.8	1.4
<b>Radio 2</b>	12.92	0.62	167.2	0.78
<b>Radio 3</b>	2.16	0.29	12.9	0.36
<b>Radio 4</b>	9.56	0.71	121.6	1.1
<b>Radio Five Live</b>	6.06	0.44	48.5	0.16
<b>Nations &amp; Local Radio</b>	10.21	n/a <sup>11</sup>	118.1	n/a <sup>10</sup>
<b>BBC Radio</b>	<b>32.11</b>	<b>4.1</b>	<b>563.0</b>	<b>4.6</b>

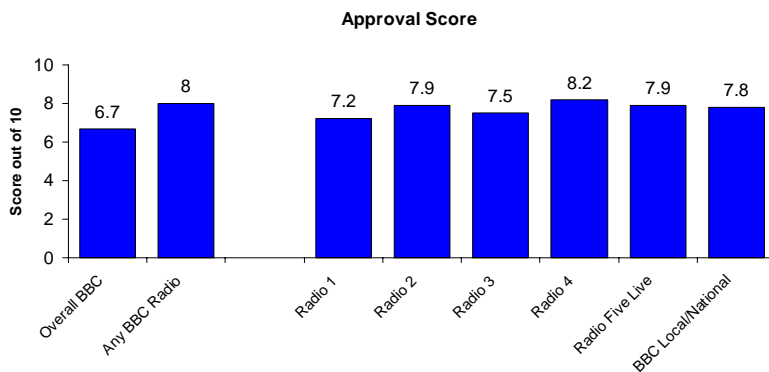
Source: RAJAR/IPSOS RSL April 2003/March 2004, and BBC Interactive Statistics April 2003/ March 2004. Online data are monthly averages across the financial year 2003/2004.

In the face of increasing radio choice from the commercial sector, BBC Radio has demonstrated its continuing value for audiences. Two thirds of the adult population listen to BBC Radio every week, and BBC stations still account for more than half of total listening in the UK even though people are beginning to include a greater number of services in personal portfolio. The BBC's radio stations now reach almost 2 million more people than they did five years ago. Although a part of that growth can be attributed to the new digital services which the BBC has launched, the analogue services have generally remained strong, and approval of each service individually, as well as BBC Radio as a whole, has been consistent over the last three years and at eight out of ten ahead of audience's rating of the BBC overall.

<sup>10</sup> All figures are drawn from RAJAR/IPSOS RSL unless otherwise stated.

<sup>11</sup> Only Nations stations currently have dedicated websites. English local stations are supported but not directly linked to the Where I Live sites. There is no audio on demand service for Nations and local radio at present.

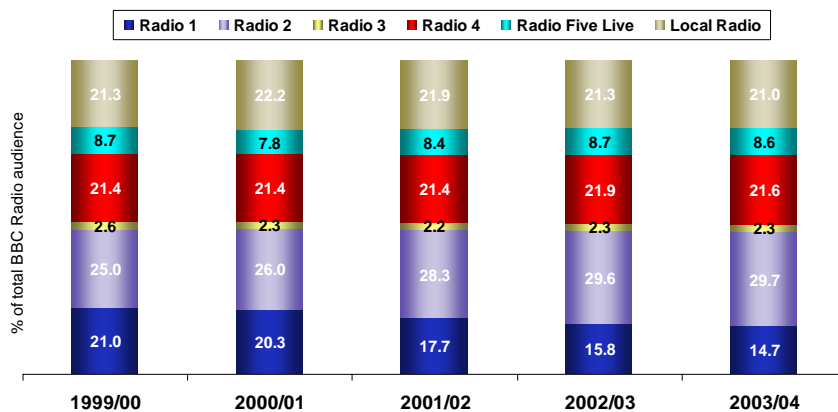
**Fig.20: Approval for BBC Radio Services**



Source: Pan BBC Tracking Study

Audiences for all news services in the UK grew in the wake of 9/11, but the evidence to date suggests that a proportion of those who came to Radio 4 and Radio Five Live have stayed with those networks and begun to listen to other programmes. Radio 3's reach has been stable for the last five years. And Radio 2 has maintained its position as the nation's favourite radio station. Despite the criticisms that this is as a result of dramatic changes within the network, the single biggest growth in numbers of listeners has been in the audience for *Wake up to Wogan*, even though there have been no changes to the slot over the last 11 years. Indeed it is often forgotten that Terry Wogan presented the Radio 2 Breakfast Show in 1980!

**Fig.21: The Composition of BBC Radio Listening**

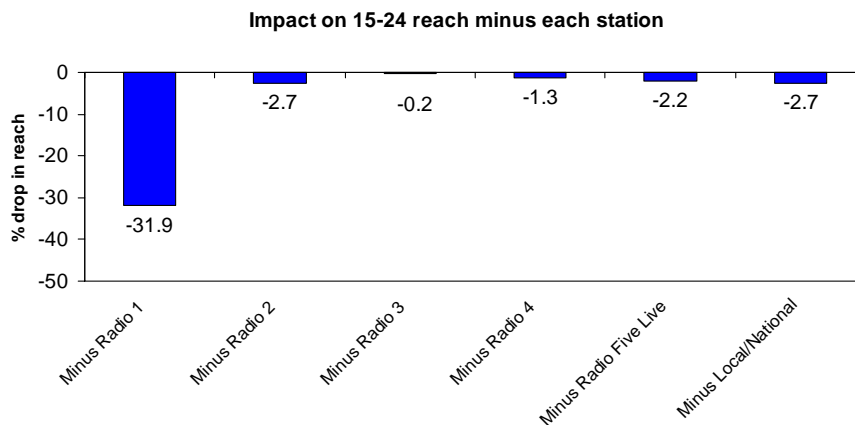


Source: RAJAR/IPSOS RSL

During this last Charter, Radio 1 has lost listeners. The commercial radio market of services targeting younger listeners has expanded from around 80 stations in the early 1990s to around 200 today. Radio 1 has become more distinctive from the market over this time by focussing on new music and live performance. Only this July the amount of specialist music programmes within the schedule increased, and news output still has the second highest reach of any genre thanks to the two daily *Newsbeat* programmes. Radio 1 still reaches just under half of all 15 to 24 year-olds in the UK, and one in five of the population over the age of 15.

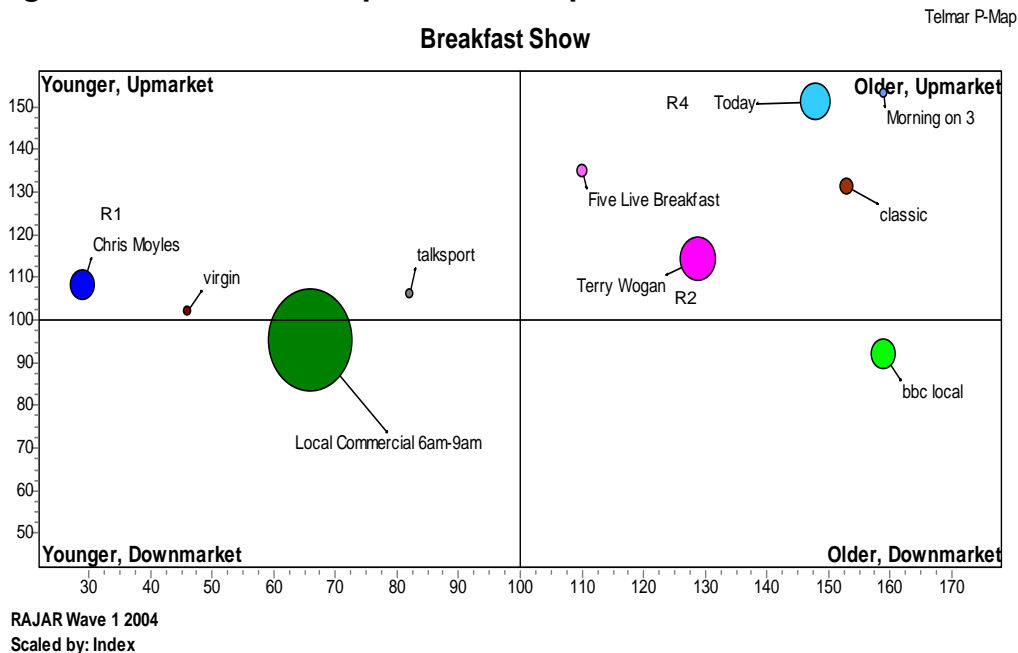
Radio 1 remains a vital part of BBC Radio's offering for audiences, uniquely connecting BBC Radio, and the BBC to young people. Without it, BBC Radio would appear to have little appeal or reach to young audiences. The radio services in the Nations and Regions play a similar role in serving those who would not otherwise find anything within the BBC portfolio – every week four million people listen to the local and national services but to no other BBC station; of those, two million listen to no other radio station at all.

**Fig.22: The Unique Reach of Radio 1: The Change in BBC Radio Reach Among Young Adults Resulting from the Withdrawal of Each Service**



While the BBC aspires to provide something for all audiences through the mix of its radio portfolio, its offering complements the market, both in terms of its content, and the audiences that it attracts.

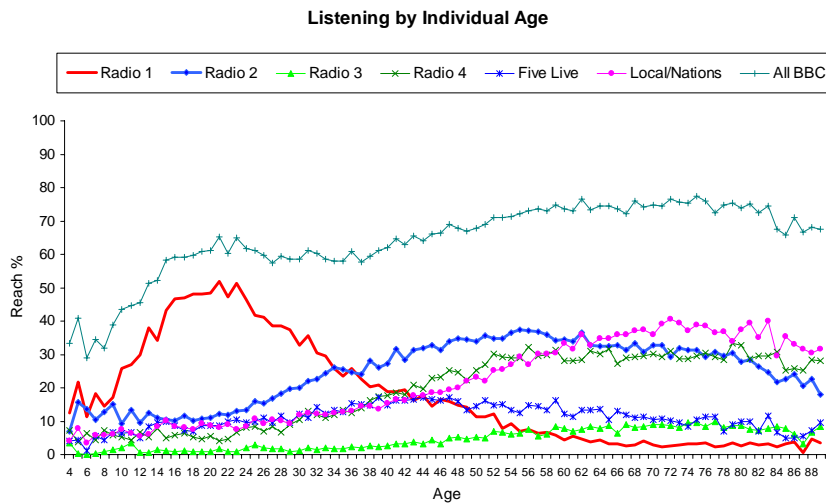
**Fig.23: BBC Radio Compared to Competitors at Breakfast**



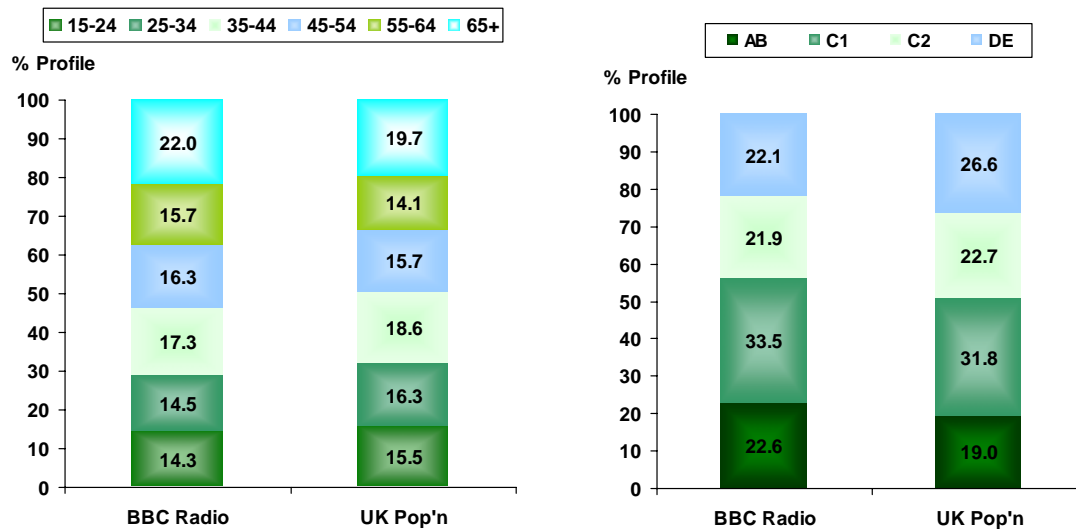
With the exception of Radio 1 and Radio Five Live, BBC Radio tends to appeal to older people. Despite perceptions to the contrary, the average age of a listener to

Radio 2 is 50, with listeners aged over 45 representing 61.2% of the network's audience even though they are only 49.5% of the population. As a whole, listeners to BBC services are getting older, in part because commercial radio tends to focus on those under 45, but mainly because of the UK's ageing population. BBC Radio faces a considerable challenge in the years ahead to maintain a connection to a younger generation of new media users in which the digital networks – particularly 1Xtra and 6 Music – will be extremely important.

**Fig.24: Listening by Age to the BBC's Radio Networks**



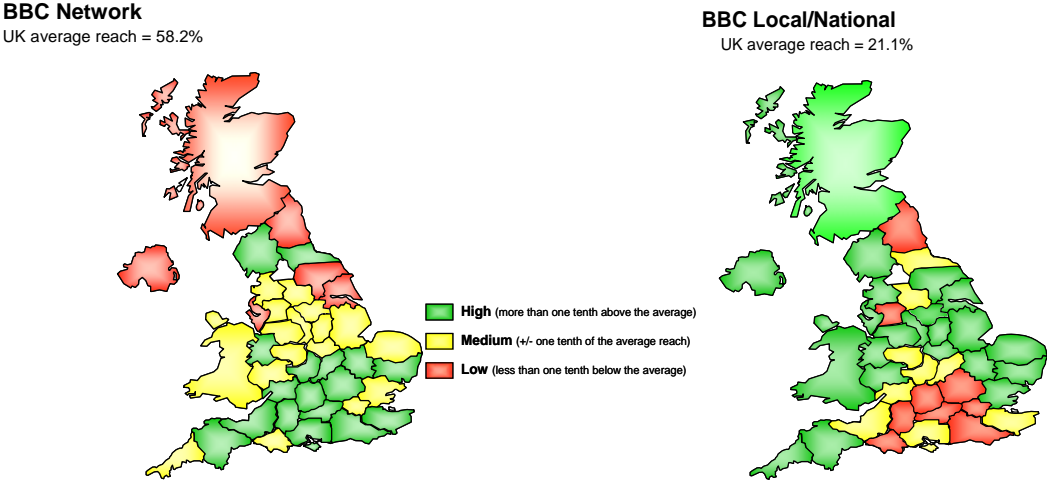
**Fig.25: BBC Radio Reach Compared to the UK Population (2003)**



BBC Radio's audience as a whole tends to be skewed towards the more prosperous groups in society. In part this is a reflection of the high news and speech content within all services (news consumption generally tends to be dominated by AB social groups), but once again, Radio 1 and BBC Nations and Local stations have a considerably higher audience than other services among C2DE groups.

The portfolio as it currently stands delivers right across the UK. While the UK-wide networks tend to be strongest in the South of England, and Radio 4 remains the most popular station in London, BBC Local and Nations Radio performs best in Scotland, Wales, Northern Ireland, and rural England.

**Fig.26: BBC Radio’s Complementary Reach Across the UK**



However the BBC’s mainstream radio services do not do well in reaching ethnic minority audiences in the UK compared to their performance among white adults (with the exception of the Asian Network). While Radio 1 and Radio Five Live perform better than other networks, it is clear that the BBC’s analogue radio networks fail to deliver to licence fee payers from ethnic minorities. Considerable efforts have been made within BBC Radio to address this problem, to try to ensure that both content and presentation reflects the multicultural make-up of the UK, and to ensure that networks are as accessible in style as possible. But this gap partly underpins the BBC’s decision to launch 1Xtra and the Asian Network as digital services more directly targeted at the interests of black and Asian populations within the UK.

BBC Radio invests for audiences in forms of programming which are inherently expensive, such as documentaries, original drama, and live concert and session music. This mix results in higher programming costs for BBC Radio networks compared to the commercial sector. But while the costs per hour of BBC networks are as a result higher than commercial radio, the reach of the BBC’s radio services reduces the cost of each listener hour to negligible levels for all networks, at between £0.01 and £0.08.

**Fig.27: Comparison of Cost per Hour and Cost per Listener Hour (£)**

		1999/00	2000/01	2001/02	2002/03	2003/04
<b>Radio 1</b>	cost per hour	4,285.43	4,433.48	4221.68	4,363.33	4,292.35
	cost/listener hour	0.01	0.01	0.01	0.01	0.01
<b>Radio 2</b>	cost per hour	4,522.65	4,370.55	4,729.11	4,770.66	4,719.07
	cost/listener hour	0.01	0.01	0.01	0.01	0.01
<b>Radio 3</b>	cost per hour	6,014.23	5,751.83	5,912.44	5,992.01	6,093.81
	cost/listener hour	0.08	0.08	0.08	0.08	0.08
<b>Radio 4</b>	cost per hour	10,502.00	11,010.67	11,185.83	11,063.27	11,044.71
	cost/listener hour	0.01	0.01	0.01	0.01	0.01
<b>Radio Five Live</b>	cost per hour	6,703.21	7,574.54	8,390.75	8,657.65	8,237.70
	cost/listener hour	0.03	0.03	0.03	0.03	0.03
<b>Nations &amp; Local</b>	cost per hour	582.18	609.87	607.49	659.53	656.11
	cost/listener hour	0.03	0.02	0.02	0.03	0.03
<b>Total</b>	<b>cost per hour</b>	<b>1,445.59</b>	<b>1,489.99</b>	<b>1,524.99</b>	<b>1,559.72</b>	<b>1,524.56</b>
	<b>cost/listener hour</b>	<b>0.02</b>	<b>0.02</b>	<b>0.02</b>	<b>0.02</b>	<b>0.02</b>

1. Cost per hour is calculated by taking the full allocated cost of each network (Source: Radio Finance) and dividing by total broadcast hours (source: BBC Annual reports).
2. Cost per listener hour divides the full allocated cost by total listening hours (Source: RAJAR/IPSOS RSL) in the year.

There is inevitably some overlap between BBC Radio services – UK listeners in any case are not monogamous in their relationships with radio stations, and tend to listen to 2.8 stations a week. The content overlap between BBC stations is extremely limited: Analysis of Radio 1 and Radio 2 has found 2.2% of records (50 out of 2,259) were played by both stations in the course of a week; and while both Radio 4 and Radio Five Live offer a breakfast news programme, their style of approaching the daily news agenda is completely different.<sup>12</sup> This is reflected in the fact that the highest overlap of audiences between services is between speech and music services (Radio 3 and Radio 4, or Radio 2 and Radio 4 or Five Live).

**Fig.28: Audience Overlaps Between BBC Services**

% of listeners who also listen to ....	Radio 1	Radio 2	Radio 3	Radio 4	Radio Five Live	BBC Local/Nations
<b>Radio 1</b>		19%	11%	12%	24%	15%
<b>Radio 2</b>	25%		41%	39%	34%	33%
<b>Radio 3</b>	3%	7%		16%	6%	6%
<b>Radio 4</b>	12%	29%	72%		32%	24%
<b>Radio Five Live</b>	15%	16%	18%	20%		18%
<b>BBC Local/Nations</b>	16%	26%	27%	26%	30%	

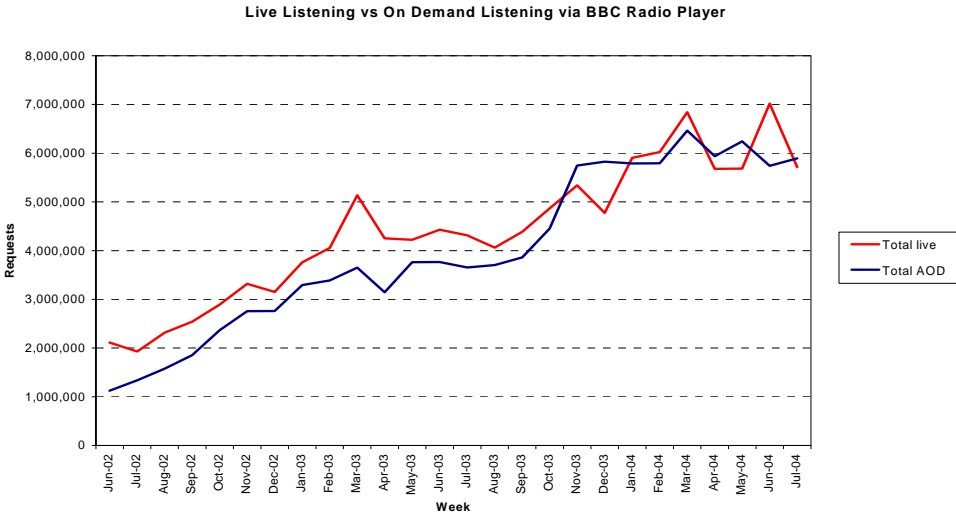
Note: To be read from the top and then across i.e. the number of Radio 2 listeners who also listen to Radio 3 is 7%

<sup>12</sup> Intelligent Media independent analysis of music played

The emergence and take-up of digital technologies has effectively transformed BBC Radio’s relationship with its audiences. The Internet in particular has provided opportunities for listeners to particular programmes to continue that experience and to build relationships with other listeners even when programmes are not on air. It has also allowed for listen-again opportunities with the BBC Radio Player, giving audiences access to content whenever it suits them within a seven-day window.

Requests to hear programmes again have risen from 1million per month two years ago when audio on demand first became available to almost 7million today. While *The Archers* still tops the list of requests, *Chris Moyles* and *Pete Tong (Essential Selection)* closely follow it.

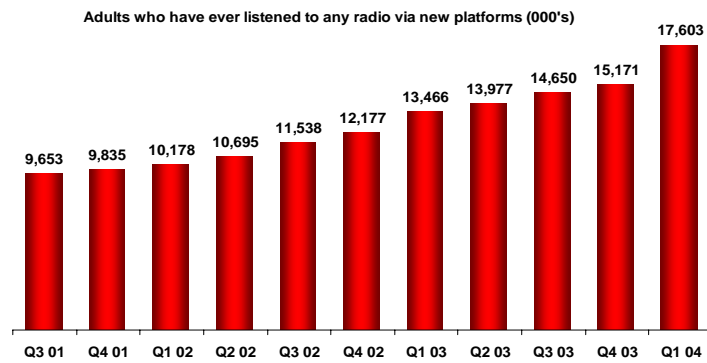
**Fig.29: Growth in Requests for BBC Live Radio Online and for Audio on Demand**



Source: *bbc.co.uk server logs*

While conventional radio listening – albeit in ever more portable form - remains the main way of accessing analogue services, it is increasingly becoming just one of a number of ways in which audiences choose to listen to the BBC’s Radio Services. Almost 18million people claimed to have used new platforms such as digital television, mobile phones, and the Internet to listen to radio over the first part of this year, and the BBC is trying to make all its analogue radio services available through the range of digital platforms. Requests for live streaming of BBC stations online have risen from 800,000 requests a month two years ago to over 7.5million today.

**Fig.30: Adults Who Have Listened to Radio Through New Digital Platforms**

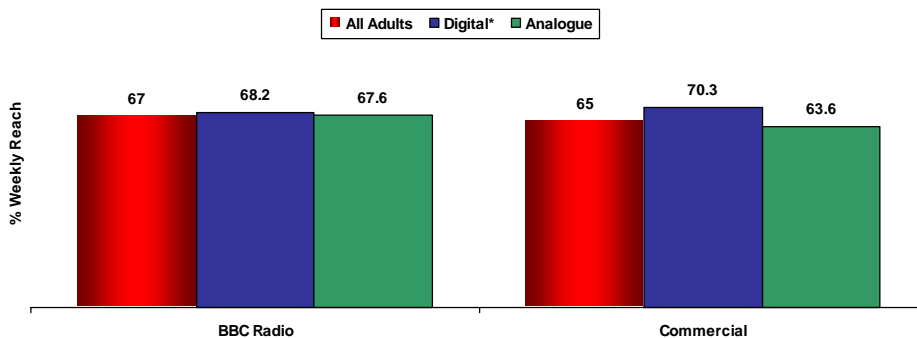


These figures do not include listening through DAB Radio

Although digital homes are now in a majority within the UK, it is not certain that they are fully representative of radio listeners across the UK, given their respective profiles. The trends which are starting to emerge from a comparison of digital and analogue households in relation to radio therefore need to be treated with some caution in looking ahead to what may happen to radio audiences within a fully digital UK.

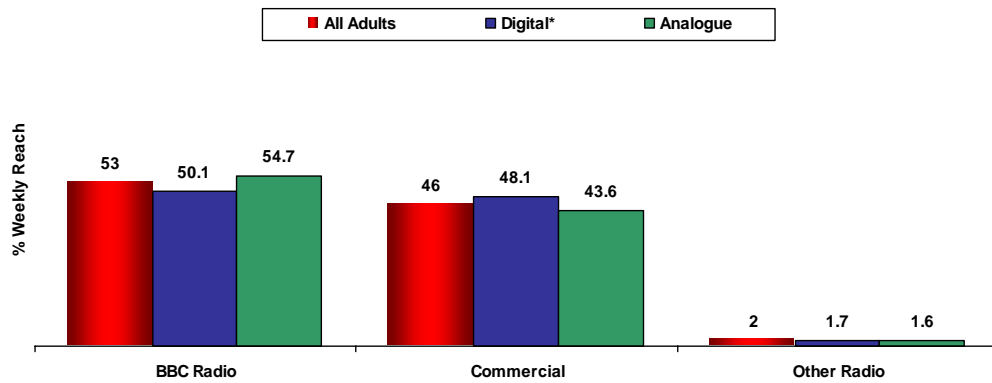
Currently in digital houses, the reach of BBC services is higher than in analogue homes. There are of course more services available, with some of the digital stations targeting audiences which analogue radio finds hard to reach. The BBC's share of overall radio listening is however lower in digital homes. It appears that adults in digital homes spend around an hour less listening to the radio compared to those who only have analogue connections, and they spend considerably less time consuming BBC Radio. But this may well be because digital households tend to be more heavily weighted towards younger families, who typically listen to less radio.

**Fig.31: Radio Reach in Digital and Analogue Homes**



Note: Digital homes are defined as all those who claim to own Digital TV, access the Internet at home and own a DAB set

**Fig.32: Radio Share in Digital and Analogue Homes**



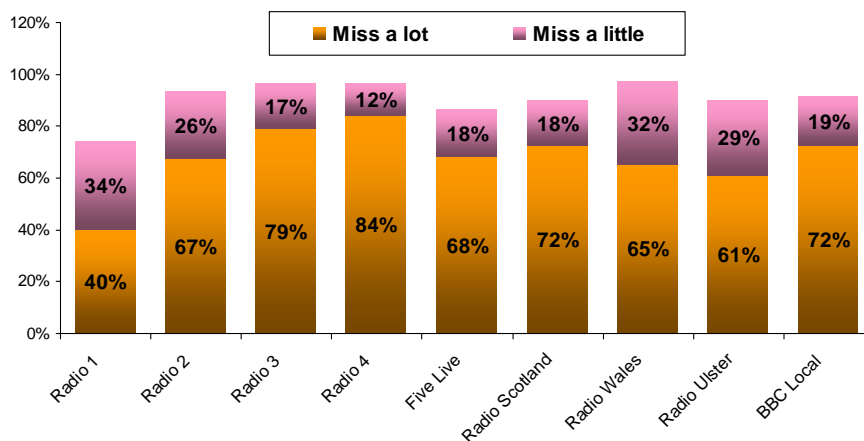
*Note: Digital homes are defined as all those who claim to own Digital TV, access the Internet at home and own a DAB set*

However, as the remaining 50% of the UK gains access to the wider choice of content across radio, television and the Internet that the second phase of the digital revolution is likely to bring, there are challenges for UK radio as a whole, and for BBC Radio in particular to ensure that it continues to remain relevant to people's lives, and able to command a share of attention in an increasingly crowded world of leisure and media choices.

## 4. BBC Radio in the Second Digital Age

Radio has already experienced a first digital revolution. The next phase of this transformation will bring further changes to audiences, technologies and the UK radio market. While there will undoubtedly be greater choice and empowerment for listeners, the role of BBC Radio in the lives of people in the UK will be as important as ever.

**Fig.33: Audience Response when Asked “Would You Miss BBC Radio Stations If They Disappeared?”**



Source: Quest Survey DATE

The value of the broad reach of the BBC’s radio stations with their respective mixed offers of news, music, entertainment, new talent, live performance, probing documentaries and space for discussion should not be underestimated. BBC Radio helps to deliver radio services of value to everyone in the UK, which through Radios 1, 2, 3, 4 and Five Live, the local stations in England and the stations in the Nations have the ability to bring the whole country together.

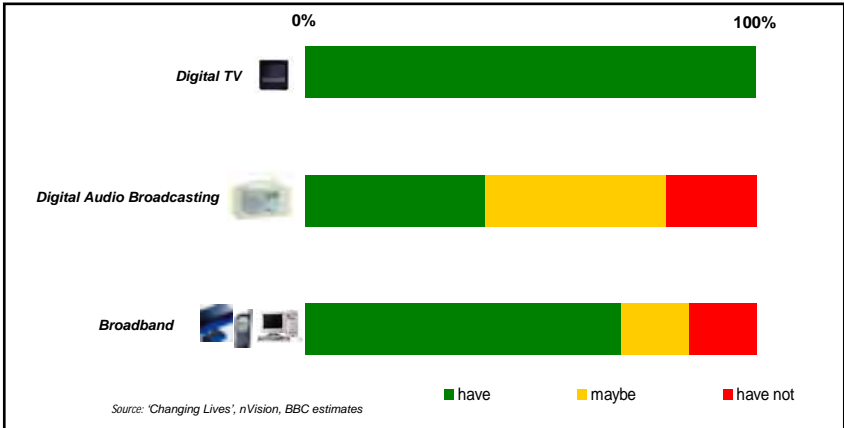
The BBC’s radio networks should not stand still, and the vision for their future which follows envisages changes which are intended to keep them abreast of audiences’ needs while respecting the wider market. But radio’s success to date has flown from a cocktail of adaptability and continuity. BBC Radio’s contribution to the future will similarly flow largely from stations’ determination to continue doing what they have always done – investing in high quality, original content for programmes which keep faith with their audiences’ demands to be informed, educated and entertained by what they hear.

### 4.1 The Changing World

By the end of the next Charter period, while the UK is unlikely to have switched off the analogue radio signal, all listeners will probably be able to receive the BBC’s radio services with digital reception through digital television. Increased access to broadband connections will open the Internet dimensions to the BBC’s radio

services to a greater proportion of the audience, at home as well as at work, and increase access both to the streaming of the BBC’s stations and to listen-again opportunities. In this world, the share of listening choices represented by BBC networks will get progressively smaller, from 6 out of 14 for the average analogue listener, to 41 out of 300 stations available to digital listeners on DAB Digital Radio.

**Fig.34: Predicted Access to Digital Platforms for Receiving BBC Radio by 2016**

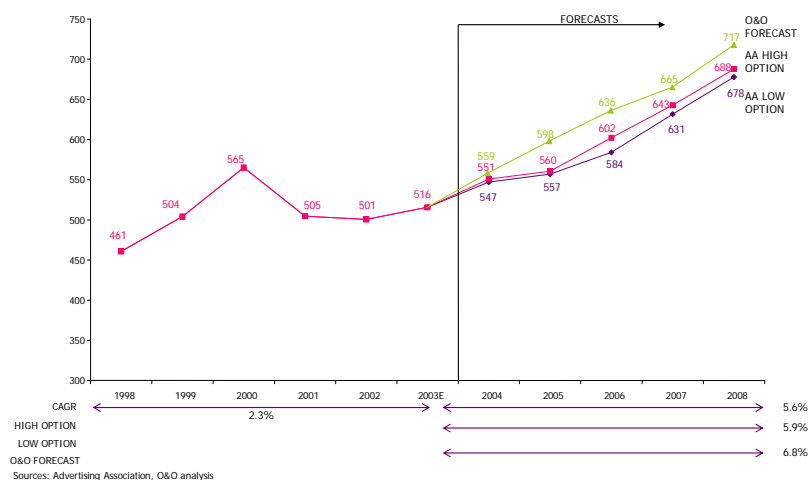


Source: nVision Changing Lives, BBC Estimates

The last ten years have seen enormous changes in UK radio. The next decade is likely to bring further transformation. While the consolidation and takeovers made possible by the Communications Act 2003 have not yet happened, the economics of commercial radio markets suggest that it is only a matter of time before fewer, larger businesses emerge.

This may bring a greater diversity of stations into the UK market, but as commercial revenues grow it is unlikely that owners will invest a higher proportion of their income in content, and they may well invest proportionately less.

**Fig.35: Long Term Trends in Radio Advertising**



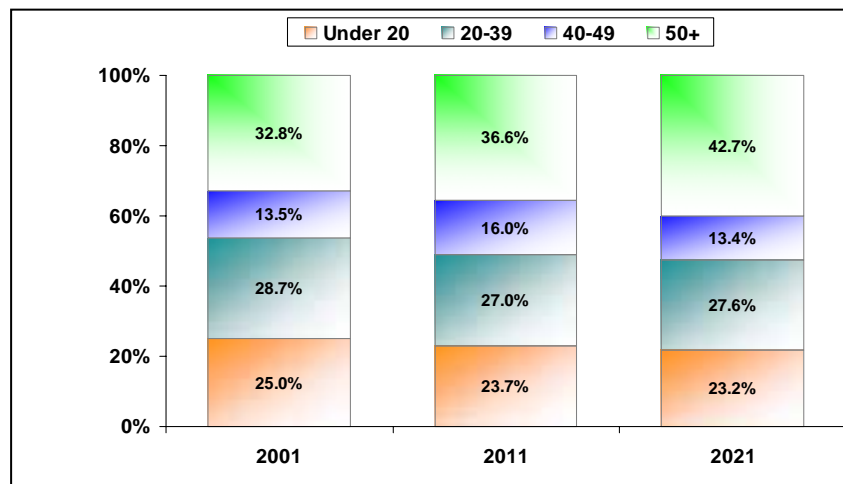
Of the £450million currently spent on radio programming and rights in the UK, around two thirds comes from the BBC. Only £150million of the £500million net advertising revenues earned by commercial radio currently go towards programme content, the rest being spent on administration, marketing, promotion, and profits.<sup>13</sup> While there will be more money available in the industry in the future, as advertising revenues grow and economies of scale are achieved, these revenues will need to fund a larger number of services in the mixed analogue/ digital world. And many of the types of content which are integral to the identity of BBC Radio networks may never be attractive to commercial operators, since genres such as new drama, comedy, documentaries and live music can cost over £10,000 an hour, requiring audiences of over a million people for an advertising funded service to meet costs and make a decent profit on them.

Audiences are also changing. Most significantly, they are becoming older as the population as a whole ages. But this does not mean that they are becoming more homogenous. On the contrary, they are becoming more varied, with divisions between generations more pronounced, a greater range of personal tastes and the expectation that they will be fulfilled, and a more mature multicultural society emerging. While the world has already begun to seem much smaller for many thanks to information flows and low-cost air travel, localness remains important with over two-thirds of UK adults believing local differences need to be retained.<sup>14</sup>

<sup>13</sup> Figures and analysis are taken from *The Market Impact of the BBC's Digital Radio Services* by Oliver and Ohlbaum Associates, March 2004.

<sup>14</sup> nVision/TNS, *Changing Lives* survey, 2002

**Fig.36: The Aging UK Population**



## 4.2 BBC Radio's Response

These changes will shape the character of the services the public might want from the BBC in future. The first phase of the digital revolution has seen the BBC combined with commercial radio delivering increased value to listeners, particularly in relation to extending choice – the general increase in listening pays tribute to that. Digital stations are further increasing the range of music which is available to people, wherever they live.

However as the digital market matures there is no evidence that the need for public service radio will disappear. While it is likely that there will continue to be gaps in commercial provision of particular types of content which the BBC has an important role in filling - for example in built speech programming, drama, comedy and live music and certain genres of music - or in serving particular audience groups, such as older people, that does not mean that BBC Radio should be confined to addressing market failure only.

There will inevitably be some overlap between BBC Radio and the commercial sector in parts of the content it offers and the audiences it serves. However the BBC will always ensure that its networks are distinctive. It will offer programmes and types of music which cannot be found elsewhere, supporting UK artists, musicians, writers and performers. In doing so, it will continue to deliver networks which can potentially offer something to the whole of the population, including those served by the commercial market.

Over the next decade the ways that some people listen to radio are likely to change as the possibilities that have already been opened up by technology become more familiar for more people. The vast majority of radio listening will still be linear, much of it as a secondary activity while getting up, driving, working, or doing other things around the house. For these listeners BBC Radio will continue to offer a breadth and richness of high quality, innovative content within each of its services which is scheduled to offer challenges and surprises to audiences.

Although it will still represent only a small amount of total BBC Radio consumption, the growth in listening by downloading individual programmes is likely to accelerate. These listeners access BBC content in ways that cut through scheduling. The BBC will try to serve them by creating compelling programmes which support and extend their interests. BBC Radio will also work to make it as easy as possible for audiences to find the content which they are looking for, and will try to find ways to encourage those downloading material to explore the wealth of programming which the BBC's radio portfolio produces.

Reaching the audiences who fund the BBC's radio services will be the key measure of success for BBC Radio going forward, rather than the share of UK radio listening which the services achieve. Alongside this, BBC Radio should be judged on its ability to deliver high quality programming across the board, which has a significant impact on audiences, and which is produced and delivered in ways that demonstrate effective value for money.

### **4.3 Building Public Value**

In the 21<sup>st</sup> century world, while the number of sources of information has exploded, impartial and trustworthy information continues to be scarce. Within the United States, Fox Corporation and Clear Channel have already signalled the potential for the political allegiances of news owners to shape the agenda delivered to the public. BBC Radio will continue to deliver to the UK independent and impartial coverage of news and current affairs. This will include in-depth analysis of the issues and it will be broadcast during radio primetime on all BBC Radio analogue services, including the music networks, as *Newsbeat* already does on Radio 1 and *Jeremy Vine* on Radio 2.

This may well become an even more valuable commitment going forward, depending on the decisions taken by others. Gifted with universal spectrum, and as the space still reserved for broadcasting at times of national emergency, the BBC will maintain its commitment to working to deliver news to all audiences in ways that engage with and reflect their lives. It will seek to invest in original journalism that aims to satisfy the desire for understanding of the issues in a world that seems smaller but more complicated and confusing with programmes like *File on 4*, *Analysis*, and *Five Live Report*. Every service will continue to offer opportunities for discussion, using the popular appeal of the other content on local stations and on Radio 1 and Radio 2 to engage these audiences with information which can help them to play their part as citizens.

The BBC will maintain its commitment to growing UK talent and developing public taste, acting as one of the UK's most trusted guides through an increasingly complex cultural maze. BBC Radio will continue to support the Arts across their length and breadth, from traditional drama and literature to popular culture. Individual stations will seek to reflect the diverse voices of the UK and the communities which they serve as they address their changing needs.

The BBC's music stations will champion good British music from pop to classical, bringing on new artists and offering new challenges to established performers. All

the music services will continue to take the excitement of live performances to people and places that would not otherwise be able to reach these experiences. The speech networks will in turn provide opportunities for a diverse group of writers, actors and comedians to reach the widest possible audience with work that is new and ground-breaking. By doing so the BBC can act as the guarantor of a vibrant, diverse cultural life within the UK in the face of increasing pressures towards global homogeneity.

It is quite legitimate that commercial radio provides primarily music that the public likes. While the BBC will support the best of mainstream music, it will do so within services which place it alongside more specialist sounds, and offer documentaries that place the music in context, adding breadth and depth to push tastes on.

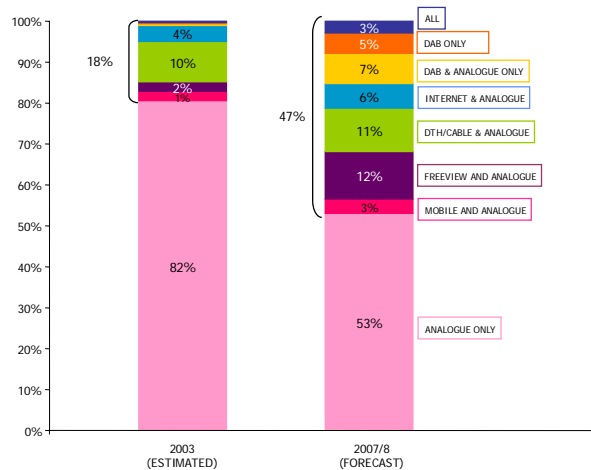
In a more uncertain world, the thirst for learning appears to be growing. BBC Radio has always played a role in informal learning through its ability to offer the surprising and unexpected to listeners. This is an increasingly important area for the radio services. BBC Radio will put renewed emphasis on the learning agenda, investing in documentaries which dig under the skin of society and culture, like Hugh Masekela's series on Radio 2 on the development of South African Music, or Andy Kershaw's Radio 3 series looking at life and music in North Korea, Iraq and Iran - through to the consumer programmes across local radio which help listeners to understand how to operate in the modern world. Further BBC buses and Open Centres will be launched, as audience needs are identified and partnerships built within individual local areas. These will help to build skills and familiarity with digital technologies, and those networks with particular appeal to older listeners such as Radio 2 will also work on-air to bridge over any digital divide.

But BBC Radio is increasingly identifying a special role within music education. A new initiative *Music For All* will harness the musical power and range of the music radio stations, the BBC's orchestras, and its relationships to musical institutions to take music to children at home and in school with the aim of developing lifelong passion, enjoyment and understanding of music. This project will be complemented however by the ongoing work within both the UK-wide networks and the Nations stations to support and encourage participation in music.

Considered as a whole, the ensemble of BBC radio stations represents a significant broadcasting force. When they work together, they have immense power to generate a UK-wide conversation, to bring diverse communities together. *Children in Need*, *Music Live* and collaborations between individual BBC Stations such as the BBC Jazz Awards (jointly sponsored by Radio 2 and Radio 3) or *A Sense of Place*, and *Voices* (Nations and Local Radio and Radio 4) show the force that can be generated when BBC Radio works together.

## 4.4 Securing the Digital Future

**Fig.37: Listening Routes to BBC Radio in the Future**



Sources: RAJAR, DRDB, O&O analysis

Audiences are increasingly using a range of platforms to experience the benefits of greater choice and crystal clear sound quality that digital radio can offer. At the same time, the BBC believes that radio needs its own platform which reflects its distinctive characteristics, if it is to make a totally successful migration from analogue to digital in the foreseeable future.

BBC Radio, in partnership with Government and the commercial sector, has played a key role in ensuring that the UK leads Europe in the introduction of Digital Audio Broadcasting. In 1995, the BBC became the first broadcaster in Europe to broadcast on DAB, building a transmitter chain to reach 60% of audiences in the UK. In 1999 commercial radio followed and were the first to launch new digital stations. They extended their transmission to 80% of the country. This summer both commercial radio and the BBC will have extended DAB coverage to reach 85% of the UK population.

This new technology is now starting to gather momentum, driven by the launch of new digital-only stations by the BBC and commercial radio, and the rebroadcast of local analogue services on national digital frequencies. The range of receivers is increasing as their cost decreases, leading to sales growth of nearly 200% last year. Some car manufacturers are set to install DAB Digital Radio sets as standard, and a new generation of receivers that allow listeners to pause, rewind and record live radio have already been launched.

Much of this achievement is due to the partnership between the BBC and commercial radio through the Digital Radio Development Bureau (DRDB). But DAB is still in its infancy and will face challenges from other emerging technologies like MP3 players which could undermine its progress if the Radio Industry falters in its united support.

Going forward the BBC will continue to work to bring the benefits of DAB Digital radio to the widest public, both through DRDB and through its own airwaves. The familiar analogue services combined with the functionality made possible by DAB can play an important role in persuading people of the benefits of the platform. The BBC will also invest further in DAB, in partnership with commercial radio, building out transmission facilities to ensure that at least 90% of UK homes can receive BBC Radio services on DAB.

With around 100million analogue radio devices in use in the UK however, universal take-up remains some way off, and other digital platforms such as digital television and broadband are likely to be more pervasive than DAB Digital Radio for some time. By ensuring that as far as possible analogue services are available on all platforms within the mainstream, the BBC hopes to make it as easy as possible for all listeners to access the stations that they fund. The BBC's local services are not all currently available on DAB Digital Radio. BBC Radio is committed to broadcasting all local services digitally once spectrum becomes available and the transmitter network is sufficiently built out.

As has already been described, new technologies are increasingly giving audiences the opportunity to take greater control of their listening and to get closer to the programming they enjoy. As radio, television and the Internet continue to converge, the BBC will exploit the emerging opportunities to provide radio listeners with information, support and spaces to share their interests with others which extend beyond the broadcast.

In the light of this, the BBC's radio services will form part of the Creative Archive which the BBC as a whole intends to develop. This pool of content from television, radio, and online archives which listeners will be able to draw on legally, for learning and for pleasure, will help to unlock the content which they as licence payers have helped to create. And the radio networks will also work together to identify new ways to make their broadcast content accessible to listeners whose interests may span different stations or who may be unfamiliar with what is available.

## **4.5 Working with Others**

By working with others in the creative industries, the BBC is able to deliver more to audiences, and to maximise the economic value of both its own and others' offerings.

Existing partnerships have delivered much to listeners and to partners. They have helped to nurture and grow music festivals around the UK such as the London Jazz Festival, WOMAD and the Cambridge Folk Festival, and to increase the numbers visiting cultural spaces around the UK such as the Lowry Centre after Radio 4's weekend of poetry from there. They have also brought great programmes and great live music to the BBC's radio services.

The BBC will therefore continue to try to work in partnership with individuals and cultural businesses and institutions, with a particular emphasis on innovation, and on reflecting the diversity of 21<sup>st</sup> century multicultural Britain. There are already more than 55,000 contributors to BBC UK Radio programmes heard on air each year.

BBC Radio will continue to develop a number of systems to try to ensure that these voices are as representative as they can be of the UK as a whole.

Effective regional representation is a particular issue for the UK networks, despite extensive spending on production outside the M25 area are still perceived as London-centric by many. To help to address this, as the network with a particular remit to reflect the voices of the UK through its news agenda, Radio Five Live will build on its existing regional reporter network to create a number of small teams of journalists and producers around the country. They will build closer links to regions of the UK, and deliver programming and views from within them. Radio 1 will continue to draw from its sessions on Nations stations to identify new talent, and to plug that into the music of the station as a whole – links with the Asian Network are already starting to bring brands of UK Asian pop into Radio 1's sound. Radio 4 is already working with the Nations and Local services to produce a collaborative landmark series about the languages of the UK, and will continue to build relationships with these stations which can bring local stories and talent to a national stage.

BBC Radio is the only European public service radio broadcaster to commission a significant amount of output from external suppliers, and has consistently exceeded its voluntary target of sourcing 10% of qualifying output on the UK analogue networks from independent producers. This will continue to be a floor and not a ceiling, and BBC Radio continues to hope that by observing the ability of the developing independent radio production sector to contribute to a rich mix of quality programming, INR will be encouraged to invest in similar fashion. BBC Radio will also extend the scope of this commitment to create formal targets for Radio Scotland, Radio Ulster and Radio Wales. BBC Radio is already engaged in an extensive consultation process around its terms of trade for working with independent production companies. The changes resulting from this review, together with the outcome of BBC Radio's examination of its current commissioning processes will be announced later in the year as part of the BBC's overall content supply review.

The BBC recognises that it is not always the easiest organisation to work with for those in the creative community, but it also realises that although BBC Radio's talent base is considerable, it is not exclusive. The consistent quality and innovation to which BBC Radio aspires is more likely to be achieved with the help of outside partners. Successful partnerships have already brought much to the mix the BBC can offer, and creating a more open BBC in every sense is a key aspiration going forward. It is hoped that this together with the outcome of the content supply review will create a framework which can underpin lasting and successful relationships in the future, which bring real benefits to radio audiences and to creative economy of the UK.

## **4.6 The BBC and the Radio Market**

The success of the UK's radio market depends on the BBC and commercial services working effectively together. In identifying its own role in delivering public value, BBC Radio does not believe that it has a monopoly in this area. Other stations have

shown over time their ability to build value across the range of areas that the BBC has identified.

The BBC has consistently tried to ensure that its services are distinctive from what else is available in the market. In the case of Radio 1 where a large number of commercial services have emerged to occupy what was the network's territory, BBC Radio has evolved its service to ensure that it continues to offer something different – new music, UK music, live music - which enhances the choices available to listeners.

With the launch of five new digital channels over the past two years, BBC Radio now has a coherent portfolio, and there are no plans to create further national stations. At the local level there continue to be a few gaps in coverage where existing stations cover a relatively large area with distinct population groups within it. In some of these areas, the BBC already offers split services at key times of the day. In future BBC Radio hopes to build on those part time services to offer full time ones, using a new model of radio station with a smaller base, lightweight equipment and staff deployed into the community itself. In doing so, the BBC will look at existing commercial and community provision in these areas and work sensitively to complement what is already available.

BBC Radio has already worked with some of the pilot community radio services which formed part of national trials for this new radio offering. Its plans to address the inadequacies in BBC local services do not envisage duplicating what community radio might offer to parts of the UK. The BBC will continue to issue an open invitation to assistance to new services which emerge as a result of the Community Radio Order, helping start-up stations if and however they feel it is appropriate.

Commercial stations have long complained that BBC Radio is subject to inadequate format controls. In recent years, in addition to the clear regulatory framework set for the radio services through the BBC Charter and Agreement, the BBC's radio services have been publicly held to account through annual Statements of Programme Policy. Going forward as the BBC has already announced, each radio service will in addition be given a Service Licence by the Board of Governors setting out the budget, remit and performance targets that the Governors as the BBC's regulators expect to be met. The Statements of Programme Policy will detail annual commitments for each service within the framework of its Service Licence. In addition the public value test proposed by the BBC in *Building Public Value* will be applied to any new service proposals put forward by BBC Radio, and to any significant changes to the existing networks.

This combination of measures will hold the BBC's services to account in ways that more than match commercial format regulations. The introduction of Service Licences is specifically designed to address concerns that have been expressed, and to provide commercial radio with the certainty about BBC intentions which it has felt to be lacking in the past. The framework now in place will help to ensure that both BBC radio and the commercial sector can flourish, working together to serve listeners in the UK.

## **5. Conclusion**

BBC Radio stations continually evolve in response to the changing tastes and expectations of their listeners. In presentation, tone and content, the analogue services have moved with the times. They have also remained well-rounded stations, offering the broadest editorial prospectus for a wide range of audiences throughout the UK who enjoy their companionship.

This balance will continue to be the principal goal of the BBC's radio services going forward. Stations will hold tight to their core purpose, while re-inventing themselves to draw in the next generation. They will take into account the revolution in the way people will use the medium, by developing an array of online output and support, rooted in broadcast content. They will have to respond to new commercial entrants in the market, fine-tuning the mix of their programmes where necessary if their distinctiveness is placed in doubt.

As the figures for listening in digital homes suggest, BBC radio cannot take its place in people's lives for granted as a range of other media becomes more available to them. The BBC's share of radio listening may well decline over the next ten years. BBC Radio will need to develop compelling programmes and networks which can act as the soundtrack to audiences' changing lives in order to continue to justify its universal funding.

The provision of high-quality content across all genres will be BBC Radio's overriding priority during the second digital age. As the hub of UK broadcast music, the source of independent and impartial journalism and information of all kinds, as a major rallying point for the creative talent of the UK in all its diversity, BBC Radio seeks to remain a vital and indispensable part of the radio landscape and a valued public service. Going forward it will do that by working in even closer collaboration with other organisations focussed on similar goals, and by ensuring that it responds with sensitivity to the concerns of the market, while maintaining its focus on serving licence payers.

By doing so, the BBC can play its part in ensuring that the second phase of the digital revolution brings audiences in the UK all that they deserve.