
Ofcom's Annual Report on the BBC: 2017/18

Annex 2: BBC Performance Report

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Overview

Introduction

Under the new BBC Charter and Agreement which commenced in 2017, Ofcom has responsibility for assessing the BBC's overall performance. To help do this, Ofcom set performance measures for the BBC. These provide a framework for holding the BBC to account for the promotion of its public purposes.

We are required to publish this performance data annually, and a summary of our key evidence base is provided here, along with an assessment of the BBC's performance by public purpose.¹

This is our first BBC Performance Report. It is separate to our assessment of the BBC's compliance with the enforceable regulatory conditions set out in the Operating Licence conditions and the requirements in the Operating Framework and the BBC Agreement (see [Annex 1](#)). The Performance Report uses the performance measurement framework published in October 2017.² This enables measurement of the BBC's performance across all its services and output and provides an overall perspective on how the BBC is delivering for audiences.

The BBC is required to establish its own framework for assessing performance. Our measures stand alone and provide an independent evidence base for monitoring the BBC.

Our performance measurement framework comprises four measures:

- a) **Availability:** the nature, type, quantity, and range of content available across the BBC's output, as well as the spend on this content;
- b) **Consumption:** the extent to which audiences consume the content provided by the BBC. This category provides an overview of what content people watch/listen to/use, as well as how much time they spend with it, by service, platform³ or across the BBC;
- c) **Impact:** what audiences think about the BBC's services and output, including their satisfaction with various aspects of the BBC's delivery of the public purposes;
- d) **Contextual factors:** aspects of each public purpose that cannot be measured solely by the measures above, such as consideration of additional information provided by the

¹ The BBC's delivery of its fifth public purpose, reflecting the UK to the world, will be achieved primarily through the BBC World Service. The BBC is responsible for setting a licence for the BBC World Service (clause 34 of the Agreement).

² This includes our core measurement principles of flexibility, proportionality, practicability, transparency, robustness, and comparability. Ofcom, [Holding the BBC to account for delivering for audiences](#) October 2017.

³ By platform we mean TV, radio or online. Individual services are the BBC's separate channels or stations, such as BBC One, BBC Two, Radio 4 and 5 live.

BBC, engagement with stakeholders,⁴ and additional qualitative or other third-party research. Contextual factors may vary from year to year.

We expect the performance measures to evolve over time. We can make changes in response to changes in the public's needs and tastes, if revealed through our independent audience research. We might, for instance, add measures in response to areas of audience or stakeholder concern, or if our periodic or ad-hoc reviews identify issues that demand further examination.

This document sets out our main findings and the key evidence used to assess the BBC's performance. We have outlined the data sources used in a [methodology annex](#) and provided more detailed data in [interactive datasets](#) published alongside this report.

Our approach

Our approach has been to include trend data wherever available, focusing on trends since 2010, as this provides the closest comparison with current BBC levels of funding.⁵ Our interactive datasets published alongside this report also include trends from 2007, where possible.

We have also collected some data for the first time, including our new BBC Performance Tracker.⁶ This annual survey asks over 4,000 people across the UK a series of detailed questions about the BBC's performance across the public purposes. Our evidence base will build over time, and future annual reports will include further trend data. We recognise that there is likely to be a time-lag between any changes in BBC commissioning and scheduling policies, and any changes in audience opinions about the BBC and its content. It takes time for new production practices and editorial directions to make an impact on programming and content, and audience opinions will reflect a combination of their current and previous consumption.

In addition to our own research and analysis, we include references to some relevant contextual information, including from the BBC's own audience research, and other third-party research such as the [Reuters Institute Digital News Report](#) 2018.

⁴ This includes engagement with industry and consumer groups. In addition, on 11 June 2018, Ofcom held a seminar to gather the views of interested academics on the BBC's performance, with a particular focus on its distinctiveness.

⁵ The BBC licence fee was frozen in 2010, so trends from this time are broadly comparable. In addition, the BARB TV measurement currency was modified in 2010, so TV audience trends prior to 2010 are indicative only.

⁶ Please see [Annex 3](#) for an overview of its methodology. Please note that our main reporting focus is on the proportion of respondents that rate the BBC highly – i.e. 7-10 out of 10; and that when we refer to the BBC's "TV viewers" this encompasses both TV and video service viewers.

Summary of key findings

In this first year, we find that overall the BBC is delivering its remit for audiences. Our key findings are as follows:

- **Public purpose 1: Providing impartial news and information to help people understand and engage with the world around them.** This role is central to the BBC's remit, and in many respects, it is performing well here. The BBC delivers a significant volume of news and current affairs content. Despite rapid changes in news consumption habits, the BBC is the most-used news source in the UK. Audiences rate it highly for providing high-quality, accurate and trustworthy content that helps them understand what is going on in the world. It is rated less highly for providing a depth of analysis and content not available elsewhere, and for its impartiality, than it is for many other aspects of its news. Given the critical importance of the BBC's role as a trusted provider of news and current affairs in an increasingly complex news landscape, we will review its news and current affairs output and how it can continue to be a trusted destination for audiences. This will inform our consideration of its delivery of purpose 1 over the Charter period.
- **Public purpose 2: To support learning for people of all ages.** The BBC is currently delivering this purpose overall. It delivers learning content that is well regarded by audiences, including a wide range of informal learning content for adults across its mainstream and specialist TV and radio services, as well as online. The BBC delivers informal learning content for very young children on CBeebies, which has retained its reach and viewing among 4-6 year-olds. But the reach and viewing of CBBC has declined significantly among 6–12 year-olds. The BBC recognises this and is investing further in children's content across its platforms. A majority of children aged 8-15 who go online say they use BBC websites and apps for their school work and homework. However, the reach of BBC Bitesize, its primary online educational resource for children, has declined. The BBC is currently developing this service further. We will monitor the impact of changes made in both areas closely.
- **Public purpose 3: Showing the most creative, highest quality and distinctive output and services.** We have found that the BBC is distinctive overall. This is evident in a number of ways, including through its provision of high-quality content across a range of genres, specialist services and services with no directly comparable provider. And the majority of audiences rate the BBC's provision of distinctive content highly. However, the BBC faces challenges in delivering this purpose in two key areas. First, amid the increasingly strong competition for TV audiences, the BBC can distinguish itself by maintaining its commitment to broadcasting original UK content across all genre. UK audiences value content made in the UK, and the BBC already broadcasts many programmes that tell UK stories. But in common with public service broadcasters as a whole, the BBC's investment in first-run UK-originated content has been declining, and there has also been a notable decline in hours of first-run UK originations in key genres. Within the BBC's funding settlement for this Charter, the BBC will need to be more

innovative and take more risks to deliver original UK content. This may require a significant change in approach for the BBC; less than six in ten BBC TV viewers consider it to be taking creative risks and innovating in its programming. Secondly, the BBC needs to take significant steps to engage with young people, who are drifting away from BBC TV and radio. Young people are critical to the BBC's future success and the BBC recognises that it needs to do more to engage young people. As well as providing content that appeals, it needs to find new ways of reaching younger people that align with their viewing and listening habits.

- **Public purpose 4: Reflecting, representing and serving the diverse communities of all of the United Kingdom's nations and regions and, in doing so, supporting the creative economy across the UK.** Audiences are generally satisfied with the BBC's services overall. A majority rate the BBC's delivery of purpose 4 highly, but people in Scotland rate the BBC's delivery of purpose 4 less highly than people in other nations do. The BBC needs to continue to develop its ways of serving and reflecting Scotland, including through its new BBC Scotland TV channel, which will launch in 2019. In our in-depth review of representation and portrayal on BBC TV, audiences told us that the BBC is better than it used to be at representing and portraying a wider mix of people. But some groups still feel less visible, and others raised concerns about being presented in one-dimensional, inauthentic and stereotypical ways. In the light of these findings, we expect the BBC to continue to make improvements in how it represents and portrays UK society. Separately, the BBC has increased its spend on network production made outside London.

Core BBC audience metrics

This section provides some of the audience measurements spanning TV, radio and online used in our report, to give an overview of how audiences consume BBC content, and what they think of it.

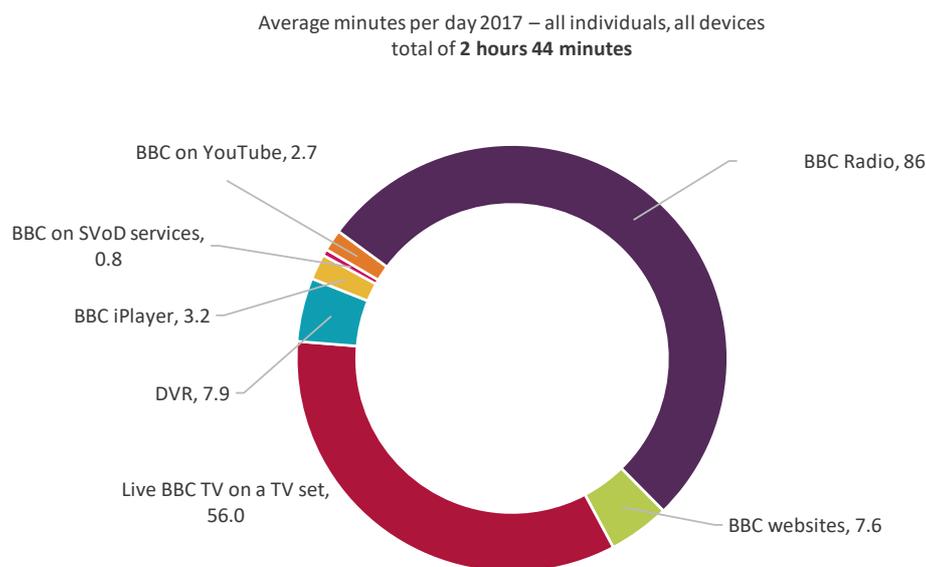
First, we look at the overall amount of time spent each day on BBC content, on TV, radio or online platforms. Then we assess the proportion of people accessing the BBC each week, again, across all its output methods. Third, we set out levels of overall audience satisfaction with the BBC, by each platform. Finally, we show the proportions of the UK population who rate the BBC highly across the various purposes we ask about.⁷

Cross-platform consumption

On average, audiences spend around 2 hours 44 minutes with the BBC every day

In 2017, people consumed on average 2 hours 44 minutes of BBC content every day, comprising 1 hour 10 minutes of TV, 1 hour 26 minutes of radio and 8 minutes of BBC online.

Figure 1: Total consumption of BBC content per day: 2017



Sources and modelling from: TV (BARB, BARB TV player reports, GfK SVoD data and TouchPoints), radio (RAJAR) and websites (comScore MMX). BBC Three is not included separately (other than within BBC iPlayer) as no way of measuring minutes consumed has been developed to date. BBC podcasts are not included in BBC radio and are estimated at less than one minute per day (TouchPoints 2018).

⁷ The subsequent sections provide much more detailed analysis of audiences, along with more understanding of how different audiences across the UK consume and think about the BBC.

More than nine in ten adults consume BBC content each week, although younger people are slightly less likely to do so

Across all platforms, 92% of adults consume BBC content each week.⁸ Overall, this decreases to 86% among those aged 15-34 and increases to 96% of those aged 65 and over. In addition to those who consume BBC TV and radio services, the online elements of the BBC (iPlayer/ online news/sport specifically) attract an incremental weekly reach of 3% among all adults, increasing to 6% among those aged 15-34.

Figure 2: Unique weekly reach of BBC platforms: 2018

	Adults 15+	15-34	65+
Any BBC service*	92%	86%	96%
BBC TV and radio only	20%	11%	37%
BBC iPlayer / online news/sport only	3%	6%	1%

Source: TouchPoints 2018

*BBC services: BBC TV = BBC One, BBC Two, BBC Three, BBC Four and BBC News channel, BBC Radio = Radio 1, Radio 2, Radio 3, Radio 4 (inc. 4 Extra), 5 live (inc. Sports Extra), 6 Music, 1Xtra, Asian Network, World Service and nations'/local radio, BBC iPlayer, BBC online news/sport via app or website

Satisfaction with the BBC, by audience group

The majority of adults have a positive overall impression of the BBC and are satisfied with the BBC's services

Around two-thirds (64%) of the UK population have a positive overall impression of all the services that the BBC provides.⁹ ¹⁰The data indicate that 16-24s and people in AB socio-economic groups rate the BBC more favourably at this overall level.

Satisfaction levels for individual BBC platform services show a similar story: just over two-thirds of TV audiences (68%) are satisfied with BBC television services, around three-quarters (74%) of radio

⁸ Please note that the TouchPoints survey fieldwork takes place in Great Britain only and therefore does not include Northern Ireland.

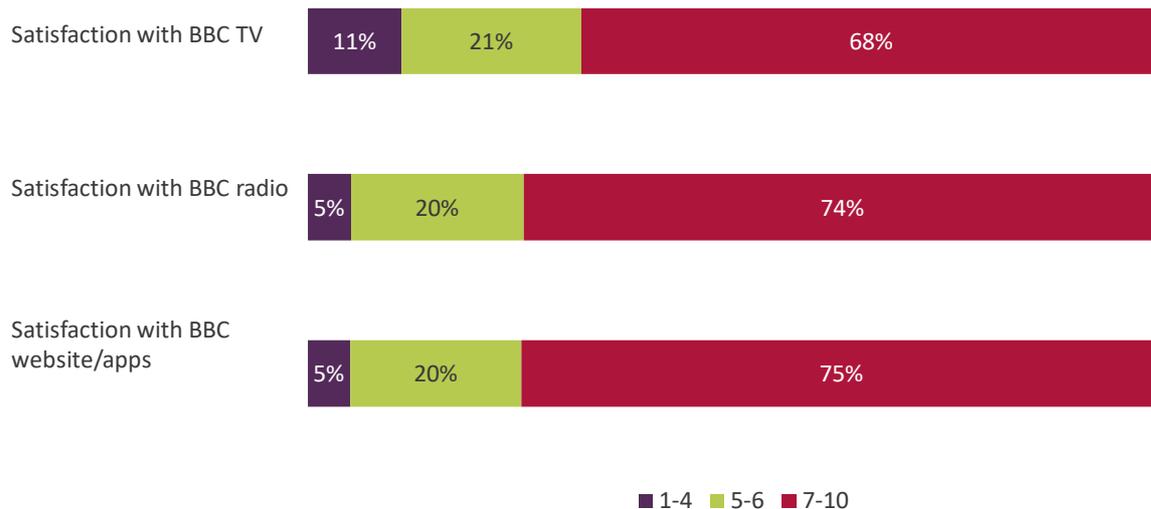
⁹ Overall positive impression measured by those rating 7-10 on a scale of 1-10 on Ofcom's BBC Performance Tracker 2017/18.

¹⁰ According to the BBC's own research, UK adults give a mean score of 7/10 in terms of their general impression of the BBC ([BBC Annual Report 2017/18](#)).

listeners are satisfied with BBC radio services, and 75% of online users are satisfied with BBC websites and apps (see Figure 3).¹¹

BBC TV was rated more highly than some of the UK commercially-funded public service broadcasters (including ITV and Channel 5), whereas services that users choose to pay for (Sky and the online video providers) provided higher levels of satisfaction.¹²

Figure 3: Audience satisfaction with the BBC, by platform: 2018



Source: Ofcom's BBC Performance Tracker 2018. Base: BBC TV (3534), BBC radio (2320), BBC website/apps (2033) Questions: B1TV / B2Radio / B3MEAPP. On a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied, overall how satisfied or dissatisfied are you with these television and video service providers / radio providers / the following websites and apps?

Satisfaction varies considerably by audience group. People in the AB socio-economic groups¹³ tend to express higher levels of satisfaction than average towards BBC television services, while people from minority ethnic backgrounds, disabled people and those in DE socio-economic groups¹⁴ tend to be less satisfied with BBC TV overall.¹⁵

¹¹ Ofcom BBC Performance Tracker October 2017 – April 2018

¹² *ibid*

¹³ This refers to the AB socio-economic groups [defined by NRS](#), which include higher and Intermediate managerial, administrative or professional occupations.

¹⁴ This refers to the DE socio-economic groups [defined by NRS](#), which include semi-skilled and unskilled manual workers; state pensioners, casual and lowest grade workers, unemployed with state benefits only.

¹⁵ Ofcom BBC Performance Tracker October 2017 – April 2018

General levels of satisfaction with BBC radio services also vary across different audience groups. Listeners from a white background, those in AB socio-economic groups and older people (aged 65+) are more satisfied, and those aged 25-34 and people from minority ethnic backgrounds are less satisfied.¹⁶

Turning to opinions about BBC online delivery, people aged 16-24 are more likely than older users to be satisfied with the BBC's online services, as are those in AB socio-economic groups and people without disabilities.¹⁷

Attitudes to the BBC's delivery of its public purposes

Figure 4 provides an overview of audience views of the BBC's delivery of its public purposes across TV, radio and online, showing the proportion of people who rated it highly (7-10 out of 10). Statements relating to purpose 4 are rated less highly than most other purposes.¹⁸

¹⁶ Ofcom BBC Performance Tracker October 2017 – April 2018

¹⁷ *ibid*

¹⁸ Respondents to our survey were asked first for their opinions about the BBC's overall delivery of the four public purposes, and then for their opinions on a series of more detailed statements relating to each purpose.

Figure 4: Comparative audience ratings of BBC purpose statements: 2018

P1	News coverage that helps me understand what's going on in the world today	68%
P2	Programmes and content that are informative	
P3	Provides a broad mix of different types of TV, radio and online programmes and content	67%
P3	Provides high quality television, radio and online content	66%
P2 overall	Informative and educational content, which is inspiring and challenging, and that supports learning for all ages	65%
P3	Provides programmes and content made specifically for UK audiences, using UK actors, writers and locations	
P3	Provides television, radio and online content which appeals to a wide range of different audiences across the UK	
P2	Programmes and content that are educational	64%
P3 overall	A range of high quality, distinctive and creative content that is different to that of other providers	63%
P3	Provides distinctive programmes and content	
P1 overall	Impartial news and information to help people understand and engage with the world around them	61% ¹
P2	Programmes and content that helps me to learn new things	
P1	News that represents a range of viewpoints	60%
P4 overall	Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK	59%
P2	Programmes and content that are inspirational	58%
P4	Programmes and content that are relevant to me	
P2	Programmes and content that support children and young people with their education	57% ²
P1	News that is impartial	56%
P3	Takes risks and provides content that is new and innovative across all of its services, including television, radio and online	
P4	A good range of programmes and content that includes people like me	
P4	A good range of programmes and content that represents where I live	50%
P4	An authentic portrayal of the region where I live	49%
P4	An authentic portrayal of people like me	48%

Source: BBC Performance Tracker 2018. Base: All respondents (4099). % rating each statement 7-10 out of 10. Notes: (1) The responses in this table are representative of all UK adults. In our News Consumption Survey, we ask users of BBC news about their attitudes towards its news provision, and ratings are higher than those shown here. For example, when asked to rate the BBC's provision of news that helps them understand what's going on in the world today, 79% of BBC TV news viewers rated them highly; 73% of BBC radio news listeners, and 80% of BBC online news users. In terms of impartiality, 61% rated BBC TV news highly, 62% radio, and 68% online; (2) This rises to 66% in households with children.

Public purpose 1: news and current affairs

Purpose 1 is to provide impartial news and information to help people understand and engage with the world around them. The BBC should provide duly accurate and impartial news, current affairs and factual programming to build people's understanding of all parts of the United Kingdom and of the wider world. Its content should be provided to the highest editorial standards. It should offer a range and depth of analysis and content not widely available from other United Kingdom news providers, using the highest calibre of presenters and journalists, and championing freedom of expression, so that all audiences can engage fully with major local, regional, national, United Kingdom and global issues and participate in the democratic process, at all levels, as active and informed citizens.¹⁹

Our key findings:

- This role is central to the BBC's remit, and in many respects, the BBC is performing well here. It produces a significant volume of news and current affairs content across its TV, radio and online platforms. And despite rapid changes in how people access news, audiences tell us that the BBC is the news source they use the most on TV, radio and online. It is also the most-used source for current affairs content on both TV and radio.
- The majority of audiences rate the BBC highly for providing high-quality, accurate and trustworthy content, which helps them understand what is going on in the world.
- The depth and range of analysis and content provided by the BBC helps audiences engage with major issues and participate in the democratic process as informed citizens. Audiences rate BBC TV and radio news less highly for providing a depth of analysis and range of content not available elsewhere, compared to many other aspects of news. Sky TV and online news is rated more highly than the BBC for this. We have also noted the BBC's shift towards greater use of panel-style current affairs TV programmes, and a significant decline in the hours of *This World*, its only dedicated international current affairs show.
- The BBC's impartiality underpins its role as a trusted news provider. In our first year as regulator, we have not found the BBC in breach of the due impartiality requirements of the Broadcasting Code (see Section 6 of [Ofcom's Annual Report on the BBC](#)). Even so, audiences rate the impartiality of the BBC's TV and radio news less highly than many other aspects of the BBC's news provision. In addition, ITV is rated more highly than the BBC for the impartiality of its TV news.
- Given the critical importance of the BBC's role as a trusted provider of news and current affairs, and the rapid changes in news consumption patterns, we are launching a review of the BBC's news and current affairs output. This will look at how the BBC can continue to be a trusted destination for audiences and will inform our consideration of its delivery of purpose 1 over the Charter period.

¹⁹ The public purposes are set out in the [Charter](#).

Key evidence base

This section provides the key evidence relating to the BBC's delivery of purpose 1. First, we look at how people consume and think about BBC news and current affairs at a cross-platform level; that is, across TV, radio and online overall. We then look at each platform in turn, using evidence on output and spend, levels of consumption and audience opinions about the content provided. We also provide data on 12-15 year-olds' habits and opinions about BBC news and information.

Cross-platform consumption and impact

The BBC is the most popular news source across any platform, although there are considerable differences by audience group

The ways in which people access news is changing. Four in five people (79%) say that they get news via TV, compared to 64% who get it online, 44% who get it via radio and 40% through printed newspapers. These proportions vary by demographic group and for 16-24s as well as those from a minority ethnic background, the internet is the most-used platform for news consumption (82% and 73% respectively).²⁰

Looking at children's news consumption, three-quarters (77%) of online 12-15s say that they consume news on a weekly or more frequent basis. TV is their most popular platform for news (68%) followed by talking to family (64%) then social media and talking to friends (both 56%).²¹

When looking at these platforms taken together, the BBC overall is the most-used source; 79% of adults say they use the BBC for news, followed by ITV at 41% and Facebook at 33%.²² BBC One is the single most popular news source with six in ten (62%) UK adults claiming to use it for news. Figure 5 shows the BBC News channel, the BBC website/ app, BBC Two, BBC Radio 2, Radio 4 and Radio 1 are also among the top 20 news sources cited.²³

There are considerable differences by demographic groups. For example, those aged 65+ are twice as likely as 16-24s to say they use BBC One for news (82% vs. 39%). The ABC1 socio-economic groups are also more likely than C2DEs to use BBC One for news (64% vs. 61%), and people from minority ethnic backgrounds are less likely than adults from a white background to use it for news (49% vs. 65%).²⁴

The most popular sources of news across platforms for online 12-15s are BBC One/Two (45% of 12-15s say they use it to follow news stories) followed by Facebook (34%), ITV (30%) and YouTube

²⁰ Ofcom News Consumption Survey 2018

²¹ *ibid*

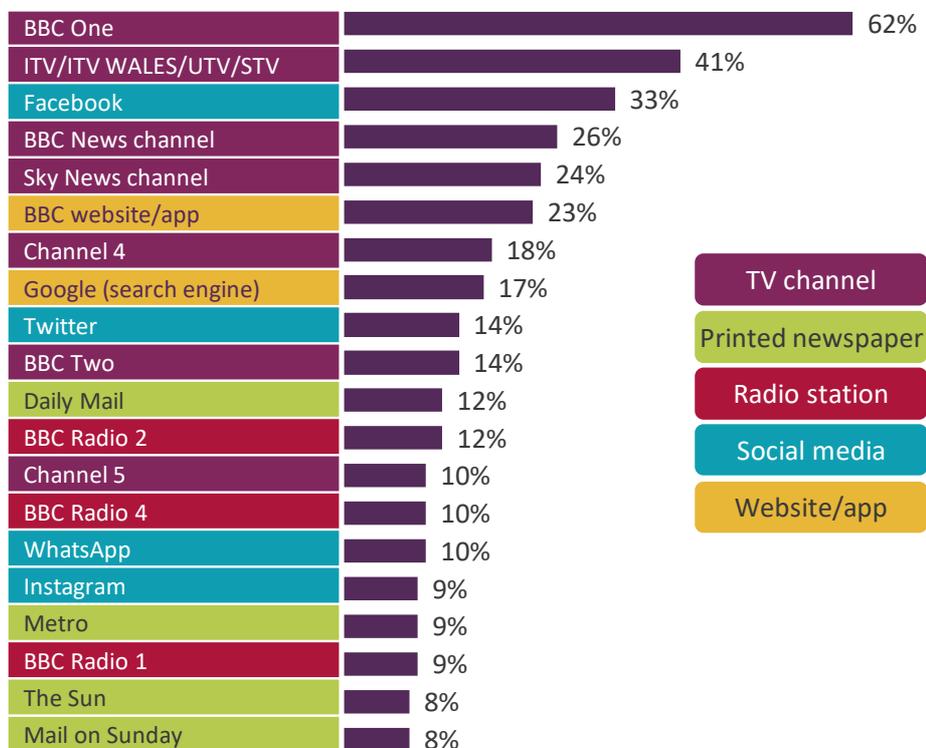
²² Ofcom News Consumption Survey 2018. According to the [Reuters Institute Digital News Report](#), 64% of UK internet news users say they use BBC TV or radio at least weekly for news, compared to 33% for ITV News and 21% for Sky News.

²³ Ofcom News Consumption Survey 2018

²⁴ *ibid*

(27%). CBBC Newsround is used by 12%. Overall, BBC news sources are used by 55% of online 12-15s.

Figure 5: Top 20 news sources across platforms: 2018



Source: Ofcom News Consumption Survey 2018. Question: D2a-8a. Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All adults 16+ = 4618

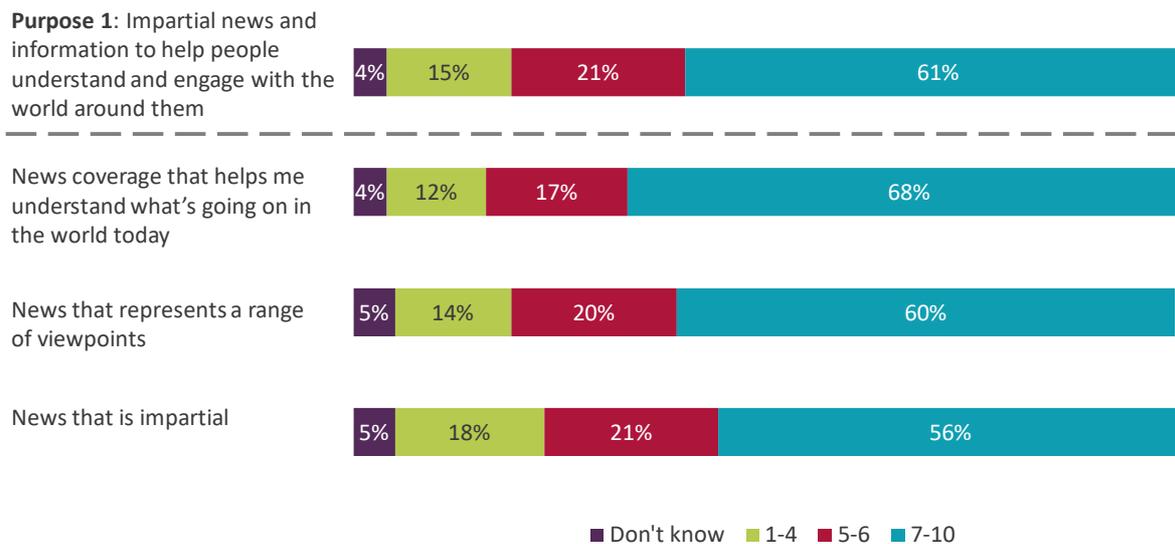
BBC news output is regarded highly and is important to audiences

The BBC's news and current affairs output remains a core component of the news landscape for most people across the UK. Audiences continue to value BBC news provision across a range of dimensions, as set out below.

In our BBC Performance Tracker, we asked people to rate the BBC's overall provision of news across TV, radio and online. As Figure 6 below shows, 61% of all UK adults rated the BBC highly for delivering purpose 1 overall, providing *impartial news and information to help people understand and engage with the world around them*. The ABC1 socio-economic groups are more likely to rate it highly (65%) while older people (aged 65+) and those in the C2DE socio-economic groups are less likely to do so (both at 56%).²⁵

²⁵ Ofcom BBC Performance Tracker October 2017 – April 2018

Figure 6: Audience views on BBC delivery of purpose 1: 2018²⁶



Source: Ofcom's BBC Performance Tracker 2018. Base: All respondents (4099). Question: C2. On a scale of 1 to 10 where 1 means not at all well and 10 means extremely well, how well, if at all, do you personally think the BBC as a whole provides: C6. On a scale of 1-10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you think the BBC as a whole provides...

The BBC's news provision is seen as particularly important both in terms of personal importance and in relation to its impact on society. Just over three-quarters of regular news users say that BBC TV news is important to them (77%), higher than the other PSB channels asked about.²⁷

Just over a quarter (27%) of news users cited BBC One as their single most important news source, with one in ten nominating ITV (10%) and one in 12 Facebook (8%).²⁸ In total, 44% named a BBC source as their single most important news source.

Overall, people are more likely to rate the BBC highly for news coverage that helps them understand what's going on in the world than for its impartiality

We asked people to rate how well BBC news overall was delivering in three specific areas (see Figure 6 above). Over two-thirds of adults rate the BBC highly for news coverage that helps me understand what is going on in the world today (68%); three in five for providing news that represents a range of

²⁶ According to the BBC's own research, 73% of UK adults think BBC news and current affairs is effective at helping them understand what is happening in the UK/world today, 65% think it is effective at informing them of the day's issues so they can make up their minds, and 64% that it is effective at helping them understand what is happening in their part of the UK (BBC Annual Report 2017/18).

²⁷ Ofcom News Consumption Survey 2018

²⁸ ibid

viewpoints (60%) and over half for *delivering news that is impartial* (56%).²⁹ This lower rating for impartiality can also be seen in findings from our News Consumption Survey, and its wider context is discussed in our assessment at the end of this section.

People in AB socio-economic groups are more likely than all adults to rate the BBC highly in relation to its news provision, as are those who are daily users of BBC news. Adults in Scotland and those in the DE socio-economic groups are more likely than all UK adults to rate each area lower. There are few differences by age group in terms of people's opinion of BBC delivery in these areas.³⁰

Television

This section sets out our evidence on the BBC's output and spend on news and current affairs since 2010. We then look at trends in audience consumption of news and current affairs, followed by audience opinions.

Almost 23,000 hours of network news and current affairs programming were broadcast on BBC TV in 2017

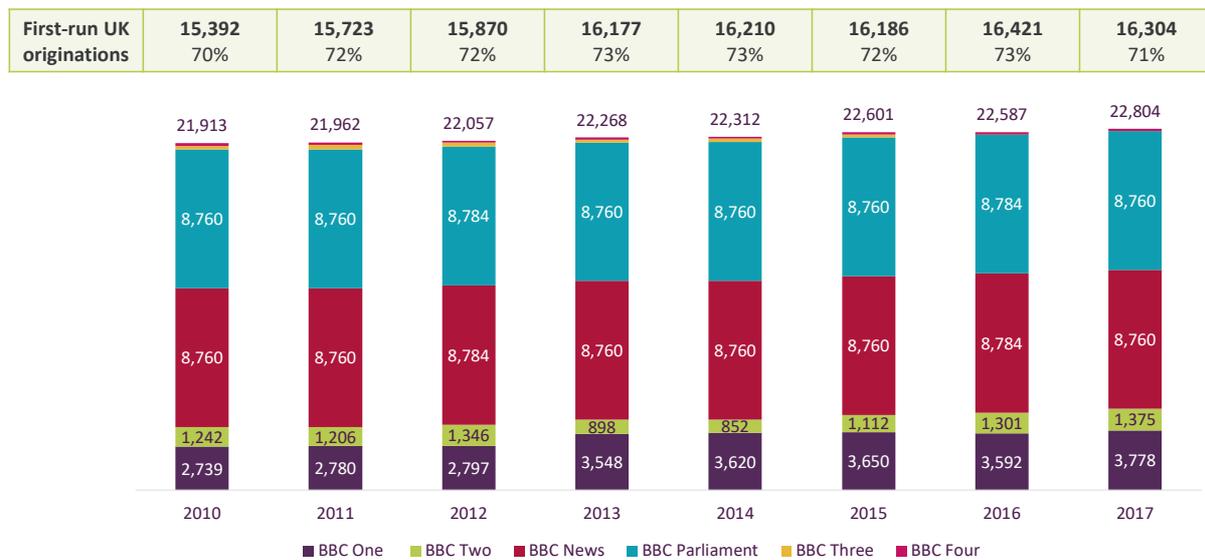
The overall amount of news and current affairs content shown across the BBC TV channels increased by 4% (891 hours) from 2010 to 2017; the 2017 total was the highest on record at 22,804 hours.³¹ The bulk of these hours (77%) came from the BBC News channel and BBC Parliament which exclusively broadcast news and current affairs programming.

²⁹ Ofcom BBC Performance Tracker October 2017 – April 2018. These results are from the first year of our tracker – it is not possible to compare findings over time.

³⁰ Ofcom BBC Performance Tracker October 2017 – April 2018

³¹ Ofcom analysis of BBC data, available to view in our [BBC Performance Report: interactive data](#). Subsequent analysis of BBC output and spend in this section have the same source unless stated otherwise.

Figure 7: BBC TV hours of network news and current affairs: 2010-2017



Source: Ofcom/BBC. Note: Figures exclude nations' and regions' content. Percentage figures show the proportion of total hours that were first-run UK originated.

There have been shifts in programming in recent years that have led to an increase in news and current affairs provision across BBC One and Two. The launch of *Victoria Derbyshire* in April 2015 led to an increase in output on BBC Two, while BBC One showed 1,829 hours of simulcast content from the BBC News channel in 2017, compared to 825 in 2010, all of which was shown overnight in both years.

The proportion of panel-style current affairs shows on BBC TV has grown in recent years

While current affairs output overall has grown slightly since 2010 (2,047 hours vs. 2,093 in 2017), this has predominantly come through an increase in repeats on the BBC News channel. More recently there has also been an increase in the hours of first-run UK-originated current affairs across BBC TV, from 734 hours in 2013 to 793 hours in 2017.

Within this, there has been growth in the proportion of panel-style current affairs programmes, including *Question Time*, *Sunday Politics* and *This Week*, across the BBC TV schedule. Between them, these three programmes accounted for 21% of first-run UK-originated current affairs output in 2017, compared to 16% in 2012.³²

The BBC has continued to provide current affairs programming that covers international themes. In 2017 there were 116 original hours of such programming, including *World News Today*, *100 Days*, and reports from Russia, Colombia and Turkey as part of the *...with Simon Reeves* series. However,

³² Figures are for BBC One, BBC Two, BBC Three and BBC Four output only over this period.

the number of broadcast hours of new, international current affairs under the ‘This World’ brand has more than halved in recent years, from 12 in 2012 to five in 2017.

Since moving online, BBC Three has continued to produce current affairs output for younger viewers under its ‘make me think’ editorial pillar. In 2017, 12.3 hours of such programming – including five episodes of *Stacey Dooley Investigates* – were shown on BBC One after debuting online. All of these hours were shown outside peak viewing time.

There were 5,577 hours of news and current affairs for the nations and regions in 2017

Overall, the number of hours of news and current affairs content produced specifically for the English regions, Scotland, Wales, Northern Ireland and BBC Alba decreased by 6% from 2010 to 2017. A decrease has been seen in each of the nations; in England output decreased by 168 hours over this period, compared to a decrease of 178 hours for Scotland, Wales and Northern Ireland combined, across BBC One and Two. For Gaelic speakers, there were 183 hours of news and current affairs broadcast on BBC Alba in 2017, a decrease of 17 hours since 2010.

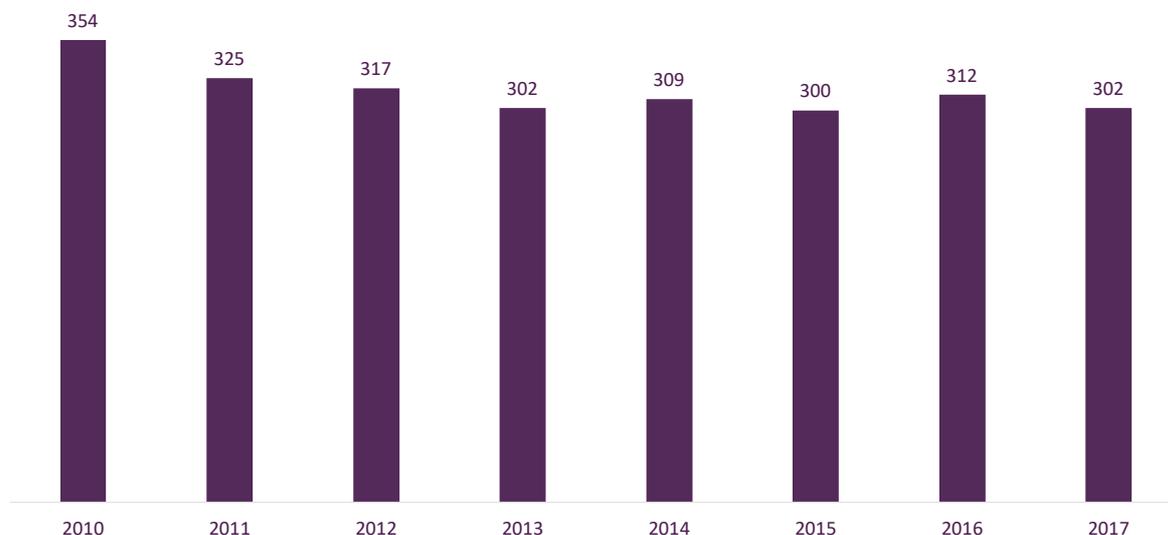
Figure 8: Hours of BBC TV news and current affairs output for the nations and regions: 2010-2017



Source: Ofcom/BBC

Programme spend on news and current affairs across BBC TV stood at £302m in 2017

The amount of money spent by the BBC on TV news and current affairs programming – across the network and including programming for the nations and regions – was £302m in 2017, a 15% decrease in real terms compared to 2010, although spend has been largely stable since 2013.

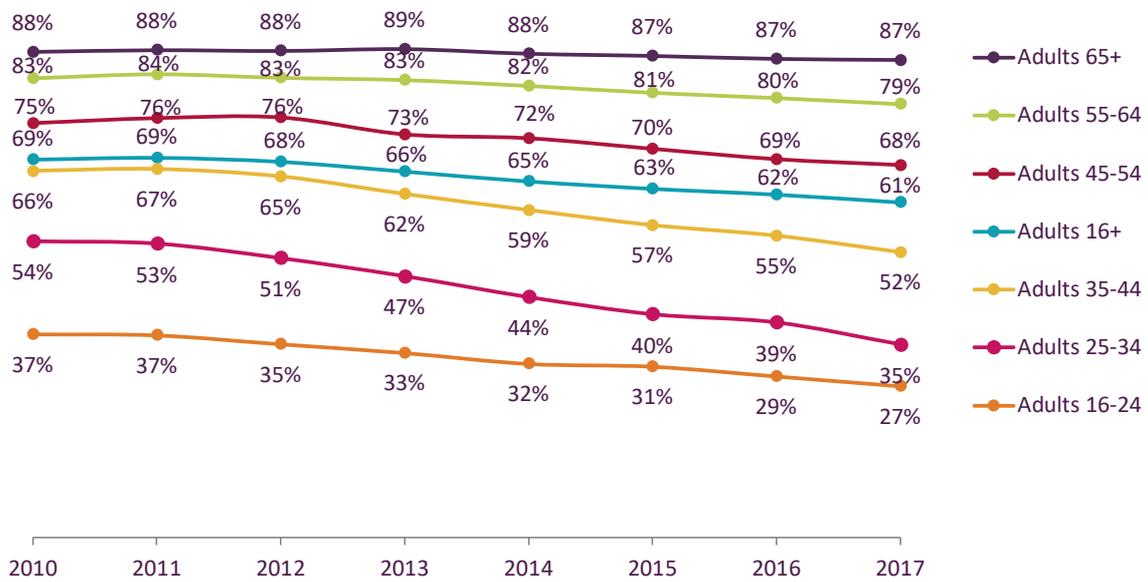
Figure 9: BBC TV news and current affairs programme spend (£m, real terms): 2010-2017

Source: Ofcom/BBC. Note: Figures have been adjusted for CPI (2017 prices). Figures include spend on programmes made specifically for Northern Ireland, Scotland, Wales and the English regions but not BBC Alba. Figures account for programmes broadcast in each calendar year and do not include spend that cannot be attributed to individual programmes, such as presentation, commissioning, scheduling, copyright and helpline.

There has been a steady decline in audiences for BBC TV news since 2010, particularly among younger viewers

The proportion of adults watching BBC TV news on the TV set each week has fallen from 69% of adults in 2010 to 61% in 2017. There is considerable variation by age, ranging from 27% of 16-24s to 87% of over-64s in 2017.

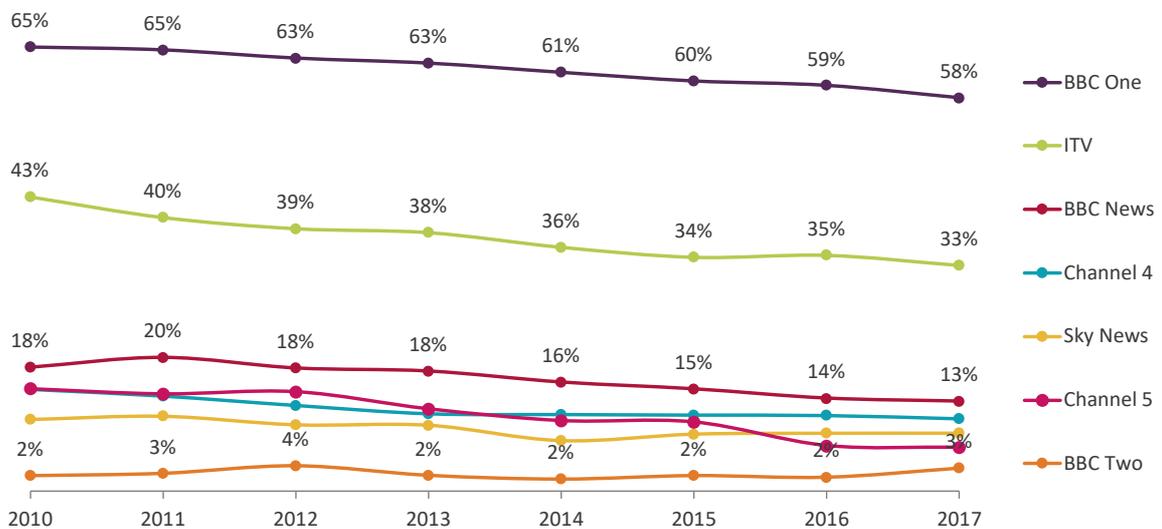
Figure 10: Average weekly reach of BBC TV news, by age: 2010-2017



Source: BARB. All programming classified in the BARB news/international news genre for all BBC TV channels. Reach criteria: 3+ consecutive minutes.

There is a corresponding decrease in the reach of TV news from other broadcasters, reflecting an overall decrease in the overall weekly reach of TV news. For example, ITV's news reach decreased from 43% in 2010 to 34% in 2017. The corresponding decreases for Channel 4 news were from 15% to 11%, and for Channel 5, from 15% to 7%. Total viewing time per person to news, across all channels, has also decreased, but BBC One has increased its share of this viewing for all adults (from 58% in 2010 to 67% in 2017), and for 16-24s (from 49% in 2010 to 59% in 2017).

Figure 11: Adult average weekly reach of all TV news, by channel: 2010-2017



Source: BARB, all adults (16+). All programming classified in the BARB news/international news genre. Reach criteria: 3+ consecutive minutes. Includes +1 channels.

Viewing of BBC TV regional news has decreased steadily since 2010

Regional news across all BBC TV reaches 44% of adults weekly. This has been steadily declining since 2010, when it reached 53% of adults on average per week. By age groups, the reach of BBC regional news is lowest for under-35s (15% reach to 16-24s and 18% to 25-34s). BBC regional news reaches 75% of over-64s, down by 5pp since 2010 and down by 16pp for 25-34s and 17pp for 35-44s over the same period.

There has been a recent increase in the reach and minutes of current affairs, driven by BBC One

The viewing of content in the current affairs genre has decreased on BBC One from 30% average adult weekly reach in 2010 to 25% in 2017, and on BBC Two from 17% in 2010 to 13% in 2017. There has, however, been an increase in BBC One current affairs reach since 2015. The amount of current affairs viewing has also increased recently, up by 2.5 mins per day in 2017 on BBC One and Two combined.

People rate BBC TV news highly in many areas, including quality and personal importance, although impartiality is rated lower

Turning to audience opinions of BBC TV news, regular BBC TV news viewers rated the BBC highly for most of the dimensions of news asked about in Figure 12 below.^{33 34} However, they are less likely to rate BBC TV news highly for its impartiality (61%). Compared to perceptions about other news providers, ITV news is more likely to be perceived as impartial by its regular audience (68%).

Figure 12: Audience opinions about aspects of TV news: 2018

	BBC TV	ITV	Sky News Channel	Channel 4	Channel 5
Is high quality	79%	75%	76%	66%	59%
Is important to me personally	77%	70%	72%	62%	55%
Is accurate	74%	72%	72%	66%	58%
Is trustworthy	73%	73%	69%	63%	57%
Is impartial	61%	68%	64%	59%	57%

Source: News Consumption Survey 2018. Base: All adults 16+ who use source for news at least once a week. Channels significance tested vs. BBC TV. Question: <E3> And to what extent do you think the following statements apply to BBC as a news source? Significance testing: red indicates a result significantly lower to BBC TV at the 95% confidence level; green indicates a result significantly higher than BBC TV.

BBC TV current affairs audiences are more likely to rate the impartiality of BBC current affairs programming highly than are BBC TV news audiences to rate the impartiality of its TV news. Seven in ten (72%) BBC current affairs viewers rate it highly on this measure, compared to 61% of BBC TV news viewers. Channel 4's current affairs programming is even more highly rated, at 80% of its viewers.

³³ In our News Consumption Survey, we asked people for their views on various aspects of news and current affairs provision. These aspects can be grouped into the following three areas: opinions about the type of news provided – whether it is perceived as accurate, impartial, trustworthy, etc; the impact of the news upon the individual – whether it helps make up people's minds, whether it helps people understand the news, and so on; and the geographic provision of news – whether it provides local, national, international content.

³⁴ Ofcom's PSB Tracker also asks audiences about whether news programmes are trustworthy, *programmes help me understand what is going on in the world* and regional news programmes *provide a wide range of good quality news about my area* for the PSB channels. 76% rate BBC One highly for having *news programmes that are trustworthy*; ITV News is on a par with BBC One (75%). BBC One is higher than other BBC TV channels (Two, Three and Four) and for Channel 4 and Channel 5.

BBC TV news viewers rate the BBC highly for helping them understand what's going on, and for the calibre of its journalists

Four in five BBC TV news viewers (79%) say it helps them understand what is going on in the world, higher than for ITV, Channel 4, Channel 5 and the Sky News channel. BBC TV is also highly rated among its news viewers for having high calibre journalists/presenters.

Other elements of news provision are rated somewhat lower: about two-thirds of viewers think that BBC TV helps them understand the political process, that it offers a range of opinions, and that it has a depth of analysis and content not available elsewhere. Three in five (58%) rate it highly for helping them to make up their mind. Comparatively, both ITV and Sky News are rated higher in terms of offering a range of opinions to viewers, and the Sky News Channel is rated higher for its depth of analysis.

Figure 13: Audience opinions about the impact of TV news: 2018

	BBC TV	ITV	Sky News channel	Channel 4	Channel 5
Helps me understand what is going on in the world today	79%	72%	74%	69%	57%
Has high calibre journalists/presenters	78%	73%	76%	66%	57%
Helps me engage/understand the political process	67%	64%	67%	64%	53%
Offers a range of opinions	65%	69%	70%	65%	59%
Has a depth of analysis and content not available elsewhere	63%	63%	68%	60%	52%
Helps me make up my mind	58%	63%	61%	56%	53%

Source: News Consumption Survey 2018. Base: All adults 16+ who use source for news at least once a week. % of regular users rating each source highly (7-10). Channels significance tested vs. BBC TV. Question: <E3> And to what extent do you think the following statements apply to BBC as a news source? Significance testing: red indicates a result significantly lower to BBC TV at the 95% confidence level; green indicates a result significantly higher than BBC TV.

For current affairs programmes, all TV sources, with the exception of Channel 5, are rated relatively highly by their viewers across the various attributes for current affairs programming. More than four in five who watch current affairs programmes on BBC TV rate them highly for covering international topics (85%), providing high quality commentary and interpretation of the events/issues (84%), providing investigative journalism (83%), and helping them to understand what is going on in the world (84%). In addition, when asked whether current affairs programming provides a good depth of analysis, 83% of BBC TV current affairs audiences rated BBC TV highly, similar to ratings for most other channels but higher than for Channel 5 (74%).

BBC TV news is rated highly for national and international news although ITV is perceived to be better at regional news

Four in five regular news viewers (83%) rate BBC TV highly for its national news, higher than for all other comparator channels.

About three-quarters of its regular news viewers feel that BBC TV is good for international news (78%), understanding what's going on in other parts of the UK (77%) and for regional/local news (74%). ITV news users are more likely to rate ITV highly for regional/local news, at 79%.

Figure 14: Audience opinions about the geographic focus of TV news: 2018

	BBC TV	ITV	Sky News Channel	Channel 4	Channel 5
Good for national news	83%	78%	76%	69%	62%
Good for international news	78%	74%	79%	67%	56%
Good for understanding what's going on in other parts of the UK	77%	75%	70%	62%	54%
Good for regional/local news	74%	79%	51%	46%	47%

Source: News Consumption Survey 2018. Base: All adults 16+ who use source for news at least once a week. % of regular users rating each source highly (7-10 out of 10). Question: <E3> And to what extent do you think the following statements apply to BBC as a news source? Significance testing: red indicates a result significantly lower to BBC TV at the 95% confidence level; green indicates a result significantly higher than BBC TV.

Radio

This section sets out our evidence on the BBC radio's news and current affairs output, before looking at trends in audience consumption and audience opinions.

News output features throughout the day on BBC radio services

The BBC's network radio stations broadcast news bulletins at regular intervals throughout the day. Such bulletins are the primary news sources on Radio 3, while Radio 1 broadcasts two 15-minute *Newsbeat* bulletins on weekdays, and Radio 2 broadcasts *The Jeremy Vine Show* for two hours each weekday, which focuses on news and current affairs. Radio 4 and Radio 5 live broadcast fewer standalone news bulletins due to the number of news programmes that make up their schedules.

Figure 15: News output across the five main BBC network radio stations

	Weekday bulletins		Weekend bulletins		News programming
	Number of bulletins	Minutes per day	Number of bulletins	Minutes per day	
Radio 1	14	33	9	19	Two 15-minute <i>Newsbeat</i> bulletins on weekdays.
Radio 2	26	76	24	78	The <i>Jeremy Vine Show</i> covers news and current affairs between 12.00-2.00pm on weekdays.
Radio 3	8	15	4	11	N/A
Radio 4	9	20	7	21	45% of the weekday schedule consisted of news and current affairs programming, including <i>Today</i> and <i>PM</i> .
Radio 5 live	7	15	22	43	86% of the weekday schedule consisted of news and current affairs output, including <i>5 live Breakfast</i> and <i>5 live Drive</i> .

Source: Ofcom/BBC. Note: figures reflect estimated averages across 2017/18. Output may vary throughout the year.

BBC network radio reaches over a third of adults with its news and current affairs programmes

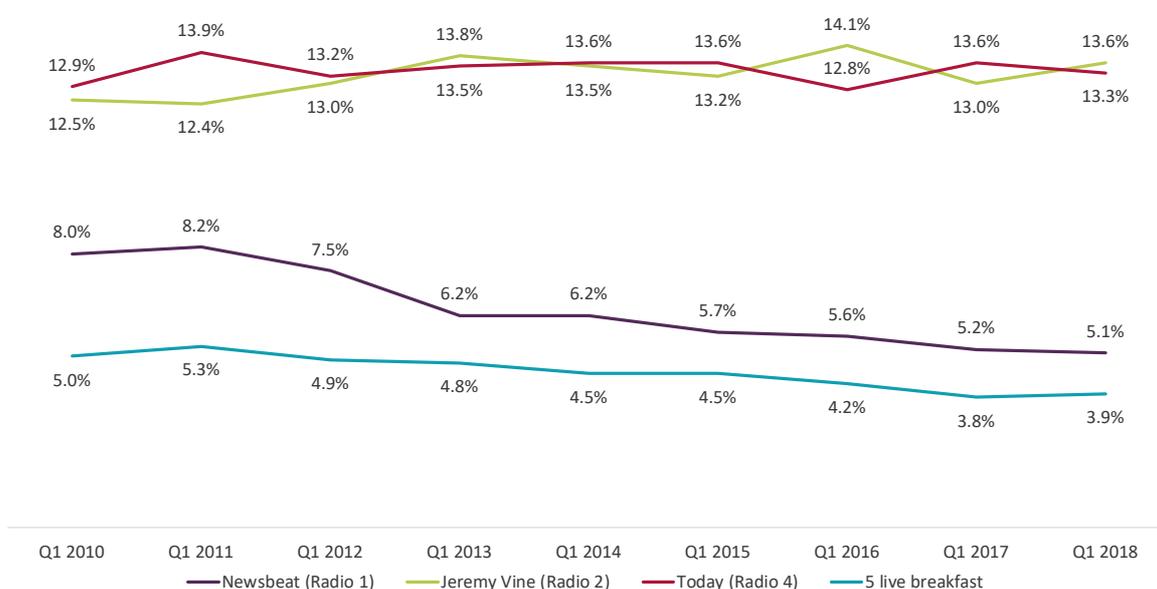
The news and current affairs programmes across Radio 1, Radio 2, Radio 4 and 5 live are listened to by 21 million adults, more than a third (36%) of all UK adults.³⁵ This overall reach figure has been stable over time. Almost six in ten (57%) of BBC radio listeners listen to one or more of these news programmes.

Figure 16 below shows that the reach of both *The Jeremy Vine Show* and the *Today* programme have remained relatively stable over time.³⁶ The number of adults listening to Radio 1's *Newsbeat* has decreased by 32% since 2010, greater than the overall decrease in the station's reach across this period (-19%). The weekly reach of the 5 live breakfast show also decreased between 2010 and 2018 (-18%) although this is in line with the decrease in the overall reach of this station (-21%).

³⁵ This excludes news bulletins, where reach cannot be measured with any accuracy as RAJAR captures listening in 15-minute segments across the day.

³⁶ The *Today* programme did show a decrease in listeners in Q2 2018 but this is not included in the time period we are covering in this report.

Figure 16: Weekly reach of the main news programmes on BBC Radio 1, 2, 4 and 5 live: 2010-2018



Source: RAJAR. Newsbeat = M-F 12:45-13:00, 17:45-18:00; Jeremy Vine = M-F 12:00-14:00; Today = M-F 06:00-09:00, Sat 07:00-09:00; 5 live Breakfast = M-F 06:00-10:00

BBC radio news is important to listeners and is rated highly for quality and accuracy although impartiality is rated lower

Seven in ten (70%) regular listeners to BBC radio news feel that its news provision is important to them, and three-quarters think that it is high quality (76%). About seven in ten regular BBC radio news listeners think that BBC radio news is accurate (73%) and trustworthy (71%). As with BBC TV news viewers, the rating for impartiality is lower, at 62%. Listeners of news on commercial radio stations rate them lower across all these aspects.

Figure 17: Audience opinions about radio news: 2018

	BBC radio	Commercial radio
Base	1423	1216
Is high quality	76%	56%
Is accurate	73%	59%
Is trustworthy	71%	59%
Is important to me personally	70%	56%
Is impartial	62%	55%

Source: Ofcom News Consumption Survey 2018. Base: All using each source for news at least weekly 2018. % of regular users rating each source highly (7-10). Question: <E2> How important is <BRAND> as a source of news to you personally? E3. And to what extent do you think the following statements apply to <BRAND> as a news source? Answer using a scale of 1 to 10. Significance testing: red indicates a result significantly lower to BBC radio at the 95% confidence level; green indicates a result significantly higher than BBC radio.

BBC radio is perceived to be delivering news provision well overall

Three-quarters of regular listeners to news output on BBC radio think that its presenters/journalists are of a high calibre (74%) and that it helps them understand what is happening in the world (73%). However, as with BBC TV news, somewhat fewer listeners (66%) rate BBC radio news highly for offering a range of opinions and helping them to engage/understand the political process.

Compared to commercial radio news listeners, BBC radio news listeners are more positive about BBC radio news' delivery of a range of aspects, including helping them understand what's going on in the world, offering a range of opinions, having depth of analysis and content, and helping them make up their mind.

Figure 18: Audience opinions about the impact of radio news: 2018

	BBC radio	Commercial radio*
<i>Base</i>	1423	1216
Has high calibre journalists/presenters	74%	N/A*
Helps me understand what's going on in the world	73%	51%
Offers a range of opinions	66%	50%
Helps me engage/understand the political process	66%	N/A*
Has a depth of analysis and content not available elsewhere	62%	45%
Helps me make up my mind	60%	47%

Source: Ofcom News Consumption Survey 2018. Base: All using each source for news at least weekly 2018. % of regular users rating each source highly (7-10). Question: E3. And to what extent do you think the following statements apply to <BRAND> as a news source? Answer using a scale of 1 to 10. Significance testing: red indicates a result significantly lower to BBC Radio at the 95% confidence level; green indicates a result significantly higher than BBC Radio. * Some aspects of news delivery were not asked of all commercial radio stations

BBC radio is rated highly for national news

Three-quarters of listeners to BBC radio news rate it highly for national news (76%) and seven in ten rate it highly for *good for understanding what's going on in different parts of the UK* and for international news. Overall, listeners are less likely to rate the BBC highly for being good for regional/local news, although when we look specifically at the views of those who say they use BBC local radio news, 81% rate it highly.

For current affairs, more than four in five BBC radio listeners say that BBC radio is good at covering international topics (85%).

Figure 19: Audience opinions about the geographic focus of radio news: 2018

BBC radio*	
Good for national news	76%
Good for understanding what's going on in other parts of the UK	72%
Good for international news	70%
Good for regional/local news	62% (81% among those who use BBC local radio news)

Source: Ofcom News Consumption Survey 2018. Base: All using each source for news at least weekly 2018 % of regular users rating each source highly (7-10). Question: E2. How important is <BRAND> as a source of news to you personally? E3. And to what extent do you think the following statements apply to <BRAND> as a news source? Answer using a scale of 1 to 10.

* These aspects of news delivery were not asked of all commercial radio stations

Online

This section sets out our evidence on the BBC's online provision of news and current affairs. We look firstly at the types of ways in which people consume online BBC news, followed by people's opinions of its provision, compared to other providers where relevant.

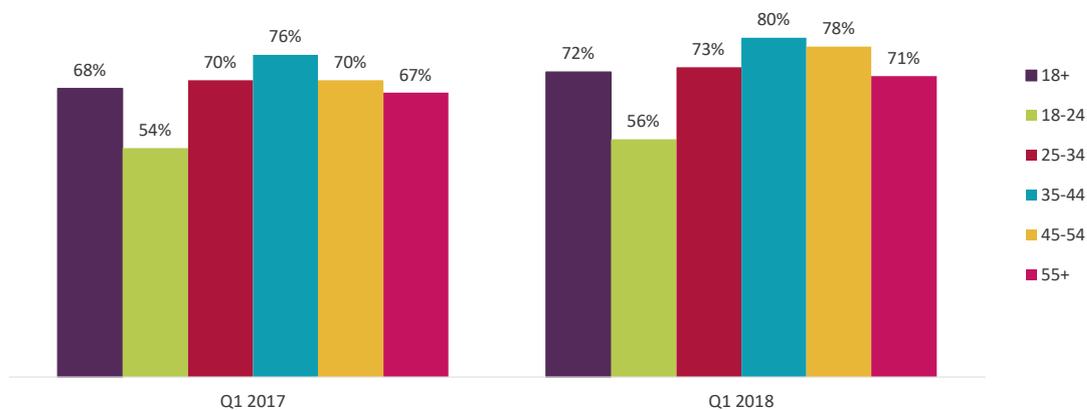
Seven in ten online users access BBC news online news each month

The BBC's online news service is available at bbc.co.uk/news. It is linked with common themes and reporting sources to the BBC's TV and radio news provision.³⁷

BBC news online is widely used by UK adults and its use is less skewed by age than BBC TV and radio news. For example, in Q1 2018 the average monthly reach of BBC news online was 72% of all online adults, according to comScore data. This figure ranges from 56% of 18-24 year-olds to 80% of 35-44 year olds. BBC news online reached 72% of adult male online users and 72% of adult female online users per month in Q1 2018. But there are differences by socio-economic group; 83% of ABC1 online adults accessed BBC news online in Q1 2018 compared to 56% of C2DE online adults.³⁸

³⁷ The equivalent to TV and radio news headlines are the top of the web page which features clickable headlines with pictures to support stories. There are a variety of sub-urls accessible from the main web page (e.g. business, politics and entertainment and arts). Scrolling down the main page leads to a sequence of sections below the main headlines, some of which are individualised; for example, local news and national news from the relevant one of the four nations. The web-based delivery also means that 'most-read' stories are highlighted.

³⁸ comScore MMX Multi-Platform, [C] BBC News, monthly average January-March 2018, age: 18+, UK

Figure 20: Average monthly reach of BBC news online by age group: Q1 2017 vs. Q1 2018³⁹

Source: comScore MMX, Multi-Platform, [C] BBC News, January-March 2017 and 2018, UK⁴⁰
 Base: all online adults 18+

BBC news is also widely used on social media platforms

More than two in five people say they use social media for news (44%), rising to 67% of 16-34s. When we asked social media news users which news sources they followed on social media sites, the BBC was the most popular answer for all the main social media platforms (Facebook 37%, Twitter 36%, Instagram 32% and Snapchat 33%).⁴¹⁻⁴² For 16-34s, the BBC was also the most popular news source followed, on all social media sites asked about except Snapchat; here, BuzzFeed was the most popular (30% compared to 28% for the BBC).

Users of BBC and Sky News online are more likely to rate these highly than are users of ITV, especially around quality and 'understanding of the world today'

About four in five regular users of BBC online news say that the BBC website/apps are high quality (81%) and accurate (78%). This is comparable to the responses from users of the Sky News websites/apps.

³⁹ comScore made changes to its methodology in 2017, so the chart is displayed to demonstrate a widespread use of BBC news online in 2017 and 2018, rather than implying any particular change over time.

⁴⁰ In addition to comScore measurement, we have survey data on users' own self-assessment of their consumption of BBC news online. According to our News Consumption Survey, 23% of adults say they use BBC news online 'nowadays' – the second most-nominated source of online news after Facebook (33%). According to the [Reuters Institute Digital News Report](#), 43% of online news users in the UK say they use BBC news online at least weekly.

⁴¹ We know that the use of social media for news is popular, although accurately measuring the extent of this, and which news sources are used within Facebook, can be challenging. We use our News Consumption Survey to ask respondents about their online habits, and 44% of adults tell us they get news via social media. Of these, 76% say they use Facebook for news 'nowadays'.

⁴² Ofcom News Consumption Survey 2018

The BBC's online news is rated similarly to Sky's online news, on most measures. The ITV/ITN website and apps are rated lower than the BBC website for most measures.

Three-quarters of BBC news users (77%) rate BBC website/apps highly for being important to them personally.

Figure 21: User opinions about the type of online news provided: 2018

	BBC website/apps	ITV/ITN website/apps	Sky news website/apps
<i>Base</i>	989	154	290
Is high quality	81%	67%	80%
Is accurate	78%	70%	74%
Is important to me personally	77%	63%	74%
Is trustworthy	76%	66%	73%
Is impartial	68%	62%	74%

Source: Ofcom News Consumption Survey 2018. Base: All adults 16+ using each source for news at least weekly 2018; % of regular users rating each source highly (7-10) (Significance tested vs. BBC website/apps). Question: E3. And to what extent do you think the following statements apply to <BRAND> as a news source? Answer using a scale of 1 to 10. Significance testing: red indicates a result significantly lower to BBC website/apps at the 95% confidence level; green indicates a result significantly higher than BBC website/apps.

The BBC website/apps are rated highly for helping people understand what's going on in the world

The BBC website/apps are rated highly, along with the Sky News website/apps, for helping people understand what is happening in the world. However, users of the Sky News website/apps are more likely to think that the Sky website/apps have a depth of analysis and content not available elsewhere, than are BBC website/app users to think this of the BBC equivalent.

Figure 22: User opinions about the impact of online news: 2018

	BBC website/apps	ITV/ITN website/apps	Sky News website/apps
<i>Base</i>	989	154	290
Helps me understand what's going on in the world	80%	67%	82%
Offers a range of opinions	69%	66%	74%
Helps me make up my mind	66%	63%	68%
Has a depth of analysis and content not available elsewhere	66%	65%	75%

Source: Ofcom News Consumption Survey 2018. Base: All using each source for news at least weekly 2018. % of regular users rating each source highly (7-10). Question: E3. And to what extent do you think the following statements apply to <BRAND> as a news source? Answer using a scale of 1 to 10. Significance testing: red indicates a result significantly lower to BBC website/apps at the 95% confidence level; green indicates a result significantly higher than BBC website/apps.

Performance assessment

Changes in the way we consume news increase the importance of the BBC's role as a trusted provider of news and current affairs

The news and current affairs landscape has changed significantly in recent years. Although TV is still the main platform for accessing news, online news is not far behind, and for young people, the internet is now the most-used news platform.

There are vast numbers of news stories available online, and people are increasingly using social media to access such information. While some have concerns about the trustworthiness of social media as a source of news, many do not have the time or inclination to think critically about this. They engage with several sources of news, but only have the capacity to do so superficially.⁴³

These changes heighten the importance of the BBC's role in providing accurate and impartial news, current affairs and factual content that helps UK citizens understand the world around them and participate in democratic processes. This is particularly true for the BBC's online news, as audiences consume less news on TV and more online.

In many respects, the BBC is performing well across its TV, radio and online platforms

The BBC produces a significant volume of news and current affairs across TV, radio and online and, overall, it is the most-used news source, with four-fifths of UK adults saying they use it for news.⁴⁴

Although the reach of BBC TV news has declined, this is in line with the decline in reach of other providers' TV news programmes. The BBC is the most-used news source on TV,⁴⁵ as well as radio⁴⁶ and online.⁴⁷ In addition, BBC One is the single most-used news source across all TV, radio, newspaper and online sources.⁴⁸ For current affairs, the BBC is also the most-used source on TV and radio.⁴⁹

⁴³ Ofcom, 2018, [Navigating news in an online world](#)

⁴⁴ Ofcom News Consumption Survey 2018

⁴⁵ Among adults who say they watch news on TV, 87% say they use a BBC TV channel. BBC One is the TV news source they use most, followed by ITV.

⁴⁶ Among adults who say they listen to news on the radio, nearly three-quarters say they use a BBC station, and BBC Radio 2, 4 and 1 are the three most popular radio stations for listening to news.

⁴⁷ 63% of online news users say they use the BBC website / app, and the BBC is the most commonly followed news organisation on key social media sites (Facebook, Twitter, Instagram and Snapchat). News Consumption Survey 2018

⁴⁸ Although the BBC News channel is one of the most-used news sources across all platforms, its weekly reach has fallen by a fifth since 2010.

⁴⁹ Of those adults who watch current affairs programmes on TV, almost three-quarters do so on BBC One; and of those who listen to current affairs programmes on the radio, the top five stations that they listen to are BBC radio stations (Ofcom News Consumption Survey 2018).

Young people are much less likely than average to consume BBC TV news.⁵⁰ But, as noted above, young people primarily consume news online rather than on TV. When young people go online, the BBC website/app is the news source they use the most, and the BBC is also the most-followed news source for 16-34s on a number of key social media sites.⁵¹

Furthermore, BBC TV, radio and website/app users all rate the BBC highly as a news source, with more than seven in ten saying that BBC news on these platforms is high quality, accurate and trustworthy and helps them understand what is going on in the world. The BBC's current affairs output on TV and radio is also highly rated by its users across a number of aspects.

Audiences rate BBC news less highly for providing a depth of analysis and range of content not available elsewhere

BBC news users rate the BBC less highly for providing a depth of analysis and content not widely available elsewhere, compared to many other aspects of its news.⁵² In addition, both BBC TV news and BBC online news are rated less highly for this aspect than Sky News.

Although the BBC's current affairs TV programmes are rated highly for this aspect and are in line with other providers' current affairs programmes,⁵³ we note that there has been an increase in the proportion of panel-style current affairs shows (such as *Question Time*, *Sunday Politics* and *This Week*) during recent years,⁵⁴ which do not tend to reflect in-depth investigative journalism. Given the BBC's particular responsibility here, we think there is value in looking further at how the BBC provides depth and range in its news across its TV, radio and online platforms.

Audiences rate BBC news less highly for impartiality than for many other aspects

Audiences rate the impartiality of the BBC's news less highly than most other aspects of its news provision,⁵⁵ and this pattern is broadly reflected in how other news providers are rated by their users. Nonetheless, ITV is rated more highly by its users for the impartiality of its TV news. In the first year of the new Charter, we did not find any breaches of the due impartiality requirements of the Broadcasting Code in the BBC's programmes.⁵⁶

⁵⁰ 61% of all adults watch BBC TV news each week while only 35% of 25-34 year-olds and 27% of 16-24 year-olds do so.

⁵¹ Facebook, Instagram and Twitter; but not Snapchat, where BuzzFeed is the most-followed news source (Ofcom News Consumption Survey 2018).

⁵² Ratings here are similar to those for impartiality, and lower than those for providing high quality, accurate, trustworthy news and 'news that helps them understand what's going on in the world'. Under purpose 1, the BBC is expected to offer "a range and depth of analysis and content not widely available from other United Kingdom news providers," among other things. This helps audiences engage fully with major issues and participate in elections as informed citizens.

⁵³ With the exception of Channel 5 News – the BBC is rated more highly than Channel 5 News.

⁵⁴ Up from 16% in 2012 to 21% of the BBC's first-run UK-originated current affairs output in 2017.

⁵⁵ 61% rate the BBC highly for impartiality of TV news and 62% for its radio news (Ofcom News Consumption Survey 2018).

⁵⁶ See Section 6 of the Annual Report for further discussion of the due impartiality of BBC programmes.

The BBC continues to cover major local, regional, national, UK and global issues but its output in the nations and regions has declined on TV

The BBC continues to cover regional, national and international themes and stories within its news programming. More than seven in ten audiences rate the BBC highly for its national and international news on both TV and radio. While a majority still rate the BBC highly for its local/regional news on radio and TV, ITV's TV news is rated more highly than the BBC's in this regard.

We are concerned that the new hours of the BBC's only regular international current affairs programme on TV, *This World*, halved between 2012 and 2017.

The volume of the BBC's coverage of news and current affairs in the nations and regions has declined since 2010, including a recent decrease in current affairs TV programming delivered to Scotland. This may rise after the launch of the new BBC Scotland television channel, scheduled for early 2019.

We will review the BBC's news and current affairs output

Changing news consumption patterns, and questions about the trustworthiness of some online news sources, heighten the importance of the BBC's role as a trusted provider of news and current affairs. In view of this we are launching a review of the BBC's news and current affairs output. We will look at how the BBC is adapting to ensure it remains relevant and can continue to be a trusted destination for audiences. In particular, we will look at the range and depth of its coverage across its TV, radio and online platforms, as well as how it delivers impartiality, including an assessment of the tools and techniques the BBC uses to deliver impartiality in the changing news environment. This will inform our consideration of its delivery of purpose 1 over the Charter period.

Public purpose 2: learning

Purpose 2 is to support learning for people of all ages: the BBC should help everyone learn about different subjects in ways they will find accessible, engaging, inspiring and challenging. The BBC should provide specialist educational content to help support learning for children and teenagers across the United Kingdom. It should encourage people to explore new subjects and participate in new activities through partnerships with educational, sporting and cultural institutions.

Our key findings:

- The BBC is delivering this purpose overall; audiences rate it highly for its education and learning output in the UK.
- It delivers a wide range of informal learning content for adults across its mainstream and specialist TV and radio services and online. Viewing of informal learning content on the TV has increased in recent years, despite an overall decline in TV viewing. While the BBC has increased the overall amount of such programming, there have been declines in the hours of key genres such as arts and religion. In addition, the increase in specialist factual content has largely been driven by an increase in repeats. We will monitor trends in the BBC's provision on TV and radio, and work with the BBC to obtain better data on online consumption of informal learning content.
- The BBC provides informal learning content specifically for children through CBeebies and CBBC. CBeebies continues to have a stable reach among 4-6 year-olds, but the reach and viewing of CBBC among 6-12 year-olds has fallen significantly. The BBC recognises this decline and is investing further in children's content with increasing emphasis on its digital services; we will monitor the impact of the BBC's multiplatform approach for providing children with informal learning content.
- There is high satisfaction among children who use the BBC website and apps for their school work. The reach of BBC Bitesize has fallen recently, but the service is currently being developed and enhanced and we will monitor its progress closely.
- We will work with the BBC to better understand the impact of its partnerships on the delivery of purpose 2.

Key evidence base

This section provides the key data findings relating to the BBC's delivery of purpose 2.

First, we look at **'informal' learning**. We consider that the specific genres of specialist factual content, such as science, history, arts, classical music and religion, are broadly educational in scope, and refer to this as 'informal learning content'.⁵⁷ We note that the BBC has a wider definition of informal learning, and although we acknowledge that any programme has the potential to provide

⁵⁷ These genres of programming formed part of our proposed performance measurement framework that we consulted upon in 2017.

informal learning for its audience, we focus on core genres for performance assessment purposes. We use data on TV, radio and online provision, wherever available, setting out evidence relating to hours of informal learning content and the consumption of that content. The BBC’s provision of formal learning is predominantly for children.

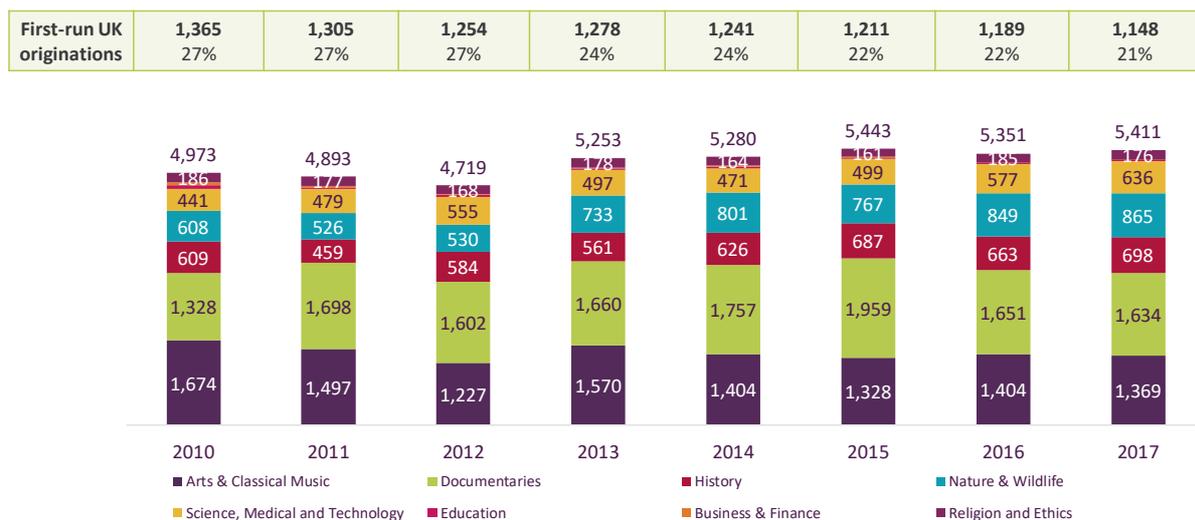
We then report on people’s opinions about learning across all the BBC’s platforms. Finally, we provide the evidence relating to both informal and formal learning for children, looking in particular at CBeebies and CBBC.

Informal learning - TV

There were 5,411 hours of informal learning content broadcast on BBC TV in 2017

There were 5,411 hours of informal learning content broadcast in 2017, an increase of 438 hours since 2010. However, there have been fewer first-run UK-originated hours of such content in recent years; the 1,148 hours in 2017 made up 21% of total broadcast output compared to 27% in 2010.

Figure 23: Total annual hours of informal learning content across BBC TV: 2010-2017



Source: BBC/Ofcom. Note: Figures don’t include nations’ and regions’ content. Education content includes social action programming only, and not schools’ or formal education programming. Percentages reflect the proportion of total hours that were first-run UK-originated in each year.

Informal learning includes a number of ‘at-risk’ genres, such as arts, religion and other specialist factual programming.⁵⁸ There has been a reduction in the hours of arts and classical music content

⁵⁸ This includes genres that provide a particular contribution to the Mission and Public Purposes, are underprovided or in decline across public service broadcasting, as set out in Schedule 2 of the Agreement.

broadcast across BBC TV in recent years, down by 18% between 2010 and 2017. This decrease is more pronounced across first-run UK originations; the 269 such hours in 2017 represented a decline of 32% since 2010 (395 hours). There were 17 hours of new UK arts and classical music programming shown on BBC One at peak time in 2017.⁵⁹

While hours of specialist factual output across BBC TV increased between 2010 and 2017 (+26%), this has predominantly been driven by repeats. History (-33%), nature and wildlife (-22%) and science, medical and technology (-15%) programming all saw declining hours of first-run UK originations between 2010 and 2017, although hours of new UK documentaries increased by 17% over the same period. There were 178 hours of specialist factual content shown on BBC One at peak time in 2017, the highest since 2009.

At 176 hours in 2017, the number of hours of religion and ethics programming across BBC TV has fallen since 2010 (-5%) and there was no religion and ethics programming broadcast during peak hours on BBC One in 2017.

In addition to the informal learning content discussed above, the BBC broadcasts a range of other types of programmes that can inform audiences. We recognise that magazine shows like *The One Show*, hobbies and leisure programming like *Saturday Kitchen* and factual entertainment series such as *Antiques Road Trip* can also play a role in the BBC's delivery of public purpose 2. There were an additional 3,417 hours of such content⁶⁰ broadcast across BBC TV in 2017, of which 36% (1,215 hours) were first-run UK originations. When these hours are included, BBC TV spend on informal education programming stood at £268m in 2017, a 1% decrease in real terms on 2016.

Informal learning viewing on BBC TV is holding up against a backdrop of overall decline

The BBC's informal learning content (comprising the BARB genres: documentaries, science and history, religion, classical music, visual & performing arts and education) has had a steady level of viewing since 2010, despite the background of overall TV viewing decline, and as such reflects sustained viewer interest in this type of TV. The biggest component of these genres is documentaries (science and history), which made up most of the viewing from 2010 to 2017 (not including leisure interests and the broader documentaries 'other' genre) and featured strongly on both BBC One and BBC Two. A prominent example is *Blue Planet II*. Religion, and visual & performing arts, made up most of the remainder of viewing in these categories.

⁵⁹ Ofcom analysis of BBC data, available to view in our [BBC Performance Report: interactive data](#). Subsequent analysis of BBC output and spend in this section have the same source unless stated otherwise. However, we note that some programmes included do not as obviously fit into the arts & classical music classification. Titles included *Our Friend Victoria* and *Sir Bruce Forsyth: Mr Entertainment*.

⁶⁰ Includes factual entertainment, general factual, hobbies and leisure, talk/factual magazine and special event programming.

Informal learning - radio

Across BBC radio, factual content was broadcast mainly outside peak listening hours

While much of the BBC radio schedule provides informal learning to listeners, a specific range of factual programming is also broadcast, apart from news and current affairs and music programming.⁶¹ While Radio 4 broadcast factual content such as *Start the Week* and *Word of Mouth* during peak listening hours in 2017/18, much of BBC radio factual output is broadcast during non-peak listening hours.⁶² Beyond the five network stations we look at below, BBC nations'/local radio services provide additional factual output, over and above that which is broadcast across the UK.

Figure 24: Overview of BBC network radio factual output

	2017/18 schedule	Audience
Radio 1	There was a weekly average of 2 hours 20 minutes of factual programming. This included <i>Radio 1 and 1Xtra's Stories</i> (9-11pm Tuesdays over the summer) and <i>Radio 1's Life Hacks</i> (4-6pm on a Sunday).	Almost 450,000 adults listened to Radio 1 factual output each week in Q1 2018, 4% of the overall Radio 1 audience.
Radio 2	The bulk of Radio 2's factual content was broadcast from 10pm on weeknights and included <i>The Radio 2 Arts Show</i> and <i>Johnnie Walker's Long Players</i> . At weekends, <i>Good Morning Sunday</i> was broadcast.	2.7m adults listened to factual content each week on Radio 2 in Q1 2018, 17% of the overall Radio 2 audience.
Radio 3	Radio 3's factual output was typically broadcast from 10pm on weekdays, including <i>Music Matters</i> and <i>Free Thinking</i> .	Just over 150,000 adults listened to factual output on Radio 3 in Q1 2018, 8% of the overall Radio 3 audience
Radio 4	About 20% of the weekday schedule consisted of factual content, much of which was broadcast in afternoon slots, e.g. <i>The Infinite Monkey Cage</i> and <i>The Food Programme</i> .	On average, 8.9 million adults listened to factual programming on Radio 4 in Q1 2018; 79% of the overall audience.
Radio 5 live	Radio 5 live broadcast the <i>Arts Club</i> and <i>Will Gompertz's Heat Map</i> throughout the year on Sunday mornings.	On average, 71,000 adults listened to the <i>Arts Club</i> each week in Q1 2018, 1% of the 5 live audience

Source: BBC/Ofcom analysis; RAJAR Q1 2018. Note: figures reflect estimated averages across 2017/18. Output may vary throughout the year.

⁶¹ There is no formal learning output on BBC radio. However, the BBC Operating Licence indicates that the BBC should "provide a broad range of content across its services which provides opportunities for all audiences to learn. We expect the BBC to produce informal learning content which covers subjects such as art, music, religion, science, nature, business and history, and content with an international focus." For this reason, we consider factual output across BBC radio to provide informal learning opportunities for audiences.

⁶² These are defined in the BBC's Operating Licence as follows: 'peak listening time' means 06:00 to 10:00 and 16:00 to 19:00 on Mondays to Fridays, and 07:00 to 11:00 on Saturdays and Sundays".

Informal learning - online

Six per cent of the adult digital population used the BBC's online learning or specialist factual websites in March 2018

More than 2.5 million unique visitors aged 18+ used the BBC's online learning sites (excluding content for children) in March 2018. This represents 6% of the adult digital population.⁶³ The most popular site within this was BBC Learning, with 1.3 million unique visitors (3% of the digital population).

Audience opinion – formal and informal learning

Two-thirds of UK adults think that, overall, the BBC delivers content that supports learning for all ages

The provision of educational content, be it formal or informal, is important to audiences: 72% of UK adults consider the provision of purpose 2 to be important to society and 67% say it's important to them personally. Two-thirds of UK adults (65%) rate the BBC highly⁶⁴ for providing *informative and educational content, which is inspiring and challenging, and that supports learning for all ages*.⁶⁵

Audiences think the BBC delivers informative content

Nearly seven in ten adults (68%) rate the BBC highly for delivering *informative* programmes and content. This characteristic of programming is the highest-rated area of the BBC's delivery of purpose 2.⁶⁶ Fewer people (58%) rate the BBC highly for delivering *inspirational* programmes and content.⁶⁷

⁶³ comScore (Audience Duplication), Unduplicated reach, March 2018, age: 18+, UK. Entity type [C], BBC entities included are: BBC Learning; Knowledge and Learning; iWonder; History; Culture; Religion & Ethics; Skillswise; Earth; Science; Nature. BBC Food is not included.

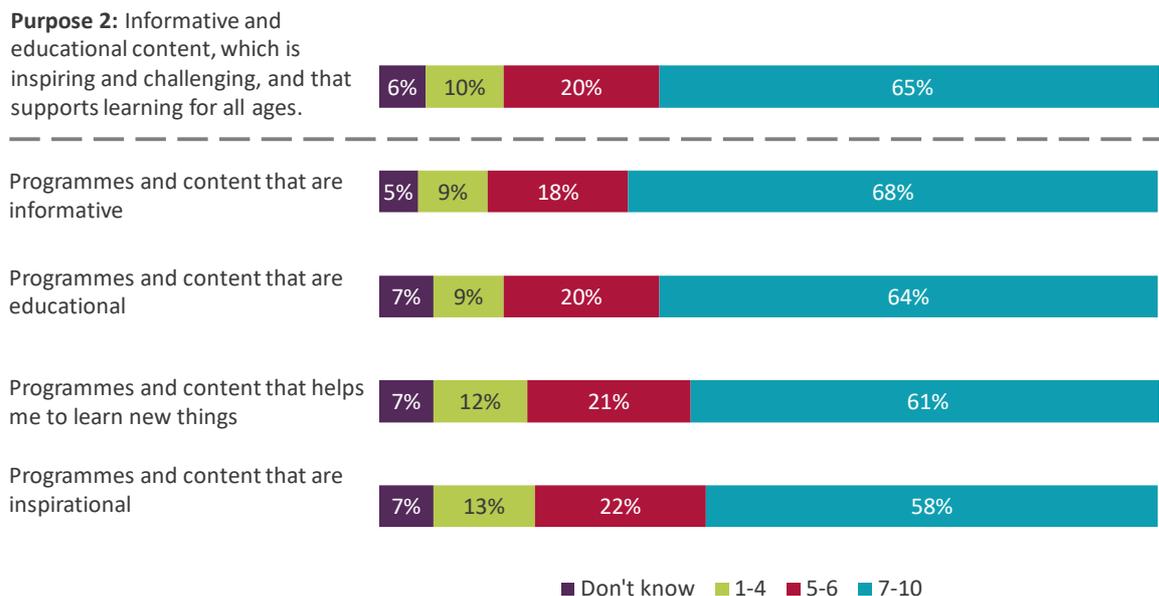
⁶⁴ Rating of 7-10 out of 10

⁶⁵ According to the BBC's research, 62% of parents think the BBC is effective at supporting children and teenagers with their learning ([BBC Annual Report 2017/18](#))

⁶⁶ Ofcom BBC Performance Tracker October 2017 - April 2018

⁶⁷ *ibid*

Figure 25: Audience views of BBC delivery of purpose 2: 2018⁶⁸



Source: BBC Performance Tracker 2018. Base: All respondents (4099). Question: C2. On a scale of 1 to 10 where 1 means not at all well and 10 means extremely well, how well, if at all, do you personally think the BBC as a whole provides:/ C7. On a scale of 1-10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you think the BBC as a whole provides...

Younger people and those in the AB socio-economic groups are more likely to rate the BBC highly in its delivery of purpose 2. Compared to those aged 75 and over, 16-24 year-olds are more likely to think that the BBC is delivering purpose 2 well at an overall level (73% vs. 57%). Those in the AB socio-economic groups are more likely to rate the BBC’s overall delivery of purpose 2 higher (72% vs. 65% for UK overall). Respondents in these socio-economic groups are also more likely to rate the BBC’s delivery higher on most aspects of purpose 2 programming, while those in the DE socio-economic groups rate the BBC’s delivery of purpose 2 lower (58% DE vs. 72% AB).⁶⁹

Children’s learning

This section first sets out the data relating to children’s content and its consumption in general,⁷⁰ and then moves onto the data relating to children’s ‘formal’ education.

⁶⁸ According to the BBC’s own research, 67% of UK adults think the BBC is effective at helping them learn new things ([BBC Annual Report 2017/18](#)).

⁶⁹ Ofcom BBC Performance Tracker October 2017-April 2018

⁷⁰ The BBC provides children’s content on its TV channels, primarily CBBC and CBeebies. It does not provide regular children’s content on the main radio networks although it does provide some audio content through CBeebies Radio online. Other bespoke content is available through CBBC and CBeebies online.

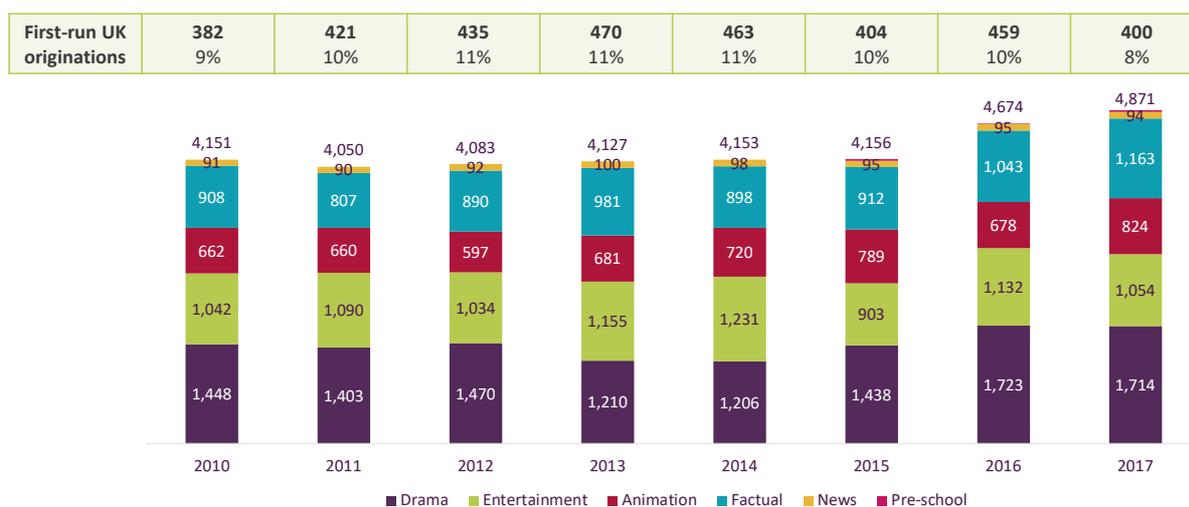
As context, children’s consumption of media is changing rapidly, and these habits are important to consider alongside the BBC’s provision.

Children still use the TV set more than any other device for watching TV programmes and films, and most of this viewing is made up of live TV. However, in the past year there has been a decrease in watching TV via a TV set among nearly all age groups of children.⁷¹ In a typical week, older children (aged 12-15) spend more hours online and using their mobiles than watching on a TV set. YouTube is also used by children to watch content, including whole programmes, cartoons, music videos and funny/prank videos, and, increasingly, YouTubers and other vloggers. Among children aged 5-15, eight in ten say they ever use YouTube.⁷²

Children’s programming on BBC TV is now delivered almost entirely through CBBC and CBeebies

There has been a 10% decrease in the hours of children’s programming – another at-risk genre – broadcast across BBC TV since 2010. But this is mainly because since early 2013 regular children’s programming has been removed from the BBC One and BBC Two schedules and is now almost entirely delivered through CBBC and CBeebies.

Figure 26: Total annual hours of children’s content on CBBC, by genre: 2010-2017



Source: BBC/Ofcom. Note: CBBC is on air from 7.00am to 9.00pm. Before April 2016 it was on air from 7.00am to 7.00pm.

CBBC broadcasts a range of children’s content including drama (e.g. *The Dumping Ground*), entertainment (e.g. *Marrying Mum & Dad*), animation (e.g. *The Deep*), factual (e.g. *Horrible Histories*), news (e.g. *Newsround*) and some pre-school content. There were 4,871 such hours broadcast in 2017, with 8% being first-run UK-originated content. The 400 hours of first-run UK originations broadcast in 2017 represented a 13% decrease on 2016 and the lowest figure since

⁷¹ Except for 5-7 year-olds (Ofcom Children’s Media Literacy Tracker 2018).

⁷² Ofcom Children’s Media Literacy Tracker 2018

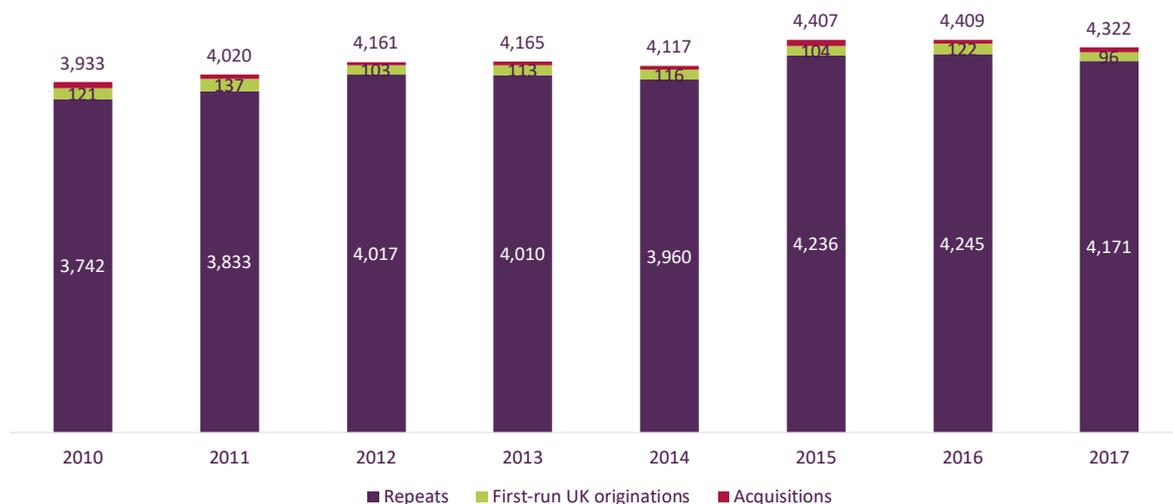
2010. There were 1,163 hours of children's factual content broadcast in 2017, 9% of which were first-run UK originations, down from 16% in 2014.

BBC Alba provides a range of children's programming for Gaelic speakers, including a mix of original programming like *De a-nis?* alongside dubbed versions of shows like *Postman Pat*. More than 300 hours of children's content were broadcast on BBC Alba in 2017, with original content set to quadruple following the recent partnership with CBBC and CBeebies.⁷³

CBeebies broadcast over 4,000 hours of pre-school content in 2017

CBeebies predominantly broadcasts pre-school content to both educate and entertain children aged six and under. In 2017, CBeebies broadcast 4,322 hours of pre-school content, 2% of which was first-run UK-originated content. Across CBBC and CBeebies,⁷⁴ hours of first-run UK originated children's content decreased by 15% between 2013⁷⁵ and 2017.

Figure 27: CBeebies, hours of pre-school content: 2010-2017



Source: BBC/Ofcom. Note: In 2017, CBeebies broadcast 129 hours of animation, 35 hours of drama and 4 hours of entertainment in addition to pre-school content, all of which were repeats.

⁷³ [BBC Alba launches new partnership with CBBC and CBeebies](#), 13 September 2018

⁷⁴ In addition to the TV service, CBeebies Radio is also available online, with its programmes available to download as podcasts for 30 days after their initial broadcast.

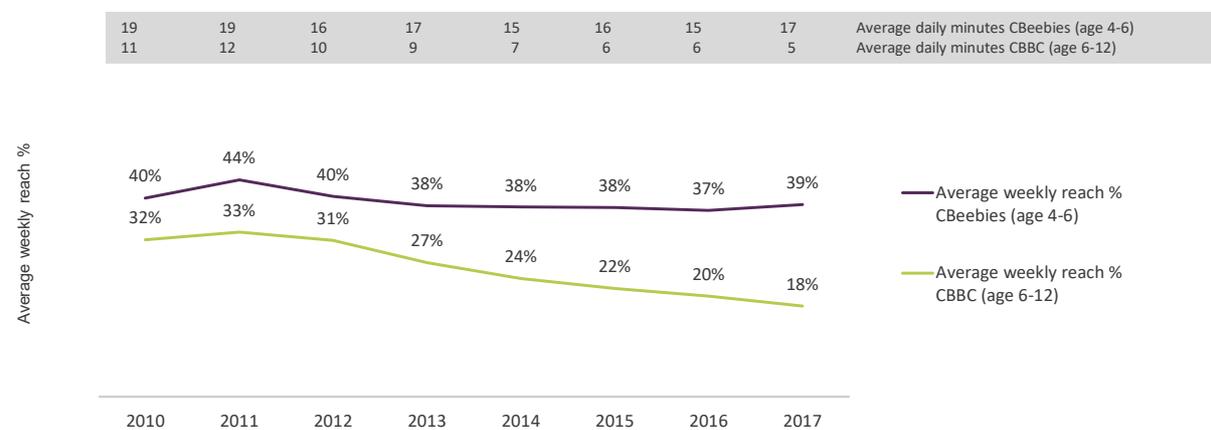
⁷⁵ 2013 was the first full year in which there was no regularly scheduled children's content on BBC One and BBC Two.

Although viewing by 4-6 year-olds of CBeebies has been stable, CBBC’s reach to its target audience has been steadily decreasing

The proportion of all 4-6 year-olds viewing CBeebies each week has remained fairly stable over the past five years and was 39% in 2017, and viewing was at 17 mins of viewing per day. CBeebies’ share of viewing by this age group has also increased slightly year on year (13% in 2016 to 16% in 2017). Children under 4 are not measured by BARB but the proxy of ‘houseperson’⁷⁶ with children aged 0-3’ is often used for viewing by under-4s on children’s channels. Viewing for this group is 16 minutes per day to CBeebies.

CBBC’s reach to its target audience (children aged 6-12) has been steadily decreasing and is now 18%. Time spent viewing was 5 minutes per day, down from 11 minutes in 2010. CBBC’s share of viewing for 6-12s has remained broadly stable since 2016.

Figure 28: Average weekly reach and average daily minutes of CBeebies and CBBC of their target audiences: 2010-2017



Source: BARB. Reach criteria: 15+ consecutive minutes.

Nine in ten parents of 3-4 year-old CBeebies viewers think it is educational

Eight in ten (83%) adults with children in their household think the provision of a wide range of high-quality UK-made programming for children by the PSB channels is important. For CBBC and CBeebies, 76% and 82% respectively think these channels provide such programming.⁷⁷ In 2018, nearly nine in ten (88%) parents of 3-4s who watch or use CBeebies think its content is either fairly, or very, educational.⁷⁸

⁷⁶ ‘Houseperson’ as defined by BARB is the member of the household who is solely or mainly responsible for the household duties. A houseperson may be male or female and there is only one houseperson per household.

⁷⁷ Ofcom PSB Tracker 2017

⁷⁸ Ofcom Children’s Media Literacy Tracker 2018

Children's 'formal' learning

The BBC's Bitesize website has declined in reach

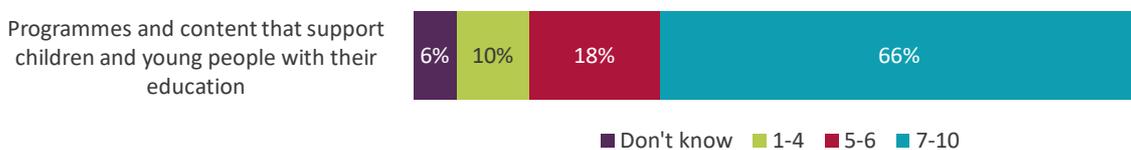
There has been no new formal learning content for children on BBC TV since 2015⁷⁹ and there is no formal educational provision for children on radio.⁸⁰ Online, on average there were 2.55 million weekly unique browser visits of Bitesize in Q1 2017, but in Q1 2018 Bitesize's weekly unique browser visits reduced to 2.26 million,⁸¹ a decrease of 11%.

Six in ten children (60%) aged 8-15 who go online say they use BBC websites and apps such as BBC Bitesize for their school work and homework. There was higher use of such sites among 12-15 year-olds (64%) than among 8-11 year-olds (56%). Among parents of children aged 5-7 years old who go online, 34% say their child uses BBC websites or apps for their schoolwork.⁸²

Parents and children are largely satisfied with the BBC's provision of educational content

Sixty-six per cent of adults with children in their household think that the BBC delivers 'programmes and content that support children and young people with their education'. These levels of satisfaction are similar across different age-groups of the children.⁸³

Figure 29: Opinions about BBC delivery of content that supports children and young people with their education: 2018



Source: BBC Performance Tracker 2018. Base: Households with children (1,296). Question: C2. On a scale of 1 to 10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you personally think the BBC as a whole provides:/ C7. On a scale of 1-10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you think the BBC as a whole provides.

There are high levels of satisfaction among children who use BBC websites and apps for their school work; more than eight in ten (83%) children aged 8-15 who use BBC websites or apps for their school

⁷⁹ There was one hour of 'schools' content broadcast on BBC Four in 2017.

⁸⁰ The online-only service, CBeebies Radio, falls under BBC Online and provides audio pre-school content.

⁸¹ Internal server data supplied by BBC, based on Bitesize Virtual Site kl-bitesize which includes New Bitesize (previously.co.uk/education now .com/bitesize), Old Bitesize (.co.uk/bitesize ; .co.uk/schools), UK, weekly Q1 2017 and Q1 2018.

⁸² Ofcom Children's Media Literacy Tracker 2018

⁸³ Ofcom BBC Performance Tracker October 2017 – April 2018

work agreed that they found them helpful in their work.⁸⁴ Among 8-11 year-olds there was 81% agreement that BBC's website and apps were helpful in their schoolwork. However, this is an 8pp decrease on the previous year.⁸⁵

Performance assessment

The BBC has a role to play in supporting people of all ages by helping them learn about different subjects in ways they will find accessible, engaging, inspiring and challenging. This includes providing informal learning content on subjects such as art, music, religion, science and history as well as educational content to help support learning for children and teenagers across the UK.

We have considered the BBC's performance in the light of the shift in children's media consumption away from broadcast television.⁸⁶ Furthermore, this assessment is made against the backdrop of our ongoing children's content review, which is looking at the commercial PSBs' provision for children.⁸⁷

Overall, we find that the BBC is delivering this purpose, but we will monitor trends closely here, particularly in relation to its provision of informal learning for 6-12 year-olds and its formal education content on BBC Bitesize.

The BBC is rated highly for the delivery of its educational and learning output as a whole

Almost two-thirds (65%) of audiences rate the BBC highly for its overall delivery of purpose 2. Audiences rate the BBC more highly for providing programmes and content that are informative and educational, but less highly for content that is inspirational and helps them learn new things.

The most-watched TV programme of 2017, *Blue Planet II*, brought natural history and ocean conservationism to a peak-time audience of 14 million with its first episode,⁸⁸ and became the iPlayer's most popular programme of the year.⁸⁹

The BBC provides a wide range of informal learning content for adults on its TV, radio and online services

In recent years, viewing of informal learning content on TV has held up against the overall decline in television viewing; steady viewing levels indicate sustained viewer interest in this content.

⁸⁴ According to the BBC's own research, 82% of Bitesize users aged under 16 say it helps them with their schoolwork/homework ([BBC Annual Report 2017/18](#)).

⁸⁵ Ofcom Children's Media Literacy Tracker 2018

⁸⁶ Between 2010 and 2017, children's viewing to broadcast TV dropped by more than an hour. As set out in Ofcom, [Media Nations UK: 2018](#), pages 24-25.

⁸⁷ For more information on this review see our [Children's content review: update](#), published in July 2018.

⁸⁸ BARB, 4+ individuals

⁸⁹ [BBC Annual Report 2017/18](#), page 2.

Between 2010 and 2017, the total hours of informal learning content on TV increased by 9%.⁹⁰ But within this there has been a notable reduction in the hours of arts and classical music, and religion and ethics. We set out our findings on the BBC's genre mix in our performance assessment of purpose 3.

In addition, although the hours of specialist factual programming increased, this was driven largely by an increase in the number of repeats; genres including history, nature and wildlife, and science, medical and technology all saw a decrease in hours of first-run UK originations.

There is a range of factual content on BBC radio, including programmes on BBC network radio, such as *Radio 1's Life Hacks* and *The Food Programme* on Radio 4, as well as the BBC's nations/ local radio services. While Radio 4 broadcasts some factual content during peak listening periods, the majority of the factual content on BBC radio stations is broadcast outside peak listening times.

We will monitor the BBC's commitment to key genres, as well as the overall trends in provision of informal learning on TV and radio, to ensure that it does not become overly reliant on repeats and that it broadcasts sufficient content in key genres, including during peak hours.

BBC online has dedicated sections on arts, history, music, the natural world and science and technology (*Tomorrow's World*). There is less data available here, and we will work with the BBC to obtain better data on audiences' use of this content.

The BBC is performing better in its provision of informal learning for very young children than for 6-12 year-olds

As a publicly-funded broadcaster which occupies a unique position in the UK media landscape, we expect the BBC to lead the way in producing high-quality children's programmes. In the BBC's Licence, we increased the requirements on the BBC to ensure that there is a minimum provision of new children's programming for different ages and a range of genres for children, such as news, drama and factual.⁹¹

CBeebies broadcasts content to educate and entertain younger children, primarily those aged 6 and under. Parents of 3-4 year-olds who watch CBeebies think its content is fairly, or very, educational.⁹² Furthermore, the stability of its reach, and the relatively consistent amount of time that 4-6 year olds spend viewing CBeebies,⁹³ suggest that the BBC is performing relatively well here.

⁹⁰ We note that other genres not included in the informal learning viewing figures may also contribute to informal learning, such as leisure programming and soaps (for example, by raising awareness of a specific social issue).

⁹¹ Ofcom, [Operating Licence for the BBC's UK Public Services](#), October 2017. Note: these requirements came into effect from January 2018 or April 2018 for financial year conditions.

⁹² Ofcom Children's Media Literacy Tracker 2018

⁹³ Since 2012, average daily minutes viewed has remained relatively stable, following a drop between 2011 and 2012.

The hours of factual content broadcast on CBBC have increased significantly since 2010 (up by 28% in 2017), however we note that the number of hours of first-run UK originations on the channel has fallen to its lowest level in seven years. A further decline would put the BBC at risk of non-compliance with our related Licence condition.⁹⁴ There has also been a significant decline in the reach and viewing of CBBC by 6-12 year-olds over this period. This may in part reflect children's growing use of online sites such as YouTube, as highlighted in the update to our children's content review.⁹⁵

In its [Annual Report and Accounts 2017/18](#), the BBC noted the decline in reach of CBBC and said that its online output had not yet compensated for it. It stated that while the linear channels remain the 'shop window' for its children's content, it is moving towards a multiplatform offer which will put more emphasis on its digital services. It has begun investing its additional £34m budget for children's services⁹⁶ across all its platforms.

We will monitor the effectiveness of the BBC's strategy for providing content for children across its platforms, to ensure that its informal learning content reaches children of all ages.

The reach of BBC Bitesize has declined, but the BBC is taking steps to develop the service

Children and parents are largely satisfied with the BBC's provision of formal learning content online. Six in ten children (60%) aged 8-15 who go online say they use BBC websites and apps, such as BBC Bitesize, for their school work and homework. However, the weekly reach of BBC Bitesize declined by 11% in Q1 2018 compared with Q1 2017. This is notable given the growing importance of a trusted online learning resource for children and teenagers.

The BBC recognises the need to develop this service and set out proposals to do so in its Annual Plan 2018/19.⁹⁷ It has begun to increase personalisation by allowing older students to sign in to Bitesize, which will then remember what they are studying. The plan is to further enhance the service through tailored and targeted learning and interactive content. We will monitor the BBC's development of Bitesize, and the impact on its reach, as these changes take place.

We will work with the BBC to better understand the impact of its partnerships

We consider that building partnerships and carrying out campaigns with key educational, cultural and sporting organisations across the UK is part of delivering against purpose 2, and the BBC should share its expertise and resources for the benefit of UK audiences.

⁹⁴ Ofcom, [Operating Licence for the BBC's UK Public Services](#), October 2017, condition 2.35. Compliance with this condition will be reported for the first time next year.

⁹⁵ Ofcom, [Children's content review: update](#), July 2018. Page 11.

⁹⁶ [The BBC announced this additional three-year investment in July 2017](#)

⁹⁷ [BBC Annual Plan 2018/19](#), March 2018, pages 10-11.

In its Annual Plan 2018/19, the BBC set out the priorities it plans to explore with partnerships; these include improving pre-school literacy, building the resilience and self-esteem of children, improving careers advice for young people and exploring opportunities for adults to retrain.⁹⁸

The BBC reported on how some of its recent partnerships are performing in its [Annual Report and Accounts 2017/18](#). These include *Terrific Scientific*, where the BBC has partnered with 30 organisations and universities to provide science resources to over 40% of primary schools, and its partnership with the Open University to develop informal educational video content for adults. The BBC has taken steps to raise the profile of informal learning content partnerships. In relation to its *Civilisations* series across TV, radio and online, the BBC partnered with more than 250 museums, galleries, libraries and archives across the UK.

To inform next year's performance report we will work with the BBC to understand the impact of its partnerships on its delivery against purpose 2.

⁹⁸ [BBC Annual Plan 2018/19](#), March 2018, page 11.

Public purpose 3: creative, high quality and distinctive output and services

Purpose 3 is to show the most creative, high quality and distinctive output and services: the BBC should provide high-quality output in many different genres and across a range of services and platforms, setting standards in the United Kingdom and internationally. Its services should be distinctive from those provided elsewhere and should take creative risks, even if not all succeed, in order to develop fresh approaches and innovative content.

Our key findings:

- We find that the BBC is distinctive overall. It is distinctive in a number of ways, including through its provision of high-quality content across a range of genres on its mainstream services, specialist services and services with no directly comparable provider, such as Asian Network, Radio 4, CBeebies and BBC Parliament. Radio 1 and Radio 2 play a broader range of music compared to comparable commercial stations. And more than six in ten adults rate the BBC highly for providing a range of high-quality, distinctive and creative content.
- However, distinctiveness requires many things from the BBC. Behind this overall picture, it faces challenges in delivering this purpose in two key areas.
- First, to remain distinctive amid the increasingly strong competition for TV audiences, it should maintain its focus on original content that reflects UK voices and lives, in all genres. Within its funding settlement for this Charter, the BBC will need to be more innovative and take more risks - in the type and range of UK content commissioned, how that content is made and with whom. This may require a significant change in approach, as less than six in ten (57%) TV viewers consider that the BBC is taking risks and being innovative in its TV programming. The BBC's distinctiveness will continue to be a key area of focus for Ofcom's monitoring and subsequent annual reports. We will discuss with the BBC the steps it will take to maintain its commitment to original UK content, and how it will be more innovative and take more risks.
- Second, as the BBC recognises, it needs to do more, more quickly, to engage young people, who are critical for its future success. Young people are turning away from the BBC's TV and radio services. The BBC needs to provide content that appeals to young audiences, and it needs to find new ways of reaching them that reflect their viewing and listening habits. It is working to address this issue. We will discuss with the BBC how it plans to address this issue and monitor the impact of the changes it makes. If the BBC does not make sufficient progress, we will consider further measures.

The Charter and Agreement puts the need for the BBC to produce high-quality, distinctive output and services at its core. This includes output and services that – taken as a whole – are substantially

different to those from comparable providers, across every UK public service⁹⁹ and platform,¹⁰⁰ both in peak time and overall, in terms of the following five characteristics:

- the mix of different genres and output;
- the quality of output;
- the amount of original output produced in the UK;
- the level of risk-taking, innovation, challenge and creative ambition; and
- the range of audiences served.

Its delivery of creative, high quality and distinctive output is relevant to all its public purposes. For example, its news and current affairs, which is central to purpose 1, can also contribute towards the BBC's fulfilment of purpose 3; its children's content, which is a key part of purpose 2, can also contribute to the BBC's fulfilment of purpose 3.

Key evidence base

This section sets out the core data and research findings which underpin our assessment of the BBC's distinctiveness. It first provides data on audiences' overall views of the BBC's distinctiveness, and then looks at the evidence for TV, then radio, then online, for each of the five characteristics of distinctive output and services.

Overall audience opinion about the BBC's distinctiveness

More than six in ten people rate the BBC highly for providing distinctive content

When asked to rate the extent to which the BBC overall provides distinctive content, 63% rate it highly.¹⁰¹ One in five provide a more neutral rating¹⁰² and 11% give it a low rating.¹⁰³ People in ABC1 socio-economic groups are more likely to rate it highly across the various characteristics of distinctiveness, whereas those in DE socio-economic groups, people in Scotland, disabled people and people from minority ethnic backgrounds are less likely to do so.¹⁰⁴ These and further differences by audience group are discussed in more detail in purpose 4.

⁹⁹ The UK public services consist of the services set out at Schedule 1 of the Agreement.

¹⁰⁰ The BBC provides content across three different platforms: TV, radio and online.

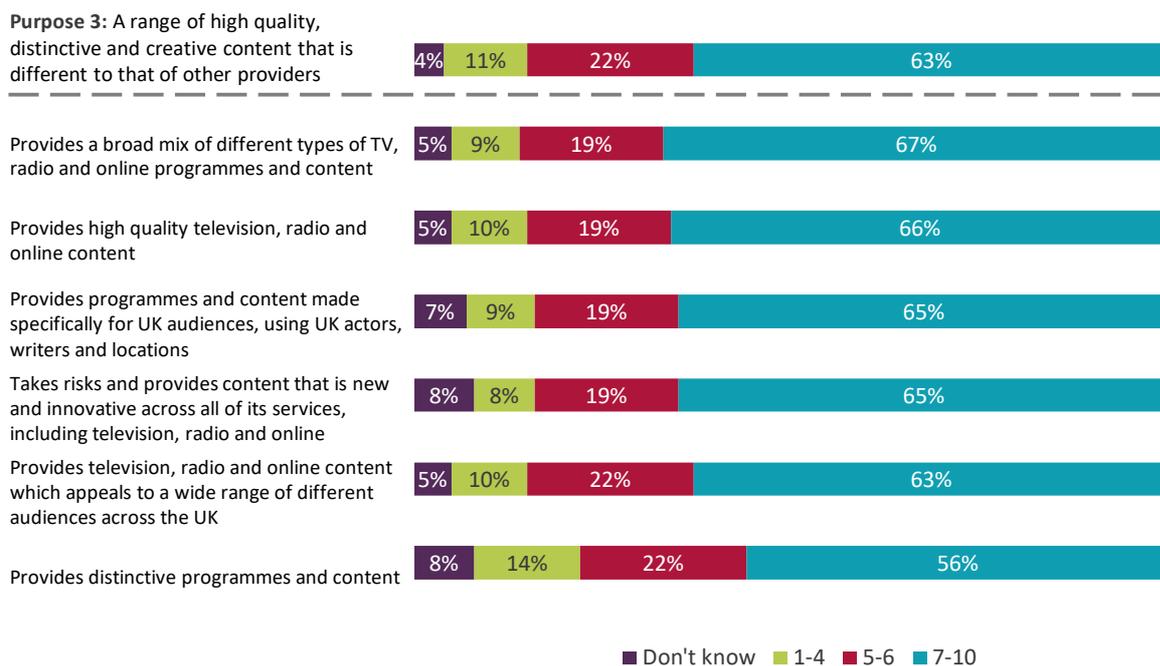
¹⁰¹ Ofcom BBC Performance Tracker October 2017 - April 2018. A high rating represents 7-10 out of 10. For further details on methodology please see [Annex 3](#).

¹⁰² 5-6 out of 10

¹⁰³ 1-4 out of 10

¹⁰⁴ Ofcom BBC Performance Tracker October 2017 - April 2018

Figure 30: Audience opinions about BBC delivery of purpose 3: 2018¹⁰⁵



Source: BBC Performance Tracker 2018. Base: All respondents (4099). Question: C2. On a scale of 1 to 10 where 1 means not at all well and 10 means extremely well, how well, if at all, do you personally think the BBC as a whole provides:/ C8. On a scale of 1-10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you think the BBC as a whole provides:

We asked users to rate the extent to which they agree that BBC services provide something that others do not. Overall, the majority agree that each of the BBC’s TV and video services do this. In particular, specialist services, or services targeted at specific audience groups, such as BBC Parliament (where 78%¹⁰⁶ agree), BBC Three (75%) and CBeebies (74%), are rated highly in this regard. A majority of users agreed that all BBC radio stations offer something that others do not. In particular, 6 Music (88% agreement), Radio 4 (86%) and BBC Asian Network (85%) are rated highly by their users.

There is positive agreement that all BBC websites and apps offer something different from other providers; for example, BBC Bitesize (86%) and CBeebies Playtime (83%). Two-thirds (67%) of users of BBC News agree that it provides something other providers do not.

¹⁰⁵ According to the BBC’s own research, 66% of UK adults think the BBC is effective at providing distinctive content and services; 72% that it provides content/services that set a high standard for quality; and 64% that it sets a high standard for originality (BBC Annual Report 2017/2018).

¹⁰⁶ Note; Figure amended 18th December from 79% to 78% due to a data error.

Television

This section sets out how BBC TV has delivered the five characteristics of distinctiveness.

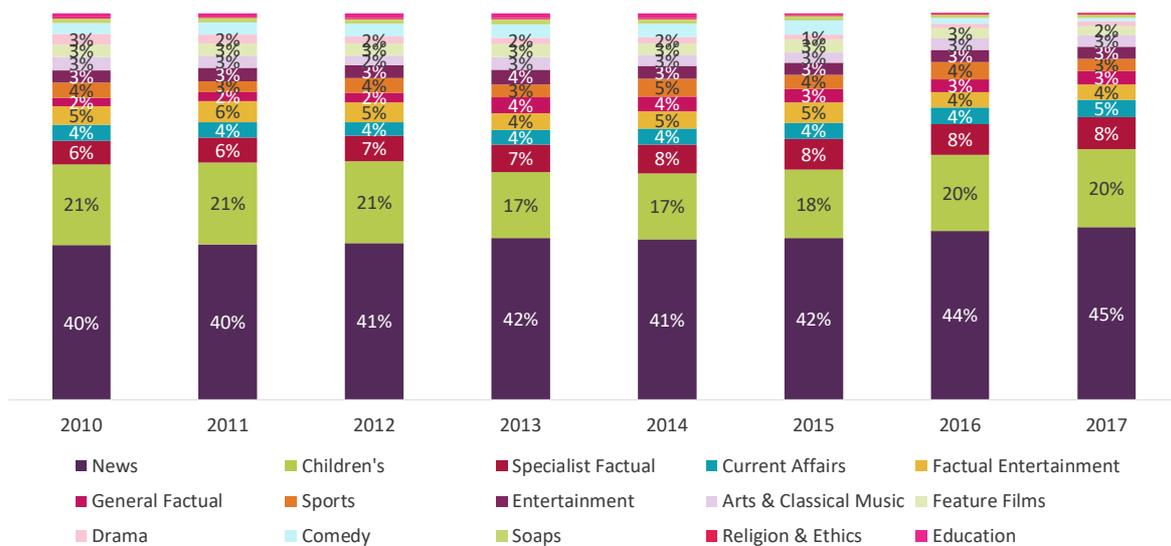
Mix of different genres and output

The BBC needs to ensure that it provides a range of programming across its TV services. It also needs to secure the amount and prominence of those genres identified as at-risk or in decline across public service broadcasting.¹⁰⁷

Overall, the BBC broadcasts a wide range of genres across its TV channels, and its genre mix has remained broadly stable in recent years

News and children's programmes are the two largest genres¹⁰⁸ and combined they made up nearly two-thirds of all network BBC TV output in 2017 (65%).¹⁰⁹ The genres with the smallest proportion of hours in 2017 were soaps, religion and ethics, and education content, which together accounted for only 1.2% of total network TV output.

Figure 31: BBC network genre mix: all TV channels (total hours broadcast): 2010-2017



Source: Ofcom/BBC. Note: figures include network content only. Excludes nations' and regions' content.

¹⁰⁷ See [Operating Licence](#), paragraph 1.33.1.

¹⁰⁸ Driven by the contribution of the BBC's four single-genre TV channels BBC News, BBC Parliament, CBBC and CBeebies.

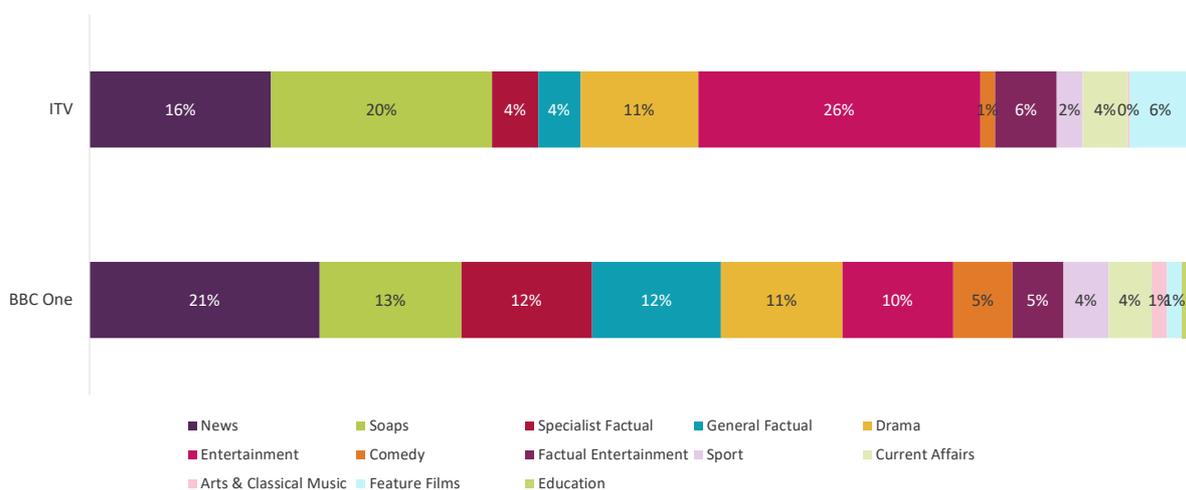
¹⁰⁹ Ofcom analysis of BBC data, available to view in our [BBC Performance Report: interactive data](#). Subsequent analysis of BBC output and spend in this section have the same source unless stated otherwise.

Despite changes in overall consumption habits, peak time on TV (6pm to 10:30pm) continues to be the part of the schedule that attracts the highest audiences. As such, the programming at peak time on BBC One (the BBC’s most popular TV channel) is of particular relevance when assessing delivery of public purpose 3.

There was a wide range of programming on BBC One in peak time in 2017

Of the 15 genres of programming shown across BBC TV in 2017, 13 were shown during BBC One peak time, across 2017 as a whole,¹¹⁰ compared to 12 on ITV. However, peak time on BBC One had a more balanced spread of genres: news, soaps and specialist factual (the three most-shown genres in BBC One peak) accounted for 46% of all BBC One peak-time output in 2017. In comparison, on ITV, news, soaps and entertainment (the three most-shown genres in ITV peak) accounted for 62% of the peak schedule in 2017. However, as noted in the evidence for delivery of public purpose 2, above, provision of some ‘at-risk’ genres has decreased across BBC TV as a whole; on BBC One in peak time there was little provision of arts and classical music, and no religion and ethics programming in 2017.

Figure 32: Genre mix on BBC One and ITV, peak hours: 2017



Source: Ofcom/BBC/ITV. Note: figures include network content only. Excludes nations’ and regions’ content.

Two-thirds of BBC TV viewers think the BBC provides a broad mix of programmes

Two-thirds of BBC TV viewers rate the BBC highly for providing a broad mix of different types of TV programme and content.

¹¹⁰ The two additional genres outside peak time were children’s (of which there was just one hour of programming on BBC One; the vast majority of children’s programming is shown on CBBC and CBeebies), and religion and ethics (87 hours in 2017).

Figure 33: Audience opinions of BBC TV delivery of distinctive content vs. other providers: 2018

Distinctiveness characteristic	% of respondents who rate the BBC's delivery highly
Provides high quality television content	69%
Provides a broad mix of different types of TV programmes and content	66%
Provides TV programmes and content made specifically for UK audiences, using UK actors, writers and locations	66%
Provides TV programmes and content which appeals to a wide range of different audiences across the UK	64%
Takes risks and provides TV programmes and content that is new and innovative	57%

Source: BBC Performance Tracker 2018. Base: BBC TV and on-demand users (3566). Question: D1. Comparing BBC television services to other television and video providers, how well, if at all, do you think BBC television ... Please give a score of 1-10, where 1 means not at all well and 10 means extremely well.

When asked explicitly about BBC One, and whether it should offer a wide range of different types of programmes (some of which might appeal only to certain people) or whether it should offer more of the popular types of programmes that most people want to watch, plus a smaller range of other types of programmes, viewers in our 2017 research were equally split, with half (49%) opting for each statement.¹¹¹

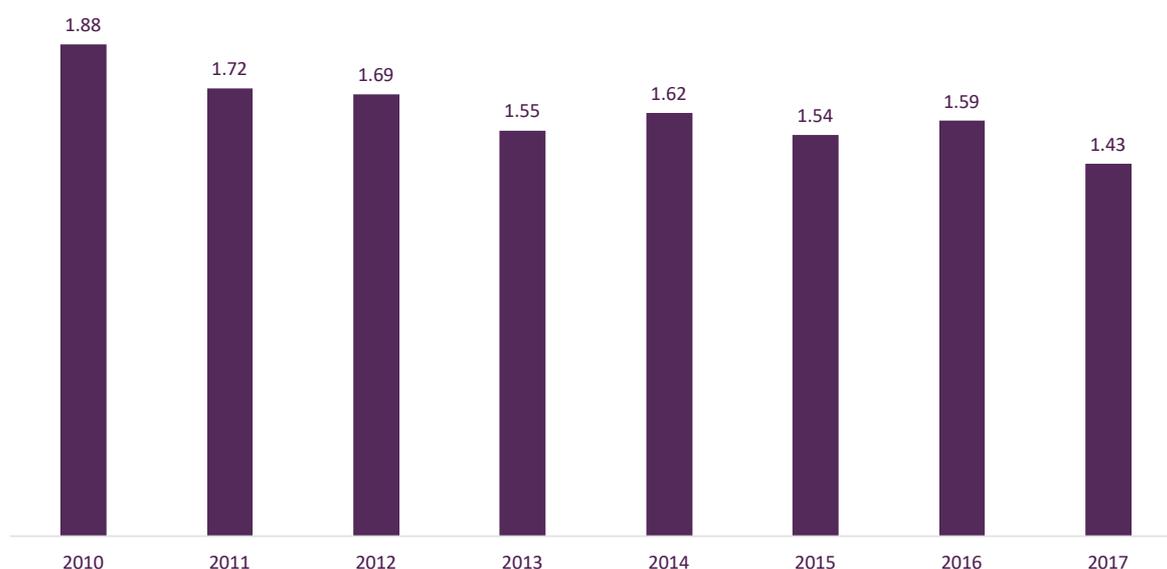
Quality of output

Measuring programme quality requires the use of various proxies, as it is an inherently subjective attribute. We use levels of investment as a proxy for high quality programming when looking at public service broadcasting, and we have adopted a similar approach for the BBC, following our 2017 consultation on our performance measures.

BBC TV programme spend stood at £1.43bn in 2017

Overall, BBC TV programme spend has been decreasing in real terms in recent years, falling to £1.43bn in 2017 (a 7% decrease in real terms since 2015, the most comparable recent year due to the impact of major sporting events).

¹¹¹ [Ofcom BBC Distinctiveness Research July 2017](#)

Figure 34: BBC TV programme spend (£bn): 2010-2017

Source: Ofcom/BBC. Figures are presented in 2017 terms and include nations' and regions' content but exclude BBC Alba. Expenditure on costs not attributed to individual programmes, such as presentation, commissioning, scheduling, copyright and helpline, are not included in these figures.

However, the decline in programme spend directly from the BBC licence fee needs to be considered in the light of changes to the way programmes are funded more generally. Analysis from Ofcom's [Media Nations Report](#) shows the growing impact of third-party funding on original UK output, whether through co-production arrangements, deficit funding or tax credits. Such funding accounted for an additional £338m in investment in first-run UK-originated content across the BBC, Channel 4 and Channel 5 in 2017.

Access to additional investment is mostly available for content that can be sold internationally; drama is particularly popular. In 2018, the BBC broadcast *Troy: Fall of a City* and *A Very English Scandal*, which were co-productions with Netflix and Amazon respectively.

Audiences rate BBC TV highly for the quality of its programmes

Audiences have consistently rated BBC TV highly in terms of quality. According to our long-running PSB tracker, 83% of regular viewers of BBC One and BBC Two rated them highly for the delivery of *well-made, high quality programmes*, alongside 82% of regular ITV viewers rating ITV programmes highly. These measures have changed little in recent years.¹¹²

When asked about the delivery of high-quality programmes across BBC TV, 69% of BBC TV viewers said the BBC delivers high quality content.¹¹³

¹¹² Ofcom PSB Tracker 2017

¹¹³ Ofcom BBC Performance Tracker October 2017 – April 2018

Amount of original output produced in the UK

There was an 8% decline in BBC first-run UK-originated non-news hours in 2017 compared to 2015

In 2017, a total of 21,885 hours of first-run UK-originated content were broadcast across BBC TV, 15,511 of which were news. The 6,374 hours of non-news first-run UK originations was an 8% decrease since 2015 (the most recent comparable year due to the impact of major sporting events).

Figure 35: BBC TV hours of first-run UK-originated content: 2010-2017



Source: Ofcom/BBC. Figures don't include programming for the nations and regions.

The hours of first-run UK-originated non-news content declined by 16% between 2010 and 2017, with declines in most genres over this period. This includes key genres such as comedy (down 38%), children's (30%),¹¹⁴ factual entertainment (25%) and entertainment (11%).

The decline in overall hours of first-run UK-originated non-news content has been offset somewhat in recent years by an increase in first-run original news hours; 2017 levels were up by 6% since 2010 and by 1% since 2015. However, this has been driven by an increase of simulcast BBC News content on BBC One and BBC Two over this period,¹¹⁵ with news making up 71% of all first-run UK-originated hours in 2017 compared to 66% in 2010.

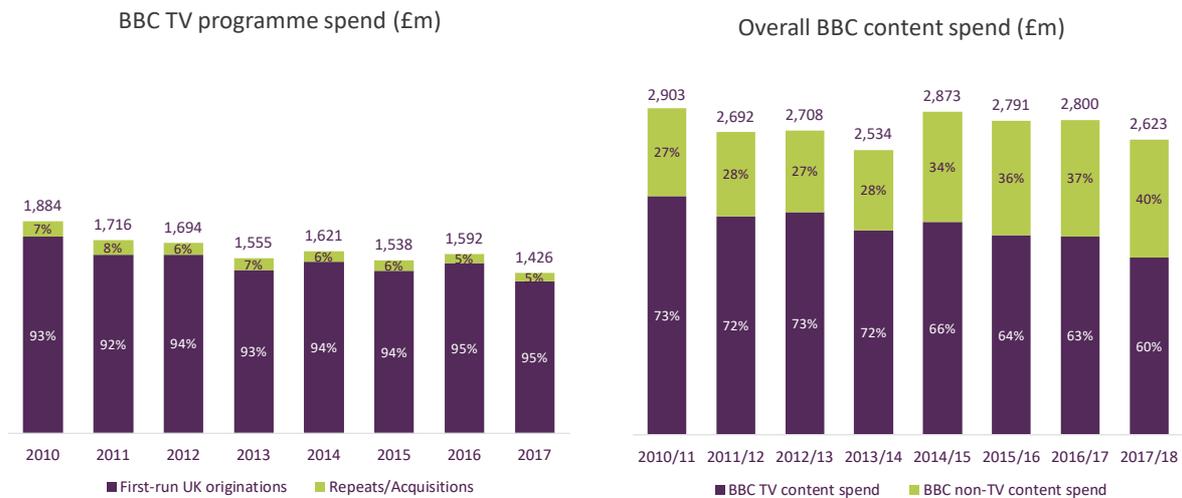
BBC TV spend as a proportion of total content spend has been decreasing in recent years

As total TV programme spend has fallen, so has spend on first-run UK originations, to £1.35bn in 2017 across network and nations'/regions' content, from £1.75bn in 2010. But in the light of this, the BBC has been protecting first-run UK originations, rather than repeats or acquisitions, with spend on first-run UK originations making up 95% of its total TV spend in 2017, up from 93% in 2010.

¹¹⁴ A large part of this decline can be attributed to children's programming leaving BBC One and Two in 2013.

¹¹⁵ BBC One saw a significant increase in the overnight hours of simulcast *BBC News* broadcast from 2013 (see analysis in public purpose 1) while *Victoria Derbyshire* has been broadcast on BBC Two since 2015.

Figure 36: First-run UK originations and BBC TV spend: 2010-2017



Source: Ofcom/BBC Annual Report. Note: Figures are presented in real terms. Calendar year figures include content for the nations and regions but exclude BBC Alba and costs not attributed to individual programmes such as presentation, commissioning, scheduling, copyright and helpline. BBC non-TV content spend includes radio spend, online spend on news, sport and weather, children’s, knowledge and learning and IP-delivered TV and radio across all connected devices, and other service spend such as the World Service, orchestras and performing groups, and S4C. The BBC began funding the World Service through the licence fee in 2014/15, assuming responsibility from the Foreign and Commonwealth office.

The decline in investment in new UK content can be seen in the context of the shifts in the BBC’s overall content spend since 2010. Whereas TV¹¹⁶ made up 73% of such spend in 2010/11, by 2017/18 it had dropped to 60%, driven by the shift to online content, and by the change in responsibility for funding the BBC World Service (from the Foreign & Commonwealth Office to the licence fee) in 2014/15. At £226.6m, the World Service’s Operating Licence made up 9% of total content spend in 2017/18.

Younger people and those in AB socio-economic groups are more likely to rate BBC TV highly for showing UK programming

More than seven in ten regular viewers of BBC One and BBC Two rate these channels highly for *showing new programmes, made in the UK*, on a par with regular viewers to ITV and higher than the other PSB channels.¹¹⁷ And two-thirds (66%) of BBC TV viewers rate the BBC highly for providing TV programmes and content *made specifically for UK audiences, using UK actors, writers and locations*. Younger age groups, and those without disabilities or in AB socio-economic groups, are more likely

¹¹⁶ Note that prior to 2014/15, content spend on BBC Red Button was included as part of TV content spend. From 2014/15 onwards, it has been included in BBC Online content spend.

¹¹⁷ Ofcom PSB Tracker 2017

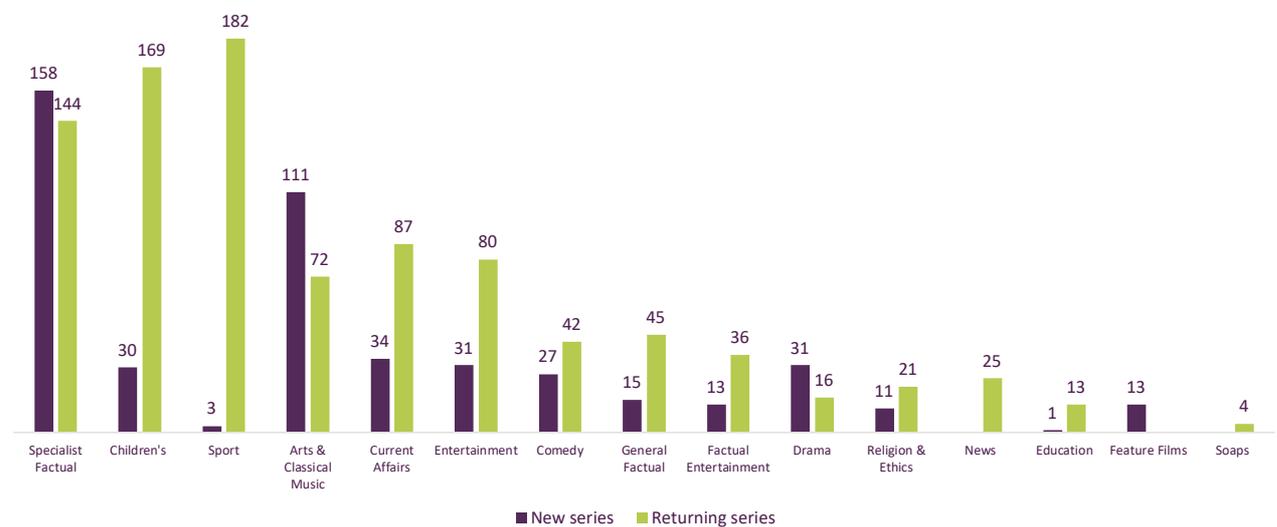
to rate the BBC highly, and older people, those in DE socio-economic groups, and those in Scotland and Northern Ireland, are less likely to rate the BBC highly in this area.¹¹⁸

Level of risk-taking, innovation, challenge and creative ambition

There were 477 new titles across BBC TV in 2017

One proxy for risk-taking and innovation is the balance between new series and long-running programmes. While long-running series are valuable in a schedule, it is also important that the BBC innovates through new titles. Over the whole, on BBC TV in 2017, there were 477 new titles compared with 943 returning series.¹¹⁹ This varies by genre, with specialist factual, arts and classical music and drama seeing more new series than returning series in 2017. As a proportion of all hours, new series made up 12% of the BBC's originated content broadcast in 2017.

Figure 37: Number of new/returning programme titles across BBC TV: 2017



Source: Ofcom/BBC. Note: Figures include originated content only. Figures exclude repeats and nations/regions programming. Figures reflect number of individual programme titles broadcast in 2017 and exclude party political broadcasts.

Some genres are more reliant on long-running series than others. Fewer than a quarter of returning children's series in 2017 (23%) were at least five years old compared to two in five for drama (40%) and comedy (41%). Nearly three-quarters (72%) of the factual entertainment returning series broadcast in 2017 were long-running series, while the three returning programmes that made up the

¹¹⁸ Ofcom BBC Performance Tracker April 2017 – April 2018

¹¹⁹ Based on original productions, excludes repeats. A returning series is one which has aired previously. It could include long running programmes, such as *EastEnders*, or programmes which return for a second or subsequent series, such as *Poldark*.

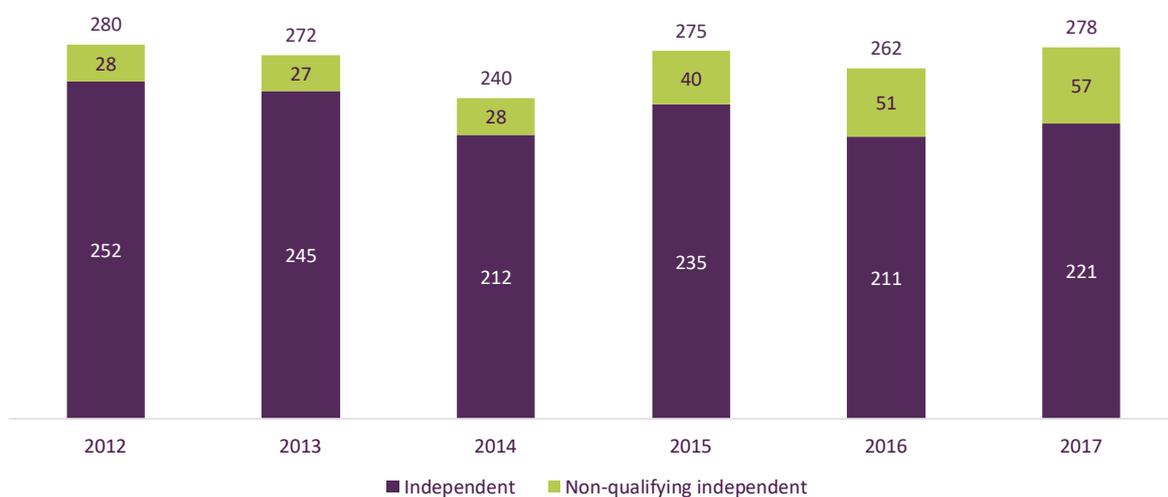
majority of religion and ethics output in 2017 – *Songs of Praise*, *Sunday Morning Live* and *The Big Questions* – were all on air in 2012.

The proportion of long-running series increased slightly in peak time, compared to all hours, for drama (43%) and comedy (48%) but decreased slightly for factual entertainment (70%), as slightly more new UK hours of this genre were broadcast during daytime than during peak time in 2017.

The BBC used 278 different production companies in 2017

The range of companies used to produce BBC TV content is another proxy for creative ambition and the range of voices heard across BBC services. Overall, the number of production companies used by the BBC for original programming has increased in recent years, totalling 278 in 2017. The effects of consolidation in the TV production industry can be seen by the increase in the number of non-qualifying indies¹²⁰ used in recent years: 57 in 2017, twice as many as in 2014.

Figure 38: Number of independent production companies used by the BBC: 2012-2017



Source: Ofcom/BBC. Note: Figures include originated content only. Figures exclude repeats and nations/regions programming and reflect reported names of production companies used.

Less than six in ten BBC viewers think that the BBC is taking risks or being innovative in its programmes

Of the five areas of distinctiveness asked about, BBC TV viewers are least likely to think that the BBC is delivering well on taking “risks and provid[ing] TV programmes and content that are new and innovative” – with 57% of BBC TV viewers rating it highly on its performance in this area (see Figure 33). Those aged 25-34, those with no disabilities and those in AB socio-economic groups are more

¹²⁰ The most common reason for a production company to be non-qualifying is when a UK broadcaster has at least a 15% ownership stake in it. The full definitions are found in the [The Broadcasting \(Independent Productions\) Order 1991](#).

likely to think the BBC takes risks and delivers new and innovative content, while older people, those who are in DE socio-economic groups, those with disabilities and those in Scotland and Northern Ireland are less likely.¹²¹

Asked about BBC One in particular, 63% of viewers in our 2017 distinctiveness research¹²² agreed that the channel should take more risks on innovative programmes, compared to 34% who agreed that it should show more new episodes of long-running series. Those in Scotland, and C2DE groups, were keener to have *long-running series* than to have *innovative ideas*.¹²³

Our PSB tracker provides us with a comparative view from regular viewers of the main PSB channels and shows that Channel 4 and BBC Three are rated highly by seven in ten of their regular viewers for their provision of programmes being *different to what I'd expect to see on other channels*. BBC One and ITV are rated less highly, although viewers to BBC One (57%) rated it higher than viewers to ITV (51%).¹²⁴

The PSB tracker also asks viewers to rate each channel according to whether it shows *programmes with new ideas and different approaches*, and 66% say that the PSB channels do so overall. Two thirds (64%) of BBC One viewers say that it shows these kinds of programme. Comparing the other channels, Channel 4 viewers are most likely to rate it highly for *showing programmes with new ideas and different approaches* (70%) followed by viewers to BBC Two (69%), BBC Three (66%), Channel 5 (66%), BBC Four (65%) and ITV (63%).¹²⁵

Range of audiences served¹²⁶

The time spent across all platforms with the BBC by adults aged 16-34 is less than half of that spent by all individuals

On average, adults aged 16-34 spend less than half as much time per day (1 hour 19 minutes) as all individuals aged 4+ (2 hours 44 minutes) consuming BBC content. BBC radio is the largest part of this consumption among both all individuals aged 4+ and those aged 16-34. BBC websites and BBC TV consumed by DVR, BBC iPlayer, or on SVoD services and YouTube constitute a proportionately larger part of consumption by those aged 16-34.

¹²¹ Ofcom BBC Performance Tracker October 2017 – April 2018

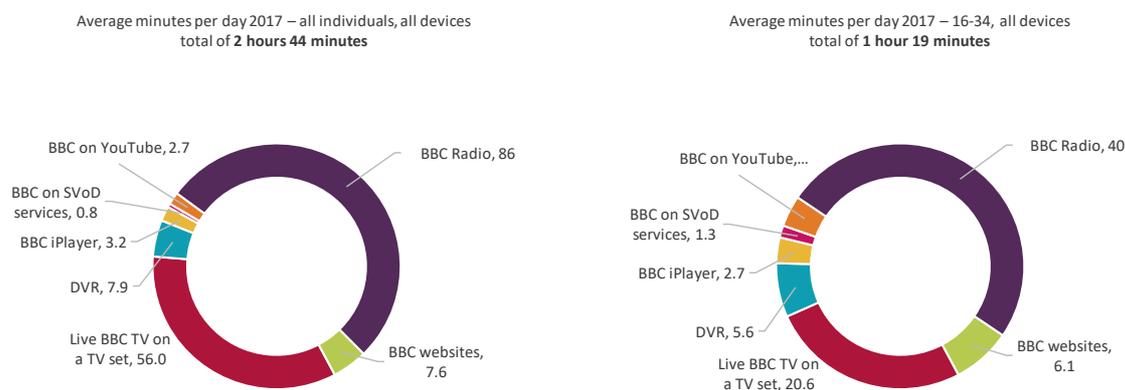
¹²² [Ofcom BBC Distinctiveness Research 2017](#)

¹²³ *ibid*

¹²⁴ Ofcom PSB Tracker 2017

¹²⁵ *ibid*

¹²⁶ For additional information about different audience groups and their consumption habits and opinions about BBC performance, please see the purpose 4 section below.

Figure 39: Total consumption of BBC content per day: 2017

Sources and modelling from: TV (BARB, BARB TV player reports, GfK SVoD data and TouchPoints), radio (RAJAR), websites (comScore MMX). BBC Three is not included separately (other than within BBC iPlayer) as no way of measuring minutes consumed has been developed to date. BBC podcasts are not included in BBC radio and are less than one minute per day (TouchPoints 2018).

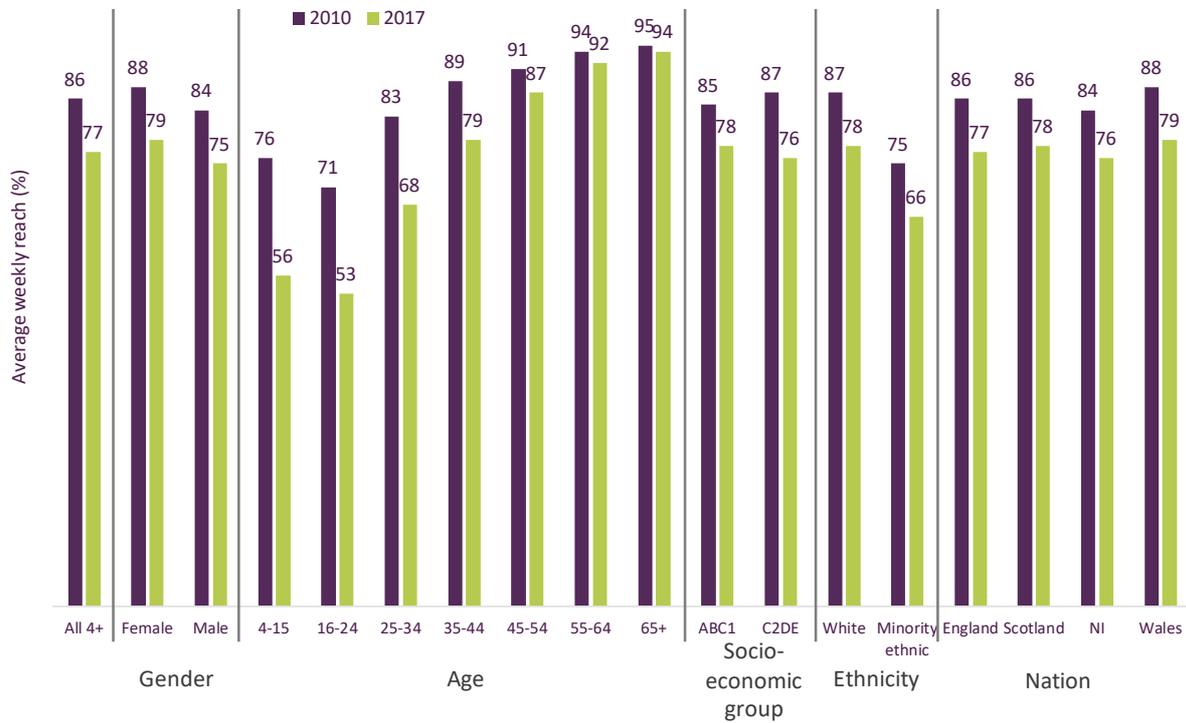
Children and young adults are much less likely than older people to view BBC TV

To provide a comparison of use of BBC TV among different audience groups, Figure 40 shows the weekly reach by audience group and how it changed between 2010 and 2017. Figure 41 shows the 2017 weekly reach of all broadcast TV, BBC TV and its constituent channels, indexed to show a comparison between different audience groups. This data focuses on the differences in likelihood to watch BBC TV across different audience groups.

All BBC TV channels have considerably lower reach to younger age groups (children and 16-34s) than to over-34s.¹²⁷ This is especially the case for younger men, to whom BBC TV's weekly reach is lower than for younger women. Since 2010, the reach of younger age groups to BBC TV channels has decreased much more than to those over-34s.

¹²⁷ The only exceptions to this are CBBC and CBeebies, which are more heavily viewed by children and their parents.

Figure 40: Average weekly reach of BBC TV by gender, age, socio-economic group, ethnicity and nation (4+): 2010 vs. 2017



Source: BARB. Reach criteria: 15+ consecutive minutes.

Those from minority ethnic backgrounds or in a C2DE socio-economic group are less likely to view BBC TV each week

Those in ABC1 socio-economic groups are slightly more likely to view BBC TV channels each week, particularly BBC Four. The differences by ethnicity are greater; those from minority ethnic backgrounds are considerably less likely than people from a white background to view most BBC TV channels. The exception is the BBC News channel, which those from minority ethnic backgrounds are more likely to view compared to people from a white background.

Figure 41: Average weekly reach of BBC TV channels by demographic, indexed¹²⁸ against all individuals (4+): 2017

	All (4+)	Female	Male	Children 4-15	16-24	25-34	35-44	45-54	55-64	65+	ABC1	C2DE	White	Minority ethnic
Total TV	100	102	98	91	87	96	102	106	107	107	99	101	101	96
All BBC channels	100	103	97	73	69	88	103	113	119	123	101	99	102	85
BBC One & Two	100	103	97	58	69	87	103	116	124	128	101	99	103	78
BBC One	100	104	96	55	67	84	102	117	127	133	101	99	103	77
BBC Two	100	101	99	34	48	68	92	118	144	166	105	94	105	59
BBC Four	100	92	108	17	26	35	76	129	168	202	109	89	108	42
BBC News	100	92	108	32	30	45	82	128	154	187	107	91	95	138
BBC Parliament	100	59	143	10	24	27	54	127	183	222	107	92	101	94
CBBC	100	114	85	364	35	52	111	62	29	32	102	97	90	176
CBeebies	100	114	86	212	50	171	160	46	37	32	103	97	95	135

Source: BARB. Reach criteria: 15+ consecutive minutes.

BBC TV audience profiles are older, less likely to be from a white background and less likely to be in a C2DE socio-economic group

The general decrease in TV viewing across all channels since 2010 is reflected in BBC TV channels and is widespread across almost all age groups, with the exception of over-64s. BBC One and Two show the biggest decrease, due to their position as the two most-viewed BBC TV channels. All age groups are watching less BBC One and Two, and the decline is greatest among those aged 25-64. All age groups, 25-34, 35-44, 45-54 and 55-64, watch over 15 minutes less of BBC One and Two than individuals in the same age ranges did in 2010. The fall in viewing of BBC One and BBC Two among children and those aged 16-24 is not as great in absolute minutes but are greater a proportion of their viewing on 2010. Declines are evenly balanced between women and men, but the decline in men's viewing is from a lower base.

Younger adults aged 16-34 watch almost as much ITV as BBC One (16 mins per day vs. 17 mins). Compared with the population average, they also watch a lower proportion of BBC TV when compared with their total broadcast TV viewing.

Overall declines in TV viewing since 2010 are particularly steep among those in the C2DE socio-economic groups, and a third of their total decline in viewing (15 minutes) is from BBC One and BBC Two.

Those from minority ethnic groups now watch almost an hour less TV than they did in 2010, and a quarter of this decline is accounted for by BBC One and BBC Two.

Viewers of BBC channels tend to be older than the total TV average, and the general population (54% of total TV adults are aged 55 or older, and 37% of the adult population are aged 55 or older).¹²⁹ For example, 65% of the total BBC One adult (16+) audience in 2017 was 55 or older, the

¹²⁸ To provide a comparison of use of BBC TV among different audience groups, Figure 4 shows the weekly reach by audience group, indexed against that of all individuals. A figure lower than 100 means that a group is less likely than average to view BBC TV; a figure higher than 100 means that they are more likely to watch.

¹²⁹ Adult population profile figures are from BARB Establishment Survey Q1 2018, base: adults 16+. All TV profiles are BARB, 2017, base: adults 16+.

same as BBC Two, and this figure is higher for BBC Four (66%). The proportion of BBC One adults who were aged 16-34 in 2017 was 10%, and the figure for BBC Two, was 9%, both lower than the all-broadcast-TV average (16%) and the average for the commercial PSB channels.

BBC channels also have a different socio-economic group mix, compared to other PSB channels. Fifty-four per cent of BBC One's total audience are in the ABC1 socio-economic group, as are 56% of BBC Two's audience and 59% of BBC Four's audience. In contrast, lower proportions of Channel 5's and ITV's audiences are ABC1 (each 42%).¹³⁰

Audience views vary on whether the BBC shows TV programmes with wide appeal

Almost two-thirds (64%) of BBC TV viewers rate the BBC highly on showing programmes which appeal to a wide range of audience groups. Older people, those in a DE socio-economic group, and people in Northern Ireland are less likely to rate this aspect highly, while young people, those without disabilities and those in an AB socio-economic group are more likely to do so.¹³¹

Radio

This section provides an overview of how BBC radio services have delivered on the five characteristics of distinctiveness. We start by looking at the range of genres offered by BBC radio stations, and attitudes towards the mix of service provided by the BBC. We also look at content investment, the range of music played on Radio 1 and Radio 2 and the range of audiences served by BBC radio.

Mix of different genres and output

While BBC radio overall covers a wide range of genres, the individual stations differ depending on their target audience

Figure 42 provides an overview of the range of programming included across the five main radio networks and an indication of the audiences that listen to particular genres.

¹³⁰ BARB, all individuals 4+

Figure 42: Overview of BBC network radio output

	2017/18 schedule	Audience
Radio 1	About 60% of the weekday schedule was made up of music programming, with specialist music accounting for much of the remaining schedule.	Each week 3.4 million adults listen to BBC Radio 1's specialist music output, 24% of BBC Radio 1's overall audience. ¹³²
Radio 2	Across 2017/18, 71% of the weekday schedule was music programming, including all but two hours of the daytime 6am-7pm period. There is a broader mix of programmes in the evenings.	Across an average week, 4.7 million adults listen to BBC Radio 2's specialist music output - 29% of BBC Radio 2's overall audience.
Radio 3	Radio 3 broadcast 6.5 hours of classical music programming from 6.30am-1pm during weekdays, and then live classical concerts until 5pm. In the evening, live/contemporary/world programming was broadcast between 11.00pm – 12.30am.	Each week, an average of 1.3 million adults listen to live or recorded as live classical music output – two-thirds (67%) of the overall BBC Radio 3 audience. ¹³³
Radio 4	News and current affairs was the most popular genre across the Radio 4 schedule, accounting for 43% of output. Beyond this, Radio 4 broadcast a range of drama, factual and entertainment programming, particularly in the afternoon slots.	The BBC Radio 4 flagship show, the <i>Today</i> programme, reaches 7.4 million adults each week. Across an average week, 10.5 million adults listen to news and current affairs output on BBC Radio 4, 94% of the overall audience. ¹³⁴
Radio 5 live	In a typical week, 86% of weekday output on Radio 5 live was news and current affairs programming. ¹³⁵ Apart from major sporting events, sport programming was broadcast from 7pm-10pm. Sport programming was typically broadcast from noon at the weekends until around 8pm.	Across a week, 3.9 million adults listen to news and current affairs on 5 live, and 3.6 million listen to sports programming. There is some overlap in listening as 60% of those who listen to sport on 5 live also listen to news programmes on the station, and 55% who listen to news also listen to sports programming.

Source: BBC/Ofcom analysis; RAJAR Q1 2018. Note: figures reflect estimated averages based on the 2017/18 schedule. Output may vary in different weeks of the year.

¹³² RAJAR Q1 2018

¹³³ RAJAR Q1 2018, 12-month weight

¹³⁴ RAJAR Q1 2018

¹³⁵ This drops significantly when covering major sports events, such as Wimbledon or the 2018 World Cup, where sports programming makes up the majority of daytime output.

More than three-quarters of BBC radio listeners rate the BBC highly in terms of providing a mix of different types of radio station

Seventy-seven per cent of BBC radio listeners rate the BBC highly for providing a mix of different types of radio station. When listeners are asked whether the station offered something that other providers did not, two of the highest-rated stations are BBC 6 Music (88% rating it highly) and BBC Radio 4 (86%).¹³⁶ Two-thirds of BBC Radio 1 listeners (66%) rated it highly for providing something that other providers do not. When asked how satisfied they were overall with BBC radio, 74% of listeners across the BBC stations rated it highly, this is in line with its competitors. various competitors¹³⁷. . .¹³⁸

Figure 43: Audience opinions of BBC radio stations' delivery of distinctive content versus other providers: 2018

Distinctiveness characteristic	% of respondents who rate the BBC's delivery highly
Provides high quality radio output	80%
Provides a mix of different types of radio station	77%
Provides radio stations that appeal to a wide range of different audiences across the UK, for example, people of different ages, regions, backgrounds and ethnicities	75%
Supports UK music and presenters	73%
Takes risks and provides radio content or music that is new and innovative, or less well known	63%

Source: BBC Performance Tracker 2018. Base: BBC radio users (2297). Question: D2 Comparing BBC radio stations to other radio stations, how well, if at all, do you think BBC radio... Please give a score of 1-10, where 1 means not at all well and 10 means extremely well

Quality of output

BBC radio content spend was £480m in 2017/18

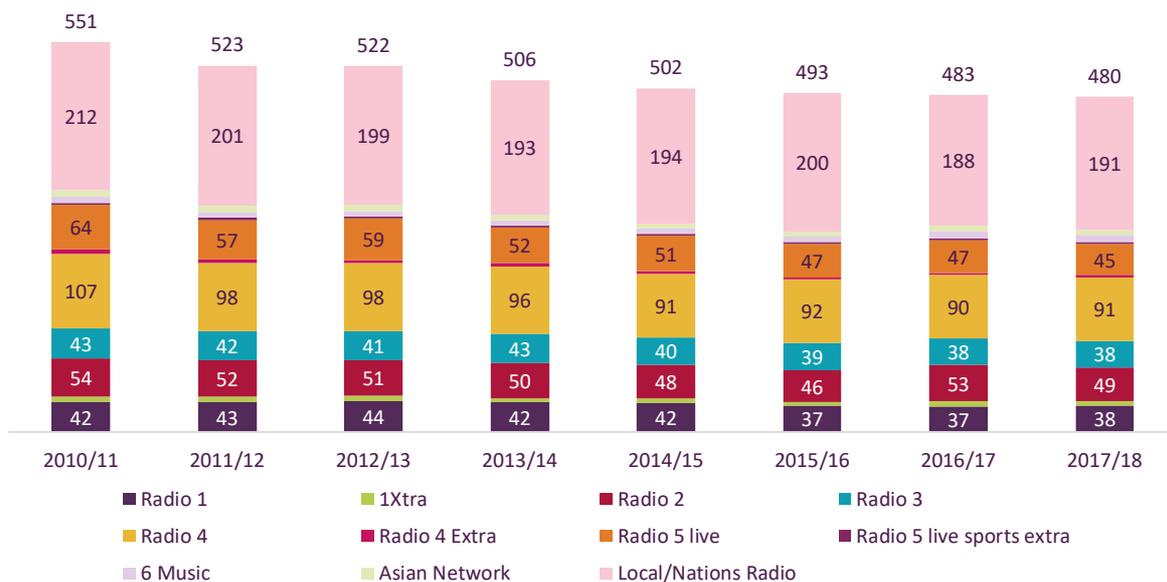
As previously noted, we use spend as one of our proxies for programme quality. Spend on BBC radio output declined by 13% in real terms from 2010/11 to 2017/18, when it stood at £480m. There was a more modest 0.5% year-on-year decline from 2016/17 in real terms.

¹³⁶ Ofcom BBC Performance Tracker October 2017 – April 2018

¹³⁷ Note: Figures were amended on 18th December 2018 due to a data error. The original stated that listeners to Magic (81%) and Smooth (80%) rated these individual stations higher than BBC Radio. The amended data shows that BBC Radio is in line with commercial radio stations. Magic is now 78% and Smooth (78%).

¹³⁸ *ibid*

Figure 44: BBC radio content spend (£m): 2010/11: 2017/18



Source: BBC Annual Report. Note: Figures are presented in real terms.

Four in five BBC radio listeners say that BBC radio provides high quality radio stations

In terms of audiences' views, four in five BBC radio listeners (80%) say that BBC radio provides high quality radio stations, with listeners in DE socio-economic groups and from minority ethnic backgrounds are less likely to think so.¹³⁹

Original UK output

Our analysis here looks at the provision of music by UK artists on the BBC's mainstream music radio stations, as well as other analysis of their music output, including range of music and provision of 'new music'.

Radio 1 and Radio 2 play a broader range of music compared to selected commercial stations¹⁴⁰

Overall, Radio 1 and Radio 2 played a higher number of different tracks compared to selected commercial stations across three sample weeks in 2017/18. For example, Radio 1 played a higher number of different tracks than Kiss and Capital. It played an average of 414 different tracks in

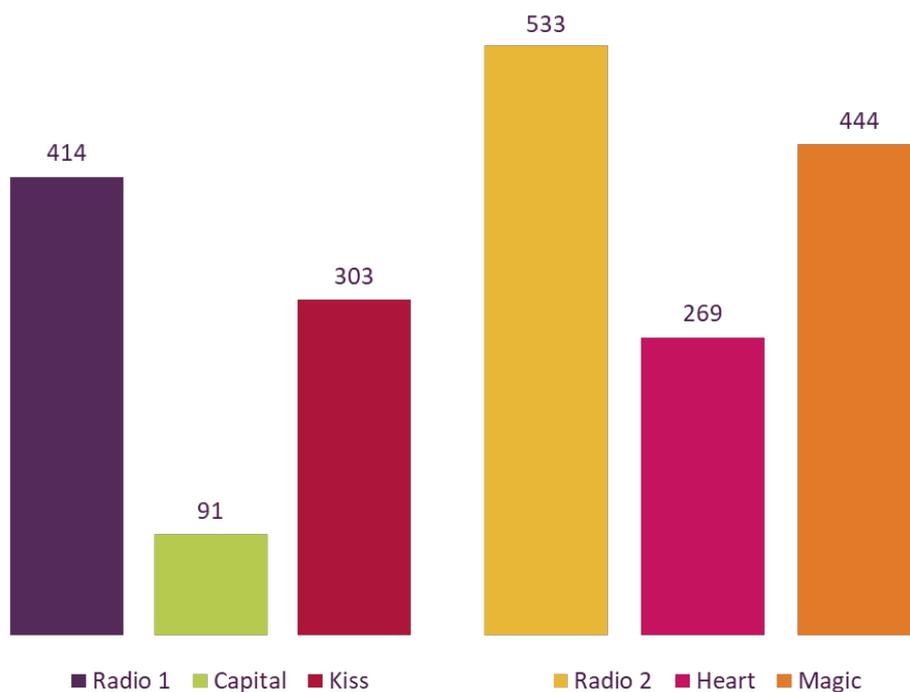
¹³⁹ Ofcom BBC Performance Tracker October 2017 – April 2018

¹⁴⁰ Analysis uses data from RadioMonitor covering three sample weeks of 8-14 July 2017, 14-20 October 2017, and 3-9 February 2018.

daytime¹⁴¹ each week, compared with 303 on Kiss and 91 on Capital.¹⁴² Each song played on Radio 1 was repeated 2.5 times on average in daytime each week. This compares with 4.1 times on Kiss, and 11.7 times on Capital.

Radio 2 played a higher number of different tracks than Heart and Magic.¹⁴³ On average, Radio 2 played 533 songs in daytime each week, compared with 269 on Heart and 444 on Magic. Radio 2 repeated tracks 1.3 times on average in a week, compared to 3.6 times for Heart and 2.1 times for Magic.

Figure 45: Average number of different tracks played on Radio 1, Radio 2 and selected commercial stations in daytime each week



Source: Ofcom/RadioMonitor. Analysis of data for 8-14 July 2017, 14-20 October 2017 and 3-9 February 2018. Daytime refers to 0600-1900 Monday-Friday, and 0800-1400 Saturday-Sunday.

¹⁴¹ Between 0600-1900 Monday to Friday and 0800-1400 on Saturday and Sunday.

¹⁴² We have selected Capital and Kiss as comparable stations to Radio 1 because they represent the two biggest commercial radio companies (Global and Bauer respectively), and they have national reach (through digital platforms) and similar audience profiles to Radio 1. For Capital, we have used output data for Capital London, as the music broadcast on the nationwide digital Capital UK service is a simulcast of the music broadcast on the London station.

¹⁴³ We have selected Heart and Magic as comparable stations to Radio 2 because they represent the two biggest commercial radio companies (Global and Bauer respectively) and while the Radio 2 audience is older than that of Heart and Magic, these stations are comparable given they have a national reach and provide a broad range of music.

Compared to selected commercial stations, Radio 1 plays less music from the Top 10 of the UK singles chart, more from UK artists and more 'new' music¹⁴⁴

Tracks that were in the Top 10 of the UK singles chart in a given week made up a smaller proportion of music output on Radio 1 across the week compared with Capital and Kiss (using the same sample weeks). For example, on average, 15% of Radio 1's music output in daytime each week was songs from the Top 10, compared to 17% for Kiss and 26% for Capital.

Radio 1 played a higher proportion of music by UK artists¹⁴⁵ compared to comparable stations. On average, almost half of Radio 1's music output across daytime was from UK artists (49%), compared with 47% for Capital and 43% for Kiss over the sample period.

On average, almost half of the music tracks Radio 2 played in daytime were by UK artists (48%). This compares with 37% for Heart and 48% for Magic.

For the same sample weeks, 'new music' on average accounted for 54% of Radio 1's music output in daytime, and 28% of Radio 2's.¹⁴⁶ We have also considered a separate sample week and analysed the 'new music' output during daytime of Radio 1 and comparable stations.¹⁴⁷ For this sample week, 51% of Radio 1's music output in daytime was 'new music', compared to 59% for Capital and 37% for Kiss. This is in the context of Capital playing fewer different 'new music' tracks while repeating them more often, whereas Radio 1 played a larger number of different 'new music' tracks.

BBC radio listeners rate it highly for supporting UK artists and presenters

Turning to listeners' views, three-quarters (73%) of BBC radio listeners rate the BBC highly for *supporting UK music and presenters*, with younger listeners and those in AB socio-economic groups more likely to do so.¹⁴⁸

Level of risk-taking, innovation, challenge and creative ambition

The majority of BBC radio hours continued to be produced in-house in 2017/18

As with TV, we use the extent of independent production as one of the proxies for innovation. The majority of BBC radio hours continued to be produced in-house in 2017/18, with 81% produced by

¹⁴⁴ Analysis covers the same sample weeks. RadioMonitor does not have nationality data for every artist played during the sample period; about 1% of output is made up of tracks by artists without nationality data.

¹⁴⁵ RadioMonitor looks at artists from Great Britain and Ireland. For these purposes, we combined artists from Great Britain with those from Northern Ireland to look at UK artists.

¹⁴⁶ The operating licence defines a music track as 'new music' for a period of either: (a) 12 months from first release (whether by physical, radio, download or streaming means), or (b) 6 weeks from the date it first enters the Top 20 of the UK official singles chart, whichever is sooner.

¹⁴⁷ Analysis of 'new music' output on Radio 1 and comparable stations covers the period 17-23 February 2018.

¹⁴⁸ Ofcom BBC Performance Tracker October 2017 – April 2018

in-house producers, compared to 82% in 2016/17. The proportion of hours produced by independent producers varies across the main five stations, from 15.7% of Radio 3 hours to 24.5% of Radio 2 hours in 2017/18.¹⁴⁹

Six in ten BBC radio listeners think the BBC takes risks and provides innovative content or new music

More than six in ten (63%) BBC radio listeners rate the BBC highly for taking *risks and provid[ing] radio content or music that is new and innovative or less well known*. Younger audiences aged 16-34, those without disabilities and those in AB socio-economic groups are more likely to think so, and older listeners, and listeners in DE socio-economic groups, are less likely.¹⁵⁰

When Radio 1 listeners were asked in 2017 to select whether Radio 1 should take more risks or play more of the popular programmes, six in ten said they preferred it to take more risks; younger people and those in ABC1 socio-economic groups were more likely to say this. When Radio 2 listeners were asked a similar question, the responses were the other way round – six in ten (57%) preferred Radio 2 to play more popular music and 40% wanted it to take more risks, with no differences by audience group.¹⁵¹

Range of audiences

On average, almost two-thirds (64%) of UK adults listen to BBC radio each week, and it accounts for 52% of all weekly radio listening hours. Both market share and weekly reach for the BBC have been gradually decreasing over the past ten years, although overall radio listening has been relatively consistent. The downward trend in listening to the BBC can largely be attributed to the increase in the availability of national commercial stations over this period - these have consequently seen increases in their reach and share. Thirty-seven per cent of BBC radio listeners don't listen to commercial radio.

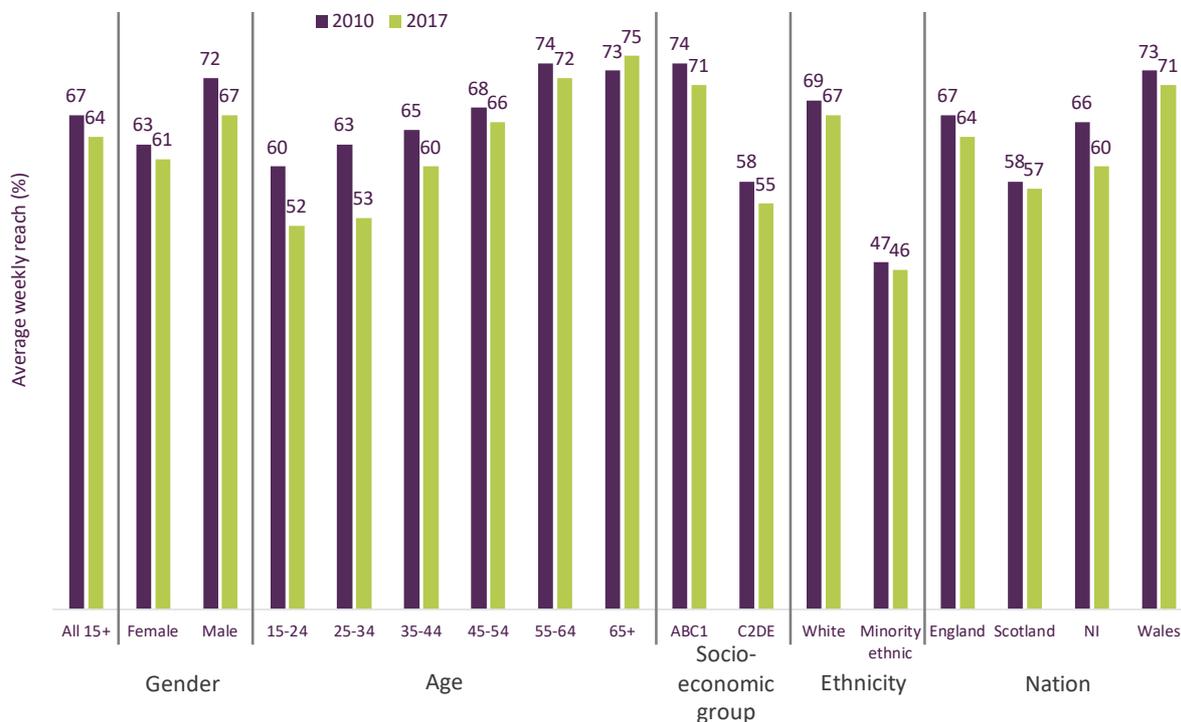
Looking at the range of audiences serviced by BBC radio, Figure 46 below shows how the weekly reach to different demographics compares between 2010 and 2017. It shows that BBC radio overall does less well among young people, those in DE socio-economic groups and people from a minority ethnic background.

¹⁴⁹ [BBC Annual Report 2017/18](#), p147

¹⁵⁰ Ofcom BBC Performance Tracker October 2017 – April 2018

¹⁵¹ [Ofcom Distinctiveness Research 2017](#)

Figure 46: Weekly reach of all BBC radio, by demographic: 2010 and 2017



Source: RAJAR, Q4 2010 and 2017, 12-month weight applied due to small sample sizes of minority ethnic groups

The BBC’s mainstream music services are aimed at certain audience groups. Part 1 of Schedule 1 to the Agreement describes Radio 1 as a service aimed at young audiences. The BBC has built on this in its Annual Plan and committed to an editorial focus on listeners aged 15-29.¹⁵² While Part 1 of Schedule 1 to the Agreement does not describe a specific target audience for Radio 2, the BBC’s Annual Plan has committed to an editorial focus on listeners aged over 35.¹⁵³

Figure 47 shows that since 2010, Radio 1’s reach of 15-29 year-olds has decreased from 46% to 33% in 2018. The proportion of Radio 1’s overall audience that is from this age group has also dropped from just over 46% to 41% in Q1 2018. The time spent listening to Radio 1 by its 15-29 year-old audience has dropped by about three hours per week, from almost 8.5 hours per week in 2010 to 5.5 hours in 2018.

¹⁵² [BBC Annual Plan 2017/18](#), page 41. It has also committed to the same focus in its 2018/19 plan: [BBC Annual Plan 2018/19](#), page 39

¹⁵³ [BBC Annual Plan 2017/18](#), page 42. It has also committed to the same focus in its 2018/19 plan: [BBC Annual Plan 2018/19](#), page 40

This is within the context of fewer 15-29 year-olds listening to *any* radio over this period (88.9% in 2010 to 83.8% in 2018) though the increased availability of national commercial stations has seen the number of listeners from this age group to these stations grow from 30.7% to 41.2% in the same period.¹⁵⁴ There are also other online music services competing for this age group with 78% of 15-29 year-olds using online streaming services or online music videos for background listening each week.¹⁵⁵

Figure 48 shows that the performance of Radio 2 among those aged 35 and over has been stable since 2010.

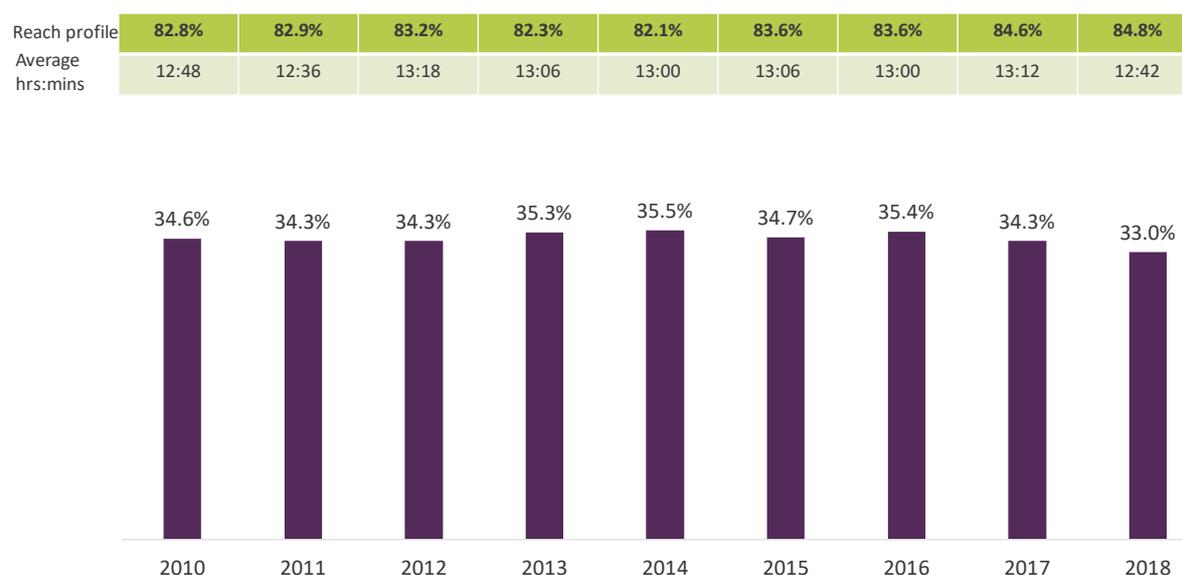
Figure 47: Weekly reach of BBC Radio 1 among 15-29 year-olds: 2010-2018



Source: RAJAR, Q1 of each year; reach profile indicates the proportion of the overall 15+ audience that are aged 15-29

¹⁵⁴ RAJAR

¹⁵⁵ TouchPoints 2018

Figure 48: Weekly reach of BBC Radio 2 among adults aged 35+: 2010-2018

Source: RAJAR, Q1 of each year; reach profile indicates the proportion of the overall 15+ audience that are aged 35+

There is little variation in listener attitudes about BBC radio catering for a wide range of audiences

In terms of listener opinions, three-quarters of BBC radio listeners (75%) rate the BBC highly for providing radio stations that appeal to a wide variety of audience groups. Older people and those in DE socio-economic groups are less likely to think that the BBC provides radio stations which appeal to a wide variety of audience groups, but otherwise there is little variation in response between audience groups.¹⁵⁶

Online

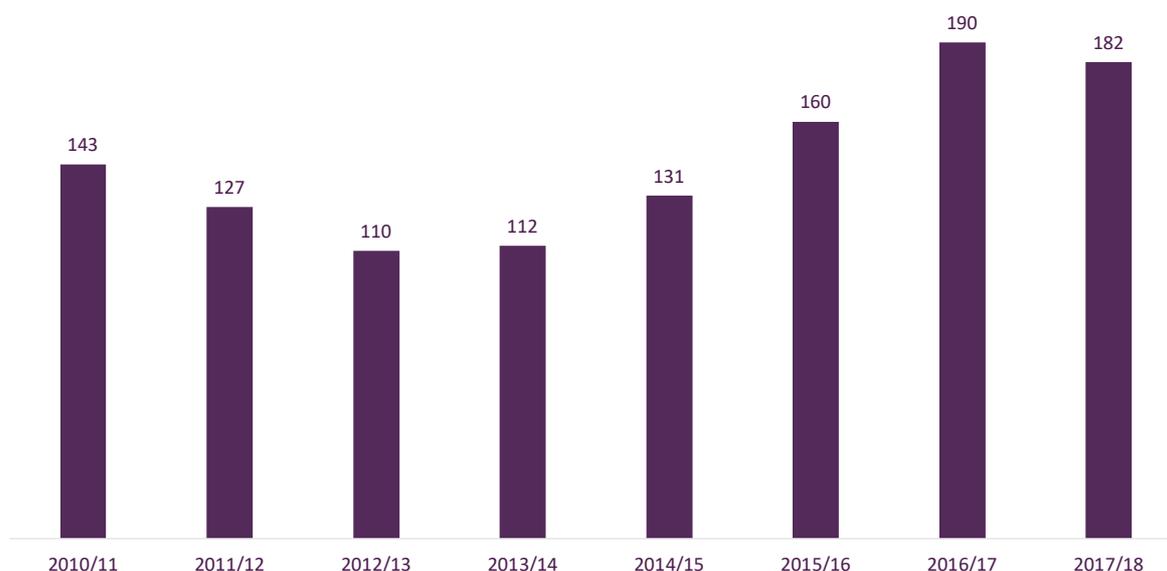
This section looks at the distinctiveness of BBC online content in the round, rather than providing separate analyses of each of the five characteristics. It starts with an examination of spend and production, then describes how the content is being consumed, and by whom. Finally, we set out the opinions of users of BBC online content in relation to how distinctive they find it.

BBC spend on online fell slightly in 2017/18 after four years of growth

The BBC has increased its online content spend in recent years since a strategic decision to cut spending on BBC online between 2012 and 2014.¹⁵⁷ However, in 2017/18, the £182m spend on BBC online was slightly lower in real terms than the £190m spend the previous year.

¹⁵⁶ Ofcom BBC Performance Tracker October 2017 – April 2018

¹⁵⁷ [BBC News: BBC to cut online budget by 25%](#)

Figure 49: BBC online content spend (£m): 2010/11 – 2017/18

Source: BBC Annual Report. Note: Figures are presented in real terms.

The BBC is producing an increasing amount of content that is available online-only. In 2017, there were 272 hours of first-run UK-originated content available exclusively online through the BBC iPlayer and BBC Three, the bulk of which (241 hours) was entertainment and music content.¹⁵⁸

The same is true of audio content; the BBC has started commissioning original podcasts in recent years. The BBC's approach to podcasts has traditionally been to focus on highlights of prominent BBC radio programming – there were 18 different Radio 1 podcast series available on Apple earlier in the year – but it has moved into original programming in recent years, first with 2017's *Beyond Reasonable Doubt* and the 2018 co-production between BBC World Service and Norway's NRK, *Death in Ice Valley*.¹⁵⁹

Almost nine in ten online users visit BBC sites

BBC sites on average were visited by over 41 million internet users in the UK per month in Q1 2018, a reach of 87% of the total online audience and an increase of 8pp since Q1 2017.¹⁶⁰ BBC sites had the third highest reach among UK internet users, after Google and Facebook sites. BBC sites were

¹⁵⁸ Additional content will have premiered online before being shown on a BBC TV service.

¹⁵⁹ [BBC: Major new original podcast series to investigate mysterious death in Norway](#)

¹⁶⁰ comScore MMX Multi-Platform, [P] BBC Sites, monthly average January – March 2017 and 2018, desktop age: 6+; mobile age: 18+, UK. The methodology for the comScore audience product suite (MMX Multi-Platform) changed in September 2017, therefore reported data may show a break in trend since then.

visited by 93% of online adults aged 18 and over. The highest average monthly reach was among 45-54 year-olds, at 96% in Q1 2018; the lowest reach was among 18-24 year-olds, at 90%.

On average, an internet user aged 18+ spent 2 hours 44 minutes per month on BBC sites on any device in Q1 2018, a total of 3% of their total time online.

Twenty-nine per cent of adults use BBC iPlayer each week, including 30% of 15-34 year-olds, with those aged 35-44 most likely to use it (33%).¹⁶¹ This is up from 11% for adults in 2012, when the age group most likely to use it was 15-24 year-olds (25%).¹⁶² BBC Three is consumed by about 8% of its 16-34 year-old target audience each week.¹⁶³

The BBC news website (including the app) is widely consumed by all age groups. For example, in Q1 2018, its average monthly reach was 72% among all online adults and the corresponding figure for BBC Weather was 27%. This BBC News figure ranges from 56% among 18-24 year-olds to 80% of 35-44s.¹⁶⁴

The BBC sports website on average was used by 44% of adults per month in Q1 2018; the most visited sports-specific page was BBC Sport Football, with a Q1 2018 monthly average of 12.7 million unique visitors (30% of the online adult audience).¹⁶⁵

Attitudes to the BBC's online provision are positive

When asked how satisfied they were overall with BBC websites and apps, 75% of users rated them highly, a rating broadly similar to that for other broadcasters' online offerings.¹⁶⁶

Seven in ten (72%) BBC online users rate the BBC highly for having a mix of different types of content. Users in the AB socio-economic groups and those without disabilities are more likely than others to rate the BBC highly on this measure, and older people and those with a disability are less likely.¹⁶⁷

¹⁶¹ TouchPoints 2018

¹⁶² *ibid*

¹⁶³ [BBC Annual Report 2017/18](#) p65. Ofcom BBC Performance Tracker figures suggest that the percentage of older age groups consuming BBC Three is lower than 16-34s.

¹⁶⁴ comScore MMX Multi-Platform, [C] BBC News and [C] BBC Weather, monthly average January – March 2018, age: 18+, UK.

¹⁶⁵ comScore MMX Multi-Platform, [C] BBC Sport and [S] BBC Sport – Football, monthly average January – March 2018, age: 18+, UK.

¹⁶⁶ Ofcom BBC Performance Tracker October 2017 – April 2018

¹⁶⁷ *ibid*

Figure 50: User opinions of BBC website and apps' delivery of distinctive content versus other providers: 2018

Distinctiveness characteristic	% of respondents who rate the BBC's delivery highly
Have high quality content	77%
Have a mix of different types of content	72%
Have content that appeals to a wide range of different audiences across the UK, for example people of different ages, regions, backgrounds and ethnicities	69%
Provide content that other websites or apps don't provide	62%
Present content in a unique/innovative way	61%

Source: BBC Performance Tracker 2018. Base: BBC Web/App Users (2018). Question: D3 Comparing BBC website apps to other providers, how well, if at all, do you think BBC website and apps... Please give a score of 1-10, where 1 means not at all well and 10 means extremely well

As in other areas, the provision of high-quality content rated most highly in comparison to other elements of distinctiveness, with 77% of BBC online users rating it highly. Those in DE socio-economic groups, people from minority ethnic backgrounds, and older people were less likely to rate the BBC highly on this measure.¹⁶⁸

Seven in ten (69%) rate the BBC highly on its provision of online content to a wide range of audiences. Younger people and those in Scotland are more likely to do this, and older people less likely.¹⁶⁹

Six in ten (61%) BBC online users rated the BBC highly in terms of presenting content in a unique/innovative way, and 62% rated the BBC for having content that other websites or apps don't provide.¹⁷⁰

Performance assessment

Public purpose 3 is a broad purpose, to which all the BBC's services, and different parts of its schedule, need to contribute. Our assessment of the BBC's performance has looked at comparisons between the BBC and other relevant providers. It has taken into account the amount of new content made for UK audiences, the range of audiences served and the range, quality and innovation in the

¹⁶⁸ Ofcom BBC Performance Tracker October 2017 – April 2018

¹⁶⁹ *ibid*

¹⁷⁰ *ibid*

BBC's output and services. We note that the BBC itself set a wide range of additional commitments related to the services' contribution to distinctiveness as part of its [Annual Plan for 2017/18](#). It has reported on its delivery of these in its [Annual Report 2017/18](#).

Overall the BBC is distinctive, but faces challenges in two key areas

On the basis of the above evidence, we consider that, overall, the BBC is distinctive. It is distinctive in a number of ways, including through its provision of high-quality content across a range of genres on its mainstream services, as well providing specialist services such as Asian Network, CBeebies and BBC Parliament, and services with no directly comparable provider such as BBC Radio 4. It provides a range of services that no other commercial broadcaster provides. Its mainstream radio stations, BBC Radio 1 and BBC Radio 2, play a broader range of music than do key commercial providers. A majority of audiences rate the BBC's provision of distinctive content highly.

However, being distinctive requires many things from the BBC. Behind the overall picture, the BBC faces challenges, particularly given the increasingly strong competition it faces for audiences, as well as the drift away from the BBC by younger audiences.

We consider that these challenges arise in two key areas: original UK content and serving young people, which we discuss further below. We also look at the range of content that the BBC broadcasts, which is an area we will continue to monitor.

Original content made for UK audiences

The BBC's spend on original UK content has been falling

In common with PSBs as a whole, the BBC's first-run UK-originated spend has been declining in real terms. It has fallen by almost a quarter (23%) since 2010, which was when the BBC started to see declines in licence-fee revenue in real terms.

Despite the real-terms decline in licence fee revenues, the BBC has continued to channel the vast majority of its TV content spend (95% in 2017) into first-run UK-originated content, rather than repeats or acquisitions.

There has been a decline in the hours of original UK non-news content

The total number of hours of first-run UK originations broadcast by the BBC has declined only slightly since 2010.¹⁷¹ However, within this there has been an increase in the amount of simulcast news broadcast in recent years, and a decline in original UK non-news output. Non-news output has

¹⁷¹ Compared with 2015 (the last comparable year due to major sports tournaments taking place in even years) new UK hours have fallen by 2%. Compared with 2010, new UK hours were down by 1%. The BBC's Licence Conditions set a floor to the number of hours of first-run UK-originated content that need to be shown on BBC One, BBC Two, CBBC and CBeebies.

declined by 16% since 2010, with declines across most genres, including comedy (down 38%), children's (down 30%),¹⁷² factual entertainment (down 25%) and entertainment (down 11%).

This decline in BBC spend is partially offset by third-party funding, although it is uncertain whether the BBC can continue to rely on this

The ability to attract third-party funding allows the BBC and other PSBs to produce content that they might not otherwise be able to produce. Across the BBC, Channel 4 and Channel 5 combined, third-party funding of first-run UK-originated content more than doubled in real terms between 2008 and 2017, to reach £338m. The BBC's own third-party funding has increased significantly over this period and has been concentrated in particular genres, most notably drama, such as the co-production with Netflix on *Collateral* that was broadcast in 2018.

Co-production funding may only be available for productions with global appeal, rather than for content aimed primarily at UK audiences.¹⁷³ And it may reduce or become unavailable as those co-producers develop their own, or alternative pipelines of original content. As we note in the market context section of the main report, a number of large online players have substantial programme budgets and are increasingly investing in their own original content. The BBC's ability to rely on such deals is uncertain.¹⁷⁴ These arrangements may also affect the editorial focus of such programmes.¹⁷⁵

The BBC should maintain its commitment to original UK programmes that speak directly to UK audiences

At present, only a small proportion of spend by Netflix and Amazon Prime Video is on programmes made in the UK.¹⁷⁶ In contrast, the vast majority of the BBC's TV output is UK content¹⁷⁷ and the BBC shows more new UK content than other PSBs on network television.¹⁷⁸

¹⁷² A large part of this decline reflects regular children's programming leaving BBC One and Two in 2013.

¹⁷³ Although we note that clearly global content can also have UK appeal.

¹⁷⁴ The Public Accounts Committee has highlighted the risk of divergence between the BBC's and its partners' interests and the need to make contingency plans for when these relationships end ([Public Accounts Committee Report: BBC commercial activity](#)).

¹⁷⁵ We note that the Public Account Committee's report states that the BBC says that it is very clear about shared editorial values and editorial alignment when choosing its partners in order to mitigate against subsequent divergence in interests. However, it also notes that the market is nonetheless constantly, and often rapidly, evolving.

¹⁷⁶ Ampere Analysis Number of Distinct Titles March 2018, originals have been classified where the primary parent production company is the SVoD platform on which the content is available. As set out in Ofcom, [Media Nations UK: 2018](#), pages 49-50.

¹⁷⁷ In 2017, 88% of the BBC's output was UK-originated output, Ofcom [PSB Annual Compliance Report 2018](#).

¹⁷⁸ Ofcom/broadcasters, as set out in Ofcom, [Media Nations UK: 2018](#), page 48.

Content made for UK audiences remains very popular.¹⁷⁹ For example, of the top 100 most-watched programmes broadcast in 2017, all but one was a UK programme.¹⁸⁰ Our representation and portrayal review found that people like to watch programmes set in, or reflecting, where they live.

We consider that the BBC is uniquely placed to distinguish itself by broadcasting a broad range of UK content that audiences value because it tells UK stories and resonates with UK lives. The BBC is already producing such programmes, including highly acclaimed dramas such as *Three Girls*. Outside drama, *Peter Kay's Car Share* was premiered online and achieved very large audiences for BBC iPlayer as well as significant audiences when broadcast on BBC One.¹⁸¹ And two-thirds (66%) of BBC TV and video service viewers rate the BBC highly for showing TV programmes and content made specifically for UK audiences, using UK actors, writers and locations.¹⁸²

To remain distinctive amid the increasingly strong competition for TV audiences, the BBC should maintain its commitment to original content across all genres. To do so within its funding settlement for this Charter, the BBC will need to be more innovative and take more risks - in the type and range of UK content commissioned, as well as how that content is made and with whom. This may require a significant change in approach, as less than six in ten (57%) TV viewers consider that the BBC is taking risks or being innovative in its TV programming.^{183 184}

The BBC's distinctiveness will continue to be a key area of focus for Ofcom's monitoring and subsequent annual reports on the BBC. We will discuss with the BBC the steps it will take to maintain its commitment to original UK content, and how it will be more innovative and take more risks.

Content that serves a wide range of UK audiences

One of the ways in which the BBC distinguishes itself is by broadcasting content that serves a range of UK audiences. It does this by providing a mixture of mainstream services as well as services aimed at specific audience groups. For example, Radio 1Xtra and BBC Asian Network are editorially targeted towards younger audiences and young British Asian audiences respectively. The BBC's children's services CBBC and CBeebies provide a significant amount of UK-originated children's

¹⁷⁹ UK content can also have appeal beyond the UK, for example *Peaky Blinders*, *The Night Manager* and *McMafia*, and can also hold its own when included in the wide range of content available on SVoD services.

¹⁸⁰ BARB, 2017, top 100 programmes, ranked by average audience, highest occurrence only (i.e. each title appears only once in the list), duration 10+ minutes. Note that there was also one programme that was a UK/US co-production.

¹⁸¹ Series 2 achieved more than 10.6 million requests on iPlayer ([BBC: Peter Kay's Car Share is smash hit for BBC iPlayer](#)) and in 2017/18 its first broadcasts achieved an average audience of 7.3 million on BBC One (BARB).

¹⁸² Ofcom BBC Performance Tracker October 2017 – April 2018

¹⁸³ *ibid*

¹⁸⁴ We recognise nonetheless that the BBC needs to strike a balance between showing popular long-running series and new programmes.

content aimed at pre-teen and pre-school children, while services such as BBC Local Radio and the BBC's nations radio stations¹⁸⁵ appeal to audiences in local communities and the nations.

The key challenge facing the BBC is serving young people, who are turning away from it¹⁸⁶

Young audiences are critical for the future relevance and success of the BBC, so its ability to reach and engage them effectively is key.

Although younger people's overall impression of the BBC is relatively high¹⁸⁷ they are less likely than average¹⁸⁸ to watch BBC TV or listen to BBC radio. In addition, the time they are spending with BBC TV and radio is falling.¹⁸⁹

To an extent, this reflects a general shift in young people's viewing habits, away from broadcast TV and radio, to online content. They now spend significantly more time watching YouTube on internet-connected devices (e.g. smartphones, tablets, desktops) than watching BBC TV on a TV set.¹⁹⁰ Compared with all adults, 15-24 year-olds spend much less time listening to live radio and more time listening to music streaming services or digital downloads.¹⁹¹

But even when they do watch broadcast TV, they spend less of their time than average watching the BBC (and PSBs more generally), choosing instead to watch a broader set of channels. Furthermore, they spend almost as much time watching ITV as BBC One, whereas individuals as a whole watch about one and a half times as much BBC One as ITV.¹⁹²

Young people are also more likely to listen to commercial radio than BBC radio: seven in ten (71%) 15-34s listen to commercial radio each week, compared to five in ten (53%) who listen to BBC radio.¹⁹³

¹⁸⁵ BBC Radio Scotland, BBC Radio nan Gàidheal, BBC Radio Wales, BBC Radio Cymru, BBC Radio Ulster and BBC Radio Foyle

¹⁸⁶ This theme cuts across all of the BBC's public purposes.

¹⁸⁷ When asked about their overall impression of the BBC, 65% of 16-34s rate it highly, in line with other age groups. 16-24s are more likely to rate it highly – at 70% (Ofcom BBC Performance Tracker October 2017 – April 2018).

¹⁸⁸ Compared to all individuals 4+ for TV and all adults 15+ for radio.

¹⁸⁹ In 2017, 77% of all individuals watched BBC TV each week, compared to 61% of 16-34s (BARB). Some 64% of UK adults listened to BBC radio each week, compared to 53% of 15-34s (RAJAR). Since 2010, time spent with BBC TV has fallen by almost half (44%) among 16-34s, compared to a decline of 20% among all individuals. This decline in young people's time spent with BBC TV is broadly in line with that of PSBs as a whole (down by 43%). Average hours per week to BBC radio for 15-34s has decreased from 10.9 in 2010 to 8.6 in 2017 (RAJAR Q4 of each year, 12 month-weight).

¹⁹⁰ In 2017 young people spend an average of 59 minutes a day watching YouTube on devices other than the TV set, compared to 26 minutes watching BBC TV on a TV set. Ofcom/BARB/BARB TV Player/TouchPoints/comScore as published in Ofcom, [Media Nations UK: 2018](#), page 21 and BARB, 2017.

¹⁹¹ Live radio accounts for 31% of all audio listening among 15-24s, compared to 71% among all adults (TouchPoints 2018).

¹⁹² BARB, 2017. All individuals watched an average of 44 minutes of BBC One per day, and 30 minutes of ITV. 16-34s watched an average of 17 minutes per day of BBC One and 15 minutes of ITV.

¹⁹³ RAJAR Q1 2018

Young people, along with other adults, are making use of BBC Online¹⁹⁴ and the BBC iPlayer.¹⁹⁵ But the time they spend on iPlayer (2.7 minutes a day),¹⁹⁶ is much less than they spend on either YouTube (59 minutes a day) or SVoD services like Netflix and Amazon Prime Video (30 minutes a day).¹⁹⁷ Although the reach of BBC Three, an online service aimed at 16-34 year-olds, has recently increased among younger audiences, it remains low - an average of 8% of young people viewed it each week in 2017/18, (up from about 5% the previous year).¹⁹⁸

The BBC's overall reach is lower among young people than among adults as a whole.¹⁹⁹ In addition, the total time that young people spend with the BBC (across all types of content and devices) is also significantly lower: we estimate that young people spend about half as much time with the BBC compared to the total population.²⁰⁰

The BBC is perceived to be losing relevance for some young people

There are likely to be a number of drivers behind these findings. Our qualitative research suggests that the BBC is perceived by some, including young people, to have a white, establishment, London/South-East lens, and is therefore losing relevance for them. Competitors like Channel 4 and Netflix have strong appeal among younger audiences and some viewers consider them to be more modern, edgy and diverse.²⁰¹

Our qualitative research into the BBC's distinctiveness suggested that some younger participants felt that the BBC offered little content that was relevant to them, and some felt that the BBC focused on older audiences.²⁰² It also revealed that younger audiences in particular thought the BBC was too safe, that it needed to take more risks and that there was too much reliance on conventional formats, with content that was similar to existing outputs.

BBC Three is rated highly among its viewers for its provision of programming that is *different to what I'd expect to see on other channels* as well as for showing *programmes with new ideas and different*

¹⁹⁴ On average 90% of online 18-24 year-olds accessed BBC Online per month in Q1 2018; this is slightly lower than other adult age groups, while in the same period 94% of online 25-34s accessed BBC Online per month. Source: comScore MMX Multi-Platform, [P] BBC Sites, January – March 2018, age: 18+, UK.

¹⁹⁵ BBC iPlayer is used by 29% of GB adults each week including 30% of adults 15-34 (TouchPoints 2018).

¹⁹⁶ Data modelled from BARB, BARB TV player reports, RAJAR, comScore, GfK SVoD data and TouchPoints.

¹⁹⁷ Ofcom/BARB/BARB TV Player/TouchPoints/comScore as published in Ofcom, [Media Nations UK: 2018](#), page 21. We estimate that of this time, the time they are spending with BBC content on YouTube and SVoD services is low.

¹⁹⁸ [BBC Annual Report 2017/18](#), page 65. Note, averages calculated from weekly averages across four quarters.

¹⁹⁹ 92% of adults aged 15+ use the BBC each week, compared with 86% of 15-34 year-olds (TouchPoints 2018).

²⁰⁰ We estimate that, across all devices, 16-34s spend 1 hour 19 minutes per day with the BBC, compared to all individuals who spend 2 hours 44 minutes per day. Data modelled from BARB, BARB TV player reports, RAJAR, comScore, GfK SVoD data and TouchPoints.

²⁰¹ [Representation and Portrayal on BBC Television: thematic review, October 2018](#). Note that we consider its findings further in the purpose 4 section of this report.

²⁰² [Ofcom Distinctiveness Research 2017](#)

*approaches.*²⁰³ But our qualitative research found that some viewers of BBC Three, including young people, claimed to watch BBC Three less, or not at all, following the move online, and some expressed regret at this move.²⁰⁴

The BBC needs to take significant steps to engage young people

The decline in use of the BBC among young people is a concern, given the need for the BBC to serve all audiences, and the importance of young people for the BBC's future. The BBC itself recognises that it needs to do things differently to serve young audiences. It has set out its plans to "reinvent the BBC for a new generation", including more personalisation and an enhanced user experience in the iPlayer, and, in audio, providing a "bolder and more intuitive mobile platform" for its radio and audio content.²⁰⁵

The BBC needs to be more innovative, not only in terms of the content it broadcasts but also in how it gets that content to young people via the devices and platforms where they are increasingly consuming media content. In doing so, the BBC will need to be aware of the likely impact on other broadcasters of any material changes to the way it distributes content.²⁰⁶

We will discuss with the BBC how it plans to address this issue and monitor the impact of changes it makes. If we do not see sufficient progress here we will consider further measures.

Broadcast specialist content alongside more popular programmes

The BBC provides a wide range of genres across its TV services, including on BBC One

The BBC needs to ensure that it provides a range of programming across its TV services. It also needs to secure the amount and prominence of those genres identified as 'at risk' or in decline across public service broadcasting.²⁰⁷

Overall, BBC TV provides a wide range of genres. Its provision includes those identified as 'at risk' such as arts, religion, other specialist factual (such as science and history) and comedy.²⁰⁸ Much of this type of content would be underprovided if left to the market, which in turn helps the BBC remain distinctive.

²⁰³ Ofcom PSB Tracker 2017

²⁰⁴ [Representation and Portrayal on BBC Television: thematic review, October 2018](#)

²⁰⁵ [BBC Annual Plan 2018/19](#)

²⁰⁶ The BBC Board has a duty to consider the effects its public service activities have on competition in the UK, and must seek to avoid unnecessary negative impacts, while promoting positive impacts on the wider market.

²⁰⁷ See [Operating Licence](#), paragraph 1.33.1

²⁰⁸ This includes genres that provide a particular contribution to the Mission and Public Purposes, are underprovided or in decline across public service broadcasting, as set out in Schedule 2 of the Agreement.

BBC One is the broadcaster's mainstream, mixed-genre and most popular channel. It also broadcasts a broad range of programmes, including of 'at risk' genre during peak time, when most people are viewing, helping such content have the most impact.²⁰⁹

However, the BBC's provision of some 'at-risk' genres has declined; it needs to continue producing such output, and broadcasting it on BBC One in peak time

But the number of first-run hours of some 'at-risk' genres on BBC TV has declined,²¹⁰ and the number of hours for some 'at-risk' genres broadcast on BBC One peak time is low: only 21 hours of arts and classical music programming were shown in total on BBC One peak time across 2017 as a whole,²¹¹ and there was no religion and ethics programming during BBC One peak time.

The BBC should continue to broadcast 'at-risk' genres alongside more popular programming on TV. It needs to continue to do so during BBC One peak time, given audience viewing at this time. This is something we will monitor, including the extent to which peak-time viewing remains important for reaching large audiences.

The BBC provides a wide range of content across its radio stations

On radio, some of the BBC's services - such as Radio 4 and 6 Music - are distinctive in themselves, having no directly comparable provider. Others are distinctive when compared with commercial providers through a variety of metrics.

One of the ways in which the BBC can continue to be distinctive is through its provision of new and UK music, providing listeners with opportunities to hear material from a diverse range of artists, as well as providing a broader range of music than comparable providers. Our analysis suggests that, on average, Radio 1 and Radio 2 are providing a broader range of music compared with key commercial providers, for example: in daytime, they both play more different tracks and have a lower repeat rate of music tracks. In addition, tracks from the Top 10 make up a smaller proportion of Radio 1's output vs. comparable providers²¹² and more than half of its daytime music output is 'new music'. About half of both stations' daytime music output is by UK artists. Next year the BBC will need to

²⁰⁹ In comparison with ITV's peak-time schedule in 2017, the content shown during BBC One peak was spread more evenly across genres, while the majority of ITV's content was in news, soaps and entertainment.

²¹⁰ Including arts & classical music, religion & ethics and comedy.

²¹¹ Including repeats. Excluding repeats there were 17 hours shown in 2017. However, as noted on page 39 we note that some programmes included do not as obviously fit into the arts and classical music classification. Titles, for example, included *Our Friend Victoria* and *Sir Bruce Forsyth: Mr Entertainment*.

²¹² See pages 68 to 70. The BBC has operating licence conditions to provide a broader range of music on Radio 1 and Radio 2 than comparable providers. We have assessed the BBC's compliance with these conditions and concluded that the BBC has met them for the relevant period (1 January to 31 March 2018). See annex 1 for further details of our assessment of the BBC's compliance with regulatory conditions.

demonstrate compliance with its conditions for 'new music' and music from UK artists on these stations,²¹³ and we will look at these areas closely.

Radio 5 live can be distinctive through its provision of a wide range of sports, as well as its news and current affairs output. The Licence sets a condition for at least 75% of Radio 5 live's output to be news and current affairs programming,²¹⁴ as well as a condition for it to provide live commentary on at least 20 different sports.²¹⁵ The BBC will report to Ofcom next year on its compliance with its conditions for news and current affairs and sports coverage on 5 live; we will look closely at these specific areas.

²¹³ These conditions came into force on 1 April 2018. The stations' new music conditions include requirements for a significant proportion of their new music to come from new and emerging UK artists.

²¹⁴ According to the [BBC Annual Report 2017/18](#), 76% of its output was news and current affairs. We have not yet assessed the BBC's performance against this condition, as it came into force on 1 April 2018. We will do so in our Annual Report next year.

²¹⁵ This is also a financial year condition, which we will assess in next year's Annual Report.

Public purpose 4: reflecting, representing and serving the diverse communities of the UK

Purpose 4 is to reflect, represent and serve the diverse communities of all of the United Kingdom's nations and regions and, in doing so, support the creative economy across the United Kingdom:

the BBC should reflect the diversity of the United Kingdom both in its output and services. In doing so, it should accurately and authentically represent and portray the lives of the people of the United Kingdom today and raise awareness of the different cultures and alternative viewpoints that make up its society. It should ensure that it provides output and services that meet the needs of the United Kingdom's nations, regions and communities. The BBC should bring people together for shared experiences and help contribute to the social cohesion and wellbeing of the United Kingdom. In commissioning and delivering output the BBC should invest in the creative economies of each of the nations and contribute to their development.

Our key findings:

- Audience satisfaction with the BBC overall is relatively high. People in AB socio-economic groups, young people aged 16-24 years old and people without disabilities have a higher overall impression of the BBC across its services, whereas people in DE socio-economic groups and people from Scotland have a lower overall impression.
- Overall, people in Scotland rate the BBC less highly for its delivery of public purpose 4 than those in the other nations and regions. The BBC needs to continue to develop its ways of serving and reflecting Scotland, and to consider how it can do so through its new BBC Scotland TV channel, which it will launch in 2019.
- In our review of representation and portrayal on BBC TV, audiences told us that the BBC is getting better at representing and portraying a wide mix of people. However, there are some audience groups that still feel poorly represented and portrayed. We expect the BBC to continue to make progress in this area in the light of the findings of our representation and portrayal review.
- Since 2010 the BBC has shifted more hours of, and spend on, network productions made out of London. In 2017, just over half of its spend on network productions was made outside London.

Key evidence base

This section provides the core data and research findings which underpin our assessment of how the BBC reflects, represents and serves audiences across the UK.²¹⁶ We set out our evidence relating to

²¹⁶ We consider that the aspect of purpose 4 which references the BBC bringing people together for shared experiences is evidenced by general BBC reach and consumption metrics. For example, 14 million people watched the first episode of *Blue Planet II*, making it the most-watched TV programme of 2017.

how the BBC does this, with reference to the diversity of UK society, including evidence about the nations and regions.

We first provide data about which audiences are consuming BBC content across TV, radio and online, including consumption of regional TV news in the nations, and weekly reach to BBC nations'/local radio. Such measures help indicate the extent to which different audiences are served by BBC content. We then turn to audience opinions of how the BBC represents and portrays them, particularly in relation to TV. We provide key findings from our qualitative research conducted for our representation and portrayal on BBC television review²¹⁷ alongside findings from our BBC Performance Tracker and PSB Tracker. Finally, we set out output and spend evidence relating to the UK nations and regions including data on BBC productions made outside London.

Television consumption

This section provides consumption data relating to different audience groups, focusing on comparisons, where possible, by age, gender, socio-economic group, ethnicity and UK nation, as these are the main groups reportable using the industry measurement currencies (BARB, RAJAR and comScore²¹⁸). Additional analysis by demographic group can be found in the *Range of audiences served* section of purpose 3 (pages 61-65).

Overall decreases in BBC TV viewing in recent years are accentuated among viewers aged 16-34

Viewing to broadcast television overall has decreased since 2010, both in terms of weekly reach and average daily minutes viewed. However, in 2017 viewers across the UK spent an average of 64 minutes per day viewing BBC TV, and BBC One is still the most-viewed TV channel, with an average of 69% of individuals viewing at some point each week. The charts below show the decrease in viewing for BBC channels and the other main PSB channels, comparing all individuals with younger viewers.

²¹⁷ [Representation and Portrayal on BBC Television: thematic review, October 2018](#)

²¹⁸ Ethnicity is not included in the comScore dataset.

Figure 51: Average daily viewing minutes of selected TV channels: 2010 vs. 2017

	Average daily minutes					
	Individuals (4+)			16-34 Adults		
	2010	2017	2010-2017 diff	2010	2017	2010-2017 diff
All broadcast TV	242	203	-39	185	123	-62
All PSBs	147	111	-36	94	54	-40
All BBC TV	80	64	-16	47	26	-21
BBC One	50	44	-6	27	17	-10
BBC Two	17	12	-5	8	4	-4
BBC Four	1.4	1.9	0.5	0.6	0.5	-0.1
BBC News	2.5	2.3	-0.2	1.0	0.7	-0.3
BBC Parliament	0.1	0.1	0.0	0.0	0.0	0.0
ITV	41	30	-11	25	15	-10
Channel 4	15	10	-5	15	8	-7
Channel 5	11	8	-3	8	5	-2

Source: BARB. 'All BBC TV' includes BBC red button as well as BBC Three and BBC HD for 2010

In 2017, younger adults (16-34s) watched a third less broadcast TV than in 2010, decreasing from about three hours per day in 2010 to about two hours per day in 2017. While young people tend to rate the BBC favourably for the services it provides,²¹⁹ their actual BBC TV viewing (in line with their overall PSB TV viewing) has declined by 44%, with most of the decrease coming from BBC One, the most-viewed BBC TV channel.

Turning to weekly reach (see Figure 52), ITV has been more affected than BBC One (13 vs. 9 percentage point reduction) while BBC Four increased its reach to all individuals between 2010 and 2017 (+2pp).

²¹⁹ Ofcom BBC Performance Tracker October 2017 – April 2018

Figure 52: Average weekly reach % of selected TV channels: 2010 vs. 2017

	Weekly Reach %					
	Individuals (4+)			16-34 Adults		
	2010	2017	2010-2017 diff	2010	2017	2010-2017 diff
All broadcast TV	93	90	-3	88	83	-5
All PSBs	90	84	-6	84	72	-11
All BBC TV	86	77	-9	77	61	-16
BBC One	79	69	-9	68	53	-14
BBC Two	56	44	-11	41	26	-14
BBC Four	10	13	2	4.9	3.9	-0.9
BBC News	12	10	-2	5.7	3.8	-2.0
BBC Parliament	0.5	0.6	0.1	0.2	0.1	-0.1
ITV	68	55	-13	57	41	-16
Channel 4	54	42	-11	51	35	-16
Channel 5	41	33	-7	33	23	-10

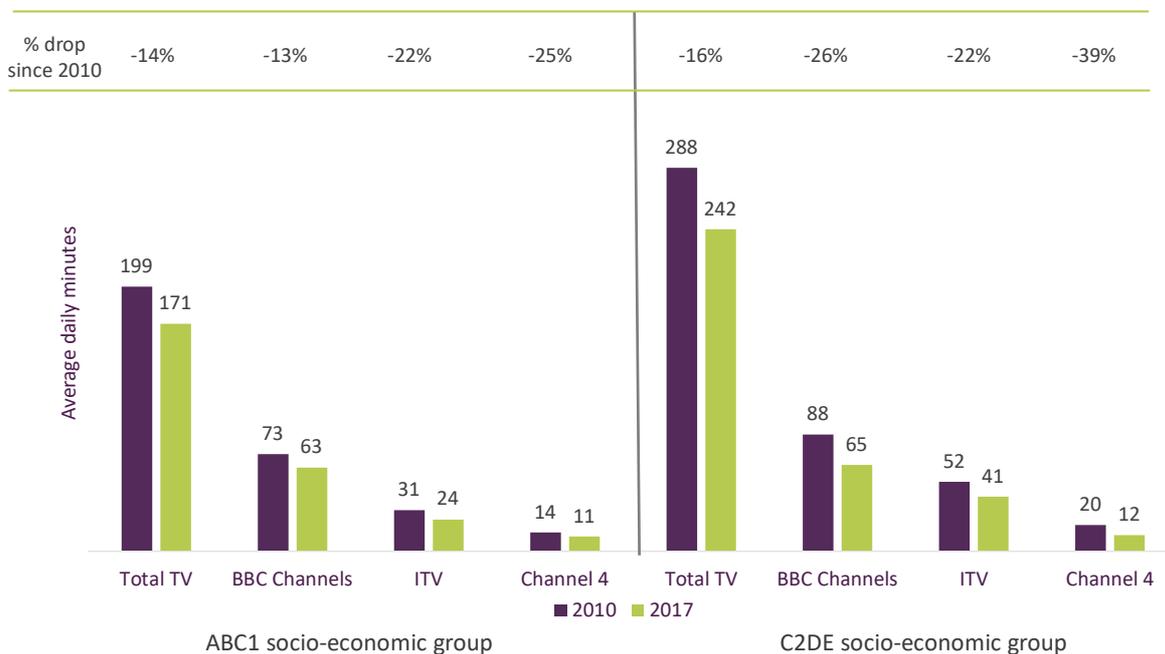
Source: BARB. All BBC TV includes BBC red button as well as BBC Three and BBC HD for 2010. Reach criteria: 15+ consecutive minutes, full weeks used.

As overall minutes viewed on BBC TV have declined, there are an increasing number of young audiences who, in some weeks, do not watch any BBC TV. The weekly reach of BBC TV among adults aged 16-34 decreased from 77% to 61% between 2010 and 2017.

Viewers in the C2DE socio-economic groups now view the same amount of BBC TV as people from ABC1 groups, despite watching much more TV overall

Both ABC1 and C2DE socio-economic groups watched less TV in 2017 than in 2010, but there are a number of differences in their patterns of consumption. Viewers in C2DE socio-economic groups still watch significantly more TV in total. But while both groups have decreased in terms of weekly reach of BBC channels, there is a greater decrease among C2DEs (26%) than among ABC1s (13%). This decrease brings their total viewing of BBC TV into line with that of ABC1s. C2DEs also now watch much less ITV and Channel 4 than in 2010, with the implication that they have not reduced their viewing of multi-channels as much as their viewing of BBC channels and the other main PSBs.

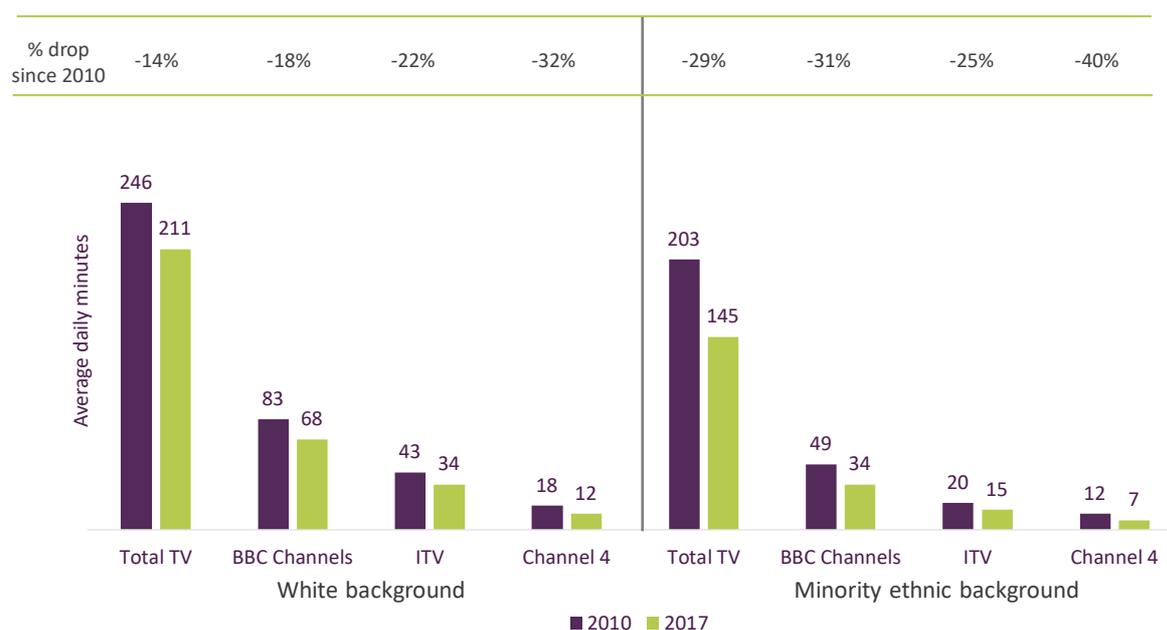
Figure 53: Average daily minutes spent on BBC TV viewing, by socio-economic group: 2010 vs. 2017



Source: BARB, percentage figures refer to the drop in average daily minutes from 2010 to 2017

Viewers from minority ethnic backgrounds watch half as much BBC TV as white viewers

Viewers from a minority ethnic background watched 15 minutes less BBC TV than in 2010 (2017: 34 minutes). Viewers from a white background also watched 15 minutes less, but this comes from a higher base of viewing (2017: 68 minutes). There are similar declines in viewing among people from a minority ethnic background across total TV, BBC TV, and ITV and Channel 4.

Figure 54: Average daily minutes spent on BBC TV viewing, by ethnicity: 2010 vs. 2017

Source: BARB, percentage figures refer to the drop in average daily minutes from 2010 to 2017

There are limited differences in weekly reach across BBC TV in the nations

To provide an overview of how the nations of the UK compare in terms of their weekly reach, Figure 55 shows their relative position when indexed against all individuals (across the UK). A figure lower than 100 means that they watch relatively less BBC TV than the average; a figure higher than 100 means they watch relatively more. Figure 56 shows the amount of viewing each day by the different nations, and to what extent this has changed from 2010 to 2017, relative to the significant declines in viewing across broadcast TV in general.

Figure 55: Average weekly reach in each UK nation indexed against all UK individuals (4+): 2017

	All (4+)	England	NI	Scotland	Wales
Total TV	100	100	101	100	101
All BBC channels	100	100	99	102	102
BBC One & Two	100	99	100	103	104
BBC One	100	99	101	103	105
BBC Two	100	99	92	108	108
BBC Four	100	100	85	104	99
BBC News	100	100	73	99	115
BBC Parliament	100	92	98	151	153

Source: BARB 4+, red/ green figures denote a reach 10% or more lower/ higher respectively than total UK audience. 15-min consecutive minutes.

Within the nations, there are few major differences in weekly viewing by nation, apart from BBC Two, BBC Four and BBC News, which are viewed less in Northern Ireland. Viewers in Scotland and Wales show a slightly stronger interest in BBC Parliament, but this channel is viewed each week by less than 1% of people in each nation.

Viewing in England has declined the least in terms of total TV, yet its decline in BBC TV viewing is the highest of the four nations, at 17 minutes. Viewers in Northern Ireland still watch less BBC TV than those in England each day (57 minutes vs. 63 minutes), but viewers in Scotland (72 minutes) and Wales (74 minutes) both view more. Note that the table below shows change between 2010 and 2017, not the actual average daily minutes.

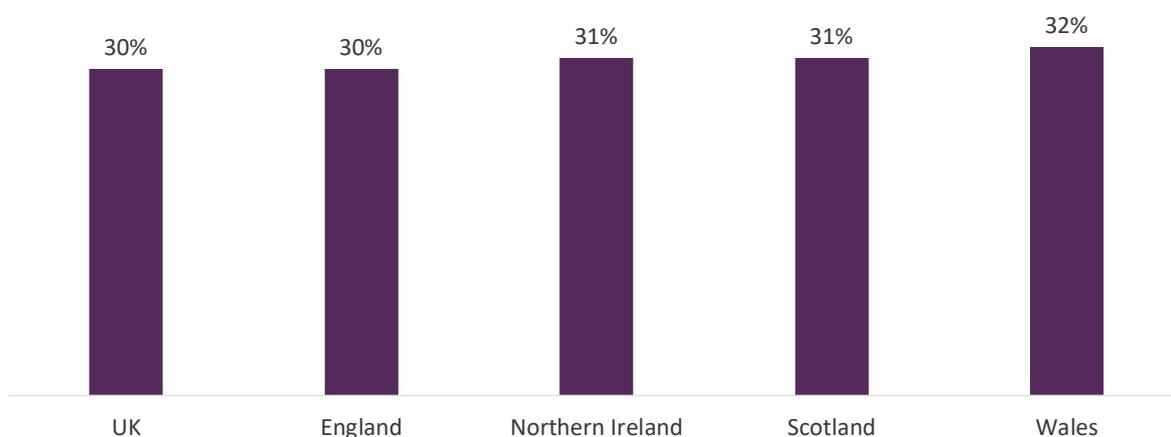
Figure 56: Change in average daily minutes of viewing, by nation and channel: 2010 vs. 2017

	All (4+)	England	NI	Scotland	Wales
Total TV	-39	-38	-51	-43	-47
All BBC channels	-16	-17	-9	-13	-10
BBC One & Two	-11	-12	-6	-8	-3
BBC One	-6	-7	-3	-3	0
BBC Two	-5	-5	-3	-4	-3
BBC Four	1	0	1	1	0
BBC News	0	0	0	0	0
BBC Parliament	0	0	0	0	0

Source: BARB, individuals 4+

Reach to BBC TV regional/national news is very similar in each nation

News and current affairs makes up the majority of content broadcast specifically for the UK's nations and regions. The main BBC One news programmes are shown in the early evening (usually 6pm) and late evening (usually 10pm) and all areas of the UK have their own regional/national variations. The proportion who view on a weekly basis is very similar across the four nations at between 30-32%.

Figure 57: Weekly reach of BBC TV regional/national news by nation: 2017

Source: BARB, BBC regional news, individuals 4+

Radio consumption

Overall, BBC radio listeners are more likely to be older, in an ABC1 socio-economic group and from a white background

In purpose 3, we detailed how BBC radio performs in attracting a range of audiences across its stations. Overall, BBC radio listeners are more likely to be older, in an ABC1 socio-economic group and from a white background.

However, each BBC station has different types of output and therefore attracts different audiences resulting in different audience compositions:

Figure 58: Weekly reach, average age and audience profiles of BBC radio stations: Q1 2018

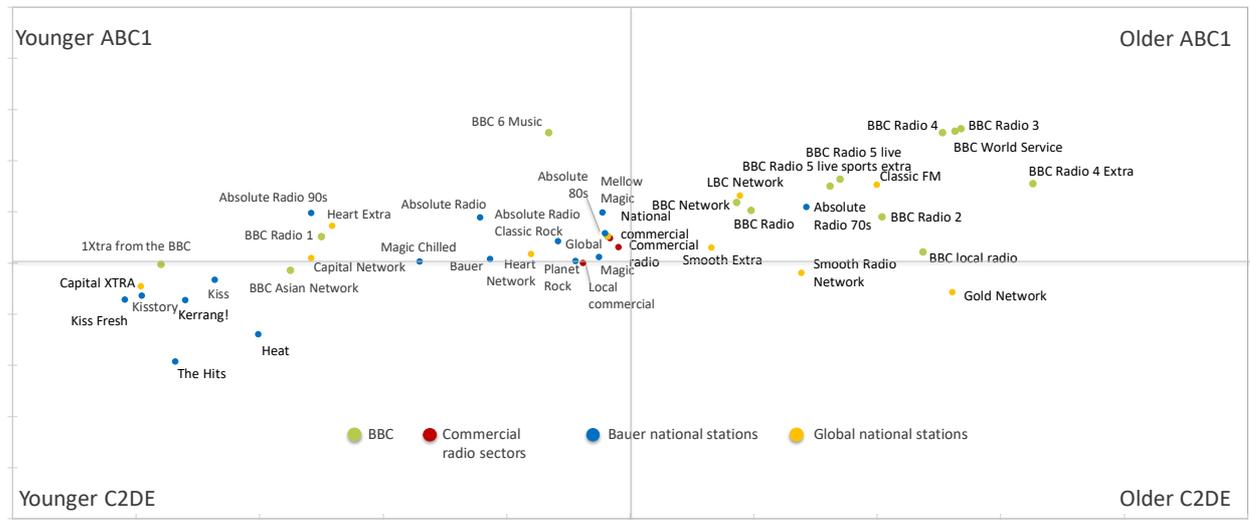
	Weekly reach (adults 15+)	Average age	Age profile (under 45 / over 45)	Gender profile (male / female)	Ethnicity profile (white / minority ethnic)	Socio-economic profile (ABC1 / C2DE)
Any BBC radio	64%	50	40% / 60%	51% / 49%	91% / 9%	60% / 40%
Radio 1	17%	36	75% / 25%	47% / 53%	88% / 12%	55% / 45%
Radio 2	28%	53	30% / 70%	52% / 48%	97% / 3%	59% / 41%
Radio 3	4%	59	23% / 77%	51% / 49%	95% / 5%	76% / 34%
Radio 4	20%	57	25% / 75%	49% / 51%	92% / 8%	75% / 25%
Radio 5 live	9%	52	33% / 67%	73% / 27%	91% / 9%	66% / 34%
BBC local radio	16%	56	26% / 74%	54% / 46%	92% / 8%	52% / 48%
1Xtra from the BBC	2%	30	88% / 12%	58% / 42%	64% / 36%	50% / 50%
6 Music	5%	43	57% / 43%	62% / 38%	94% / 6%	75% / 25%
5 live sports extra	2%	52	34% / 66%	78% / 22%	88% / 12%	65% / 35%
Asian Network	1%	37	77% / 23%	53% / 47%	9% / 91%	49% / 51%
4 Extra	4%	59	17% / 83%	56% / 44%	95% / 5%	65% / 35%

Source: RAJAR Q1 2018

The chart below shows how BBC radio stations compare with national commercial stations in terms of the age and socio-economic profiles of their audiences. It shows that more than half of the audiences for most of the BBC UK-wide radio stations are aged 45 and over, and they are also more likely to be ABC1. The exceptions are 1Xtra, Radio 1, Asian Network and 6 Music, which are more likely to have audiences younger than 45 and be C2DE.

In contrast, the national commercial stations have a range of audience profiles varying by age and socio-economic group.

Figure 59: Audience profile of radio sectors and national stations, by age and socio-economic group: Q1 2018



Source: RAJAR Q1 2018

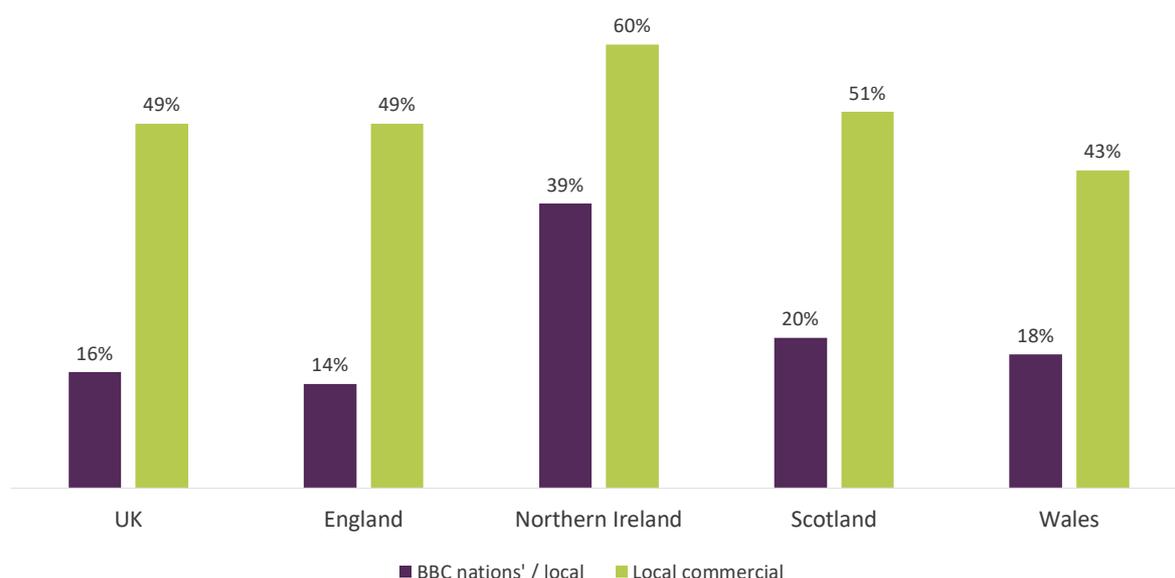
Note: The vertical line shows the split in the age profile of the audience: below 45 and 45+ The horizontal line shows the audience profile split between ABC1 and C2DE listeners.

BBC radio reach varies by nation

BBC radio performs relatively well in Wales, where 71% of adults listen to at least one BBC radio station each week, but in Scotland it has a lower-than-average reach with 58% of adults tuning in. The reach of any BBC radio station in Northern Ireland is on a par with the UK average (64%).²²⁰

Looking at how local radio services compare by nation, three-fifths of adults in Northern Ireland listen to local commercial stations (60%) and four in ten (39%) listen to BBC nations’/local radio. BBC local radio reach is lowest in England, at 14%.

²²⁰ RAJAR Q1 2018

Figure 60: Weekly reach of nations'/local radio by UK nation – BBC vs. commercial: Q1 2018

Source: RAJAR Q1 2018; BBC nations'/local radio TSA in each nation

Online consumption

Overall, BBC online is visited by slightly more users from an ABC1 group than from C2DE

On a monthly basis, BBC sites reach 93% of the adult internet population; its reach is slightly higher, at 96%, among the ABC1 socio-economic group than among the C2DE group (89%). In Q1 2018, 94% of males and 93% of females visited the BBC's online sites each month. Slightly more women than men aged 18-34 (94% vs. 90%) visited the BBC sites. The opposite is true for users aged 55+; slightly more men (95%) than women (88%) visited the BBC online sites.²²¹

Audience attitudes

Attitudes towards the BBC differ by audience group

Our qualitative research, which explores views towards BBC television in depth, found that audiences are, on the whole, largely satisfied with BBC television.²²² But beneath the surface there is a much wider and more nuanced range of attitudes towards the BBC.²²³ Some audiences discussed

²²¹ comScore MMX Multi-platform, [P] BBC Sites, monthly average January – March 2018, age: 18+, UK

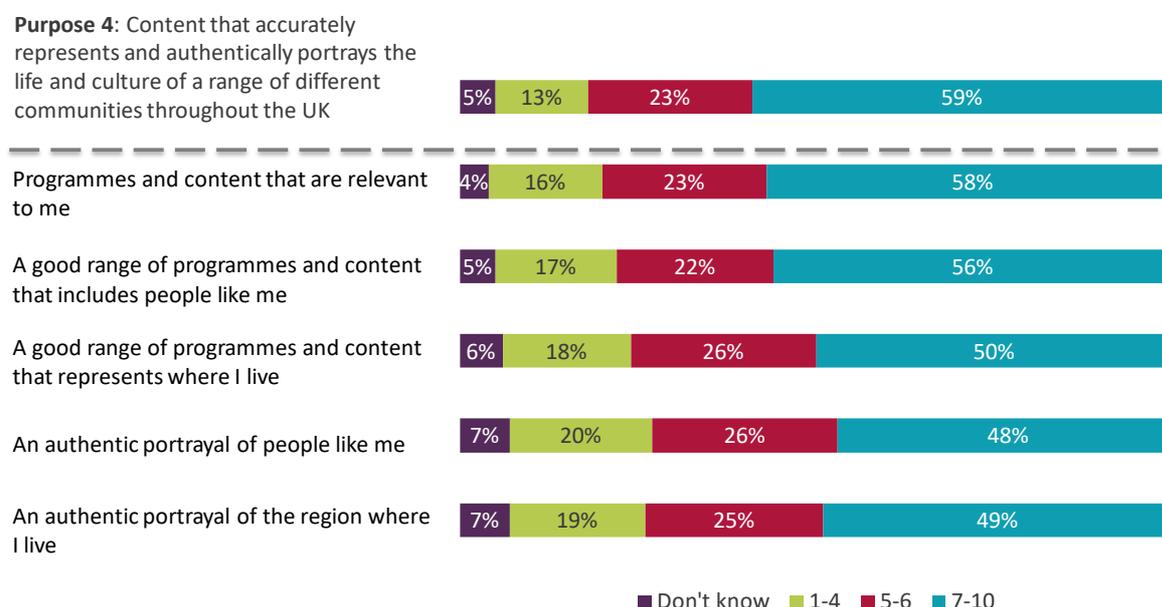
²²² [Representation and Portrayal on BBC Television: thematic review, October 2018](#)

²²³ Indeed, our qualitative research found that issues of representation and portrayal are not at the forefront of people's minds when they consider the BBC, and indeed, other broadcasters. When they think of television services they think primarily of entertainment, escapism and relaxation. However, on consideration and deliberation of the issues, the representation and portrayal of the range of diverse groups of the UK was in fact, seen as very important and the BBC, as a public service broadcaster, was seen as having a duty to fulfil this purpose.

feeling less well-served in terms of both their representation and portrayal on BBC television. Some people, including older women, and people from DE socio-economic groups, said they felt under-represented by the BBC. Others, particularly disabled people, LGBT people, and those from minority ethnic backgrounds, wanted more authentic and less stereotypical portrayal from the BBC.

These views are broadly reflected in responses to our tracking survey. When asked to rate the extent to which the BBC provides *content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK*, 59% of all UK adults rate it highly (7-10), as Figure 61 illustrates.²²⁴ People in AB socio-economic groups are more likely to rate the BBC’s performance highly (66% rate it 7-10), while people aged 65+ (55%) and those from a DE socio-economic background are less likely to do so (52%).²²⁵

Figure 61: Audience views of BBC delivery of purpose 4: 2018



Source: BBC Performance Tracker 2018. Base: All respondents (4099) Question: C2. On a scale of 1 to 10 where 1 means not at all well and 10 means extremely well, how well, if at all, do you personally think the BBC as a whole provides:/ C9. This set of statements are about the BBC’s responsibility to reflect, represent and serve diverse communities within all the UK’s nations and regions.

²²⁴ According to the BBC’s own research, 62% of UK adults think the BBC is effective at providing content and services relevant to them; 56% that it is effective at catering for the part of the UK in which they live; 56% that it is effective at reflecting people like them; and 55% that it is effective at reflecting the part of the UK they live in ([BBC Annual Report 2017/18](#)).

²²⁵ Ofcom BBC Performance Tracker October 2017 – April 2018

Looking at the specific statements relating to purpose 4, the BBC rates highest on providing *programmes and content that are relevant to me* (58%). Women (60%), younger audiences (aged 16-24, 62%) and those in ABC1 socio-economic groups (64%) rate the BBC more highly on this measure than the overall UK response. Those in C2DE socio-economic groups (52%), from a minority ethnic background (53%) and people with a disability (52%) are less likely to do so.²²⁶

As Figure 61 shows, people are more likely to rate the BBC highly in regard to representation of themselves (*includes people like me*) than for portrayal (*an authentic portrayal of people like me*). These findings align with our qualitative research, in which people from some audience groups discussed how they felt that they were not always portrayed authentically.²²⁷

Our PSB Tracker also provides some useful context about perceptions of the individual BBC TV channels, as well as comparisons with other PSB channels. As we can see in Figure 62 seven in ten viewers rate BBC One, BBC Two, and BBC Three highly for showing different cultures within the UK, with six in ten rating BBC Four highly in this regard.²²⁸ There has been an increase since 2015 in viewers of BBC One and Two, and ITV, rating these channels highly for showing different cultures within the UK.

Figure 62: TV viewer opinions of PSB channel delivery related to showing different UK cultures: 2017

	Its programmes show different kinds of cultures within the UK
	7-10 rating %
BBC One	69
BBC Two	68
BBC Three	69
BBC Four	59
ITV/STV/ITV Wales/UTV	62
Channel 4	68
Channel 5	58

Source: Ofcom PSB Tracker 2017. Q15 - How would you rate each channel individually on this statement, on a scale of 1 to 10, where 10 is the highest score and 1 is the lowest? Summary % of respondents rating delivery 7-10 out of 10. Base: Self-reported regular viewer of BBC One (2207), BBC Two (1030), BBC Three (200), BBC Four (389), ITV (1884), Channel 4 (1232) and Channel 5 (867)

²²⁶ Ofcom BBC Performance Tracker October 2017 – April 2018

²²⁷ [Representation and Portrayal on BBC Television: thematic review, October 2018](#)

²²⁸ These higher ratings for individual BBC channels, compared to the ratings for overall BBC delivery for purpose 4, are largely explained by the difference in the focus of the question – a particular channel vs. the BBC overall – and by the difference in the sample – the PSB tracker focuses on regular viewers of each channel, while the BBC performance tracker reports on all adults.

People in Scotland are less likely to rate the BBC highly

Nearly two-thirds (64%) of the UK population rate the BBC highly, across all its services taken together.²²⁹ People in England (65%), Wales (69%) and Northern Ireland (63%) rate the BBC more favourably than those living in Scotland (52%).

When asked to rate the extent to which the BBC provides *content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK*, six in ten (59%) UK adults rate the BBC highly. People in Scotland rate the BBC's performance on this purpose lower than the other nations (51%).²³⁰

In general, people in Scotland rated the BBC lower than the other nations, as Figure 63 below shows. There is little differentiation by English region, although people in the South and West regions are more likely to rate highly some of the BBC's performance in relation to these statements compared to the UK average.²³¹

Figure 63: Audience views of BBC delivery of purpose 4, by nation: 2018

	Total Sample	Nation			
		England	Scotland	Wales	Northern Ireland
Base	4099	3104	358	337	300
Programmes and content that are relevant to me	58%	59%	46%	57%	55%
A good range of programmes and content that includes people like me	56%	57%	47%	57%	53%
A good range of programmes and content that represents where I live	50%	51%	39%	47%	49%
An authentic portrayal of people like me	48%	49%	39%	47%	47%
An authentic portrayal of the region where I live	49%	50%	37%	46%	47%

Source: BBC Performance Tracker 2018. Base: All respondents (4099). Circles indicate groups that are 95% statistically significant above/below the total UK sample for rating 7-10. Question: C2. On a scale of 1 to 10 where 1 means not at all well and 10 means extremely well, how well, if at all, do you personally think the BBC as a whole provides:/ C9. This set of statements are about the BBC's responsibility to reflect, represent and serve diverse communities within all the UK's nations and regions.

Our qualitative research found that people in Northern Ireland, Scotland and Wales felt the BBC had a London/South-East bias. However, they also generally considered it to be performing well compared to other broadcasters in terms of reflecting their nation. For example, many people in Wales appreciated having a dedicated Welsh variant of BBC One, and felt that the production of

²²⁹ Overall positive impression measured by those rating 7-10 on a scale of 1-10 on Ofcom's BBC Performance Tracker 2017/18

²³⁰ Ofcom BBC Performance Tracker October 2017 – April 2018

²³¹ *ibid*

dramas depicting life in Wales - including *Hinterland* and *Keeping Faith* - generally gave Wales greater visibility.

There was, however, a strong sense among many that more could be done, particularly in relation to producing and broadcasting more network content from the nations, and further improvements around positive representation and portrayal of each nation, including coverage of towns and cities outside the hubs, rural areas, remote communities and less affluent communities.

Results from our PSB Tracker tend to show higher ratings for individual BBC TV channels. As Figure 64 shows, the *representation* of different parts of the UK is rated more highly than their *portrayal* across the PSB channels, except for ITV where there is no difference between the two statements. Views about representation have largely remained the same since 2015, except for BBC Three, whose viewers feel more positively now. In terms of portrayal, viewers are now more likely than in 2015 to rate BBC Two and BBC Three highly, with little change for the other channels.

Figure 64: TV viewer opinions of PSB channel delivery related to geographic representation and portrayal: 2017

	It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales	It portrays my region/nation fairly to the rest of the UK
	7-10 rating %	7-10 rating %
BBC One	70	59
BBC Two	62	47
BBC Three	63	49
BBC Four	53	38
ITV/STV/ITV Wales/UTV	64	63
Channel 4	56	39
Channel 5	52	39

Source: Ofcom PSB Tracker 2017. Q15 - How would you rate each channel individually on this statement, on a scale of 1 to 10, where 10 is the highest score and 1 is the lowest? Summary % of respondents rating delivery 7-10 out of 10. Base: Self-reported regular viewer of BBC One (2207), BBC Two (1030), BBC Three (200), BBC Four (389), ITV (1884), Channel 4 (1232) and Channel 5 (867)

Output and spend data relating to nations and regions production

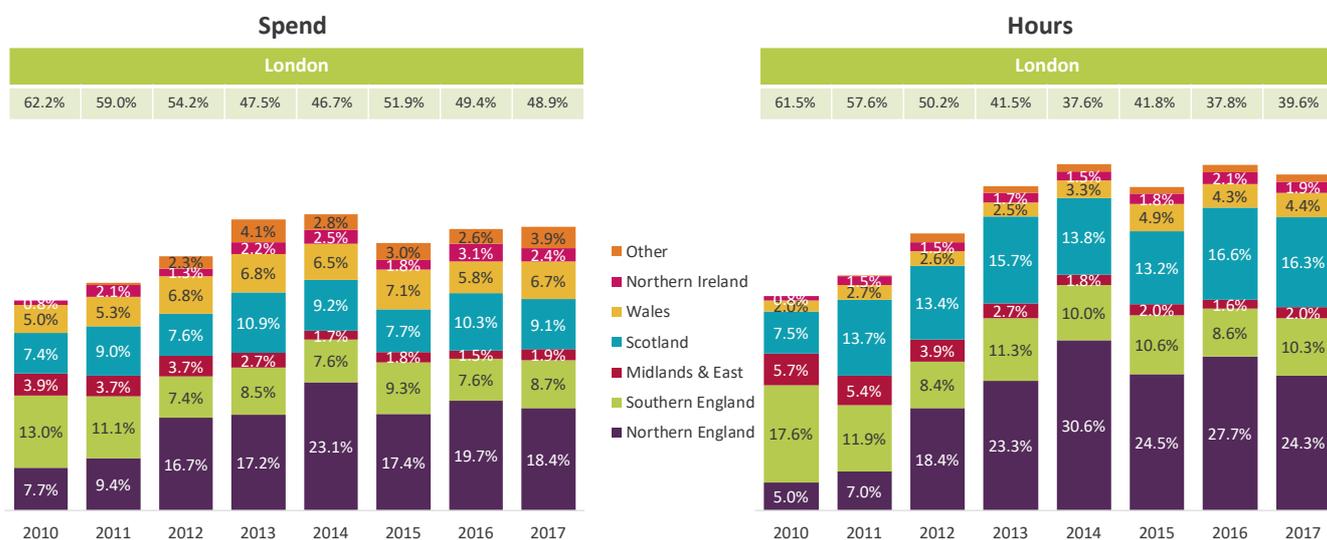
The BBC has increased its proportion of productions made outside London since 2010

Since 2010 the BBC has increased the proportion of qualifying network productions produced outside London. While 62% of qualifying hours²³² were made in London in 2010, this was down to

²³² See [Regional production and regional programme definitions](#).

40% in 2017. The north of England – driven by the relocation of departments such as BBC Sport and Children’s to Salford in 2012 – has been the main beneficiary, producing nearly a quarter (24%) of the BBC’s qualifying hours in 2017 compared to 5% in 2010.

Figure 65: BBC expenditure on, and hours of, originated network productions outside London: 2010-2017



Source: Ofcom/BBC. Note: Figures do not include network news production. The category ‘other’ refers to programmes made by producers based within the M25 which qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25, but not all in one macro-region, and therefore cannot be attributed to a single region. See [Regional production and regional programme definitions](#) for further details.

There has been a similar shift over the same time period when looking at spend. While 62% of all qualifying spend was on London-based productions in 2010, this dropped below half for four of the past five years and stood at 49% in 2017. The North of England, through Salford, has again been the main beneficiary of this shift, with 8% of spend in 2010 rising to 18% in 2017. However, the move to Salford – alongside the increase in production in the nations discussed below – has led to declines across the rest of England.

Scotland, Wales and Northern Ireland have also benefited from the BBC’s increased number of commissions made outside London in recent years. Total spend across the nations increased from 13% of total spend in 2010 to 18% in 2017, peaking in 2013 at 20%. Hours increased from 10% to 23% of total hours over the same period, slightly down from the 2016 high.

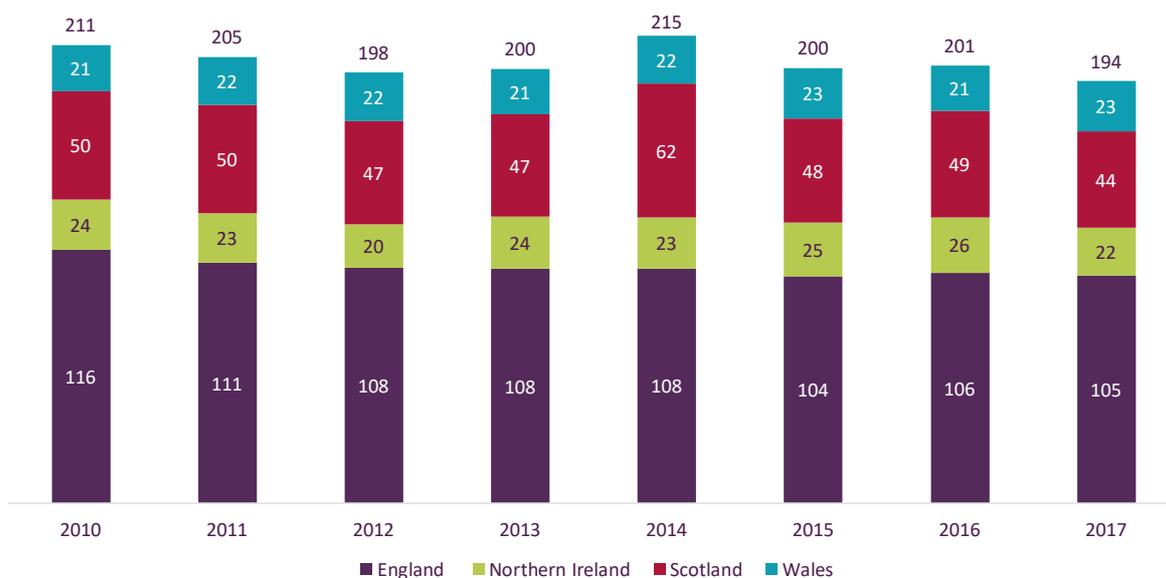
The strategies when it comes to BBC production in the nations have varied over this period. Wales and Northern Ireland have been producing high-value drama productions in recent years – such as *Doctor Who* and *Line of Duty* – which brings spend levels up to complement high-volume productions such as *Bargain Hunt* and *Wanted Down Under*. Meanwhile, Scotland has produced a broader range of qualifying productions over this period, including high-volume productions like snooker coverage and *Eggheads* and network comedies like *Mrs Brown’s Boys* and *Still Game*.

The BBC spent £194m on programmes for the nations and regions in 2017

The BBC produces a range of programming for the UK's nations and regions apart from networked content²³³ shown across the UK, spending £194m on such programming in 2017. Across England, this mainly consists of news and current affairs output, covering local issues across 12 English regions. In 2017, the BBC spent £105m on such content – across 4,159 hours of content – which has been relatively stable in real terms since 2012.

While the bulk of output for Scotland (455 hours in 2017), Wales (392 hours) and Northern Ireland (431 hours) is also news and current affairs programming, there is a greater range of additional local content broadcast for the nations, compared to England. A large part of that is driven by sport, particularly rugby coverage in Wales and Northern Ireland, and football in Scotland. However, in 2017 there were also consumer shows (such as BBC Wales' *X-Ray*), comedy shows (such as BBC Northern Ireland's *The Blame Game*) and dramas and soaps (like BBC Scotland's long-running *River City*). Spend on all output for the nations stood at £90m in 2017, the lowest figure since 2012 in real terms.

Figure 66: BBC spend on non-network content, by nation (£m): 2010-2017



Source: Ofcom/BBC. Figures do not include spend that cannot be attributed to individual programmes, such as presentation, commissioning, scheduling, copyright and helpline.

There were 648 hours of first-run UK-originated hours shown on BBC Alba in 2017

BBC Alba broadcasts a range of Gaelic-language programming across Scotland and is a partnership between the BBC and the Scottish Government-funded MG Alba. In 2017, the channel broadcast 648

²³³ By 'network content', we mean content shown to the whole of the UK.

hours of first-run UK-originated content (a 58-hour reduction on 2016), of which 27% was news and current affairs.

Spend on first-run UK-originated content for BBC Alba stood at £15.4m in 2017, an 8% year-on-year decline on 2016 in real terms. However, this was still the third highest annual spend since the channel launched in 2008. The BBC's contribution to BBC Alba content was £7.9m in 2017/18, a 29% real-terms increase on the previous year.²³⁴

There is limited BBC network radio production outside England

All of the BBC's network radio stations are based in England, with some programming for BBC Radio 3 and BBC Radio 4 produced in the other UK nations in 2017/18. As such, the vast majority (97%) of BBC network radio spend was attributable to England in 2017/18.

Figure 67: BBC spend on network radio, by nation (£m): 2017/18 vs. 2016/17



Source: BBC Annual Report 2018. Note: 2016/17 figures are presented in real terms.

Beyond network radio, there are multiple local radio stations across England as well as stations for Scotland, Wales and Northern Ireland. Spend on these services stood at £191m in 2017/18, a 2% increase in real terms on the previous year.

²³⁴ [BBC Annual Report 2017/18](#)

Figure 68: BBC spend on local and nations radio (£m): 2010/11-2017/18



Source: BBC Annual Report. Note: Figures are in real terms

Most BBC online and red button spend takes place in England

The majority (85%) of spend on BBC online and the red button services was attributed to England in 2017/18. £27m was spent in Scotland, Wales and Northern Ireland, £22m of which was on local content for each nation.

Figure 69: BBC spend on online and red button; by nation (£m): 2016/17 vs. 2017/18



Source: BBC Annual Report 2018. Note: Figures are in real terms.

Performance assessment

Our assessment considers the BBC's performance in delivering for diverse communities in the UK and its delivery across the nations and regions. It also looks at the BBC's investment in the creative economy across the UK.

People's perspectives and experiences do not depend on just one characteristic; they are influenced by multiple, intersecting layers of identity, location, and background. Our data on satisfaction and perception provides insight on these different elements. Our review of representation and portrayal in television, which has been published alongside this report, has informed this year's assessment of the BBC's delivery of public purpose 4 and should be read in conjunction with it.²³⁵

The Licence includes conditions relating to public purpose 4, with the aim of improving the BBC's representation and portrayal of the diverse communities of all the UK's nations and regions.²³⁶ We also place specific conditions on the percentage of hours of, and spend on, programme-making outside the M25, and in the nations and regions. Next year, we will assess the BBC's performance against these conditions.

Audience satisfaction with the BBC is relatively high, but there are variations by audience group

Audience satisfaction with the BBC's services overall is relatively high.²³⁷ People in AB socio-economic groups, young people aged 16-24 years old and people without disabilities have a higher overall impression of the BBC across its services, whereas people in DE socio-economic groups, and people from Scotland have a lower overall impression.²³⁸

Just over two-thirds of TV audiences (68%) are satisfied with BBC television services. People in the AB socio-economic group have a higher level of satisfaction with BBC TV, while people from minority ethnic backgrounds, disabled people, and people in DE socio-economic groups tend to have a lower level of satisfaction.²³⁹

Overall, radio audiences are even more satisfied with the BBC.²⁴⁰ People from a white background, people in ABC1 socio-economic groups, and older people have a higher overall impression of BBC radio services. Younger adults, people in DE socio-economic groups, and those from minority ethnic backgrounds are generally less satisfied with BBC radio.²⁴¹

²³⁵ [Representation and Portrayal on BBC Television: thematic review, October 2018](#)

²³⁶ See [Operating Licence](#), paragraphs 2.43-2.96.3

²³⁷ Ofcom BBC Performance Tracker October 2017 – April 2018

²³⁸ *ibid*

²³⁹ *ibid*

²⁴⁰ *ibid*

²⁴¹ *ibid*

People are generally satisfied with BBC online services. People aged 16-24 are more likely than older users to be satisfied with the BBC's online services, as are those in AB socio-economic groups and people without disabilities.

People in Scotland are less satisfied than those in the other nations and regions with the BBC's delivery of the public purposes, including purpose 4

Overall, people in Scotland generally rated the BBC lower for its delivery across the public purposes than people from other nations and regions, including purpose 4.²⁴² The BBC needs to continue to develop its ways of serving and reflecting Scotland and consider how it can do this through its new BBC Scotland channel, which launches in 2019.

Audience consumption data can provide insight into how well audiences are being served

Audience consumption data can indicate how well audiences are being served. The BBC's reach remains high overall, with more than nine in ten adults consuming BBC content each week.²⁴³ Each week, BBC television reaches 77% of individuals aged 4 and older²⁴⁴ and its radio stations reach 64% of individuals aged 15 and older.²⁴⁵ Its online services reach 93% of the adult internet population each month.²⁴⁶

BBC television viewing has declined, as has viewing for television overall, but it declined more significantly between 2010 and 2017 among people from minority ethnic backgrounds, C2DE socio-economic groups and younger adults.²⁴⁷ We explore the challenge facing the BBC of serving young people in our public purpose 3 performance assessment. People in C2DE socio-economic groups now watch a similar amount of BBC television as people in ABC1 socio-economic groups, even though they watch more minutes of television overall.

While each BBC radio station has a different type of output to attract different audiences, overall its listeners tend to be older, from an ABC1 socio-economic group and from a white background. Radio 2 has the highest reach of the BBC's stations, attracting 28% of the adult population, but we note that only 3% of its audience is from a minority ethnic background.²⁴⁸ The BBC's Asian Network and 1Xtra have been more successful than the main BBC radio stations in appealing to people from minority ethnic backgrounds.

We have limited data about the characteristics of people who use BBC online services, but found its reach is slightly higher, at 96%, among the ABC1 socio-economic group than among the C2DE socio-economic group (89%).

²⁴² Ofcom BBC Performance Tracker October 2017 – April 2018

²⁴³ See Figure 2

²⁴⁴ See Figure 40

²⁴⁵ See Figure 58

²⁴⁶ See page 96

²⁴⁷ Ofcom using BARB data comparing 2010 with 2017

²⁴⁸ RAJAR Q1 2018

The BBC has made progress in representing and portraying the diverse communities of the UK and we expect it to continue to improve

In our representation and portrayal review, audiences told us in our qualitative research that the BBC, and TV in general, is better at representing and portraying a wider mix of people than it used to be. While historically some groups were marginalised on TV, people feel the situation has improved and things are changing for the better.

But some people still feel less visible on TV. For example, representation of older women is felt to be restricted to a subset of roles and genres, and some people feel BBC content reflects the lives of middle class people more than those from other backgrounds.

Others raised concerns about being presented in one-dimensional, inauthentic or stereotypical ways. Some disabled people said that the BBC, and TV in general, tends to focus on their difficulties and struggles. Portrayal of transgender experiences is felt to focus on the negative and the medical. Lesbian, gay and bisexual people said TV often gives a skewed impression of them and their experiences. Some people from Black African and Black African-Caribbean backgrounds often feel portrayed negatively and feel as though they are portrayed from a narrow perspective. The research found that audiences connect with programmes they feel are authentic, and as a result these programmes can have broad appeal.

The BBC is seen to compare well to others in representing and portraying the nations and regions, and people in the nations cited several examples of positive representation and portrayal such as *Peaky Blinders* (Birmingham, England), *Line of Duty* (Northern Ireland), *Keeping Faith* (Wales) and *Shetland* (Scotland). However, there is a clear appetite for the BBC to do more. In particular, people want to see more representation of the UK outside of its major cities, and especially London.

The BBC could adopt a more nuanced approach to programme making, to reflect diversity within groups as well as between them. A richer understanding of this diversity helps broadcasters make programmes that feel more authentic to their audiences.

The review will act as a baseline for assessing the BBC's future performance. We will monitor this closely, alongside its compliance with relevant conditions in the Licence. If we find that the BBC is failing to meet its objectives, or if we decide progress is too slow, we will consider revising the Licence.

The BBC has increased its hours of, and spend on UK-originated network productions made outside London

As well as content on national and regional services, much of the BBC's network content is produced in the UK's nations and regions.²⁴⁹ There has been a significant shift since 2010 in the proportion of spend, and hours of content produced outside London, peaking in 2014.²⁵⁰ Just over 51% of the

²⁴⁹ We are currently reviewing our guidance on regional TV production and programming, and plan to publish our consultation in the coming months.

²⁵⁰ Ofcom using data from the BBC.

BBC's spend on UK originated network productions was made outside London in 2017. The main beneficiaries in recent years have been the North of England, with the move of some BBC operations to Salford, and Scotland, Wales and Northern Ireland. An overall decline in BBC TV content spend, and the shift to other parts of the UK, has led to decreases in other parts of England.

The Licence includes conditions on the production of out-of-London content, including by nation and region;²⁵¹ we will monitor the BBC's performance against these conditions and report on this in future Annual Reports.

²⁵¹ [Operating Licence](#), paragraph 2.53