

# Broadcasting Committee

## "BCC(3)-07-08 (p1)"

### BBC Wales Evidence for the

### National Assembly for Wales Broadcasting Committee

#### 1. Summary

BBC Cymru Wales is the only public service broadcaster in Wales producing content in both Welsh and English across television, radio and online.

BBC Wales is committed to reflecting and reporting the full diversity of Welsh life through its news, current affairs, political, sport, drama, factual and cultural content in both languages.

BBC Wales employs approximately 1200 staff based at broadcast centres in Cardiff, Swansea, Wrexham, Aberystwyth, Carmarthen and Bangor.

In 2007/08, BBC Wales spent over £70m on services for audiences in Wales. This local funding was spent on programming and content across television (1105 hours in English and 524 hours in Welsh), radio (15,546 hours across Radio Wales and Radio Cymru) and online services, as well as our support for the BBC National Orchestra of Wales.

BBC Wales is far and away the leading provider of news, current affairs and political coverage in Wales. It runs the biggest BBC newsroom outside London and delivers news across all platforms and in both languages.

BBC Wales' network production slate - across TV, radio and online - totalled almost £50m in 2007/08. Our output included Doctor Who, "Tribe and Torchwood".

Increasingly, BBC Wales is focusing on major multi-platform projects that deliver major audience impact across all media platforms. The recent Coal House series was enjoyed by approximately 60% of adults in Wales and achieved record appreciation levels.

The BBC National Orchestra of Wales is the nation's only professional symphony orchestra. It will shortly relocate from Broadcasting House in Llandaff to a new rehearsal and performance facility, BBC Hoddinott Hall, at the Wales Millennium Centre in Cardiff Bay.

#### 2. BBC Wales Public Purposes

BBC Wales' mission is to support the corporation's public purposes in Wales - as set down by the BBC Trust - by building:

**Social and community value:** BBC Wales has this purpose at its heart and is dedicated to bringing audiences together across Wales to debate, explore and celebrate. This is the *raison d'être* "of BBC Wales" - "a unique national broadcaster offering content and services in both Welsh and English, and helping to connect diverse communities and build social value by providing universal access to the best of Welsh life.

**Democratic value:** BBC Wales supports civic life and national debate in Wales by providing trusted and impartial news and information in both languages and an independent platform for national discussion across television, online and its two national radio stations, BBC Radio Cymru and BBC Radio Wales.

**Cultural and creative value:** As well as celebrating and reflecting our unique cultural, sporting and social heritage, BBC Wales plays a major role in building creative value across the whole UK through its distinctive and successful contribution to the BBC's networks.

**Educational value:** BBC Wales offers audiences of every age access to a world of formal and informal learning, and plays a central role in serving Wales' growing Welsh language audience.

**Global value:** BBC Wales reflects the global/international agenda from a Welsh perspective across all its services. Its growing online presence also enables Welsh communities living across the world to stay connected with issues back home.

#### 3. Key challenges for BBC Wales""

##### Reach and impact ""

The challenges for all UK public broadcasters are profound: the reality of multichannel TV; convergence; political devolution; changes in markets; and increasingly complex public expectations. These challenges are heightened in Wales, both through our commitment to broadcasting in both languages and the paucity of the indigenous national press.

BBC Wales is determined to build the reach and impact of its services in Wales through focused investment in high-quality and distinctive content across all platforms. These include plans to develop new local online services (subject to BBC Trust approval), improving our news coverage across the regions of Wales. We are also working on a UK-wide project to transform the quality of political and citizenship resources available online.

Delivering these ambitions requires us to be clear about priorities, and to target investment in content that really cuts through with audiences in a fragmenting marketplace.

## **Network production and cultural representation**

Working in partnership with the wider creative sector in Wales, we are determined to ensure that the nation and its creative talent are more fully represented in the output of the BBC's UK networks. The drama series Torchwood (produced by BBC Wales) has helped to improve the portrayal of Wales but we recognise there is still some way to go.

Last month, the BBC Trust approved plans that should lead to a significant increase in network television production across Scotland, Wales and Northern Ireland. The Trust agreed that in future the BBC should adopt more challenging targets for measuring and meeting its targets for network production in the nations by using Ofcom's definition instead of the existing BBC one. This will exclude programmes executive produced by BBC Wales but produced elsewhere, like Life on Mars and Ashes to Ashes.

The Trust now expects the BBC to ensure that 50% of network production is made outside London under the Ofcom definition by 2016.

This represents a significant opportunity both for our in-house teams and partners in the independent sector, and we are determined to build on the significant progress that we have made in recent years.

## **Distribution**

Distribution issues continue to restrict the equitable provision of public services across Wales. The current debate in Wales is dominated by the commercial licensing issues that have restricted the availability of both Radio Wales and Radio Cymru on DAB radio, but the extent of DTT provision after digital switchover is also a concern (with availability of the full six multiplexes forecast to be lower in Wales than any other part of the UK).

As new methods of content delivery proliferate, there is a real danger that the situation will deteriorate further with rural audiences suffering disproportionately as commercial network providers focus high-speed broadband development on the more populous areas.

The BBC has led many initiatives to improve coverage and the recent launch of a subscription-free satellite service, Freesat, has at last provided viewers in Wales with a free-to-air television platform with near universal coverage (the platform also provides digital access to Radio Wales and Radio Cymru via the TV set).

## **4. BBC Wales Audience performance**

On average, almost a million viewers in Wales watch our English language local programming each week, including Week In Week Out", "X-Ray, Scrum V and Coal House. BBC Wales Today alone is seen by almost 600,000 viewers each week. The nightly programme has been far and away Wales' most watched news service for more than ten years.

Almost 600,000 adults in Wales listen to BBC Radio Wales and/or BBC Radio Cymru each week. Only BBC Radio 2 and BBC Radio 1 achieve a greater reach among audiences in Wales.

BBC Wales' extensive online services register approximately one million unique users each week.

BBC Wales contributes more than 520 hours of programming to S4C each year, funded by the licence fee. Our programming - including news, sport and drama - is the bedrock of the Welsh language channel's daily schedule.

## **5. Outline of BBC Wales output and services**

### **BBC One Wales, BBC Two Wales and BBC 2W**

BBC Wales broadcasts over 21 hours a week of English language programmes for audiences in Wales.

### **BBC Cymru on S4C**

Since 1982, BBC Wales has produced more than ten hours of Welsh language television programmes each week for broadcast on S4C, funded entirely from the licence fee. We also provide coverage of Assembly proceedings on S4C2.

### **BBC Radio Wales**

19 hours a day throughout the week in English.

### **BBC Radio Cymru**

20 hours a day of Welsh language programmes.

### **bbc.co.uk/wales**

English language online service for Wales, incorporating news, sport and the five local sites.

## **bbc.co.uk/cymru**

Welsh language online service, incorporating news, sport and five Welsh language local sites "BBC Lleol".

## **BBC National Orchestra of Wales**

Wales' only professional symphony orchestra.

## **6. BBC overall performance in Wales**

BBC One is still the most watched channel in Wales, with 77% of adults viewing each week. Along with BBC Two and the BBC's digital channels, BBC television channels reach 84% of people in Wales each week.

The BBC's radio services reach 72% of adults in Wales each week. The BBC's total share of listening in Wales is 62%, higher than in England (55%), Northern Ireland (52%) and Scotland (44%).

## **7. BBC Wales News**

News is the backbone of BBC Wales' national services, in both the Welsh and English languages.

The news service across all three platforms includes our flagship television news programmes BBC Wales Today and Newyddion (broadcast on S4C), up to ten hours a day of bulletins and news programming on the two national stations BBC Radio Wales and BBC Radio Cymru, and online news services in both Welsh and English.

BBC Wales also produces a range of political and current affairs programming, including Dragon's Eye, Week In Week Out "and am/pm (on BBC One and BBC Two), Eye on Wales and Called to Order (on BBC Radio Wales), Dau o'r Bae" "and Manylu (Radio Cymru) and CF99, Pawb a'i Farn and Taro Naw (on S4C).

BBC Wales funds and produces live coverage of Assembly and committee proceedings which is broadcast on S4C2.

The BBC's proposals to develop local/regional online news services will shortly be submitted to the BBC Trust for approval. The plans would see the development of broadband services across north-east, north-west, mid, south-east and south-west Wales in both Welsh and English.

We are also developing an ambitious UK-wide online project - provisionally entitled Digital Democracy - to enable UK citizens to engage more effectively with our democratic institutions and the key issues that shape life in the UK and its constituent nations.

## **8. English-language television services for audiences in Wales**

### **Summary**

BBC Wales commissions a range of programmes for audiences in Wales across all major genres, broadcast on BBC One Wales and BBC Two Wales/2W. The programmes are produced by a mix of our in-house teams and a range of independent production companies based in Wales.

These programmes complement and supplement the network programmes scheduled on these channels by offering more relevance and greater portrayal of modern Wales. This service is about much more than news. Our aim is to provide viewers in Wales with a diverse mix of programming that collectively capture the Welsh experience.

Despite ever-increasing competition, almost one million people in Wales tune into BBC Wales English language programme each week.

BBC Wales local programmes include Wales Today, Week In Week Out, X-Ray (consumer), Dragon's Eye (politics), Coal House (history), Belonging" "(drama), Iolo's Welsh Safari (nature), High Hopes (comedy) and Scrum V" "(club rugby).

### **Creative Future strategy**

Our ambition over the next five years - as part of the BBC Creative Future strategy - is to develop content which can be accessed across a range of media platforms in order to deliver maximum impact and value for audiences.

BBC Wales' recent" "Coal House series (produced by the independent Indus Films) is an excellent example of this so-called 'multi-platform future.' Broadcast last Autumn, Coal House took three families back to experience the realities of mining life in 1927. Alongside the series, the entire portfolio of BBC Wales services - radio, television, online - helped provide the vital historical context through radio discussions, innovative websites, community events and additional television programming.

The result was memorable: an overwhelmingly positive audience response evidenced by hundreds of letters, calls and emails; record viewing and appreciation figures for BBC Wales across all age groups; and, most importantly, a project that succeeded in bringing history to life for hundreds of thousands of viewers. In all, more than 60% of the population of Wales experienced Coal House during its three-week run. Its success was recognised at the recent Bafta Cymru ceremony where it won the Gwyn Alf Williams Award.

Indus' success with Coal House is an excellent example of the important and growing role that independent production companies play

in supporting and developing our content strategy. This year, between 35-40% of all our new local programming will be produced by the commercial sector.

## **BBC Two Wales and 2W**

Over recent years and in the run-up to digital switchover, BBC Wales has been able to broadcast two separate BBC Two services - BBC Two Wales on analogue and BBC 2W on digital.

BBC2W has provided viewers in Wales with a range of local programmes, primarily repeats, during peak viewing hours. Although popular with many viewers, the service has also attracted criticism from other viewers who felt they were being deprived of major network programmes being shown at the same time on BBC Two on digital elsewhere in the UK.

Once analogue services are withdrawn in 2009, this split provision will no longer be possible. As a result, BBC Wales plans to begin to merge these two BBC Two services in advance of switchover. BBC Wales will continue to broadcast original and distinctive local programming across both BBC One Wales and BBC Two Wales, at various points in the schedule, with a strong range of output in peaktime.

## **9. Welsh language television service**

Since 1982, BBC Wales has contributed more than 520 hours of programming to S4C each year, funded by the licence fee.

The BBC's programming - including news, sport and drama - is the bedrock of the Welsh language channel's daily schedule, delivering more than 40% of the viewing to S4C's analogue service (compared to a 30% share of broadcast hours).

The BBC's contribution includes the daily news service *Newyddion, Pobol y Cwm* "(drama)", *CF99* (politics), *Pawb a'i Farn* (debate), *Taro Naw* (current affairs), Welsh international and club rugby, and *Mosgito*, a multiplatform magazine programme for 12-15 year olds.

The BBC Trust and S4C Authority entered a three-year Strategic Partnership in 2006 that has helped to align programme strategies and clarify editorial, financial and programme planning arrangements between the two broadcasters.

Our news and current affairs services on S4C are at the heart of the BBC's delivery of its public purposes in the Welsh language. Similarly, our programming from the National Eisteddfod is an important signifier of the BBC's role as a cultural patron in Wales. It is also an event that lends itself to multiplatform coverage across our television, radio and online/broadband outlets.

## **10. BBC Wales network production**

### **Summary**

The last four years have seen rapid growth in BBC Wales' contribution to the corporation's network radio, television and online/interactive services, and significant audience success. The BBC's network spend in Wales in 2007/08 totalled almost £50m across TV, radio and online.

Our most recent network successes, across a range of genres, have included *Doctor Who* "(tv and online production)", *Torchwood* "(tv and online)", "BBC Cardiff Singer of the World, *Tribe*, *China's Terracotta Army*, *Legends*" "and" *The Sarah Jane Adventures*.

"*Doctor Who*", which is produced at studios near Pontypridd, has been sold to 37 countries, including the US, China, Germany and France. Its sister show, *Torchwood* - which is centred on Cardiff - has also been an international hit, with sales to 17 countries.

At the peak of production, BBC Wales' drama studio complex is home to more than 400 artists, writers, editors, technicians, designers and producers. The success of BBC Wales' network production has enabled more long-term talent planning. From the outset, BBC Wales was determined to showcase and develop the brightest and most creative Welsh talent, rather than just importing experienced production staff from elsewhere.

### **Overview of output**

**Television** BBC Wales' contribution to network has been focused on three key genres: drama, music and factual. Our drama offer has been centred on the development of *Doctor Who*, *Torchwood*, "and *The Sarah Jane Adventures* - all of which are produced and overseen by Head of BBC Wales drama Julie Gardner and executive producer/lead writer Russell T Davies.

BBC Wales' music contribution has included coverage of major events and competitions including "BBC Cardiff Singer of the World "and, this year, the "BBC Young Musician of the Year" competition (held at the Wales Millennium Centre).

The factual department was responsible for the ground-breaking BBC Two documentary/adventure series "Tribe" presented by Bruce Parry. He will return to our screens in a new network series, "Amazon", later this year: a project being produced by Cardiff-based Indus Films for BBC Wales. Following the success of "Tribe," our factual department are currently collaborating with the Natural History Unit at BBC Bristol on a major new anthropology project, "Human Planet", which is expected to air in 2009.

BBC Wales' factual output extends from consumer films - for BBC One's "The One Show -" to successful observational series such as "A Year At Kew" (three series were broadcast), "The Museum" (about the British Museum) and "The Trees That Made Britain. "

**Radio** BBC Wales produces radio programmes for the BBC's network services - Radio 1, Radio 2, Radio 3 and Radio 4. The volume of these commissions has been relatively constant in recent years and covers drama, music, features and religion and including performances by the BBC National Orchestra of Wales. Our network commissions have provided a platform for a range of Welsh writers, including Gwyneth Lewis, Gillian Clarke and Owen Sheers.

Output delivered in 2006-07 included "Book at Bedtime, Ken Clarke's Jazz Greats, Hole, Marking the Event", and "Challenging the Silence" (all Radio 4); "The Choir, Composer of the Week, Leeds Piano Competition" and "Quarantine" (Radio 3); "Session in Wales with Bethan & Huw, Wakestock Festival" and "Green Man Festival" (Radio 1).

**New Media** The BBC Wales new media team also produces a wide range of online services and websites for BBC network productions, including the popular "Doctor Who, Tribe" and "Sarah Jane" sites, plus the forthcoming "Amazon" site.

## 11. Partnership with Wales' creative sector

BBC Wales' continued success - both here in Wales and across the UK - relies increasingly on a close partnership with a range of independent production companies and sectoral agencies.

All partners locally have a shared interest in developing a culture of creative excellence and collaboration in Wales, enabling the sector to grow economically and to play a more central role in the production of content for both the BBC and other commercial broadcasters.

As a result, BBC Wales is playing a full and active role in supporting a range of sectoral development programmes, including the Welsh Assembly Government's "Creative Business Wales" initiative; and the training and development programmes of a number of agencies, including Cyfle and the new Talent Attraction Fund launched in May 2008. BBC Wales also supports the BBC's Regional Independent Development Scheme: a BBC network initiative to develop executive producer talent across the nations and regions. A range of independent companies in Wales have benefited from this scheme over recent years.

Clearly the biggest contribution the BBC can make to the sector is commissioning content, and we work closely with a wide range of independents to help them develop proposals that will attract the attention of the BBC's local and network commissioners.

As part of this collaborative relationship, we routinely share audience insight and research with the indie sector, and brief them regularly about our developing content strategy. "Coal House" is a fine example of a series that was developed collaboratively, with BBC Wales and Indus working together to explore and refine the idea, and to ensure maximum impact across all platforms.

At a network level, BBC Wales' support can take a variety of forms. For example, BBC Wales and BBC Four co-commissioned the historical documentary "Owain Glyndwr "(produced by the independent Green Bay)", "combining local programming budgets with the funds available from network commissioners.

In other cases, local success can lead on to network broadcasts. Fulmar's documentary series, "Frontline Iraq", was commissioned by BBC Wales as a local 'opt-out'. Such was the impact of the series here that BBC Wales was subsequently able to assist Fulmar in securing a network showing for the programme.

## 12. BBC Wales national radio services

BBC Radio Cymru (all Welsh) and BBC Radio Wales (all English) are the only indigenous radio services that broadcast to the whole of Wales. Both stations offer high-quality news and information services, with all-speech breakfast and evening programmes.

BBC Radio Wales is the most popular indigenous radios station in Wales, and the third most popular station overall after Radio 2 and Radio 1.

Radio Wales places news, sport and information at the heart of its schedule with "Good Morning Wales" and "Good Evening Wales". The "Richard Evans" programme at lunchtime offers audiences in Wales a platform for national debate. There are also standalone programmes that scrutinise the world of politics and business.

BBC Radio Cymru is a comprehensive speech and music radio service for Welsh speakers, covering a wide range of genres and reflecting the issues, events, culture and interests of the people of Wales. Programmes focus on local and national concerns but also address matters of UK and international significance.

As the only national radio station for Welsh speakers the service targets audiences of all ages across different parts of the day. For example, the youth zone, "C2", every weekday evening targets younger audiences.

The non-availability of both BBC Radio Wales and Radio Cymru on DAB digital radio across large parts of Wales continues to be a cause of concern and inconvenience for many listeners. The impact on audiences is significant. Currently, we believe more than half of households in Wales are unable to receive either of the national stations via DAB.

As a result of UK Government legislation, the BBC is reliant on the local commercial marketplace to provide the digital radio infrastructure for the carriage of both BBC Radio Wales and BBC Radio Cymru. Whereas the BBC's UK radio networks are broadcast on a BBC-owned 'multiplex', BBC Wales' two national stations can only be broadcast in areas where a local commercial multiplex has been licensed by Ofcom.

The BBC is doing everything within its power to resolve these distribution issues (including extensive discussions with Ofcom). In

addition, the BBC has ensured both stations are provided to listeners on alternative digital platforms in Wales, including online, satellite TV, Freeview, digital cable and the newly launched free-to-air satellite service, Freesat.

### **13. Online and emerging media**

Strong new media activity is central to ensuring that BBC Wales meets the challenge of a rapidly changing media environment. To this end, BBC Wales has developed a single online and interactive content strategy focusing on four key areas of activity:

National services in English and Welsh at [bbc.co.uk/wales](http://bbc.co.uk/wales) and [bbc.co.uk/cymru](http://bbc.co.uk/cymru), including 24/7 news and sport services.

Multiplatform BBC Wales commissions such as [bbc.co.uk/coalhouse](http://bbc.co.uk/coalhouse).

Network multiplatform commissions, such as [bbc.co.uk/doctorwho](http://bbc.co.uk/doctorwho), [bbc.co.uk/torchwood](http://bbc.co.uk/torchwood) and [bbc.co.uk/amazon](http://bbc.co.uk/amazon).

New technology innovations such as podcasting (for Radio Wales and Radio Cymru programmes) and BBC Vocab (an online translation application).

In addition, BBC Wales is able to harness wider BBC services to maximise the value of our content. The BBC's new iPlayer service enables online users in Wales and beyond to access programme from across the BBC schedules for up to seven days after they're first broadcast. "Scrum V, Coal House" and many other programmes are now available to view via the iPlayer service, while "Torchwood" and "Doctor Who" have been two of i-player's most downloaded series since it launched at Christmas.

BBC Wales is prioritising high-impact multiplatform productions offering content to audiences across all three platforms. Examples include "BBC Wales Nature", learning content such as "The Big Welsh Challenge" and history (with sites such as "Coal House").

BBC Wales' New Media department is recognised as a UK centre of excellence for online drama (e.g. "Doctor Who", "Torchwood" and "Life on Mars") and it's also a growing centre for multiplatform factual productions.

Other recent innovations include BBC Vocab (a language translation application) and podcasting for both Radio Wales and Radio Cymru programmes.

### **14. BBC National Orchestra of Wales**

BBC Wales runs the nation's only professional symphony orchestra, the BBC National Orchestra of Wales. BBC NOW performances are regularly broadcast on Radio Wales, Radio Cymru and throughout the UK on Radio 3.

Last year, the orchestra gave 80 concerts, 59 of which were in Wales. It also completed an 11 concert tour of the eastern USA under its principal conductor Thierry Fischer. The orchestra receives significant financial support from the Arts Council of Wales.

BBC NOW will move to a new home at the Wales Millennium Centre in the New Year. The new centre - to be known as BBC Hoddinott Hall - will be a custom built broadcast, recording and performance facility capable of holding a large orchestra, chorus and an audience of up to 350.

### **15. Education and Learning**

The Education and Learning team at BBC Wales produces multiplatform content for adults - including parents and teachers - and children in both English and Welsh.

Formal learning support for children and teenagers is offered on television and online with a wide range of programmes and websites. Most recently "Coal Stories", aimed at 9-13 year olds, was a four-part television series that looked at the impact of the coal industry on children and communities across two centuries and also played into the wider "Coal House" multi platform season on BBC Wales.

BBC Wales provides curriculum-based revision resources for GCSE students, via the TGAU Bitesize website.

Over the past few years, BBC Wales has developed a range of ground-breaking projects for Welsh language learners, ranging from multi-platform projects including the "Big Welsh Language", to our innovative online translation tool "Vocab," and the "learnwelsh" website.

Last year, we extended our educational programming for young Welsh speakers with the launch of "Mosgito," a major multi platform project for 12-15 year olds. The audience helps to drive the content of this twice-weekly live magazine programme (shown on S4C) through the contributions of the 'web gang', and the interactive nature of the website, which allows teenagers to offer opinions, ideas and content.