Ofcom's annual report on the BBC: 2018/19

Annex 2: BBC Performance Report

Publication date: 24 October 2019

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1. Introduction

The Performance Report uses the measurement framework published in October 2017[1] which 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, platform 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 BBC, engagement with stakeholders, and additional qualitative or other third-party research. Contextual factors may vary from year to year.

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 2017/18 report was the first published report since Ofcom acquired regulatory duties for the BBC, and as such covered long-term trends in order to set the scene for ongoing assessment. This year's report provides a second year of data and primarily focuses on how the BBC has performed relative to the 2017/18 benchmark year, with longer-term trends referenced where necessary.

We have drawn on a number of sources to assess the BBC's performance across the four measures and these are summarised in an annex. The time periods vary depending on the metric and source used and are clearly stated. In addition, different sources use different bases or different definitions, so some demographics may vary slightly according to which metric is being used. There are extensive data available for each of the measures within our framework; these are available in the interactive report, published separately.

[1] 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.

Key findings

Across all platforms, the BBC is facing increasing challenges, particularly from online content providers. This is evident most acutely in the BBC's ability to attract and retain audiences as they turn away from BBC services to find content that is relevant to them elsewhere, including on subscription-video-on-demand services and advertising-funded online services such as YouTube.

Overall, BBC services continue to be more likely to be used by older people and those from higher socio-economic backgrounds. Broadly, those in lower socio-economic backgrounds, people living in the nations and older people are more likely to have concerns about the BBC's delivery of the purposes.

Public Purpose 1

- The way people consume news nowadays is changing, with online news and social media playing an increasingly important role, especially for young people.
- Despite this, the BBC remains the most-used news provider overall, although its reach has decreased the previous year.
- Audiences continue to rate BBC TV news highly for accuracy and quality, but also continue to rate it less highly for impartiality.

Public Purpose 2

Audiences rate the BBC highly for its education and learning output in the UK.

- This year, although there have been declines in the hours of genres such as arts and classical music, there have been increases in genres such as history and religion & ethics.
- The BBC provides informal learning content specifically for children through CBeebies and CBBC. As it did last year, reach to, and viewing by children aged 6-12 continues to decline. This year CBeebies also saw a decline in its reach to, and viewing by, children aged 4-6.

Public Purpose 3

- The BBC continues to perform well in providing a broad mix of content. BBC One broadcasts a greater range of output than ITV during the peak-time hours of 6pm to 10:30pm.
- Although spend on TV still dominates the BBC's overall content spend, this has decreased over time as spend on online and other areas such as development have increased.
- Although there have been some improvements in the perceptions of minority ethnic group and older audiences in its delivery of this purpose, audiences in Scotland and those in lower socio-economic backgrounds continue to rate the BBC lower.

Public Purpose 4

- The BBC continues to perform highest on its provision of relevant content, and least well on authentic portrayal.
- In particular, older people do not rate the BBC highly for portraying people like them authentically and those in lower socio-economic groups continue to rate the BBC lower on all aspects of representation and portrayal.
- There have been improvements in the perceptions of people from a minority ethnic background, largely driven by more positive opinions among the Asian population.

- In the nations, the representation and portrayal of Scotland, in terms of both people and places, is considered to be a particular weakness. There are also concerns that the BBC is not providing a sufficiently good range of programmes and content that represents people living in Wales.

2. Overall BBC performance

Summary

Overview of the BBC's performance

Across all platforms, the BBC is facing increasing challenges, particularly from online content providers. This is most acutely apparent in the BBC's ability to attract and retain young audiences as they turn away from BBC services to find content that is relevant to them elsewhere, including on subscription-video-on-demand (SVoD) services and advertising-funded online services such as YouTube.

Cross-platform

- Nine in ten adults consume some BBC content each week.
- But audiences spend on average ten minutes less with the BBC each day compared to 12 months ago.

BBC television

- Viewing behaviour continues to shift towards alternatives to broadcast TV, in particular online video services.
- Although BBC channels reach slightly more 16-24s than ITV channels, less than half of all 16-24 year-olds now watch BBC TV on the TV set and they spend less time on BBC TV compared to the ITV portfolio channels.

BBC radio

- The BBC's share of the radio market has been declining, particularly due to the strength of national commercial stations. This sector has been increasing its reach across all age groups, while BBC stations have been losing, particularly among the under-45s, with BBC losing 4% of its reach to listeners in this age group as national commercial stations increased by 4%.
- In the past year the BBC has invested in online audio, launching BBC Sounds and producing a broad range of on-demand content.

BBC online

- Although reach has been stable, the amount of time spent on BBC sites has fallen by around 30% over the past year.

Overall audience perceptions

- Satisfaction with the BBC overall remains relatively high, particularly with BBC online.
- Importance to society for all purposes has increased significantly compared to last year.
- Although the BBC is generally seen to be performing well in information and news provision, representation and portrayal continue to be areas in which the BBC is seen to perform less well.

Before assessing the BBC's performance against each public purpose, it is useful to consider the BBC's overall performance across its various platforms and to understand some of the changes in audience behaviour across these platforms, as more choices are offered by a wider range of providers.

Cross-platform consumption

Nine in ten adults consume some BBC content each week

The BBC provides a range of content for audiences to watch, listen to or read across all platforms. Industry metrics provide us with estimates of how many people consume services within each platform (BARB for TV, RAJAR for radio and Comscore for online) but for us to understand cross-platform consumption we have used TouchPoints data.[2] It shows that 93% of adults consume some BBC content each week across TV, radio or online, varying by demographic. For example, among 15-24 year-olds, the figure is 85%, compared to 95% for those aged 65 and older.

On average, adults in the UK use 3.6 different BBC services each week,[3] but again, there are differences by demographic: men are more likely than women to use more BBC services; 16-24 year olds use fewer services than 25-74 year olds; and higher socio-economic groups use more services than lower groups.

Figure 1: Weekly reach, by BBC platform

	2017/18	2018/19
Any BBC service*	92%	93%
BBC TV	76%	73%
BBC Radio	64%	62%
BBC Online **	92%	92%

*Source: TouchPoints 2018 and 2019; BARB standard viewing on TV sets up to 7 days after broadcast, individuals 4+; RAJAR Q1 with 12-month weight; **Comscore MMX Multiplatform, adults 18+, March 2018 and 2019 (excluding commercial sites), UK*
**BBC services measured:*
BBC TV = BBC One, BBC Two, BBC Four, BBC News channel, BBC Parliament, CBBC, CBeebies, BBC red button
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, nations'/local radio.
BBC iPlayer
BBC online excl. commercial activities

Audiences spend ten minutes less with the BBC each day compared to 12 months ago, with time spent with BBC online falling by 30% since last year

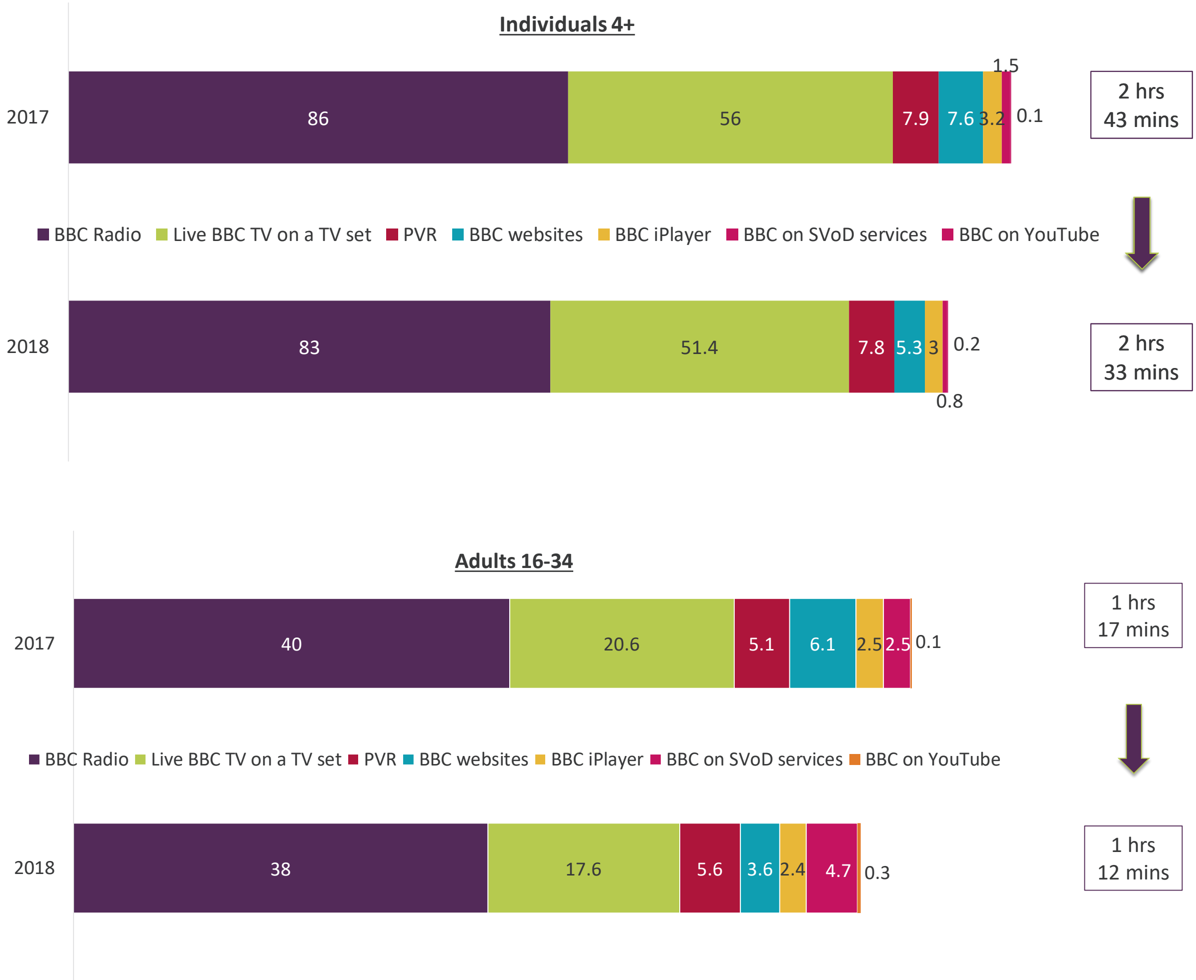
Currently, there is no industry cross-media, cross-platform currency available to allow us to measure how long the average person spends with the BBC in a typical day; so, using the available currencies, we have estimated these figures. In 2018, audiences consumed on average 2 hours 33 minutes of BBC content each day, ten minutes less than in 2017. The largest proportion of time was with BBC

[2] TouchPoints is an annual survey commissioned by the IPA. See annex for further details.
[3] BBC Performance Tracker 2018/19. BBC service includes individual BBC TV channels, individual BBC radio stations, BBC iPlayer, BBC Sounds, BBC online.

radio stations, accounting for 55% of average daily minutes. Time spent watching broadcast BBC TV on a TV set has fallen furthest in absolute terms (-4.7 minutes) but time spent with BBC websites has fallen furthest proportionally (-30%) despite the increasing focus by the BBC on its online delivery.

Audiences, especially younger viewers, are more likely to watch BBC content on SVoD services rather than through BBC iPlayer (4.7mins per day on SVoD vs. 2.5mins per day on iPlayer for 16-34 year-olds), suggesting that one possible strategy for reaching this group is ensuring that BBC content is widely available on services they are already accessing.

Figure 2: Estimated total BBC minutes per day, all individuals 4+, 16-34s: 2017 vs. 2018

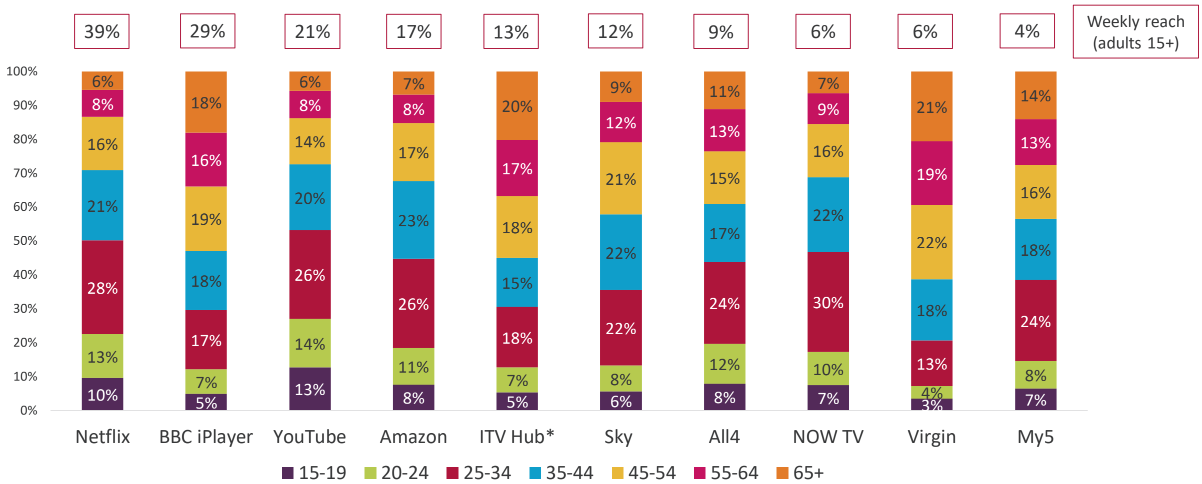


Source: TV (BARB, BARB TV player reports, GfK SVoD data and TouchPoints), radio (RAJAR) and websites (Comscore MMX). BBC Three is not included separately (other than within BBC iPlayer) as no way of measuring minutes consumed has been developed to date.

Although BBC iPlayer is the second most used VoD service overall, among young people it is ranked third behind Netflix and YouTube

The most used on-demand service is Netflix with around two fifths of adults using it each week followed by BBC iPlayer with a weekly reach of 29%. However, looking at the use among younger adults aged 15-24, the challenge faced by the BBC is evident as Netflix reaches almost two thirds of this age group (up from 56% in the previous year) compared to BBC iPlayer that reaches 26% (down from 28% a year ago). YouTube is also more likely to be used by young people to watch programmes than BBC iPlayer with a weekly reach of 42%. The audience profiles of the services also reveal the appeal of the platforms with YouTube having the youngest audience (27% aged 15-24) followed by Netflix (23%) and then All4 (20%).

Figure 3: Age profile of weekly users of top 10 most used VoD services: 2019



Source: TouchPoints 2019; ranked by weekly reach of adults 15+
**includes ITV Hub+ and STV Player*

BBC television

The BBC is struggling to retain audiences as it has historically done in response to changing audience consumption patterns

The challenge to attract viewers, particularly younger audiences, is one facing all broadcasters, not just the BBC. Although broadcast content still accounts for the majority of viewing, the decline in viewing is accelerating. Online content delivery and the expansion of global video providers, notably Netflix and YouTube, are driving fundamental shifts in viewing habits and industry structures. The internet is massively increasing the choice available to UK viewers. More than half of UK households now have their TV connected to the internet and eight in ten adults have a smartphone, which they are increasingly using to watch video.[4] Around half of UK households now subscribe to at least one subscription- video-on-demand (SVoD) service (such as Netflix or Amazon Prime Video)[5] and UK adults watch, on average, about half an hour of YouTube per day.[6]

Around 70% of time spent viewing programmes is live TV on a TV set, decreasing to 40% for 15-24 year-olds. For this age group, the biggest proportion of TV viewing is to Netflix (34%) followed by any BBC (18%). This is in contrast to all adults, where 32% of time spent watching TV programmes is to the BBC, increasing to 43% for those aged 65 and older.[7]

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[4] Ofcom Technology Tracker 2019
[5] BARB Establishment Survey Q1 2019
[6] Ofcom total AV modelling using BARB, TouchPoints and Comscore data. See annex for methodology.
[7] TouchPoints 2019

Less than half of all 16-24 year-olds now watch BBC TV

Although overall time spent watching any broadcast TV is falling (down 0.5% between 2017 and 2018), time spent with BBC TV channels for all individuals fell at a greater rate (-0.9%), primarily driven by a decline in viewing BBC One (-0.9%).

In 2018, the proportion of 16-24 year-olds watching at least 15 consecutive minutes of BBC TV fell below 50% for the first time; for ITV channels this had occurred in 2017 and for the Channel 4 portfolio it was in 2016.

However, Figure 5 shows that BBC TV is losing viewers aged 16-24 at a faster rate than ITV, and this has been the case since 2016. Breaking this demographic down into two smaller age groups, the greater variation in decrease between BBC and ITV is among 20-24s; BBC reach fell by 8% and ITV's by only 3% for this age group).

In 2016 the BBC moved its young-adult-oriented channel, BBC Three, from broadcast to online-only. Despite young people's preference for watching TV online, this move resulted in a very steep decline in reach for the channel. In contrast, by investing in its broadcast channels, ITV2 has had some success in retaining young audiences. BBC Three does, however, continue to produce programmes, many of which are later shown on broadcast channels as well as on BBC iPlayer. The most popular BBC Three programme shown on BBC One over the past 12 months was the first season of *Killing Eve; its* highest-performing episode had an average audience of 5.4 million.[8] BBC's share of viewing for 16-24s (20%) is much lower than its share for all adults (31%); nevertheless, it has maintained this share. More recently, the BBC announced it was to broadcast the new BBC Three series, *RuPaul's Drag Race UK* on BBC iPlayer, at 8pm on Thursdays, creating 'appointment to view' TV more typically seen on broadcast channels than on on-demand services.

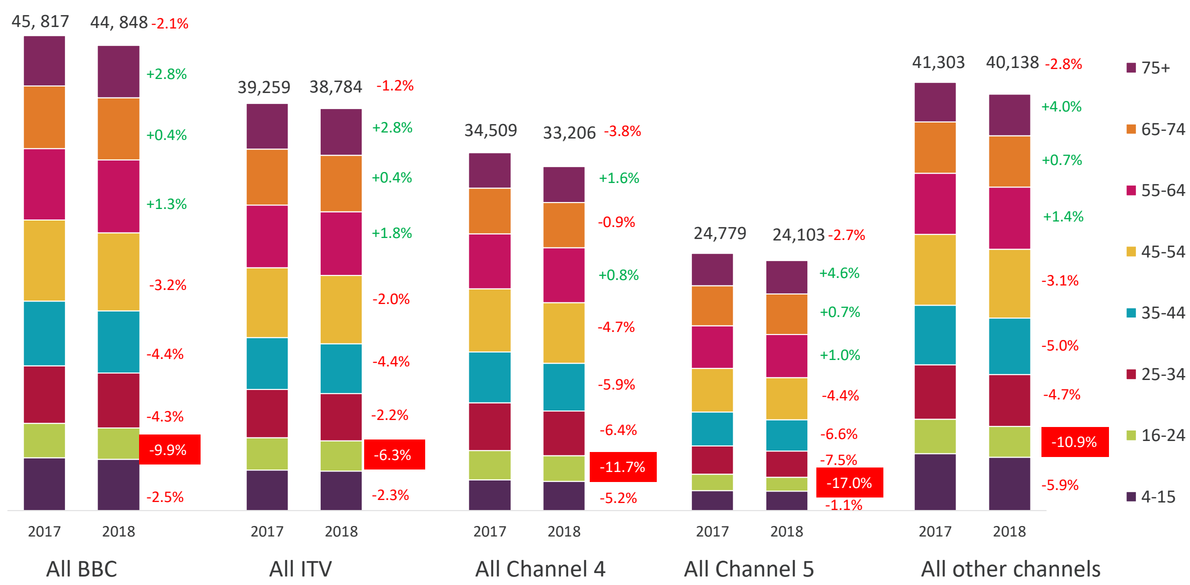
[8] BARB. Top performing programmes based on all individuals (4+) for standard consolidated viewing on the TV set up to seven days after broadcast.

Figure 4: Key metrics for BBC television channels: individuals 4+ and adults 16-24

	Individuals 4+						16-24					
	Weekly reach %		Ave daily mins per viewer		Share %		Weekly reach %		Ave daily mins per viewer		Share %	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Total TV	**90.2%**	**88.5%**	**203**	**193**	-	-	**78.2%**	**74.5%**	**101**	**85**	-	-
BBC TV	**77.0%**	**74.5%**	**65**	**60**	**32%**	**31%**	**53.1%**	**48.3%**	**21**	**18**	**20%**	**20%**
BBC One	69.5%	67.3%	45	41	22%	21%	46.2%	41.8%	14	12	14%	14%
BBC Two	44.5%	42.2%	12	12	6%	6%	21.3%	18.7%	14	13	4%	4%
BBC Three*	-	-	-	-	-	-	12.7%	11.3%	-	-	-	-
BBC Four	12.7%	12.1%	2	2	1%	1%	3.3%	3.1%	1	1	0%	0%
CBeebies	7.4%	6.6%	6	6	1%	1%	3.7%	3.0%	6	5	0%	0%
CBBC	3.9%	3.5%	2	2	0%	0%	1.3%	1.1%	1	1	0%	0%
BBC News channel	9.8%	8.1%	4	4	1%	1%	2.9%	2.1%	1	1	0%	0%
BBC Parliament	0.6%	0.5%	0.4	0.5	0%	0%	0.1%	0.1%	0.2	0.1	0%	0%

*Source: BARB; 15min consecutive reach. The daily minutes here are averages per viewer as opposed to an average per individuals of the universe that is used elsewhere in the report. *Claimed in TouchPoints survey*

Figure 5: Average weekly reach (000s) by age, by broadcaster (percentages indicate year-on-year change for each age group): 2017 vs. 2018



Source: BARB; 15+min consecutive reach

Notes: The largest drop by age groups indicated with red box

BBC radio

Although live radio continues to have a wide reach, there are growing challenges from other audio services including music streaming services and podcast providers

Nine in ten adults in the UK listen to live radio at least once a week, and live radio listened to on a radio set accounts for 67% of audio time for adults overall. However, as with the TV market, the availability of connected devices and high-speed fixed and mobile networks has given listeners more choice than ever in what they listen to and how they listen to it. One outcome of this is that live radio on a radio set accounted for just 28% of audio time in 2018 for listeners aged 15-24, as more of their time was spent on music streaming services.

Radio broadcasters are not just competing with companies that offer music streaming services. A wide range of organisations now create and distribute their own speech-based podcast content. Although this currently forms a relatively small proportion of overall listening, the number of people who listen to podcasts has increased over time, and podcasts account for a significant share of audio for those who listen to them.[9]

The BBC has responded to these challenges with the launch of its audio on-demand service, BBC Sounds, which has now replaced BBC iPlayer Radio. There is limited information available about the use of podcasts, but Ofcom research[10] in March 2019 found that among weekly podcast listeners[11] 39% use any BBC service to access podcasts, with more people using BBC iPlayer Radio than BBC Sounds at the time of the research. Spotify, YouTube and Apple podcasts were more popular than either BBC iPlayer Radio or BBC Sounds among younger listeners for accessing podcasts[12].

The BBC's share of the radio market has been declining, particularly due to the strength of national commercial stations available on digital platforms

Time spent listening to UK-wide BBC services has fallen by 42 minutes over the past five years (to 14 hours 24 minutes per week in Q1 2019) compared to national commercial services which have seen time spent with them increase by 90 minutes over the same period (9 hours 12 minutes per week in Q1 2019).

In Q1 2019 radio listeners tuned into an average of 3.6 stations (BBC or commercial) each week, up from 2.9 in 2014. This increases to 4.8 stations for those who listen to national commercial radio. This indicates that listeners are now accessing more stations to meet their needs, whether mood-based or music genre-based. Previously, stations would rely on the loyalty of their listeners to remain with them from breakfast to drive-time, but increasingly that loyalty is now spread across a number of stations.

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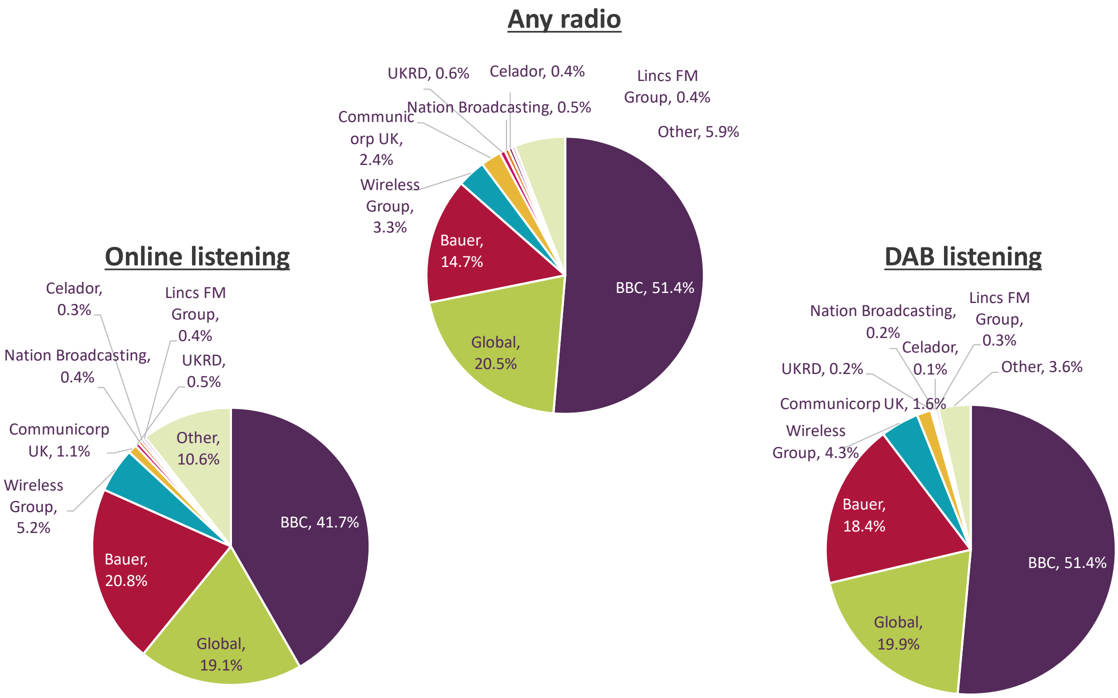
[9] Populus research, March 2019. Published in *Ofcom Media Nations Report* 2019
[10] Populus research, March 2019. Published in *Ofcom Media Nations Report* 2019
[11] RAJAR Q1 2019 estimates this at 13% of adults
[12] BBC Sounds had a soft launch in June 2018 with its full release in November 2018. In September 2019 the closure of BBC iPlayer Radio began.

Taking into account all time spent listening to radio each week, 51.4% was to BBC stations in Q1 2019.[13] But this varies by platform; only 41.7% of online listening was to BBC stations. Bauer's share of listening is higher when looking at online listening compared to its share overall; it has the highest proportion apart from the BBC. In a response to changing consumer behaviours and in order to maximise the appeal of genre-based stations among young people, Bauer has recently announced changes to its distribution strategy with the launch of seven online-only stations offering specific music genres.[14]

Figure 6: UK radio listening: market share by radio group, by platform



Source: RAJAR Q1 2019

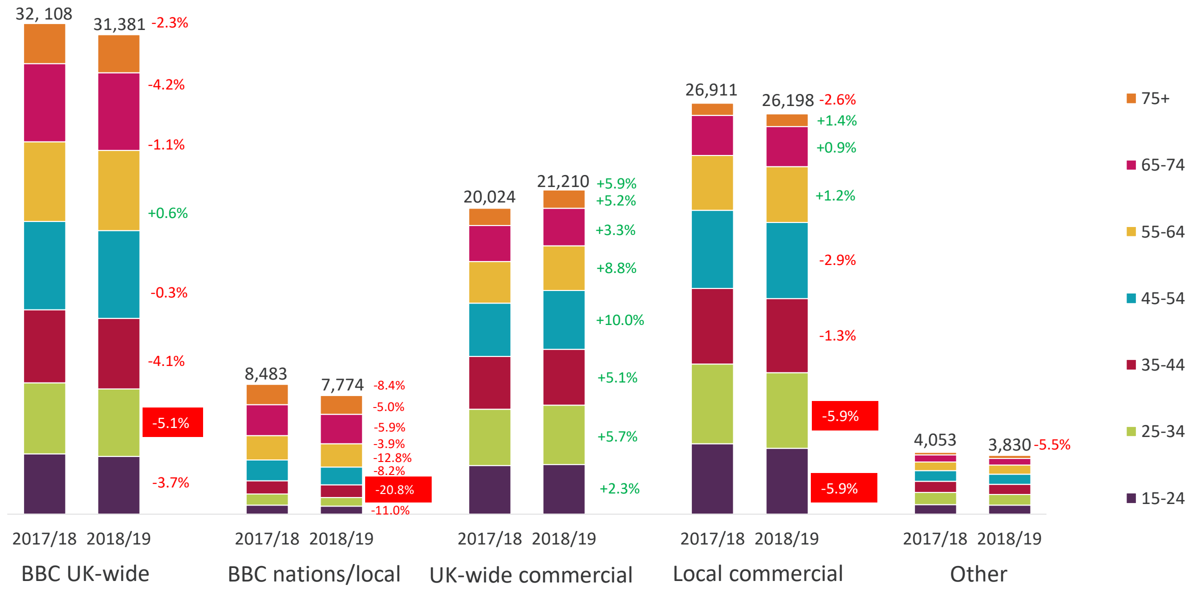
National commercial stations are increasing reach across all age groups while BBC services are losing listeners, particularly among the under-45s

BBC stations have seen a decrease in listeners aged under 45, while national commercial stations have had increases in all groups over the past year. National commercial radio is the only sector to have increased its younger listeners, as a result of commercial broadcasters maximising their existing successful brands and by adopting more of a playlist-type approach, with either genre or mood-based music formats.

[13] This report covers the period up to March 2019, but Q2 2019 RAJAR figures indicate that the BBC's share of the radio market fell below 50% for the first time, to 49.3%.

[14] https://www.campaignlive.co.uk/article/bauer-launches-seven-online-only-radio-stations/1593922

Figure 7: Average weekly reach (000s) by age, by radio sector (percentages indicate year-on-year change for each age group): 2017/18 vs. 2018/19



Source: RAJAR, Q1 of each year

Notes: The largest drop by age groups indicated with red box

BBC nations'/ local radio stations have lost both reach and listening hours over the past year

With the exception of 6 Music and 1Xtra, all BBC stations have had a decrease in listeners in the past 12 months. However, most national stations are retaining their market share. The main services that are losing market share are the BBC stations for the English regions and for Northern Ireland, Scotland and Wales, which have seen both reach and share fall over the past year, although this pattern is also apparent within the commercial sector as local services lose out to national stations. Radio 1 has maintained its market share among younger listeners, despite losing some reach.[15]

[15] This report covers the period up to March 2019, but Q2 2019 RAJAR figures indicate that the for the first time less than 50% of 15-24 year-olds listen to BBC Radio.

Figure 8: Key metrics for BBC radio stations: adults 15+ and adults 15-24

	Adults 15+						15-24					
	Weekly reach %		Ave daily mins per listener		Market share %		Weekly reach %		Ave daily mins per listener		Market share %	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
All radio	**90.0%**	**88.8%**	**181**	**171**	-	-	**82.4%**	**81.3%**	**117**	**112**	-	-
BBC radio	**64.2%**	**62.4%**	**133**	**130**	**52.3%**	**51.2%**	**51.6%**	**50.4%**	**60**	**57**	**32.1%**	**31.5%**
Radio 1	17.7%	17.0%	54	54	5.8%	5.8%	33.3%	32.1%	48	47	16.6%	16.6%
Radio 2	28.1%	27.2%	102	102	17.6%	17.6%	12.6%	11.6%	40	44	5.2%	5.5%
Radio 3	3.7%	3.5%	51	52	1.1%	1.2%	1.7%	1.4%	22	20	0.4%	0.3%
Radio 4	20.6%	19.3%	94	94	12.0%	11.5%	6.2%	6.4%	33	28	2.2%	2.0%
5 live	9.7%	9.2	57	57	3.3%	3.3%	4.3%	3.8%	26	27	1.1%	1.1%
1Xtra	1.9%	1.9%	40	37	0.5%	0.4%	5.7%	5.6%	33	28	1.9%	1.7%
6 Music	4.4%	4.4%	79	80	2.1%	2.2%	2.7%	2.9%	49	39	1.4%	1.2%
4 Extra	3.9%	3.8%	48	54	1.2%	1.3%	1.1%	0.9%	21	33	0.2%	0.3%
5 live sports extra	2.3%	1.9%	28	27	0.4%	0.3%	1.0%	1.0%	13	13	0.1%	0.1%
Asian Network	1.2%	1.1%	45	45	0.3%	0.3%	1.7%	1.7%	42	27	0.7%	0.5%
Nations'/local radio	15.6%	14.2%	75	74	7.2%	6.6%	7.4%	6.7%	25	24	1.9%	1.8%

Source: RAJAR, 12-month weighting to Q1

BBC online

Although overall reach to the BBC websites has remained stable since last year, reach to BBC news and sport have decreased

Overall reach to BBC sites has remained stable since the same period last year among all adults and has increased slightly among 18-24 year olds. However, the proportion of online users accessing BBC News or BBC Sport online has decreased, including among young adults.

The increase in overall reach to 18-24s is partly due to a number of new sites launched in 2018 by the BBC, such as the BBC Sounds app and BBC Teach, so despite the decrease to individual BBC sites there are more BBC sites for internet users to visit: this is contributing to increased reach to total BBC sites. There has also been a significant increase in reach to the BBC homepage over the past 12 months.

In November 2018, the BBC officially launched its BBC Sounds app, and in March 2019 it was visited by 622,000 adults. BBC Sounds was launched with the aim of attracting a younger audience, giving access to live and on-demand radio as well as podcasts. Comscore data in March 2019 indicated that 85% of users who accessed any BBC Sounds (for any purpose, including live radio) were aged 35 or older[16] while research we commissioned in the same month found that weekly podcast listeners who use BBC Sounds were likely to be younger, with 44% aged under 35.[17]

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[16] Comscore Mobile Metrix, BBC Sounds: radio & podcasts (mobile app), Age: 18+, March 2019, UK
[17] Populus research, March 2019. Published in Ofcom *Media Nations Report 2019*

Figure 9: Key metrics for top five BBC online sites: adults 18+ and adults 18-24

	Online adults 18+				Online adults 18-24			
	Reach %		Average time spent per visitor per day mins:secs		Reach %		Average time spent per visitor per day mins:secs	
	Mar 2018	Mar 2019	Mar 2018	Mar 2019	Mar 2018	Mar 2019	Mar 2018	Mar 2019
BBC sites*	**92%**	**92%**	**04:14**	**03:49**	**90%**	**92%**	**02:43**	**02:00**
BBC News	72%	65%	02:28	02:13	53%	46%	01:05	01:00
BBC Sport	42%	36%	01:40	01:13	26%	18%	00:41	00:27
BBC iPlayer**	29%	29%	03:38	03:42	30%	25%	04:59	04:05
BBC Homepage	21%	28%	00:14	00:24	15%	25%	00:09	00:16
BBC Weather	24%	23%	00:30	00:29	14%	11%	00:17	00:14

Source: Comscore MMX Multi-platform, Age: 18+, March 2018 and 2019, UK

**BBC sites excludes those produced as part of the BBC's commercial activities*

***Excludes TV set use*

Audience perceptions of the BBC

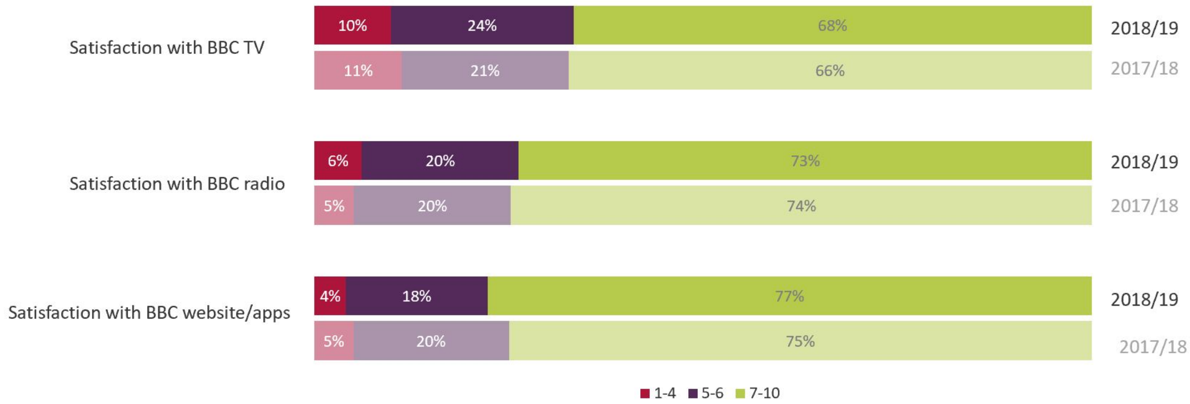
The previous section looked at how many people consume BBC content and for how long. The following section considers their opinions of the BBC in terms of overall satisfaction levels and in terms of the BBC's purposes.

Overall satisfaction with BBC services remains high across all platforms

Overall, the majority of audiences are satisfied with the BBC. In terms of platform differences, users of the BBC website and apps and are the most satisfied.[18] We can expect radio satisfaction to be higher than TV satisfaction because radio listeners tend to be more selective in their listening, choosing stations geared to their interests, whereas the BBC TV channels need to cover a broader range of content to appeal to a wider range of audience interests.

[18] BBC iPlayer/BBC Three are included in television services

Figure 10: Satisfaction with the BBC, by platform



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019

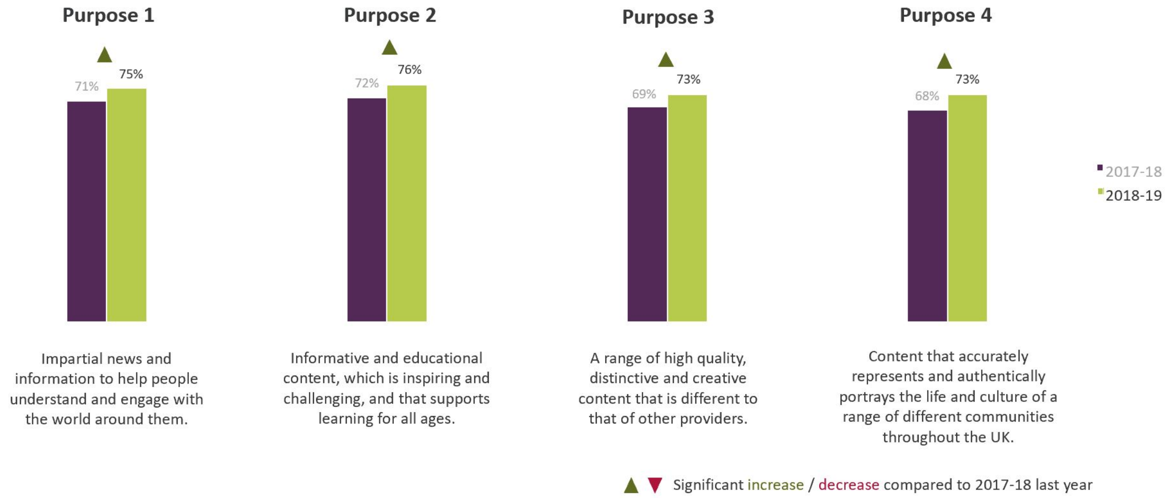
Question: B1 TV. On a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied, overall how satisfied or dissatisfied are you with these television and video service providers? / B2 Radio. On a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied, overall how satisfied or dissatisfied are you with these radio providers? / B3 MEAPP 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 the following websites and apps?

Base: Platform users in the past three months; BBC TV (3508/3411), BBC radio (2320/2309), BBC website/apps (2033/1915)

Importance to society of all purposes has increased significantly since last year

This is the second year of the BBC Performance Tracker, which we commission to track perceptions of the BBC's public purposes among UK adults. Although there have been changes since last year – which we will highlight where relevant in each section – one of the aspects which has changed most since last year is in the purposes' importance to society. Figure 11 shows that almost three-quarters of adults feel that it is important to society that the BBC provides each purpose. Although we cannot be sure why these changes have happened, the increasing amount of unregulated choice in the online world perhaps increases the need for a trusted provider.

Figure 11: Importance to society



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019

Question: C3. On a scale of 1-10 where 1 means not at all important and 10 means extremely important, how important for SOCIETY OVERALL is it that the BBC provides:

Base: All participants (4099/3907)

Although the BBC is seen to be performing well in information and news provision, representation and portrayal continue to be areas where the BBC performs less well

Each of the following sections will detail the relevant findings from our Performance Tracker survey, for each purpose. Figure 12 provides an overview of each of the overall purpose statements and sub-statements. There has been very little change since last year; Purpose 2 (education and learning) and Purpose 3 (distinctiveness) have the highest ratings while audiences continue to rate the BBC performance against Purpose 4 (representing diverse communities) less well compared to other purposes.

Figure 12: Comparative ratings of BBC purpose statements, by delivery (rated 7-10)

	Purpose statement	2017/18	2018/19
P2	Programmes and content that are informative	68%	**68%**
P1	News coverage that helps me understand what's going on in the world today	68%	**67%**
P3	Provides a broad mix of different types of TV, radio and online programmes and content	67%	**66%**
P3	Provides high quality television, radio and online content	66%	**66%**
P2 overall	**Informative and educational content, which is inspiring and challenging, and supports learning for all ages**	65%	**66%**
P2	Programmes and content that are educational	64%	**66%**
P3	Provides programmes and content made specifically for UK audiences, using UK actors, writers and locations	65%	**65%**
P3	Provides television, radio and online content which appeals to a wide range of different audiences across the UK	65%	**64%**
P3	Provides distinctive programmes and content	63%	**64%**
P3 overall	**A range of high quality, distinctive and creative content that is different to that of other providers**	63%	**63%**
P1 overall	**Impartial news and information to help people understand and engage with the world around them**	61%[1]	**61%[1]**
P2	Programmes and content that helps me to learn new things	61%	**61%**
P1	News that represents a range of viewpoints	60%	**61%**
P4 overall	**Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK**	59%	**61%**
P2	Programmes and content that are inspirational	58%	**58%**
P4	Programmes and content that are relevant to me	58%	**58%**
P2	Programmes and content that support children and young people with their education	57%[2]	**57%[2]**
P3	Takes risks and provides content that is new and innovative across all of its services, including television, radio and online	56%	**57%**
P4	A good range of programmes and content that includes people like me	56%	**57%**
P1	News that is impartial	56%	**56%**
P4	A good range of programmes and content that represents where I live	50%	**52%**
P4	An authentic portrayal of the region where I live	49%	**50%**
P4	An authentic portrayal of people like me	48%	**49%**

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018 ; 16 April 2018 to 10 April 2019
Question: 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:
Base: All participants (4099/3907)
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, 77% of BBC TV news viewers rated them highly; 72% of BBC radio news listeners, and 76% of BBC online news users. In terms of impartiality, 59% rated BBC TV news highly, 64% radio, and 61% online. (2): This rises to 69% among households with children.

In the following sections we explore each purpose in detail, in the context of the performance measurement framework: availability, consumption, impact and contextual factors.

3. Purpose 1: news and current affairs

Summary

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.

Our key findings:

• The way people consume news nowadays is changing, with online news and social media in particular playing an increasingly important role, particularly for young people.

• Despite this, the BBC remains the most-used news provider overall, although its reach has decreased since 2018. BBC One continues to be the most-used individual news source across all news platforms.

• Although the BBC holds up relatively well among 16-24 year-olds, with BBC One being one of their most-used sources for news, there are increasing challenges in engaging this age group as they increasingly turn to a range of other sources online.

• Audiences continue to rate BBC TV news highly for accuracy and quality but also continue to rate it less highly for impartiality. ITV, Sky and Channel 4 TV news are all more likely to be perceived as impartial by their regular viewers.

Alongside the Annual Report and this performance annex, we have published a detailed review of the BBC's performance in providing news and current affairs and delivering purpose 1. The report draws on the performance data presented in this annex as well as a range of new and in-depth research and analysis. It can be found here.

Performance assessment

Cross-platform consumption and impact

The BBC remains the most-used news provider across any platform, though its reach has decreased since 2018

BBC remains overall the most-used news provider across all platforms; 75% of adults say they use any BBC source for news 'nowadays', followed by ITV (41%) and Facebook (35%). BBC One is the single most-used individual news source, with around six in ten UK adults claiming to use it for news.

The table below shows that there are seven BBC services among the top 20 sources used by people for news.

However, we know that the ways in which people consume news is changing. While TV is still the most-used platform for news, its use has decreased since last year. This is evident from the decrease in reach of several BBC TV sources including BBC One, BBC Two and the BBC News channel compared to last year.

There are also considerable differences by demographic group in the way people consume news. For example, those aged 65 and over are twice as likely as 16-24s to say they use BBC One for news (78% vs. 35%). The ABC1 socio-economic groups are also more likely than C2DEs to use BBC One for news, and adults from minority ethnic backgrounds are less likely than white adults to use it for news.

The most popular sources of news, across all platforms, for 12-15s are BBC One/Two (followed by Facebook, YouTube and ITV). Nevertheless, as with adults, the reach of BBC TV sources has decreased among 12-15s from 45% in 2018 to 40% in 2019. Overall, BBC news sources are used by 53% of 12-15s[19].

Figure 13: Top 20 news sources across platforms: 2018 vs. 2019

	2018	2019
BBC One	62%	58% ▼
ITV/ITV WALES/UTV/STV	41%	40%
Facebook	33%	35%
BBC website/app	23%	25%
BBC News channel	26%	23% ▼
Sky News channel	24%	23%
Google (search engine)	17%	19% ▲
Daily Mail/Mail on Sunday	18%	18%
Channel 4	18%	17%
Twitter	14%	16% ▲
WhatsApp	10%	14% ▲
Instagram	9%	13% ▲
BBC Radio 2	12%	12%
The Guardian/Observer	11%	11%
The Sun/Sun on Sunday	11%	11%
BBC Two	14%	11% ▼
Channel 5	10%	10%
BBC Radio 4	10%	9%
BBC Radio 1	9%	9%
Metro	10%	9%

TV channel

Newspaper (print and digital)

Radio station

Social media

Other online

Source: Ofcom News Consumption Survey 2019. Question: D2a-8a. Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All adults 16+ = 4691

[19] Source: Ofcom News Consumption Survey for children (online 12-15 year olds)

More people are accessing news online, and the BBC remains the most-used source.

While TV use for news has decreased since last year, a greater proportion of people say they now use social media for their news. Not surprisingly, social media use is much more common among younger age groups, with around half of 16-24s saying they use Facebook for news, compared to just one in ten of those aged 65 and over, with a similar pattern across other social media platforms.

Of those who access news organisations by using the main social media platforms (Facebook, Twitter, Instagram and Snapchat), the BBC is the most-followed across all of these. The BBC's website/app also remains the most-used source for other types of online sources, that is, not accessed through social media. When these new methods of consumption are combined with television and radio, we see that eight in ten people are using the BBC in some form to get their news.

However, research commissioned for our review of BBC news and current affairs shows that people tend to consume content accessed on social media in an 'incidental' fashion, with more people likely to skim-read the headlines rather than go on to read the full articles.[20]

BBC news output is regarded as highly important for people, both personally and for society

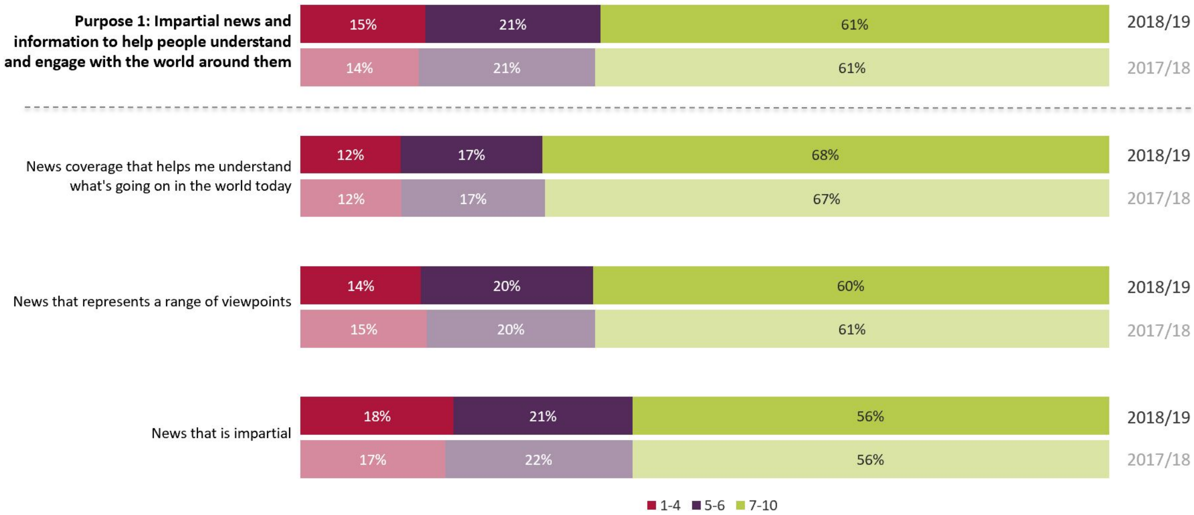
Around three-quarters of all adults said that it was important to them personally that the BBC provides impartial news, and that the BBC delivers Purpose 1 for the benefit of society overall.[21]

Further research specifically highlighted the importance of BBC TV news, rating it higher than other PSB channels in this area. BBC One remains the most important news source, with a quarter of adults citing it, more than double of the next placed source, ITV.

In terms of how the BBC is delivering on Purpose 1, we asked people to rate the BBC's overall provision of news across TV, radio and online. We can see below that the BBC's performance was very similar to last year, with impartiality continuing to be the lowest-scoring aspect of the purpose.

[20] *Ofcom review of BBC news and current affairs*
[21] Ofcom *BBC Performance Tracker* 2019

Figure 14: Audience opinions about BBC delivery of Purpose 1



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019

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:
Base: All participants (4099/3907)

Television

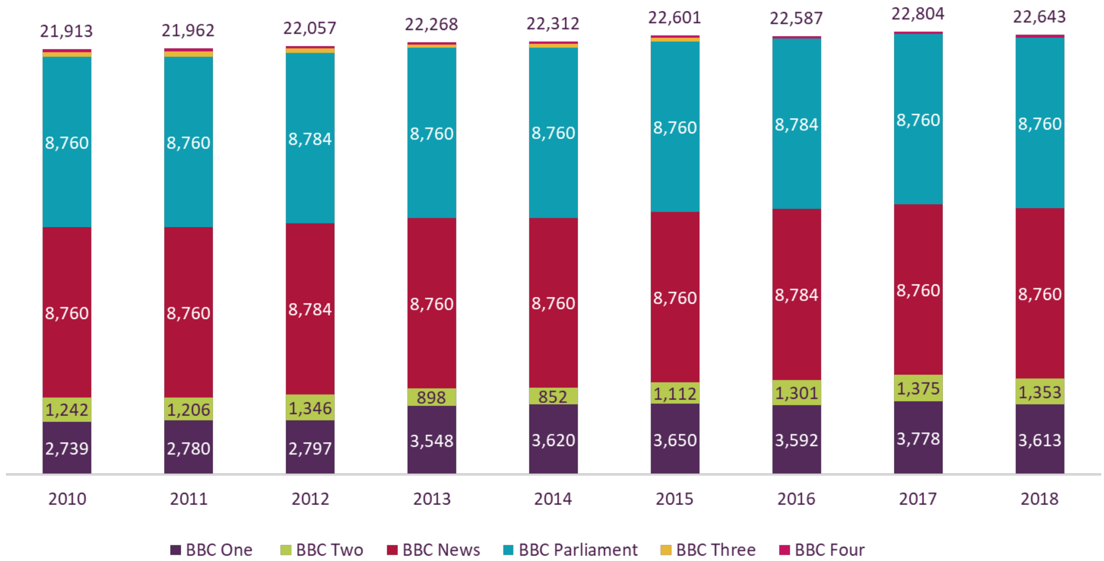
There has been a slight decrease since 2017 in hours of network news and current affairs programming broadcast on BBC TV

While the overall amount of news and current affairs content shown across the BBC TV channels has increased by around 3% since 2010, Figure 15 shows there has been a small decrease since last year in total hours, driven by BBC One and Two.

News made up 90% of the total hours shown below, with current affairs claiming the remaining 10%. Consistent with last year, current affairs output overall has grown slightly over the last two years, largely due to a rise in the number of current affairs hours on both BBC Four and BBC News. On BBC Four, this was primarily due to an increase in internationally-themed programming, including first-run broadcasts of *This World*, in addition to broadcasts of BBC Two's *…with Simon Reeve* series. However, the increase in current affairs hours in 2018 was not enough to offset a decline in total news hours.

Last year, we noted the launch of the *Victoria Derbyshire* programme which led to an increase in news output on BBC Two, in addition to an increase in hours of simulcast content from the BBC News channel on BBC One (from 825 hours in 2010 to 1,829 in 2017). The amount of simulcast content on BBC One fell in 2018, which partly explains the decrease in news hours. However, the amount of BBC News simulcast content in 2018 is roughly in line with the 2016 level; in both years there was a decrease due to an increase in sports hours covering large sporting events (e.g. 2016 Summer Olympics, FIFA 2018 World Cup and Commonwealth Games). In addition, unlike 2015-2017, there was no growth in news output on BBC Two in 2018, largely due to fewer hours of *Victoria Derbyshire* broadcast last year.

Figure 15: BBC TV hours of network news and current affairs, by channel: 2010-2018



Source: Ofcom/BBC. Note: Figures exclude nations' and regions' content.

Despite the small decline in total news and current affairs output, first-run UK originations[22] increased by 1% in 2018, reaching 16,397 hours. This represents 72% of total news and current affairs hours and has remained stable since 2010. In 2018, the remaining hours mostly consisted of repeated news and current affairs content (27% of the total) and acquired programming (1%). Last year also saw the second highest number of first-run news and current affairs originations since 2006 – on par with the 16,421 hours in 2016. This was reflected in total news and current affairs spend, up by 5% to £175.1m in 2018.

Panel-style shows have slightly decreased since last year after a change to specific political programming

Last year we noted that there had been growth in the proportion of panel-style current affairs programmes shown on BBC TV, which do not tend to reflect in-depth investigative journalism, and we expressed concern that the BBC had more than halved the hours of *This World*, its only dedicated international current affairs show.

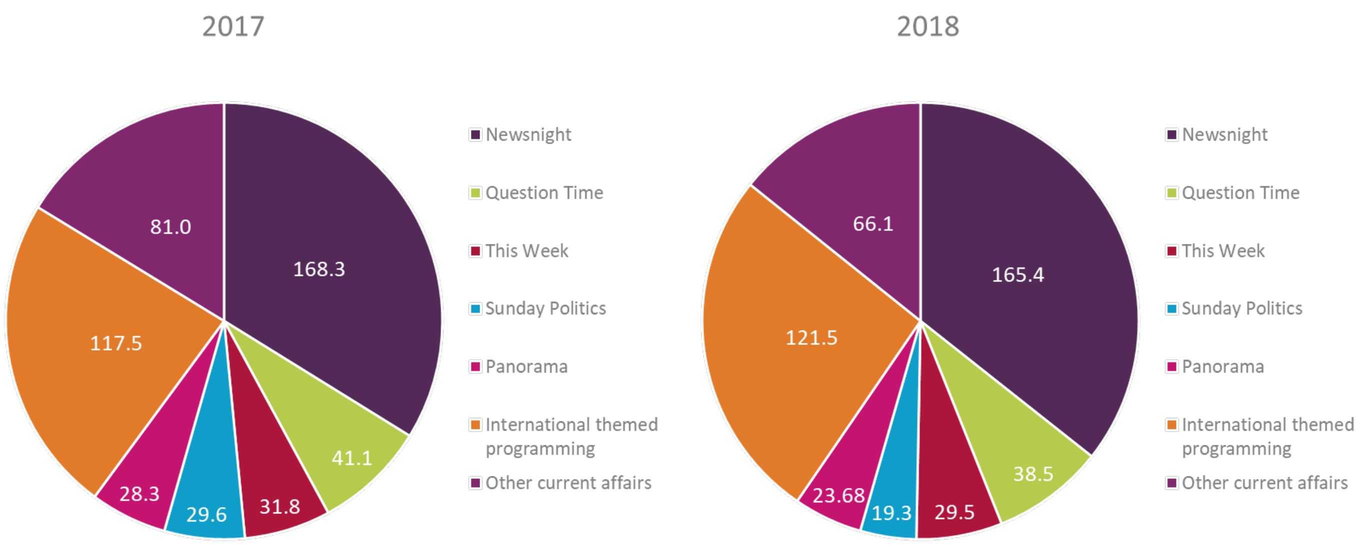
Total network hours of panel shows decreased in the past year, mainly due to a reduction in the number of networked hours of *Sunday Politics,* following the BBC's changes to its to political programming last summer. The UK-wide network edition of *Sunday Politics*, which was previously 75 minutes, was replaced by a half-hour stand-alone *Sunday Politics* programme for each of the nations and English regions.

A slightly larger amount of programming was devoted to international themes in 2018: the proportion increased from 24% of total first-run current affairs hours to 27%. This was driven by the

[22] First-run UK-originations refers to programmes commissioned by or for a licensed channel for first showing on television in the UK in the reference year.

BBC's continuation of its *100 Days* series, as well as increased hours of *This World*, which had eight hours of first-run content in 2018, compared to one hour the previous year.

Figure 16: First-run current affairs programming across the BBC: 2017 vs. 2018



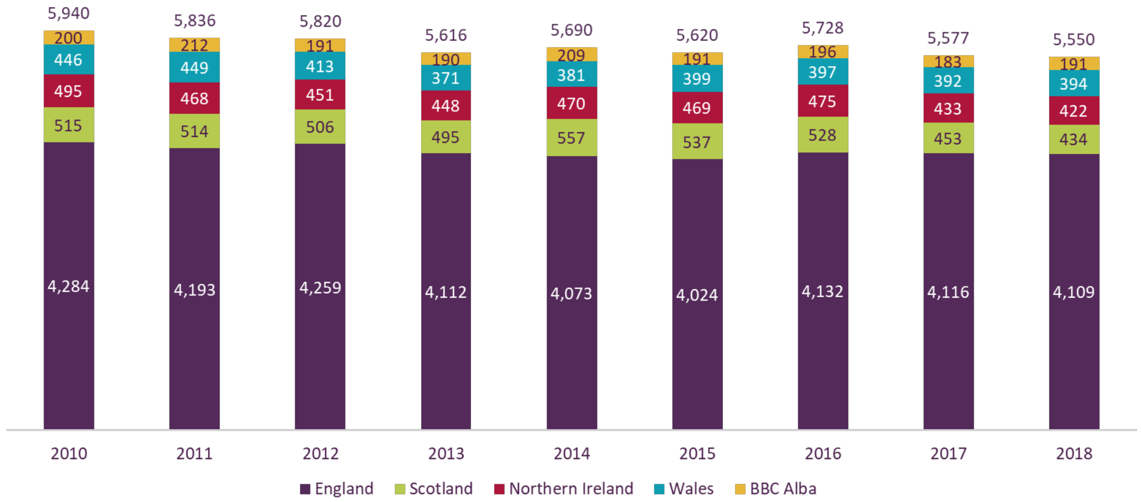
Source: Ofcom/BBC. Based on broadcast hours

There has been a slight decrease in hours of news and current affairs for the nations and regions in recent years

Overall, there has been a slight decrease in hours (27) of news and current affairs content produced specifically for the English regions, Scotland, Wales, Northern Ireland and BBC Alba since 2017. However, General Election coverage in 2017 was the main driver of this. Stripping out programming relating to 2017 elections, non-networked news and current affairs content was up 1% on 2017. This was because of an increase in current affairs content across the nations and regions. Key to this was the introduction of stand-alone *Sunday Politics* programmes for each nation and region. In addition, broadcast hours for *BBC Wales Live* increased in the past year.

When taking a longer-term view, comparing figures to 2010, we note that news and current affairs hours for the nations and regions has decreased by 390 hours. The decrease can be seen across each region and nation, with Scotland having the largest decrease. However, a new dedicated BBC channel for Scotland, BBC Scotland, launched on 24 February 2019, with news and current affairs as part of its core offering: flagship news programme *The Nine* broadcasts Scottish, UK and international news seven nights a week. BBC Scotland will feature more prominently in our next report when we will report on a full year of it being broadcast.

Figure 17: Hours of BBC TV news and current affairs output for the nations and regions: 2010-2018

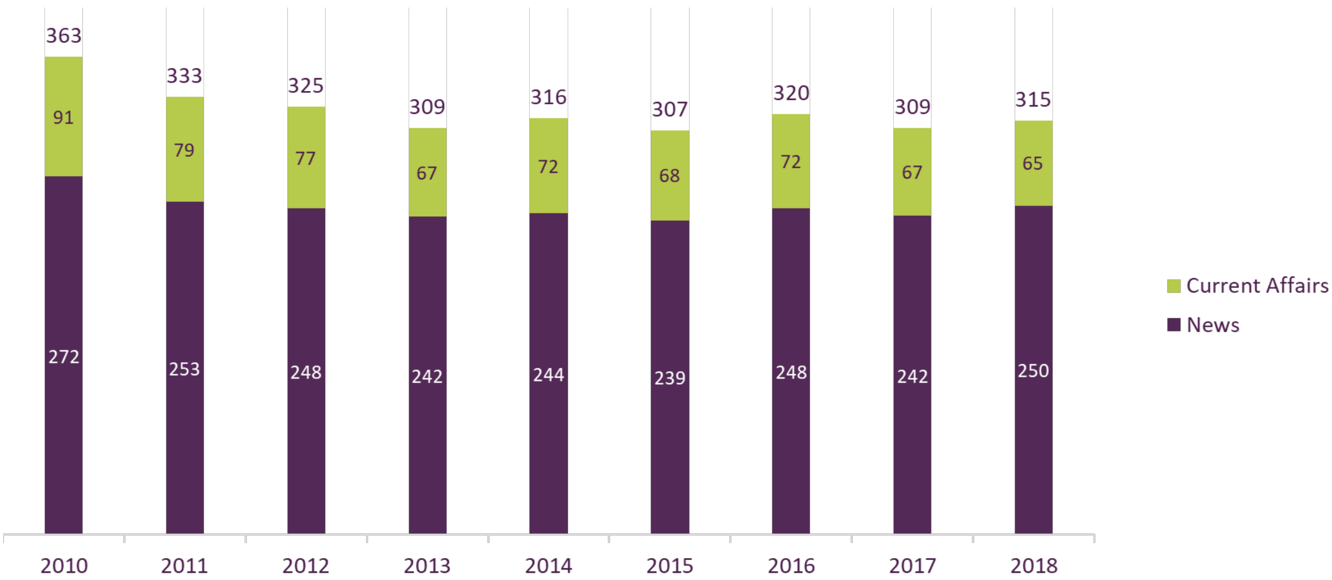


Source: Ofcom/BBC

Programme spend on news and current affairs across BBC TV increased slightly to £315m in 2018

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 £315m in 2018, an increase since 2017 of £6m in real terms, driven by the increase in first-run networked news and current affairs programming over the year. However, this was down by £48m since 2010.

Figure 18: BBC TV news and current affairs programme spend (£m, real terms): 2010-2018



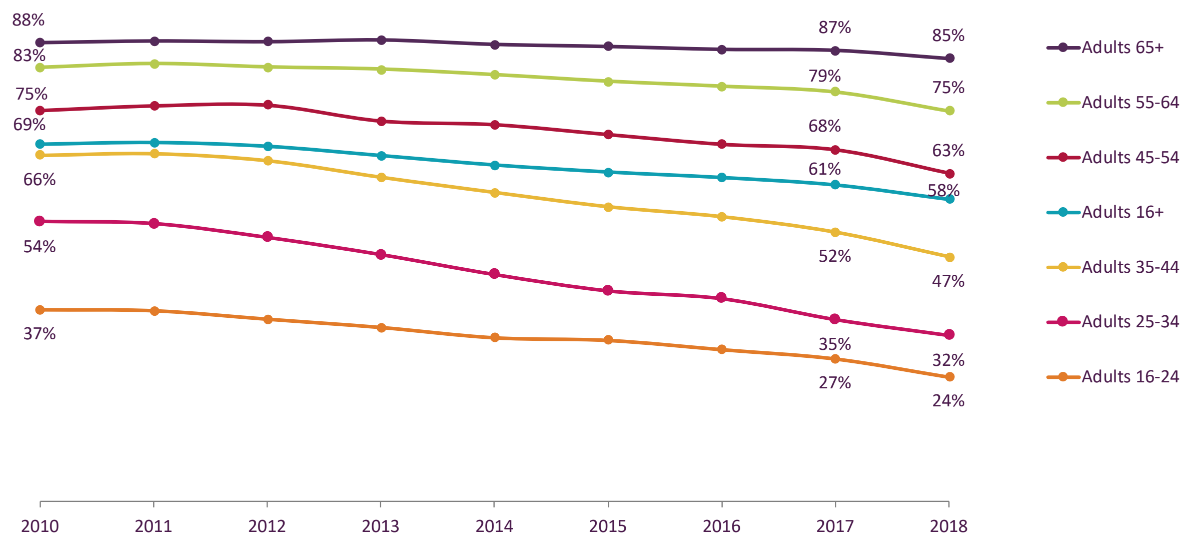
Source: Ofcom/BBC. Figures have been adjusted for CPI (2018 prices). Figures include spend on programmes made specifically for Northern Ireland, Scotland, Wales or the English regions but not BBC Alba. Figures account for programmes broadcast in each calendar year and do not include spend that cannot be attributed to individual programmes, such as presentation, commissioning, scheduling, copyright and helpline.

BBC TV news viewing has decreased across all age groups

The proportion of adults watching BBC news output on their TV fell by three percentage points (pp) in 2018, the largest decrease since 2010. While there is considerable variation in reach by age, there has been a decrease across all age groups since 2017. The largest decreases are among the 45-54 and 35-44 age groups, which both fell by five percentage points. For the first time, less than half of all 35-44-year olds watched BBC TV news each week.

By channel, reach to news on BBC One was down by three percentage points since 2017, to 55% of adults, the largest decrease of any channel. Overall, however, its reach remains by far the highest of all television channels.

Figure 19: Average weekly reach of BBC TV news, by age: 2010-2018



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

Impartiality continues to be one of the lowest-rated attributes for BBC TV news

Of all the aspects of news provision we asked about, regular BBC TV news viewers continue to give the BBC a lower rating for impartiality (59%), in line with last year's figure (61%). ITV, Sky and Channel 4 TV are more likely to be perceived as impartial by their regular audiences. In addition, 17% of regular BBC TV news viewers gave the BBC a low rating (between 1 and 4 on the 10-point scale) indicating active disagreement that BBC TV news is impartial. This is significantly higher than all low 1-4 ratings given by regular news viewers of the other main broadcasters (6% for ITV, 8% for Sky, 7% for Channel 4 and 8% for Channel 5).

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 (68% vs. 59%). However, there has been a decrease since last year in the numbers who do rate it highly; this is the BBC's lowest rating for current affairs output. Channel 4's and Sky's current affairs programming are rated more highly than the BBC's for impartiality among their respective audiences.

Our review of BBC news and current affairs suggests that audience perceptions of the BBC's impartiality are not linked to its content alone. Some audiences acknowledged that the BBC was held to greater scrutiny than other organisations on its impartiality – by the public, politicians and others in the media.

Figure 20: Audience opinions about aspects of TV news: 2019

	BBC TV	ITV	Sky News channel	Channel 4	Channel 5
Base size	*2878*	*1888*	*956*	*688*	*376*
Good for national news	81%	78%	79%	72%	64%
Is high quality	79%	76%	80%	72%	62%
Helps me understand what is going on in the world today	77%	74%	80%	70%	61%
Good for international news	77%	74%	83%	73%	59%
Has high calibre journalists/presenters	76%	73%	77%	72%	59%
Is important to me personally	76%	70%	73%	60%	57%
Good for understanding what's going on in other parts of the UK	75%	74%	71%	66%	58%
Good for regional/local news	73%	76%	51%	48%	52%
Is accurate	71%	74%	76%	71%	62%
Is trustworthy	71%	74%	73%	69%	60%
Helps me engage/understand the political process	68%	63%	71%	67%	60%
Offers a range of opinions	66%	69%	75%	66%	60%
Has a depth of analysis and content not available elsewhere	62%	60%	73%	64%	56%
Helps me make up my mind	60%	65%	72%	60%	57%
Is impartial	59%	65%	68%	65%	58%

Source: News Consumption Survey 2019. Base: All adults 16+ who use source for news at least once a week. Channels significance tested vs. BBC TV. Question: 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

The BBC's news output on its network radio stations was on par with 2017

News output across the BBC's network radio stations in 2018 remained consistent with the previous year. As in 2017, *Newsbeat* on Radio 1 and news and current affairs show *Jeremy Vine* on Radio 2 provided the majority of news output, in addition to regular bulletins. The amount of news output on BBC Radio 4 increased slightly over the last year, from 3,334 hours in 2017/18 to 3,394 in 2018/19, and the number of weekend bulletins on Radio 4 and 5 live has also increased since 2017.

Figure 21: 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		
	2017	2018	2017	2018	2017	2018	2017	2018	
Radio 1	14	**13**	33	**32**	9	**9**	19	**18**	Each weekday has two 15 minute *Newsbeat* programmes (unchanged from 2017)
Radio 2	26	**26**	76	**76**	24	**24**	78	**78**	The *Jeremy Vine Show* is broadcast for two hours every weekday (unchanged from 2017)
Radio 3	8	**8**	15	**15**	4	**4**	11	**11**	N/A
Radio 4	9	**9**	20	**20**	7	**8**	21	**29**	39% of Radio 4 output is dedicated to news/current affairs (38% in 2017/18)
5 live	7	**8**	15	**16**	22	**24**	43	**47**	76% of 5 live output is dedicated to news/current affairs (unchanged from 2017/18)

Source: Ofcom/BBC. Note: figures reflect estimated averages across 2018/19. Output may vary throughout the year. For 5 live, the number of bulletins refers to news bulletins occurring during non-news programming.

In 2018/19, an average of 20 million adults listened to BBC network radio's news and current affairs programmes each week, down by 1 million since the previous year

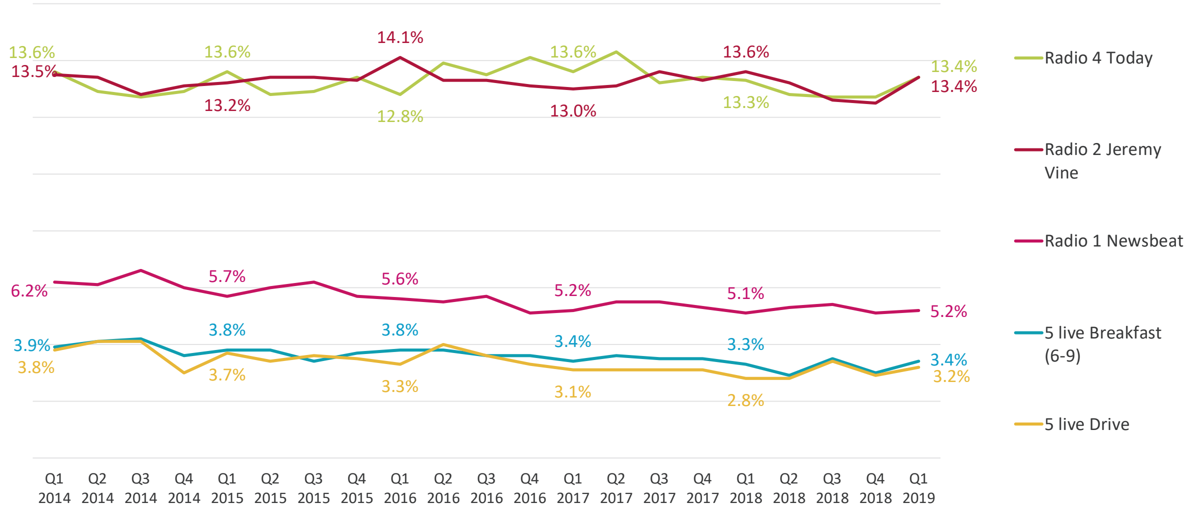
According to RAJAR, just over a third of adults listen to the scheduled news and current affairs programmes each week across BBC Radio 1, Radio 2, Radio 4 and 5 live (19.8 million adults). Although this is down from 20.8 million in 2017/18, there are signs of improvement; the figures for the first quarter of 2019 indicate that 20.5 million adults listened to this output each week, an increase from 19.4 million in the last quarter of 2018.

In addition to live radio, measured by RAJAR, people are increasingly turning to podcasts for news content. Research we commissioned earlier this year[23] showed that almost half of the sample of regular podcast listeners listen to news and current affairs podcasts each week. *Brexitcast*, a BBC Radio 5 live podcast, was named regularly across our sample week, and in June 2019 it was announced that this would become a weekly television programme on BBC One. BBC Sounds was also more likely than either Spotify or Apple to be used for news and current affairs podcasts, mainly driven by the Radio 4 and Radio 5 live content.

Figure 22 shows that in Q1 of this year there was an uptick in reach of some of the prominent news and current affairs programmes on BBC network radio, with notable increases since Q4 2018.

[23] Populus research, March 2019. Published in Ofcom *Media Nations Report 2019*

Figure 22: Weekly reach of selected news programmes on BBC Radio 1, 2, 4 and 5 live: 2014-2019



Source: RAJAR

Listeners continue to rate BBC radio news highly for quality, accuracy and news coverage.

The BBC is rated highly by its regular listeners for many aspects of radio news provision, including quality, accuracy, and provision of national and international news. Compared to commercial radio news listeners, BBC radio news listeners are more positive about BBC radio news' delivery on all the aspects of news provision we asked about.

As is the case with BBC TV news, there has been no change since last year in regular BBC radio news listeners' attitudes towards its news output. The rating for impartiality is still one of the BBC's lowest, at 64%, while the other comparatively low ratings are similar to last years' and comparable to the low ratings given for BBC TV news, including for depth of analysis and '*helping people to make up their mind*'. In addition, only 63% rated BBC radio news highly for being good for regional/local news.

For current affairs, BBC radio continues to rate highly across all aspects, including 87% for depth of analysis.

Figure 23: Audience opinions about radio news: 2019

	BBC radio	Commercial radio
Base	*1434*	*963/1599*
Good for national news	77%	56%
Is high quality	75%	59%
Is accurate	72%	62%
Is trustworthy	72%	63%
Good for international news	72%	46%
Helps me understand what's going on in the world	72%	55%
Has high calibre journalists/presenters	71%	49%
Has high calibre journalists/presenters	71%	49%
Good for understanding what's going on in other parts of the UK	69%	52%
Is important to me personally	68%	59%
Helps me engage/understand the political process	68%	45%
Offers a range of opinions	67%	53%
Is impartial	64%	58%
Good for regional/local news	63%	53%
Has a depth of analysis and content not available elsewhere	63%	48%
Helps me make up my mind	61%	50%

Source: Ofcom News Consumption Survey 2019. Base: All using each source for news at least weekly 2018. % of regular users rating each source highly (7-10). Question: How important is as a source of news to you personally? E3. And to what extent do you think the following statements apply to 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. A subset of the radio statements was asked of fewer commercial radio station news users than the other statements. This was to ensure the survey was kept to a manageable length for all participants.

Online

There has been a significant drop in the proportion of younger people using BBC online news services

The BBC's online news service is available at bbc.co.uk/news and via the BBC app. It is linked by common themes and reporting sources to the BBC's TV and radio news provision.[24]

Last year, the average monthly reach of the BBC's online news service to online UK adults fell by two percentage points to 70%.[25] The same percentage fall applied to adults visiting BBC news via the app.[26] This decrease has been driven by a significant drop in younger adults' (18-34) use, slightly offset by an increase among over-55s.

Users' ratings of the BBC news website/app across a range of aspects have worsened since last year

Like last year, the BBC's online news is rated similarly to Sky's online news and above ITV/ITN's digital offer on several measures. There have, however, been some decreases in the BBC's ratings across several aspects, including quality (from 81% in 2018 to 75% in 2019), trustworthiness (from 76% to 71%), impartiality (from 68% to 61%), range of opinions (from 69% to 62%) and '*helps me to make up my mind*' (from 66% to 61%).

Figure 24: User opinions about the type of online news provided: 2019

	BBC news website/app	ITV/ITN website/app	Sky news website/app
Base	*1087*	*119*	*320*
Helps me understand what's going on in the world	76%	59%	71%
Is high quality	75%	62%	73%
Is accurate	74%	58%	67%
Is important to me personally	73%	49%	71%
Is trustworthy	71%	58%	68%
Has a depth of analysis and content not available elsewhere	63%	56%	66%
Offers a range of opinions	62%	61%	68%
Is impartial	61%	55%	61%
Helps me make up my mind	61%	57%	63%

Source: Ofcom News Consumption Survey 2019. 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

[24] The equivalent to TV and radio news headlines is 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.

[25] Comscore MMX Multi-Platform, [C] BBC News, April 2018 – March 2019 and April 2017 – March 2018, Age: 18+, UK

[26] Comscore MMX Multi-Platform, BBC News (Mobile App), April 2018 – March 2019 and April 2017- March 2018, Age: 18+, UK

statements apply to 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.

4. Purpose 2: learning

Summary

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 services. There has been a general increase in the number of hours since 2013, although in 2018, hours declined.
- Although in 2018 there has been a decline in hours broadcast of genres such as arts and classical music, there have been increases in genres such as history, and religion & ethics.
- There has been a decline in hours of first-run informal learning content for adults on BBC TV, although the proportion of total output that is first-run programming has remained stable in recent years. However, this has declined from 27% of total hours in 2010 to 21% in 2018.
- The BBC provides informal learning content specifically for children through CBeebies and CBBC. Like last year, reach to, and viewing by children aged 6-12 continues to decline. This year, CBeebies also saw a decline in its reach to, and viewing by children aged 4-6. The BBC acknowledges this decline and is investing further in children's content with increasing emphasis on its digital services.
- There is high satisfaction among children who use the BBC website and apps for their school work. Due to the development of BBC Bitesize through 2018/19, it is not possible to measure the impact of these changes. We will continue to monitor its progress and report next year.

Performance assessment

This section provides the 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'.[27] We note that the BBC has a wider definition of informal learning, and although we acknowledge that any programme has the potential to provide informal learning for its audience, we focus on core genres for performance assessment purposes.

[27] These genres of programming formed part of our proposed performance measurement framework that we consulted on in 2017.

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.

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

Informal learning for adults - TV

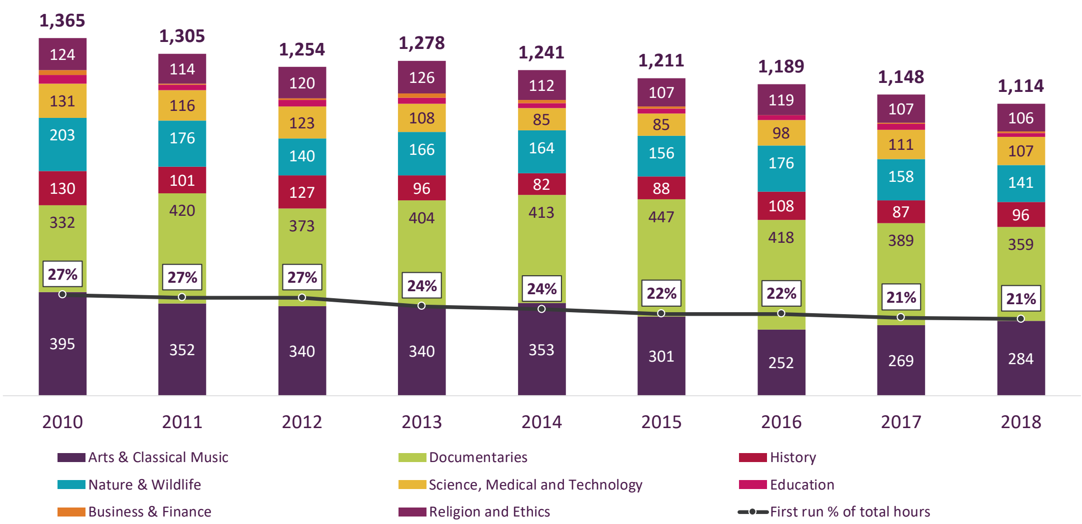
Hours of first-run informal learning content broadcast on BBC TV continued to decline in 2018

There were more hours of first-run arts and classical music broadcast in 2018 (284 hours) than in 2017 (269 hours). This was in part driven by the series *Civilisations.* There was also an improvement in the number of first-run history hours during 2018.

However, since 2010, there have been fewer first-run UK-originated hours of informal learning content in all sub-genres, except for general documentary content. Despite the increase in hours in 2018, first-run arts and classical music content notably declined between 2010 and 2018, from 395 to 284 hours.

Although a decline in first-run hours can be seen in Figure 25 below, the proportion of total output devoted to first-run programming has remained stable in recent years, at 21% in 2018, albeit lower than 27% in 2010.

Figure 25: BBC hours of first-run originated UK informal education content

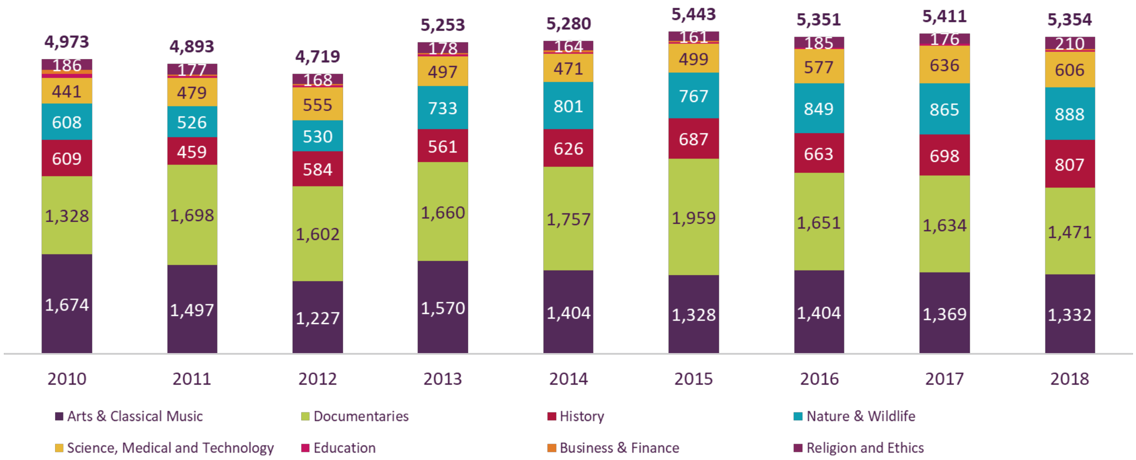


Source: Ofcom/BBC. Note: Figures don't include nations' and regions' content. Education content includes social action programming only, and not schools' or formal education programming. Percentages reflect the proportion of total hours that were first-run UK-originated in each year.

A decrease in documentary output drove a slight decline in total informal learning hours for adults in 2018

A total of 5,354 hours of informal learning content was broadcast in 2018, down by 57 hours since 2017. This has been driven by fewer hours of general documentaries broadcast across the BBC's channels, from 1,634 hours in 2017 to 1,471 in 2018. This was most apparent on BBC Four, where the number of unique documentary titles decreased from 494 to 320 titles in 2018. However, the proportion of these titles which were first-run remained stable, increasing slightly from 34% to 35% of documentary titles in 2018, despite a slight decline in the number of first-run documentary hours, down from 389 to 359 during 2018.

Figure 26: BBC hours of informal education content, by genre: 2010-2018



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.[28]

Although hours of informal learning broadly fell, as the chart above shows, there were more hours of history, and religion and ethics, content available across BBC TV in 2018. History programming increased from 698 hours in 2017 to 807 in 2018, while religion and ethics availability was at its highest since 2010. Repeats of titles such as *Who Do you Think You Are?*, *Timeshift*, *The Story of the Jews* and *Pilgrimage* primarily drove these increases. In addition, content devoted to nature and wildlife continued to increase in 2018, with a year-on-year rise of 3%. This was primarily a result of an increase in the number of broadcast hours for *Countryfile* and *Natural World.*

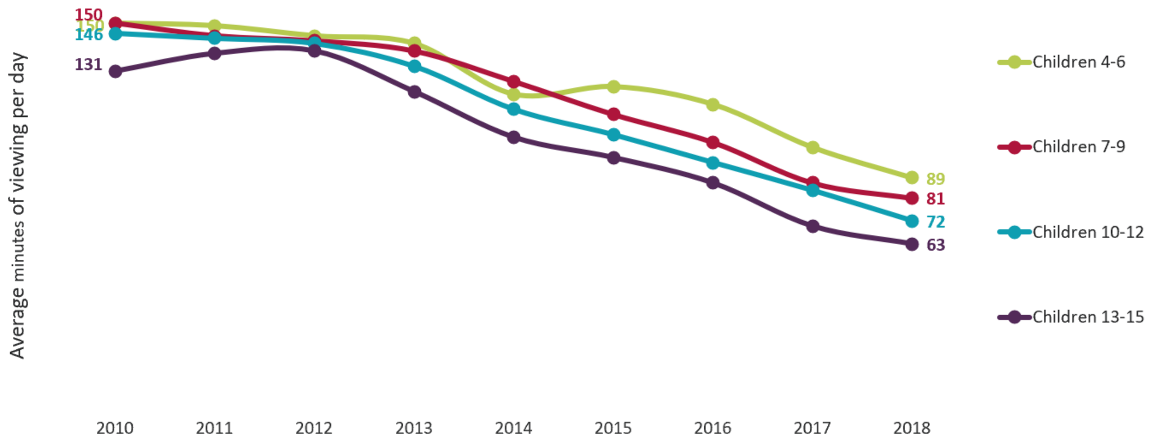
[28] This includes genres that provide a particular contribution to the mission and public purposes, are underprovided or in decline across public service broadcasting, as set out in Schedule 2 of the Agreement.

Children's content

Children's media habits are evolving; TV viewing on a TV set is becoming less important and children are more likely to be watching on-demand services

Ofcom research[29] found that although TV sets are used by almost all children, broadcast television viewing on the TV set appears to be of lessening importance. Figure 27 shows how average daily minutes viewed by children of all ages has decreased over time; it is also clear that the older children get, the less linear TV they watch. In 2018, younger children (aged 4-6) had the highest amount of viewing at nearly an hour and a half per child per day. Young teenagers (aged 13-15) had the lowest amount of daily viewing compared to any other age group, at just over an hour.

Figure 27: Average daily minutes viewed by children, total TV: 2010-2018



Source: BARB

We asked about children's viewing of SVoD for the first time in 2018 and found that one third of 3-4s (32%) and half of all 5-15s (49%) use services such as Netflix, Amazon Prime Video and Now TV.[30] BARB data show that although broadcast TV viewing declined in 2018, 'unmatched viewing' on the TV set by children – this is, TV screen time that cannot be attributed to broadcast programmes, including viewing of video-on-demand services such as Netflix, gaming and YouTube[31] – increased. This increase was slightly more than the decline in broadcast viewing, meaning children were spending almost a minute more a day using the TV set overall.[32]

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[29] Ofcom Children and Parents Media Use and Attitudes: 2018

[30] Ofcom Children and Parents Media Use and Attitudes: 2018

[31] Unmatched viewing = TV set in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs/box sets/archives, SVoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content.

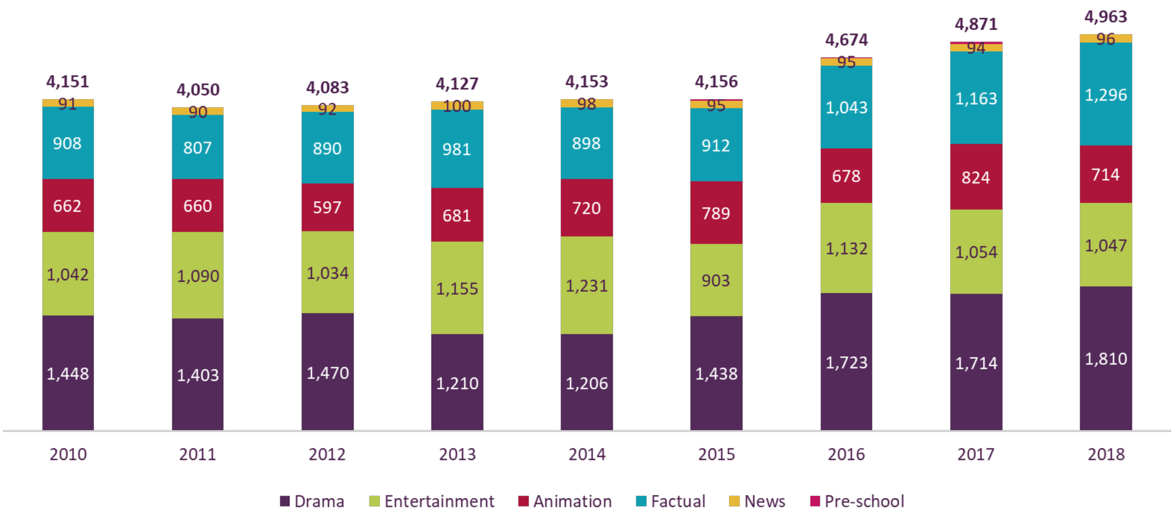
[32] BARB. Children 4-15 unmatched viewing compared to broadcast consolidated up to 28 days on the TV set. Unmatched viewing may include some pre-broadcast content within the broadcasters' non-linear measurement.

The amount of children's content available via CBBC increased again in 2018

CBBC broadcasts a range of children's content including drama (e.g. *The Dumping Ground)*, entertainment (e.g. *Marrying Mum & Dad)*, animation (e.g. *Arthur*), factual (e.g. *Horrible Histories)*, news (e.g. *Newsround)* and some pre-school content. There were 4,963 hours broadcast in 2018, of which 415 hours were first-run UK originations. This represented a 4% increase in first-run hours on 2017, in contrast to the 13% decline in the previous year. This was driven by a rise in first-run entertainment content, particularly music programmes, with increases in broadcast hours of *The Playlist* and singing competition *Got What it Takes?,* as well as coverage of the *CBBC Summer Social* music festival. But despite the increase in first-run hours, these still comprised 8% of total CBBC hours in 2018, the same proportion as in 2017.

Total hours of content available for children on CBBC increased by 2% in 2018[33]. This was due to an increase in children's drama and factual programming, offsetting declines in total hours broadcast for animation and entertainment. Output of children's factual content was at its highest level yet in 2018, due to more broadcast hours of *Art Ninja* and *Our School*. Similarly, the number of children's drama hours was also at its highest last year, driven by repeats of *Millie Inbetween* and *Jamie Johnson* in particular. But despite the greater amount of total content available, a smaller proportion of children's drama and factual hours were first-run in 2018. For drama content, first-run originated hours were slightly down on 2017, from 61 to 59 hours, representing 3% of total children's drama output in 2018. First-run hours as a proportion of total children's factual output has also been declining in recent years – from 16% in 2014 to 8% in 2018.

Figure 28: Total annual hours of children's content on CBBC, by genre



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

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[33] This refers to the number of hours classified as 'children's' on CBBC, and excludes content classed as drama, education, entertainment & comedy, and feature films.

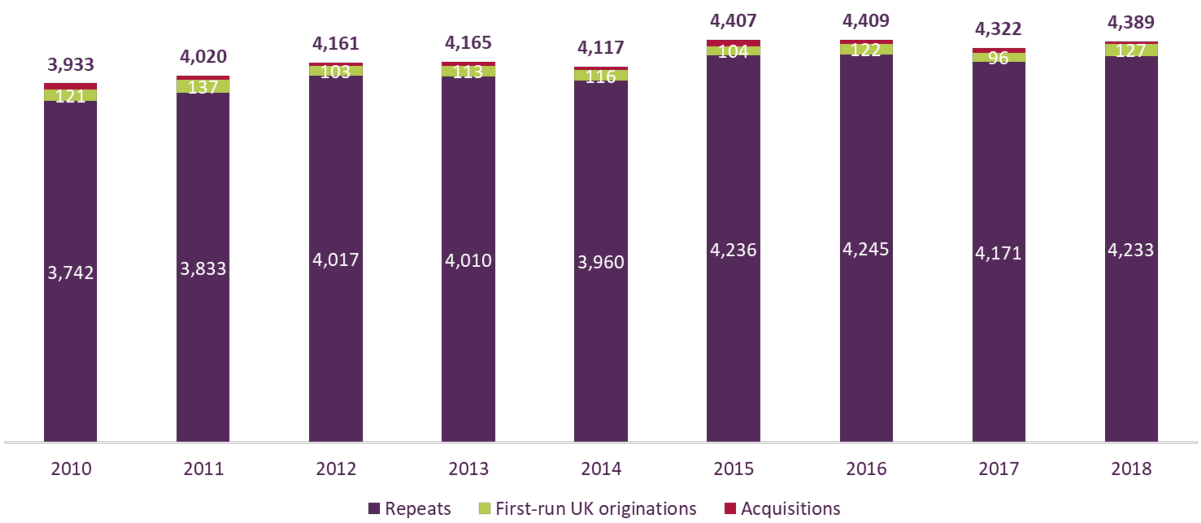
BBC Alba provides a range of children's programming for Gaelic speakers, including a mix of original programming like *De a-nis?* alongside dubbed versions of shows like *Postman Pat*. According to the BBC, more than 600 hours of children's content were broadcast on BBC Alba in 2018.[34]

First-run output of pre-school content reached its highest level since 2011

CBeebies predominantly broadcasts pre-school content to educate and entertain children aged six and under. In 2018, CBeebies broadcast 4,389 hours of pre-school content, 3% of which was first-run UK-originated. Year on year, first-run UK-originated hours increased by 32% on CBeebies, driven by new introductions such as *Bitz & Bob*, *Junk Rescue*, and *Ferne and Rory's Vet Tales*. In total, there were 15 new unique titles in 2018, up from 11 in 2017.

Outside first-run originations, a general increase in repeated content ensured that total hours of content on CBeebies remained consistent with recent years.

Figure 29: CBeebies: hours of pre-school content



Source: BBC/Ofcom. Note: In 2018, CBeebies broadcast 129 hours of animation, 12 hours of drama and 1 hour of entertainment in addition to pre-school content, all of which were repeats.

Only around one in three 4-6 year-olds watch CBeebies and one in six 6-12 year-olds watch CBBC

Overall, there has been a significant shift away from viewing children's programming, with average weekly reach to total TV declining by three percentage points, from 82% in 2017 to 79% in 2018 among children aged 4-15. Total time spent watching total TV fell by 11 minutes to 77 minutes among this age group.[35]

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[34] BBC Annual Report page 172
[35] BARB

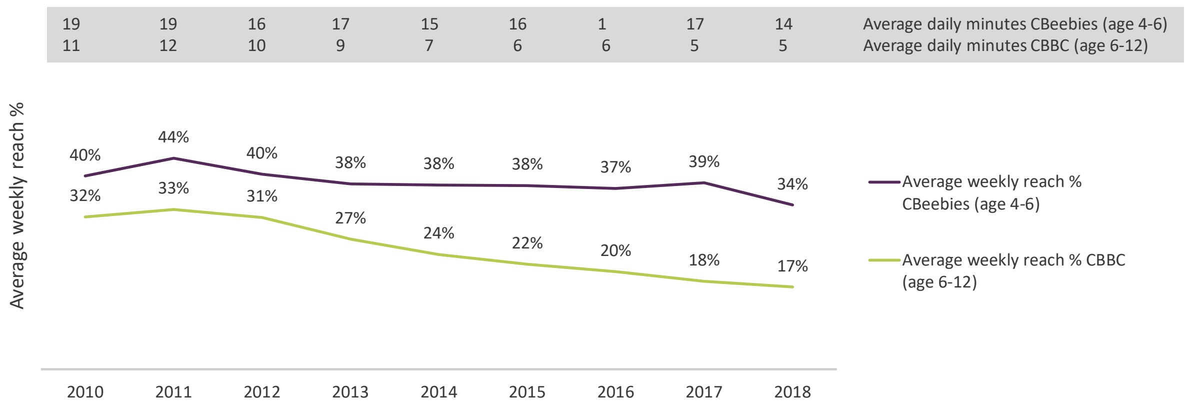
Across all TV, for the period April-March 2018/19, BBC iPlayer and online CBBC had an average weekly reach of 24% among 0-15s; for CBeebies this was 48%[36]. These figures are in line with the previous year.[37]

The average weekly reach of CBeebies to all 4-6 year-olds watching on the TV set declined from 39% in 2017 to 34% in 2018[38], despite the increase in first-run content. Average viewing minutes per day also fell from 17 to 14 in 2018. Overall, the average weekly reach for 4-6 year-olds on other children's Freeview channels[39] also declined year on year; only POP Max showed a slight increase (one percentage point since 2017).

For CBBC, the average weekly reach of its target audience (children aged 6-12) has been steadily decreasing and is now at 17%, just one in six of the target audience. Time spent viewing was stable at five minutes per day, although this is down from 11 minutes in 2010. CITV has also seen a steady decline with this age group since 2016, with its average weekly reach down to 6% in 2018.

Overall, there has been a significant shift away from viewing children's programming, with average weekly reach to total TV declining by three percentage points, from 82% in 2017 to 79% in 2018 among children aged 4-15. Total time spent watching TV also fell by 11 minutes to 77 minutes among this age group.

Figure 30: Average weekly reach % and average daily minutes of CBeebies and CBBC of their target audiences



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

[36] Kids CMI (Cross-Media Insight) survey by Ipsos MORI for the BBC, 0-15 year olds: 2,660 Jun 2017-Mar 2018, 2,974 Apr 2018-Mar 2019, 706 Apr-Jun 2019. Kids CMI is a survey of 0-15s' weekly media behaviour. c.700 different 0-15s take part each quarter by filling in a media diary for seven days (parents complete the diary for 0-6 year-olds). The diary covers linear TV, radio, video on demand, audio on demand, social media, YouTube, web and app consumption.
[37] June-March 2017-2018
[38] Average weekly reach criteria: 15+ minutes of consecutive viewing (BARB)
[39] Other Freeview channels include Pop, Tiny Pop, and CITV.

Informal learning - radio

The BBC continues to meet its quotas for factual content on network radio

Across its five main network radio stations, the BBC broadcast an average of 51 hours of factual content per week during 2018-19.[40] This was slightly down on the previous year's 54 hours, partly due to a decrease in the amount of factual content broadcast during the week on BBC Radio 2. Across the year, BBC radio's total output of arts programming, new documentaries, and religious content on Radio 2 decreased from 476 to 460 hours.[41] However, despite the decline on the previous year, the BBC still met or exceeded its quotas of such programming in 2018-19. For its other radio stations, the BBC also met its output commitments for documentary, religious and arts programming in 2018-19. An average of 11.4 million adults listened to some factual output on BBC Radio across the year, a third of the overall BBC radio audience[42].

Figure 31: Overview of BBC network radio factual output

	2017/18 schedule	2018/19 schedule
Radio 1	There was a weekly average of 2 hours 20 minutes of factual programming. This included *Radio 1 and 1Xtra's Stories* (9-11pm Tuesdays over the summer) and *Radio 1's Life Hacks* (4-6pm on a Sunday).	Radio 1 broadcast an average of 2 hours 15 minutes of factual programming per week. From November 2018 *Radio 1 and 1Xtra's Stories* returned and was broadcast 3.40–4am on Wednesdays. *Radio 1's Life Hacks* continued to be broadcast Sunday 4– 6pm.
Radio 2	The bulk of Radio 2's factual content was broadcast from 10pm on weeknights and included *The Radio 2 Arts Show* and *Johnnie Walker's Long Players*. At weekends, *Good Morning Sunday* was broadcast.	During 2018/19 various factual content was broadcast Tuesday – Thursday at 9-10pm. Across the year this slot was occasionally taken by specialist music content. *Good Morning Sunday* continued from 6-9am. Radio 2 broadcast 5 hours 20 minutes of factual programming in an average week.
Radio 3	Radio 3's factual output was typically broadcast from 10pm on weekdays, including *Music Matters* and *Free Thinking*.	Radio 3 broadcast a weekly average of 6 hours 30 minutes of factual content. As in 2017/18, the bulk of this output was broadcast from 10pm on weekdays.
Radio 4	About 20% of the weekday schedule consisted of factual content, much of which was broadcast in afternoon slots, e.g. *The Infinite Monkey Cage* and *The Food Programme*.	Radio 4's factual content was largely unchanged from the previous year, with again about 20% of an average week's output being devoted to factual programming.
Radio 5 live	Radio 5 live broadcast the *Arts Club* and *Will Gompertz's Heat Map* throughout the year on Sunday mornings.	Radio 5 live factual content continued to be limited to the weekend. This programming varied across the year dependant on news and sporting events. On average, 20 minutes factual programming were broadcast during the weekend, including *Under the Weather* and *Will Gompertz's Heat Map*.

Source: BBC/Ofcom analysis; RAJAR Q1 2019

[40] BBC/Ofcom analysis; RAJAR Q1 2019
[41] BBC Annual Reports
[42] RAJAR Q1 2019; figures reflect estimated weekly averages across the year. Output may vary throughout the year.

Informal learning - partnerships and online

The BBC also delivers Purpose 2 through partnerships and informal learning content on its website

The BBC engages in partnerships with industry to run campaigns and other initiatives which help to deliver Purpose 2. An example of this is *Super Movers*, a partnership with the Premier League and the Scottish Professional Football League, aimed at getting children active while they learn. According to BBC data, awareness among teachers had grown to 44% in January 2019, an increase of 5pp since June 2018[43]; *Super Movers* videos had been used by a quarter (25%) of primary school teachers surveyed, and three-quarters of those using it (76%) said they were using the activity videos with their students on a weekly basis.[44]

In 2018, the BBC concluded *Terrific Scientific*, a science campaign for primary schools delivered in partnership with Wellcome and around 20 academic institutions. Its aim was to inspire primary school pupils to 'get hands-on' with science. According to the BBC, almost 9,000 schools engaged with this initiative.[45]

March 2019 marked the 50th anniversary of the BBC's partnership with the Open University (OU). The OU invests in around 12-15 BBC projects a year; in 2018-19 these projects included *Blue Planet Live*, *The Secret Story of Stuff*, *The Prosecutors*, *Big Life Fix* and *5 Billion Pound Super Sewer.*[46]

Informal learning content is also available across the BBC's website, with pages such as *Plastics Watch*, containing supporting material for documentary series *War on Plastics with Hugh and Anita,* and *Blue Planet II.* As well as being available as programmes on BBC iPlayer, these have their own BBC online pages, containing links to podcasts, further information and other resources.[47]

Formal learning - online

BBC Teach

Awareness and use of BBC Teach is increasing

As part of its 2019-20 priorities, the BBC brought together the different parts of its teacher-facing portfolio under the BBC Teach banner to create an online destination for teachers. This includes Class Clips, Live Lessons, School Radio and other campaigns.

According to BBC data, awareness, claimed use and consumption of BBC Teach has increased. Claimed weekly use of BBC Teach content among teachers has remained fairly consistent across the year, finishing at 27% in the spring term of 2019. Fifty-three per cent of teachers say that they are aware of BBC Teach, up from 48% in the spring term of 2018. In Q1 2019, an average of 55,000 adult

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[43] EdComs, Super Movers January 2019 Survey, online survey, n=515 primary school teachers
EdComs, Super Mover June 2018 Survey, online survey, n=550 primary school teachers
[44] BBC Annual Report page 25
[45] BBC Annual Report page 25
[46] BBC Annual Report Page 25
[47] The BBC also has informal learning pages on its website such as BBC Culture, BBC Capital, BBC Earth, BBC Future and BBC Travel which are funded commercially rather than by the licence fee.

mobile and desktop online users (0.1% of the online adult population) visited the BBC Teach site per month, along with 6,000 6-17 year olds.[48]

BBC Teach

The BBC Bitesize website has undergone a transformation over the past year

There has been virtually no new formal learning content for children on BBC TV since 2015[49] and there is no formal educational provision for children on radio.[50] As mentioned in last year's report, on average there were 2.55 million weekly unique browser visits to Bitesize in Q1 2017. In Q1 2018, weekly unique browser visits to Bitesize reduced to 2.26 million,[51] a decrease of 11%. We are unable to compare year-on-year data in 2019, as BBC Bitesize has been undergoing a transformation, with old content being removed from the site in September 2018. The BBC acknowledges that this overhaul has resulted in some reduction in weekly browser reach compared with 2017/18. According to BBC data, 58% of secondary-school-aged students say that Bitesize helps them to achieve better grades, down from 64% in 2017-2018. Forty per cent of primary school children use BBC Bitesize; this is in line with 2017-2018.[52]

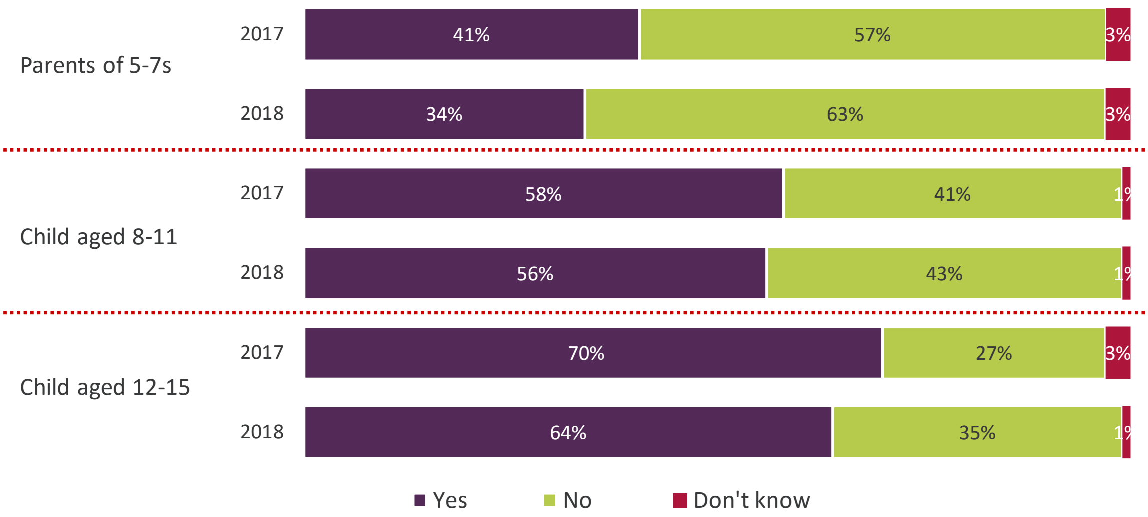
Use of BBC apps and websites for schoolwork and homework has remained stable and these continue to be seen as helpful

BBC websites and apps for schoolwork or homework are rated as helpful by around nine in ten parents of 5-7s and users aged 8-15. As shown in Figure 32, use of BBC websites, or apps such as Bitesize, for schoolwork or homework increases with the age of the child: from one in three (34%) 5-7s, to more than half (56%) of 8-11s and close to two in three (67%) 12-15s. Compared to 2017, there are no significant changes for each of these age groups.

At least four in five users (or their parents), ranging from 81% to 86%, agree that these resources are helpful. However, children aged 8-11 are less likely than in 2017 to say they are helpful; this has declined to 81% from 89% last year.

[48] Comscore MMX Multi-Platform, [C] BBC Teach, Jan-Mar 2019, Age: Desktop: 6+ and Mobile 18+, UK
[49] There was one hour of 'schools' content broadcast on BBC Four in 2017.
[50] The online-only service, CBeebies Radio, falls under BBC Online and provides audio pre-school content.
[51] 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.
[52] BBC Annual Report 2018-2019 Page 25

Figure 32: Whether child uses BBC websites or apps for school work and homework: 2017 vs. 2018



Source: Ofcom Parents' and Children's Media Literacy Tracker 2018

QP55B – Does your child ever use BBC websites or apps for their schoolwork or homework, so sites or apps like BBC Bitesize? (unprompted responses, single coded)/ QC39A - Do you ever use BBC websites or apps for your schoolwork or homework, so sites or apps like BBC Bitesize? (unprompted responses, single coded)

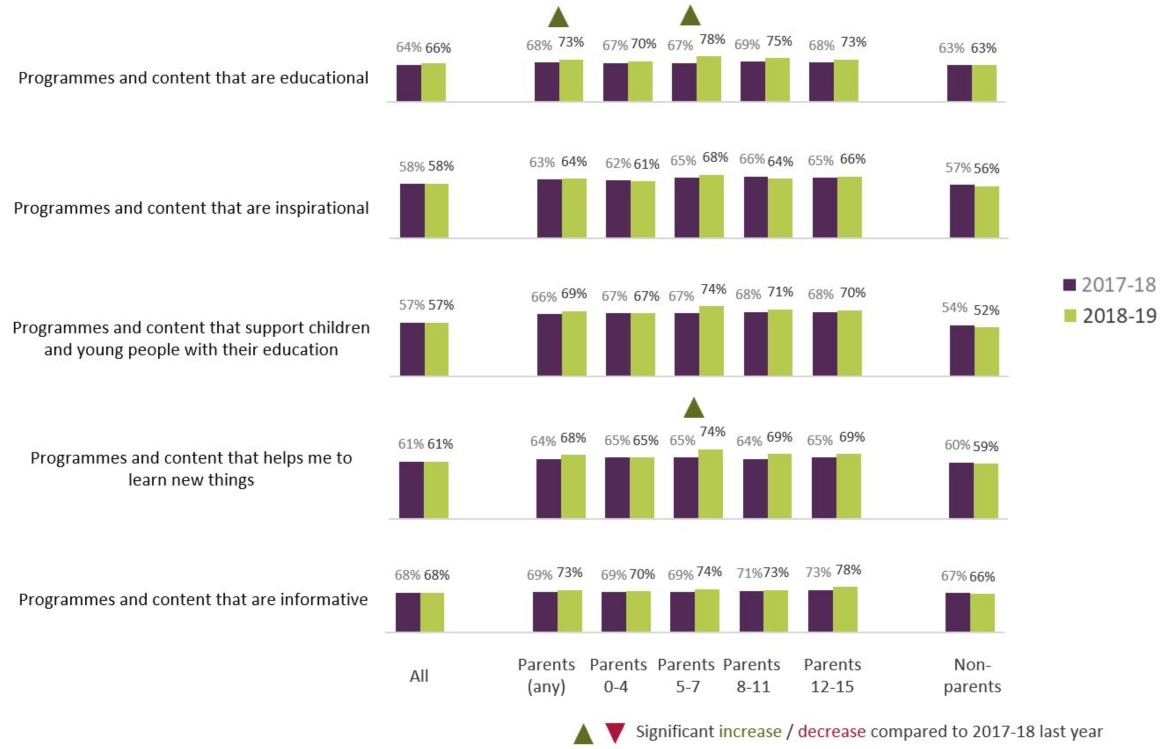
Base: Parents of children aged 5-7 whose child goes online (362)/ Children aged 8-15 who ever use BBC websites or apps (like BBC Bitesize) for their schoolwork or homework (251 aged 8-11, 307 aged 12-15). Significance testing shows any change between 2017 and 2018.

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

Around seven in ten parents 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 children.[53] Figure 33 shows that there have been significant year-on-year increases among parents of children aged 5-7.

[53] Ofcom BBC Performance Tracker

Figure 33: Purpose 2 sub-statements by parents and non-parents: % scoring 7-10

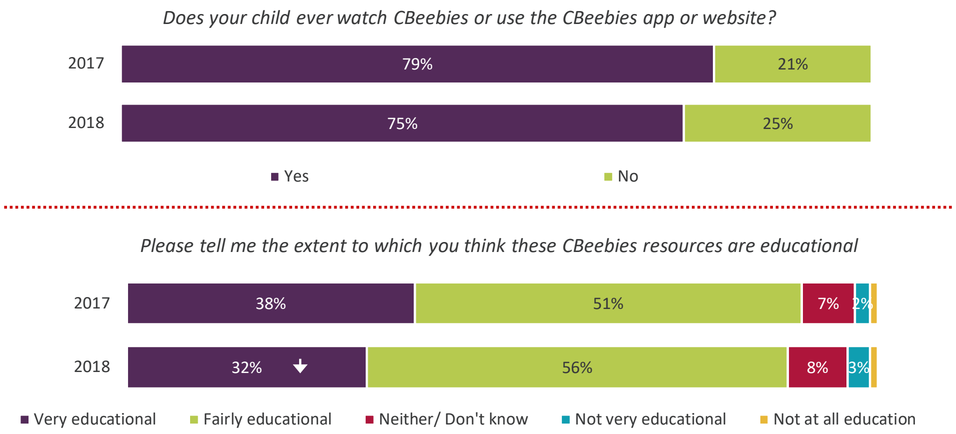


Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C7. On a scale of 1-10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you think the BBC as a whole provides:
Base: All (4099/3907), parents (1296/1206), parents with children 0-4 (516/487), parents with children 5-7 (395/332), parents with children 8-11 (434/426), parents with children 12-15 (452/427), non-parents (2740/2657)

The majority of parents of 3-4 year-olds agree that CBeebies resources are educational

Three in four parents of children aged 3-4 watch CBeebies or use the CBeebies app or website and the majority (88%) say that these CBeebies resources are educational. However, it is worth noting that the proportion who say that these resources are '*very educational*' has declined significantly this year, from 32% to 38%.

Figure 34: **Attitudes towards CBeebies among parents of 3-4s and among those whose child watches CBeebies TV, website or app: 2017 vs. 2018**



Source: Ofcom Parent and Children's Media Literacy Tracker 2018 QP55A – Does your child ever watch CBeebies or use the CBeebies app or website? (unprompted responses, single coded)/ QP56A - Using this card can you please tell me the extent to which you think these CBeebies resources are educational? (prompted responses, single coded).

Base: Parents of children aged 3-4 (630)/ parents of children aged 3-4 whose child ever watches CBeebies or use the CBeebies app or website (472). Significance testing shows any change between 2017 and 2018.

Whit arrow indicates significance testing at the 95% level shows any change 2017 and 2018

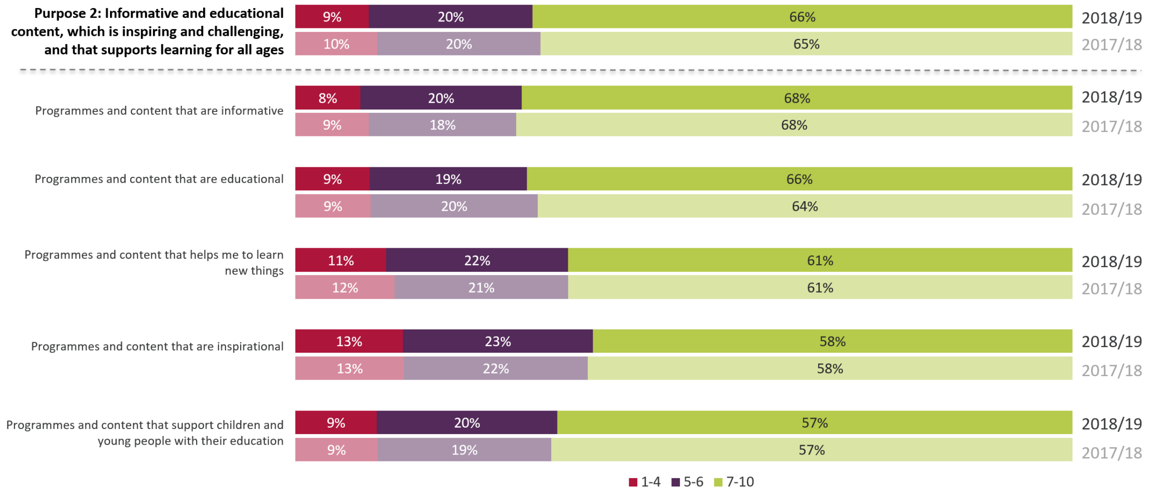
Audience opinion – formal and informal learning

Opinions of the BBC's delivery of Purpose 2 have not changed in the last 12 months among all adults

When asked to rate the extent to which the BBC provides '*informative and educational content, which is inspiring and challenging, and that supports learning for all ages'*, 66% of all UK adults rate it highly (7-10). There has been no significant change in audience opinions (65% last year compared to 66% this year) at the total UK audience level. This lack of movement in attitudes is similar across all of the public purposes, although Purpose 2 continues to be the highest-rating purpose in terms of delivery.

When we look more closely at audience sub-groups, those in England and in the ABC1 socio-economic groups rate the BBC more highly than do all adults. Those in the DE socio-economic groups, those aged 65+, and those in Scotland and Northern Ireland rate the BBC's delivery of Purpose 2 less positively than do all adults.

Figure 35: Audience opinions about BBC delivery of Purpose 2

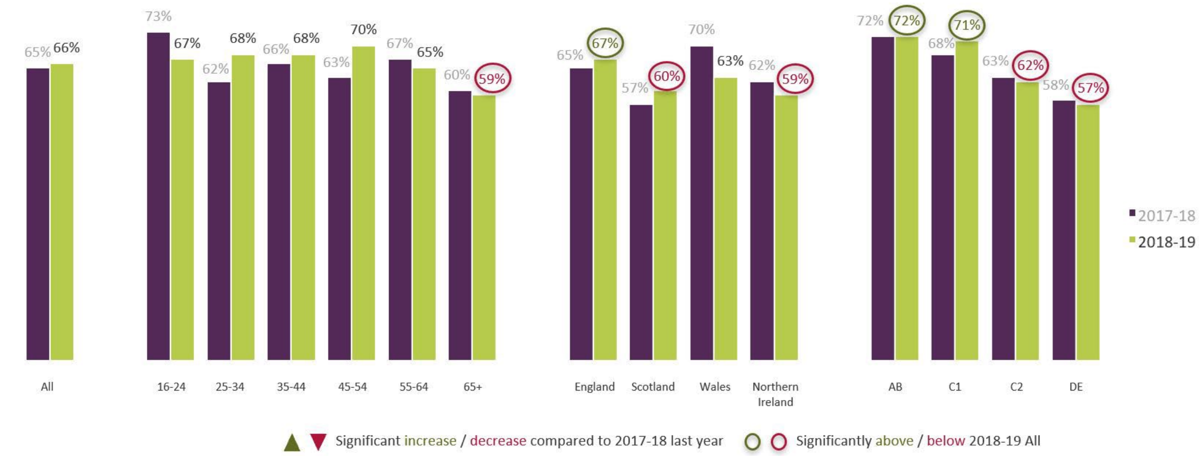


Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019

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:

Base: All participants (4099/3907)

Figure 36: Agreement with statement 'Provides Informative and educational content, which is inspiring and challenging and that supports learning for all ages' by demographic



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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: Informative and educational content, which is inspiring and challenging, and that supports learning for all ages.
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795), England (3104/2892), Scotland (358/349), Wales (337/327), Northern Ireland (300/339), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022).

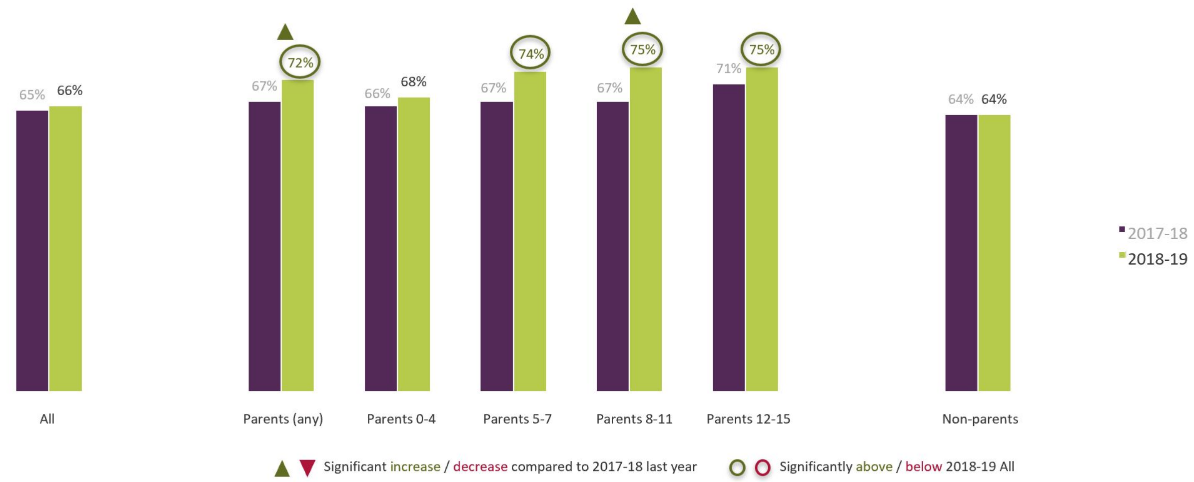
Last year we reported that younger people (16-24) and those in the AB socio-economic groups were more likely to rate the BBC highly in its delivery of Purpose 2. This year, ABs continue to rate delivery of this purpose highly, although 16-24s are now more in line with all adults.

Parents of children aged 16 and under

Parents' rating of the BBC's performance on this purpose has improved, driven by increases among parents of children aged 5-11

Seventy-two per cent of parents rate the BBC's overall delivery of this purpose highly, an increase from 67% last year and significantly higher than the proportion of non-parents who rate the BBC highly (64%). This increase has been driven by parents who have children aged 5-11. Almost three-quarters of parents of children aged 8-11 rate overall delivery of this purpose highly; this is 8pp higher than in the previous year.

Figure 37: Agreement by parents with statement 'Provides informative and educational content, which is inspiring and challenging and supports learning for all ages'

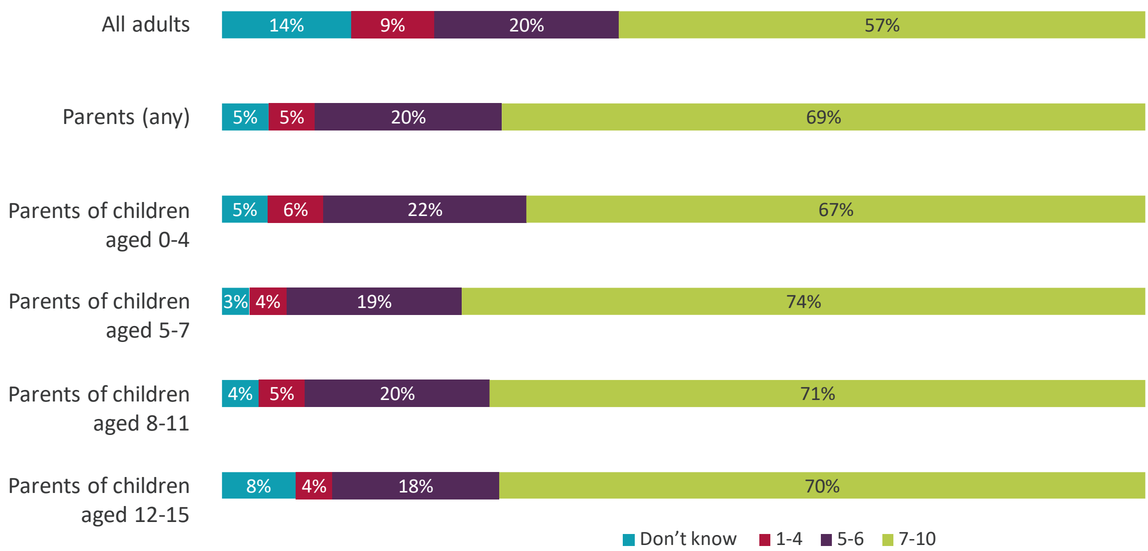


Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C2. On a scale of 1 to 10 where 1 means not at all well and 10 means extremely well, how well, if at all, do you personally think the BBC as a whole provides: Informative and educational content, which is inspiring and challenging and that supports learning for all ages?
Base: All (4099/3907), parents (1296/1206), parents with children 0-4 (516/487), parents with children 5-7 (395/332), parents with children 8-11 (434/426), parents with children 12-15 (452/427), non-parents (2740/2657).

Parents rate the BBC highly for providing programmes and content that support children and young people with their education.

The overall hierarchy of the sub-statements which make-up Purpose 2 (ranked on 7-10 ratings) has not changed since last year; 68% of UK adults rate the BBC highly (7-10) on its provision of informative programmes and content. The BBC performs least well on programmes and content that support children and young people with their education; 57% of UK adults rate this measure highly. However, parents with children aged 16 or under rate this statement more highly, at 69%, with 5% saying that they do not know, compared to 14% of all UK adults.

Figure 38: Attitudes to programmes and content that support children and young people with their education



Source: BBC Performance Tracker, fieldwork: 16 April 2018 to 10 April 2019
Question: 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: Programmes and content that support children and young people with their education
Base: All (4099/3907), parents (1296/1206), parents with children 0-4 (516/487), parents with children 5-7 (395/332), parents with children 8-11 (434/426), parents with children 12-15 (452/427)

16-24s rate the delivery of Purpose 2 highly

Young people aged 16-24 are more likely than all adults to say that the BBC has programmes and content that are educational (71% vs. 66%) and programmes and content that support children and young people with their education (64% vs. 57%). This is consistent with findings from last year. This age group is also more likely than all adults to rate the BBC highly for '*programmes and content that helps me to learn new things'* (67% vs. 61%).

There are also some significant differences across some of the sub-statements among some age groups. For instance, people in the 65+ age group are more likely to rate all the sub-statements significantly lower than all adults. In particular, the sub-statement regarding 'programmes and content that helps me to learn new things' is rated significantly lower than last year (50% vs. 56%) among this age group. The 45-54 age group are more likely to rate the sub-statement that the BBC provides '*programmes and content that support children and young people with their education*', significantly more highly than all adults (61%); this has increased by seven percentage points year on year. There has also been a 7pp year-on-year increase among this age group (from 62% to 69%) for the BBC '*providing programmes and content that are educational*'

Figure 39: Delivery performance of the Purpose 2 sub-statements (7-10 ratings), by age

	All		16-24		25-34		35-44		45-54		55-64		65+	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 2: Informative and educational content, which is inspiring and challenging, and that supports learning for all ages	65%	66%	73%	67%	62%	68%	66%	68%	63%	70%	67%	65%	60%	59%
Programmes and content that are informative	68%	68%	72%	71%	65%	70%	69%	69%	65%	70%	72%	67%	66%	62%
Programmes and content that are educational	64%	66%	68%	71%	64%	65%	65%	69%	62%	69%△	66%	66%	61%	58%
Programmes and content that helps me to learn new things	61%	61%	61%	67%	63%	65%	63%	62%	59%	65%	63%	62%	56%	50%▼
Programmes and content that are inspirational	58%	58%	60%	59%	58%	62%	61%	61%	58%	60%	60%	60%	55%	50%
Programmes and content that support children and young people with their education	57%	57%	64%	64%	60%	62%	61%	60%	54%	61%▲	60%	53%	49%	45%

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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. This set of statements are about the BBC's responsibility to support learning for all people of all ages. 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:
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795)

Those in the DE socio-economic group are less likely than all adults to be positive about the delivery across all five of the sub-statements. People in Scotland and Northern Ireland continue to rate the BBC less favourably, across the majority of sub-statements; '*programmes and content that support children and young people with their education*' is rated the lowest in Scotland – less than half (47%) rate it highly for delivering this.

Figure 40: Delivery performance of the Purpose 2 sub-statements (7-10 ratings), by socio-economic group and nation

	All		AB		C1		C2		DE		England		Scotland		Wales		Northern Ireland	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 2: Informative and educational content, which is inspiring and challenging, and that supports learning for all ages	65%	66%	72%	72%	68%	71%	63%	62%	58%	57%	65%	67%	57%	60%	70%	63%	62%	59%
Programmes and content that are informative	68%	68%	76%	76%	71%	74%	67%	63%	58%	57%	69%	69%	55%	60%	74%	68%	61%	58%
Programmes and content that are educational	64%	66%	73%	71%	67%	69%	63%	63%	55%	60%	65%	67%	55%	60%	71%	66%	60%	55%
Programmes and content that helps me to learn new things	61%	61%	70%	67%	61%	65%	60%	57%	53%	54%	61%	62%	51%	52%	64%	62%	56%	54%
Programmes and content that are inspirational	58%	58%	66%	66%	61%	62%	59%	52%▼	50%	52%	59%	60%	48%	47%	65%	59%	54%	52%
Programmes and content that support children and young people with their education	57%	57%	63%	62%	59%	59%	58%	54%	51%	52%	58%	58%	49%	45%	61%	53%	51%	54%

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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. 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. 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:
Base: All (4099/3907), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022), England (3104/2892), Scotland (358/349), Wales (337/327), Northern Ireland (300/339)

5. Purpose 3: creative, high quality and distinctive output and services

Summary

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:

Overall, we find that the BBC is distinctive in a number of ways, including through its provision of high-quality content across a range of genres on both its mainstream and specialist services, with no directly comparable provider.

• The BBC continues to perform well in providing a broad mix of different types of TV, radio and online programmes and content. BBC One broadcasts a greater range of output than ITV during the peak-time hours of 6pm to 10:30pm.

• Although spend on TV still dominates the BBC's overall content spend, this has decreased as spend on online, and other areas of content spend such as development, have increased.

• An indicator that the BBC is willing to take risks and source programmes from new providers is that in 2018 it used 308 different production companies, the highest number since 2012.

• Although there have been some improvements in the perceptions of minority ethnic group and older audiences in its delivery of this purpose, audiences in Scotland and those in lower socio-economic backgrounds continue to rate the BBC lower.

Performance assessment

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 service and platform, both in peak time[54] 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.

[54] The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three (until it ceased broadcasting as a linear channel) and BBC Four, peak time runs from 7pm (when broadcasting starts on these channels) to 10.30pm.

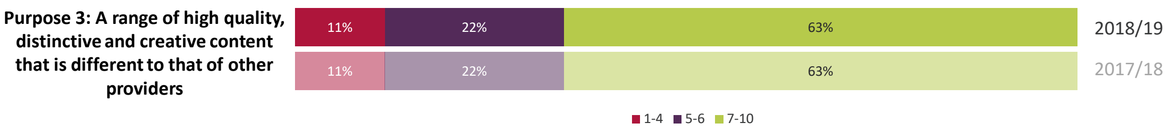
Our assessment of the BBC's performance has looked at comparisons between the BBC and other relevant providers. It has taken into account the amount of new content made for UK audiences, the range of audiences served and the range, quality and innovation in the BBC's output and services.

We also 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 2018-19.

Overall perceptions of the BBC's delivery of this purpose have not changed over the past year

Looking at the adult audience overall, there is very little change in how they see the BBC delivering this purpose, with 63% rating the BBC highly on its range of high quality, distinctive and creative content that is different to that of other providers.

Figure 41: Audience opinions about BBC delivery of Purpose 3



Source: BBC Performance Tracker; fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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:
Base: All (4099/3907)

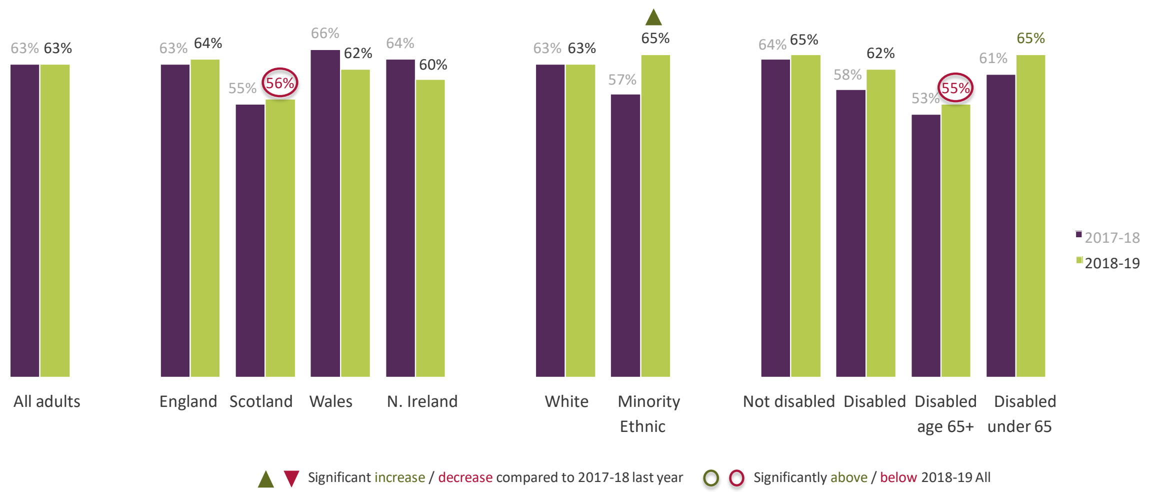
Those in higher socio-economic groups continue to rate the BBC highly for its delivery of this purpose, and there have been improvements among minority ethnic groups and older audiences

When we look more closely at the different demographics, there is some movement in opinions among those from a minority ethnic background. This audience group rates the BBC significantly higher this year on its delivery of Purpose 3.

ABC1s continue to rate the delivery of this purpose higher than average, and there have been improvements among the 45-54 age group this year. Those in Scotland, the C2DE socio-economic groups, and those who are disabled and aged 65 and over, continue to rate the delivery of Purpose 3 lower than average.

Figure 42: Overall delivery performance (7-10 ratings) for Purpose 3 by age and socio-economic group

Figure 43: Overall delivery performance (7-10 ratings) for Purpose 3 by nation, ethnicity and disability



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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: A range of high quality, distinctive and creative content which is different to that of other providers.
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022),England (3104/2892), Scotland (358/349), Wales (337/327), Northern Ireland (300/339), white (3408/3295), minority ethnic groups (672/598), not disabled (2980/2803), disabled (940/946), disabled age 65+ (258/276), disabled under-65s (682/670).

Assessment of each characteristic

Mix of different genres and output

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

The BBC continues to perform well in providing a broad mix of different types of TV, radio and online programmes and content

Two-thirds of adults rate this attribute highly, with significant year-on-year increases among the 25-34 age group and among those who are disabled and aged under 65. These two groups, along with the 45-54 age group, the ABC1 socio-economic group, and those in England, all rate the BBC significantly higher than all adults on this measure.

In contrast, the 65+ age group, the DE socio-economic group, those in Scotland and Northern Ireland and those who are aged over 65 and disabled rate the BBC significantly lower than all adults for its provision of a broad mix of different types of content.

Figure 44: Audience opinions about BBC delivery on providing a mix of different genres and output, by demographics

		Provides a broad mix of different types of TV, radio and online programmes and content	
		2017/18	2018/19
All		67%	66%
Age	16-24	70%	66%
	25-34	63%	71% △
	35-44	65%	67%
	45-54	68%	70%
	55-64	72%	67%
	65+	66%	58% ▽
Socio-economic group	AB	75%	74%
	C1	71%	69%
	C2	66%	63%
	DE	57%	58%
Nation	England	68%	67%
	Scotland	56%	58%
	Wales	73%	66%
	Northern Ireland	63%	58%
Disability	Not disabled	68%	67%
	Disabled	63%	66%
	Disabled age 65+	62%	55%
	Disabled age under 65	64%	71% △

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C8. This set of statements are about the BBC's responsibility to provide the most creative, highest quality and distinctive content. 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:
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022), England (3104/2892), Scotland

(358/349), Wales (337/327), Northern Ireland (300/339), not disabled (2980/2803), disabled (940/946), disabled age 65+ (258/276), disabled age under 65 (682/670)

Television

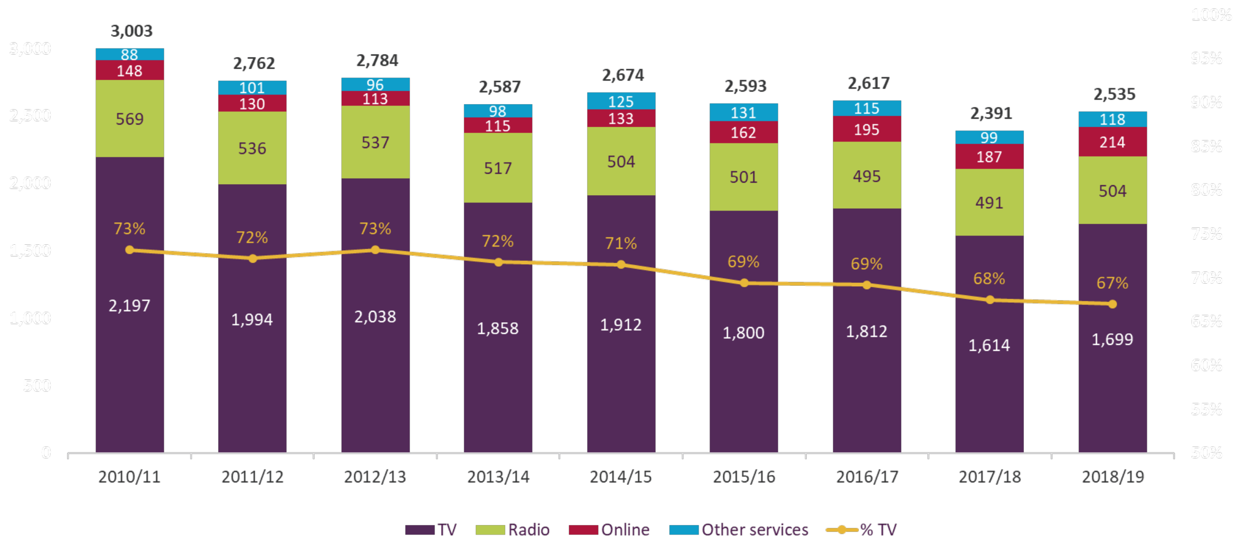
Although spend on TV still dominates the BBC's overall content spend, this has decreased as spend on online, and other areas such as development, have increased

Excluding spend on the BBC World Service, BBC content spend across TV, radio, online and other services increased by £144m in real terms to £2.535bn in 2018/19. TV accounted for 67% of this spend – its lowest proportion of BBC content spend in the period since 2010/11. Despite the decline in the proportion of spend allocated to TV content this year, TV spend has increased since 2017/18, although it is still lower than in 2016/17.

The lower proportion of spend for TV was driven by a shift to online content and other services, such as development spend. In real terms, online content spend was £148m in 2010/11 and rose to a high of £214m in 2018-19, accounting for 8% of overall BBC content spend.

When we include the BBC World Service, for which funding responsibility transferred from the Foreign & Commonwealth Office to the licence fee in 2014-15, the proportion of BBC content spend allocated to TV in 2018/19 decreases to 59%.[55]

Figure 45: Overall BBC content spend (£m): 2010/11 to 2018/19



Source: BBC Annual Report. Note: figures are expressed in real terms. Online spend includes spend on news, sport and weather, children's, knowledge and learning and IP-delivered TV and radio across all connected devices. Other service spend includes spend on orchestras and performing groups, development spend and S4C, but does not include spend on BBC World Service.

[55] Source: BBC Annual Report. £234m and £93m were spent on the BBC World Service operating licence and grant respectively in 2018/19.

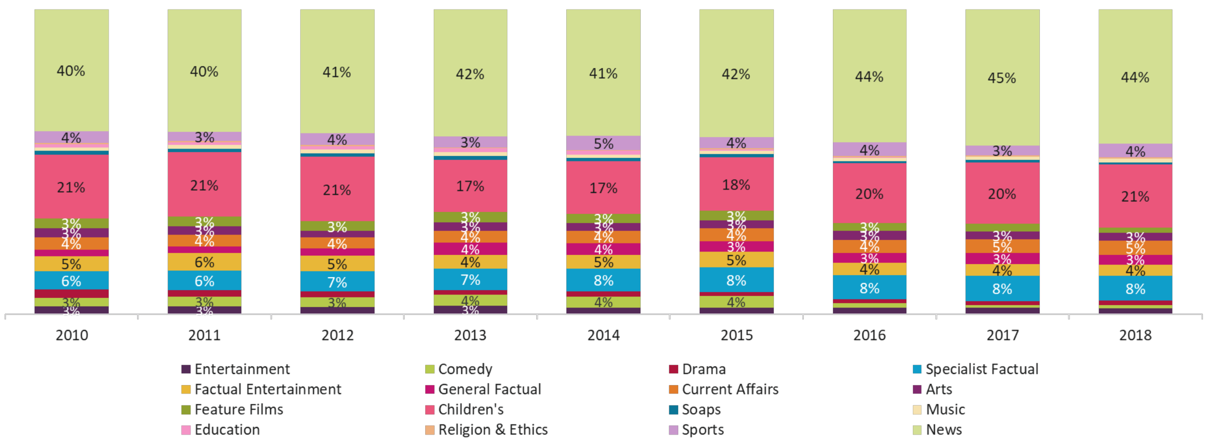
Overall, the BBC broadcasts a wide range of genres across its TV channels, and its genre mix has remained broadly stable in recent years

BBC TV programming has remained consistent and stable since 2010, with little change in share of hours distributed across genres. The largest change since 2010 is in news content, which increased from a 40% share to 44%, and specialist factual content which increased from 6% of all output to 8% (although specialist factual has remained at this level since 2014).

Over the years, news, children's, and specialist factual have increased their share of total hours. In 2018, these three genres combined accounted for 73% of total hours broadcast across the BBC channels, compared to 67% in 2010.

While it has been relatively stable since 2016, the amount of news hours broadcast on the BBC in 2018 was 3% higher than in 2010 (from 19,866 to 20,480 hours). This high figure is in part due to several BBC TV channels, including BBC News and BBC Parliament, focusing almost exclusively on news programming. Children's content has retained a consistent share of the BBC's broadcast hours. As with news programming, this proportion of children's content is high because CBBC and CBeebies are dedicated to broadcasting children's content.

Figure 46: BBC network genre mix across total hours broadcast, all TV channels: 2010-2018



Source: Ofcom/BBC. Note: figures include network content across first-run originations, acquisitions, and repeats for BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, and BBC Parliament. Figures exclude BBC HD and nations' and regions' content.

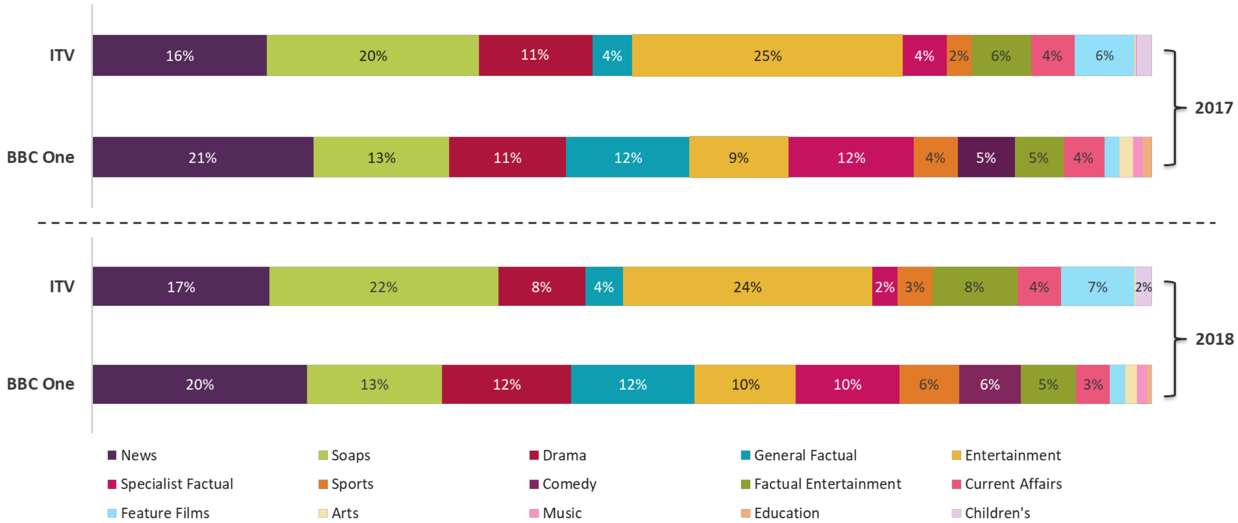
There was a more balanced range of programming on BBC One than on ITV in peak time

In terms of genres, BBC One broadcasts a greater range of output than ITV during the peak-time hours of 6pm to 10:30pm.

In 2018, 20% of peak-time programming on BBC One was news content, with a relatively equal share of around 10% for soaps, drama, general factual, entertainment, and specialist factual genres. In contrast, ITV's peak-time content was dominated by entertainment (24%), soaps (22%), and news (17%) content; no other genre achieved more than an 8% share. Between 2017 and 2018, ITV's catalogue became less varied, with an additional 3% of peak hours being dedicated to news and soaps, while entertainment programming still comprised almost a quarter of peak content.

The share of genres across peak time remained consistent for BBC One between 2017 and 2018, with only slight changes: the most significant was a 2% decrease in specialist factual content and a 2% increase in sports content in 2018, due to major sporting events such as the FIFA World Cup. The more evenly distributed share of hours across multiple genres of content indicates that peak-time BBC One content is more diverse and balanced in nature than the content offered by ITV overall. The BBC allocates a larger proportion of hours to general factual, specialist factual, sports, and comedy during peak time, some of which are double the peak-time output of ITV.

Figure 47: BBC One and ITV genre mix during peak time, of total network hours broadcast: 2017 vs. 2018



Source: Ofcom/BBC/ITV. Note: figures include network content across first-run originations, acquisitions, and repeats for ITV and BBC One during peak time from 18:00-22:30. Figures exclude BBC HD and nations' and regions' content.

Radio

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

The table below 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. On Radio 1, around two-fifths of its music output is centred on specialist music programming, with more than 3 million adults tuning in each week. The specialist music programme with the highest reach is *Future Sounds with Annie Mac*, each weekday at 7pm.

Figure 48: Overview of BBC network radio output and audience to certain genres

	Output	Audience
Radio 1	Close to 95% of the average weekly output on Radio 1 was music content. Of Radio 1's music programming across the week, about 40% was specialist music content. General music programming took up 60% of output on average between Monday and Friday. Over the weekend, specialist music was slightly more predominant, at around 50% of total output.	Specialist music content on Radio 1 was listened to by an average of 3.2m adults each week across 2018/19, around 35% of Radio 1's overall audience.
Radio 2	On a typical week, around 70% of output on Radio was general music content, with just under 15% dedicated to specialist music. As part of this, Radio 2 broadcast 257 hours of live music. Compared to 2017/18, there was less factual content during the weekdays, dropping from around 6 hours per average week to 2 hours in 2018/19; although output has increased slightly over the weekend periods.	Specialist programming on Radio 2 was listened to by an average of 4.0m adults each week across 2018/19, around a quarter of Radio 2's overall audience. Within this, 2.1m adults listened to *Elaine Paige on Sunday*.
Radio 3	Live, classical, and jazz/contemporary music dominated Radio 3's weekly output on an typical week, comprising just under 90% of output on average. 57% of output is live or specially recorded music; comprising 501 live or specially recorded performances in 2018/19.	Live and specially recorded music on Radio 3 was listened to by an average of 1.3m adults each week, two-thirds of Radio 3's overall audience.
Radio 4	The most prominent genre is news and current affairs, accounting for around 43% of output in a typical week. Beyond this, Radio 4 broadcasts a range of drama, factual, and entertainment programming, particularly over the weekend slots.	Factual output on Radio 4 was listened to by an average of 8.2m adults each week across 2018/19, three quarters of Radio 4's overall audience.
Radio 5 live	In a typical week, just over 75% of Radio 5 live's output is news and current affairs. Sports takes up the majority of the remaining broadcasts on the network, with 20% of output for the average week.	Sport output on 5 live was listened to by an average of 3.3m adults each week across 2018/19, around two thirds of 5 live's overall audience.

Source: BBC/Ofcom analysis; BBC Annual Report; RAJAR Q1 2019 12-month weight

Quality of output

Overall, there has been no change in the provision of high-quality content this year

Two-thirds of all adults (66%) continue to rate the BBC highly for providing high quality television, radio and online content. The 45-54 age group, the AB socio-economic group, those in England and those without a disability all rate this measure significantly higher than all adults. There has been a significant year-on-year improvement among those who are disabled and aged under 65.

The 65+ age group, those in the DE socio-economic group, those in Scotland and Northern Ireland and disabled people aged over 65 all rate the delivery of this measure lower than all adults. It is worth noting the significant decrease of nine percentage points, to 55%, among people in Northern Ireland.

When asked how the BBC compares to other providers, around two-thirds of BBC TV and on-demand viewers rate BBC TV highly (7-10) for providing high-quality content (67%), eight in ten listeners rate BBC radio highly for providing high-quality radio output (79%) and three-quarters of users rate the BBC website and apps highly (7-10) for providing high-quality content (75%)[56].

[56] Full data available in the interactive report

Figure 49: Audience opinions about BBC delivery of providing high quality of output, by demographics

		Provides high quality television, radio and online content	
		2017/18	2018/19
All		66%	66%
Age	16-24	72%	68%
	25-34	64%	69%
	35-44	66%	67%
	45-54	67%	73%
	55-64	69%	67%
	65+	63%	58%
Socio-economic group	AB	76%	73%
	C1	70%	69%
	C2	65%	64%
	DE	56%	58%
Nation	England	67%	68%
	Scotland	56%	57%
	Wales	74%	70%
	Northern Ireland	64%	55% ▽
Disability	Not disabled	68%	68%
	Disabled	63%	65%
	Disabled age 65+	63%	54%
	Disabled age under 65	62%	70% △

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C8. This set of statements are about the BBC's responsibility to provide the most creative, highest quality and distinctive content. 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:
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022), England (3104/2892), Scotland (358/349), Wales (337/327), Northern Ireland (300/339), not disabled (2980/2803), disabled (940/946), disabled age 65+ (258/276), disabled under-65s (682/670)

Television

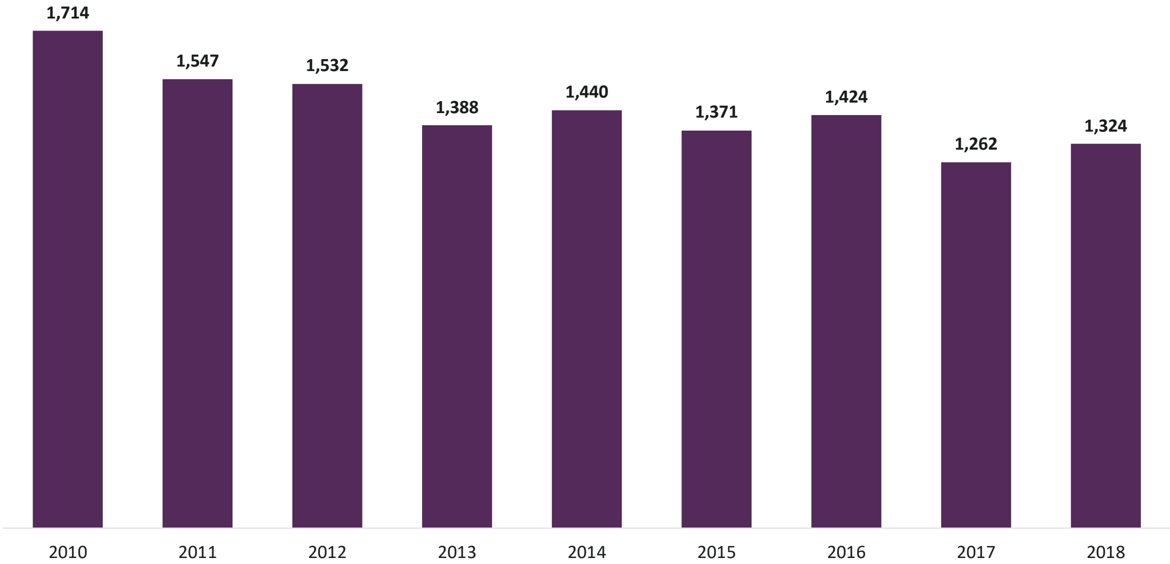
The BBC's spend in real terms on content has declined over time

Total network TV spend by the BBC has been on a steady downwards trajectory since 2010. This is across the combined spend on first-run originations, acquisitions and repeats. Spend stood at £1.324bn in 2018 - a decrease of 23% since 2010. While spend was up by 5% since 2017, driven by increases in expenditure on children's, news and current affairs, and sports content, 2018 had the second lowest network spend since 2010.

Total spend rises to £1.525bn when including nations' and regions' content spend (excluding BBC Alba). This was a marginal increase (4%) on 2017 spend levels, but still lower than the BBC's total TV content spend in 2010, which was £1.930bn.[57]

[57] Genre breakdowns of content spend are available in the interactive report

Figure 50: BBC TV total network spend on content (£m): 2010-2018



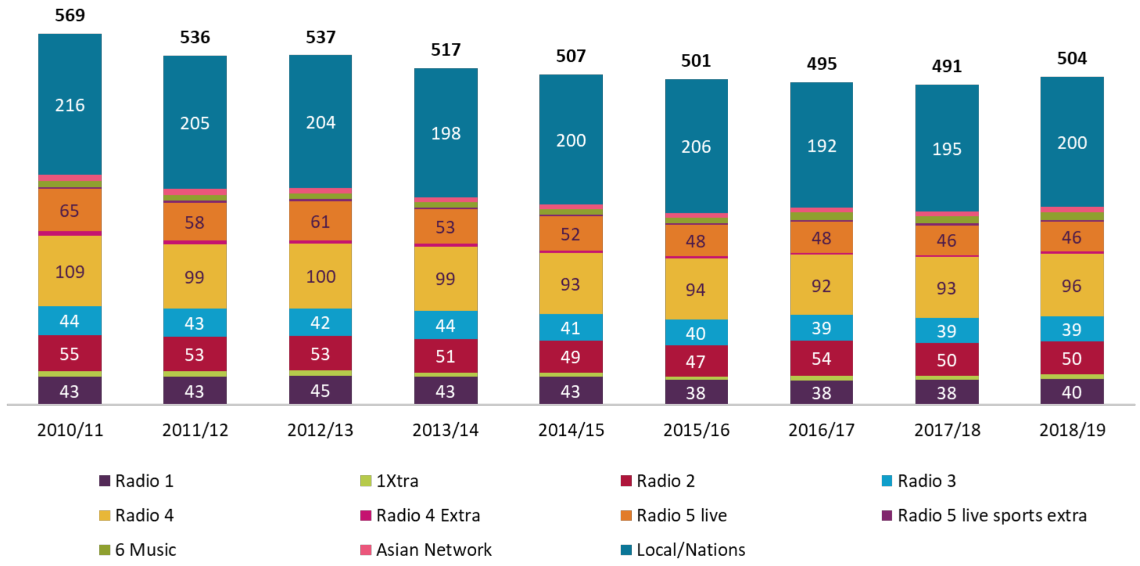
Source: Ofcom/BBC. Note: figures are expressed in real terms and include network content across first-run originations, acquisitions, and repeats for BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, and BBC Parliament. Figures exclude BBC HD and nations' and regions' content.

Radio

BBC radio content spend was £504m in 2018/19, rising for the first time since 2014/15

Following three years of steady decline, BBC spend on radio content increased in 2018/19, up by £13m to £504m. This 3% increase on 2017/18 was primarily due to greater funding for Radio 1, Radio 4, and nations'/local radio channels. The 2018/19 radio spend marks a four-year high and is the first time since 2014-15 that the BBC has increased its spend on radio content.

Figure 51: BBC radio content spend (£m): 2010/11 to 2018/19



Source: BBC Annual Report. Note: figures are expressed in real terms.

Online

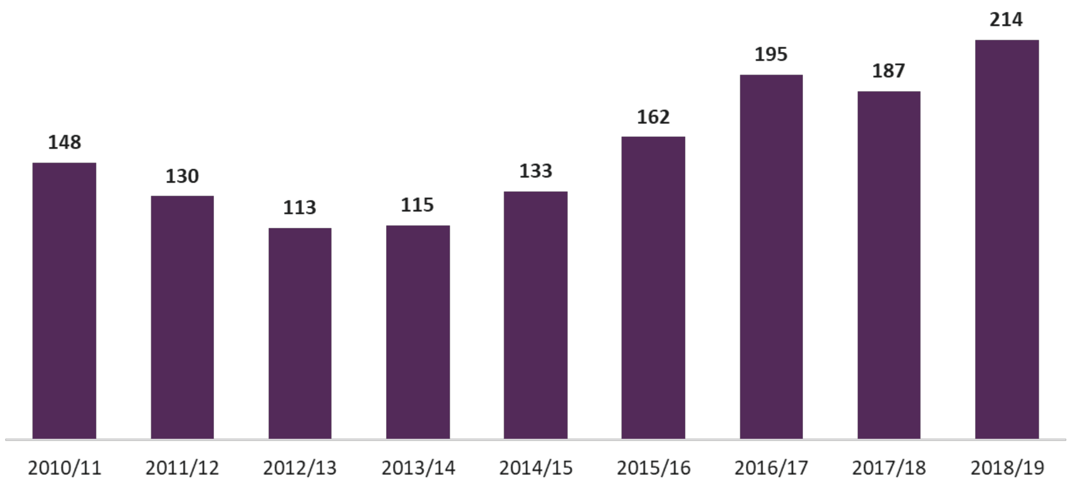
Spend on online content increased in 2018-19, continuing the overall trend since 2013-14 and following a slight dip last year

The BBC is increasingly producing TV and radio content that is online-only. In 2018, there were 217 hours of first-run UK-originated TV content available on the BBC iPlayer and BBC Three platforms, the majority of which was dedicated to entertainment and contemporary music content (126 hours). The BBC has also begun commissioning more original podcasts in recent years; these are available to download on BBC Sounds, including *That Peter Crouch Podcast* and *Brexitcast*, among a catalogue of additional BBC radio content available online.

As reported by the BBC, 2018/19 spend on online content has increased by 14% since the previous year, rising to £214m. The BBC's online content spend goes toward online services, platforms, and content available on connected TV, desktop computer, mobile and tablet, as well as IP-delivered TV and radio services on BBC iPlayer (live and on-demand), including news, weather and sports content, as well as CBBC and CBeebies.

Following a steady increase in online content spend since 2012/13, there was a slight dip in spend last year, recovering in 2018/19 to reach the highest level of spend by the BBC on online content, at £214m. 2018/19 represented an 89% increase in BBC online content spend since 2012/13; a clear upward trajectory in spend in recent years which reflects the BBC's push toward online broadcasting.

Figure 52: BBC online content spend (£m): 2010/11 to 2018/19



Source: BBC Annual Report. Note: figures are expressed in real terms.

Amount of original output produced in the UK

Those aged 65 and older are less likely to be positive about the BBC's provision of original UK content

As seen throughout the analysis of our Performance Tracker data, people in higher socio-economic groups are more likely to rate the BBC highly for delivering this purpose. The perceptions of over-64s are less positive than last year, and this group continue to rate this statement lower compared to the overall population.

Figure 53: Audience opinions about BBC delivery on providing original output produced in the UK, by demographics

		Provides programmes and content made specifically for UK audiences, using UK actors, writers and locations 2017/18	2018/19
All		65%	65%
Age	16-24	74%	68%
	25-34	64%	68%
	35-44	67%	67%
	45-54	65%	68%
	55-64	65%	65%
	65+	61%	55% ▽
Socio-economic Group	AB	75%	72%
	C1	68%	68%
	C2	63%	63%
	DE	58%	55%
Nation	England	66%	66%
	Scotland	53%	54%
	Wales	72%	71%
	Northern Ireland	66%	60%
Disability	Not disabled	66%	66%
	Disabled	63%	64%
	Disabled age 65+	60%	53%
	Disabled age under 65	65%	69%

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C8. This set of statements are about the BBC's responsibility to provide the most creative, highest quality and distinctive content. 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:
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022), England (3104/2892), Scotland (358/349), Wales (337/327), Northern Ireland (300/339), not disabled (2980/2803), disabled (940/946), disabled age 65+ (258/276), disabled under-65s (682/670).

Levels of first-run UK-originated hours remained stable in 2018, with news programming accounting for 69.5% of hours broadcast

The combined hours of first-run UK-originated content broadcast have remained stable since 2010 across BBC One, BBC Two, and the BBC portfolio channels (combining the hours of BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament), with variances between specific channels.

BBC One had the largest increase in first-run hours over this period, increasing by 20.5% (1,132 hours) between 2010 and 2018, driven by an increase of 923 news hours on BBC One since 2010. News content makes up over half (51%) of the first-run hours broadcast on BBC One, yet is comparatively inexpensive to produce, taking up only 9% of BBC One's first-run spend in 2018. BBC Two increased its first-run hours from 3,140 in 2016 to 3,248 in 2018. Most of these additional hours were allocated to sports, which took up one-third of the first-run hours broadcast on the channel in 2018.

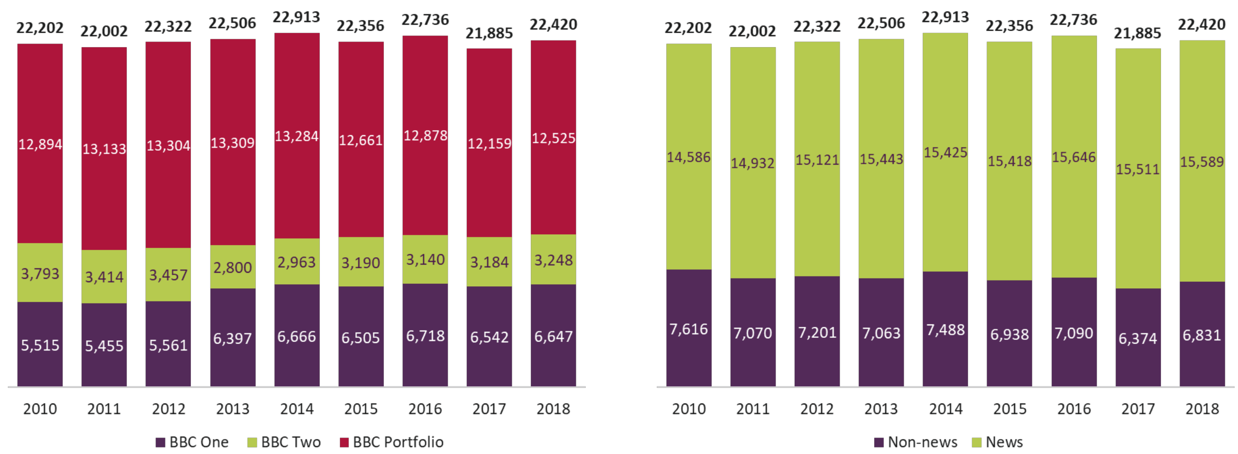
In contrast, the BBC portfolio channels have all decreased first-run hours since 2016 individually, with the collective total declining from 12,878 in 2016 to 12,525 in 2018. BBC Four had the largest decline in first-run hours during this period, down by 29% (178 hours) when compared to two years previously. However, 2016 was an outlier year on the channel, as over 200 hours of sports content were broadcast, due to coverage of the 2016 Olympics shown on BBC Four. In contrast, there were only 30 hours of sports content broadcast on BBC Four in 2018. First-run hours on BBC Four returned to a typical level in 2018 and were slightly up on 2017 (from 412 to 439 hours).

The proportion of overall BBC TV first-run hours dedicated to news content has gradually increased over time. In 2018, news amounted to 69.5% of first-run hours broadcast, while all other genres accounted for 30.5% of hours. The increase in first-run hours of news content since 2010 is driven by BBC One (up by 923 hours) and BBC Parliament (up by 267 hours). News output on the BBC News channel has decreased by 204 hours since 2010, in line with the increase of news hours on BBC One.

Hours of first-run non-news content have fluctuated over time; 2018 had the second-lowest level of non-news content hours since 2010. Compared to 2016, non-news hours have declined by 4%, with 259 fewer first-run hours in 2018 (6,831 hours). This decline is across BBC channels, with the exception of BBC Two and BBC News, which both increased their first-run non-news hours. And as noted in the analysis of purpose 1, news hours have decreased on BBC Two.

Netflix, the UK's most popular SVoD service, has significantly increased the number of UK-produced distinct titles available on its platform. In March 2019, there were 736 UK-produced distinct titles available on Netflix UK, an increase of 76% since March 2016. UK content accounts for 11% of Netflix's overall library, with 42% of the library originating from the US. By comparison, in 2018 the BBC had 853 UK titles.

Figure 54: BBC TV hours of first-run UK-originated content: 2010-2018



Source: Ofcom/BBC. Note: figures include first-run originations only for BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, and BBC Parliament. Figures exclude BBC HD and nations' and regions' content.

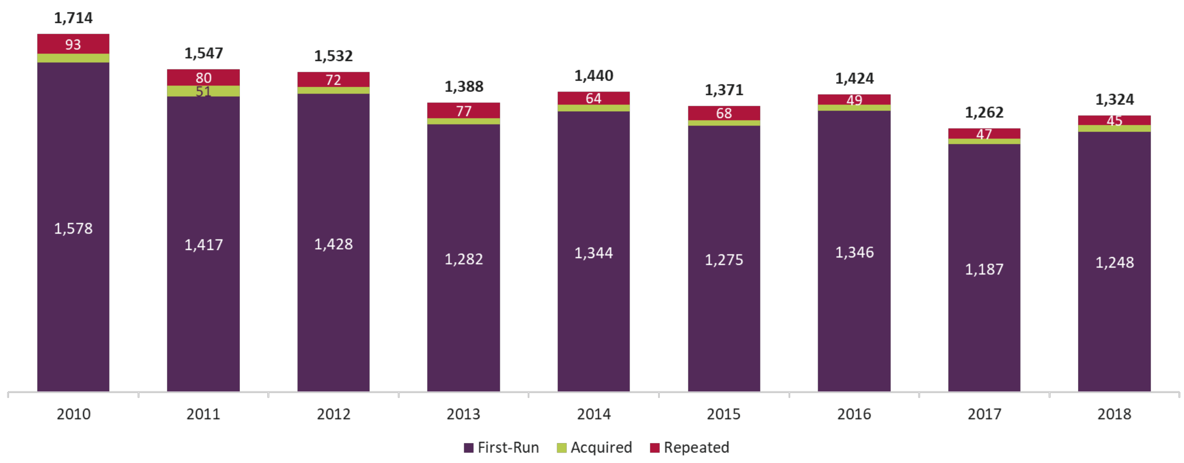
While first-run UK-originated spend on TV content has decreased over time, the overall share of first-run programming has increased

As detailed above, the BBC's overall spend on TV content has declined in recent years. Proportionally, spend on acquired and repeated content has faced the largest cuts. While the proportion of spend on acquired and repeated content has been steady since 2016, the total spend on this content was 44% lower in 2018 than in 2010. The long-term decrease in funding of repeated and acquired content has meant that the BBC has spent proportionally more on first-run UK-originated content.

Nevertheless, spend on first-run UK-originated content has also fallen. In 2018, first-run spend by the BBC on TV content was at its second-lowest level, at £1.248bn, behind only 2017 when spend was £61m lower, at 1.187bn. In the face of financial pressures, the BBC has to some extent protected first-run UK-originated spend: it accounted for 94% of total content spend in 2018, the same percentage as in 2016 and a higher share than in 2010 when 92% of spend was first-run.

As illustrated in Figure 54, the BBC has also maintained its output of first-run content in terms of broadcast hours, largely coming from its increase in news programming.

Figure 55: BBC TV total spend by first-run UK-originated content, acquired, and repeated content (£m): 2010-2018



Source: Ofcom/BBC. Note: figures are expressed in real terms and include network content only, across first-run originations, acquisitions, and repeats for BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News, and BBC Parliament. Figures excludes BBC HD and nations' and regions' content.

Radio 1 and Radio 2 both met their quota for new music in daytime

Across the year, 'new music'[58] on average accounted for 51% of Radio 1's music output in daytime, and 26% of Radio 2's. We have also considered comparable stations across an average of three sample weeks across the year. Over this period, 54% of Radio 1's music output in daytime was 'new music', compared to 37% for Capital and 28% for Kiss. The repetition rate of tracks across daytime on Capital was more than three times that of Radio 1. Radio 2 was less likely to repeat tracks across daytime than Heart, with the commercial station repeating tracks around four times more often than Radio 2.

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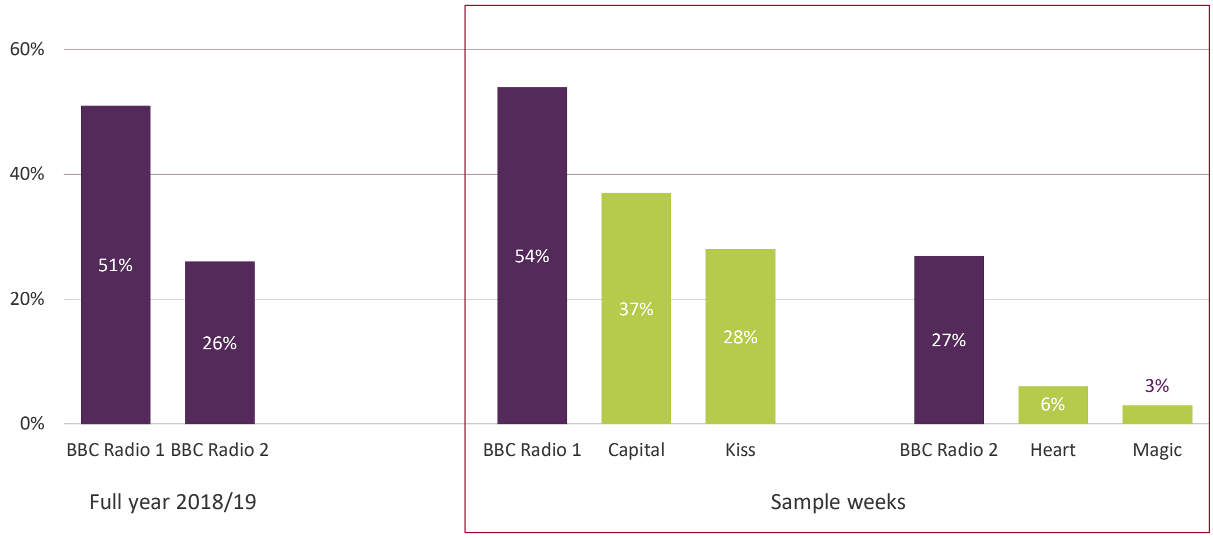
[58] A music track is to be considered 'New Music' for a period of either: (a) 12 months from first release (whether by physical, radio, download or streaming means), or (b) 6 weeks from the date it first enters the Top 20 of the UK Official Singles Chart, whichever is sooner. Ofcom Statement: *Definition of New Music on Radio 1 and Radio 2*

Figure 56: Proportion of new music played in daytime on BBC Radio 1, BBC Radio 2 and selected commercial stations



Source: Ofcom analysis of RadioMonitor and Official Charts Company data. Daytime refers to 0600-1900 Monday-Friday, and 0800-1400 Saturday-Sunday. Full year 2018-19 figures for BBC Radio 1 and BBC Radio 2 are April 2018 to March 2019, sample weeks are data for 20-27 July 2018, 13-19 October 2018 and 2-8 February 2019.

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

Compared to other providers, BBC services are less likely to be seen as risk-taking or innovative

More than half of adults (57%) rate the BBC highly for providing content that takes risks and is new and innovative, across TV, radio and online. However, this statement is the lowest-rated of all the sub-statements for Purpose 3 and is also lower when audiences are asked to compare the BBC to other providers.

Among audience sub-groups, there have been improvements among the 45-54 age group and those in the AB socio-economic group, compared to all adults. In the 45-54 age group, high ratings have increased by 9pp year on year. There has also been an improvement among those aged under 65 and disabled, with a 10pp year-on-year increase.

However, the 65+ age group, the DE socio-economic group, people in Scotland and Northern Ireland, and those who are aged 65+ and disabled, rate the BBC below the all-adults average on this attribute. The rating for the 65+ group (49%) is also a significant decrease of 6pp since last year.

Figure 57: Audience opinions about BBC delivery on risk-taking, innovation, challenge and creative ambition, by demographics

		Take risks and provides content that is new and innovative across all of its services, including television, radio and online	
		2017/18	2018/19
All		56%	57%
Age	16-24	57%	56%
	25-34	54%	60%
	35-44	59%	58%
	45-54	53%	62% △
	55-64	56%	57%
	65+	55%	49% ▽
Socio-economic Group	AB	62%	63%
	C1	58%	57%
	C2	56%	57%
	DE	48%	49%
Nation	England	56%	58%
	Scotland	46%	49%
	Wales	60%	59%
	Northern Ireland	52%	50%
Disability	Not disabled	57%	58%
	Disabled	52%	55%
	Disabled age 65+	54%	45%
	Disabled age under 65	50%	60% △

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

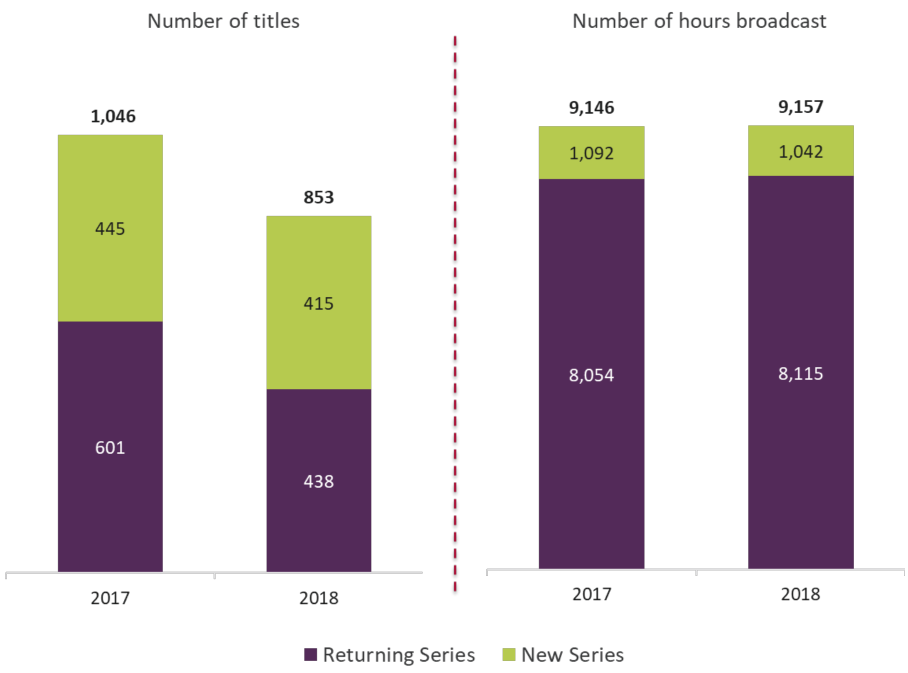
Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C8. This set of statements are about the BBC's responsibility to provide the most creative, highest quality and distinctive content. On a scale of 1-10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you think the BBC as a whole provides:
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022), England (3104/2892), Scotland (358/349), Wales (337/327), Northern Ireland (300/339), not disabled (2980/2803), disabled (940/946), disabled age 65+ (258/276), disabled under-65s (682/670)

The BBC had 415 new UK-originated programme titles in 2018, compared to 445 in 2017

It is important that the BBC is innovative in its content, and one way this can be achieved is through commissioning new programme titles. While returning series titles are important for broadcasters to continually serve audience interests and secure repeat viewership over time, new titles potentially indicate more risk-taking and diversity of content. In 2018, there were 415 new titles (including *Bodyguard*, *A Very English Scandal*, and *Troy: Fall of a City*), which represents a decline of 7% since 2017 in the number of new UK-originated titles. This decline is across multiple genres including specialist factual, entertainment, arts and current affairs, and other genres.

The decline in new series commissioned by the BBC has not resulted in an increase in returning series titles. Since 2017, the number of UK-originated returning series has declined significantly, from 601 to 438. Despite this decrease, the number of broadcast hours of returning series has not declined; rather, it has increased by 61 hours. The BBC has reduced the number of titles returning but not replaced these with new titles or reduced the amount of broadcast output; BBC TV content in 2018 included longer runs of existing returning series. This indicates that BBC TV content has become less diverse in 2018, with fewer returning titles accounting for a greater proportion of broadcast hours.

Figure 58: **Number of new/returning series titles and hours broadcast across BBC TV: 2017 vs. 2018**



Source: Ofcom/BBC. Note: figures include originated content only and reflect number of individual programme titles broadcast in 2017 and 2018 for BBC One, BBC Two, BBC Four, CBBC, and CBeebies. Data for 2017 have been restated so that figures are comparable with 2018 data. Figures exclude repeats, nations'/regions' programming, and party political broadcasts.

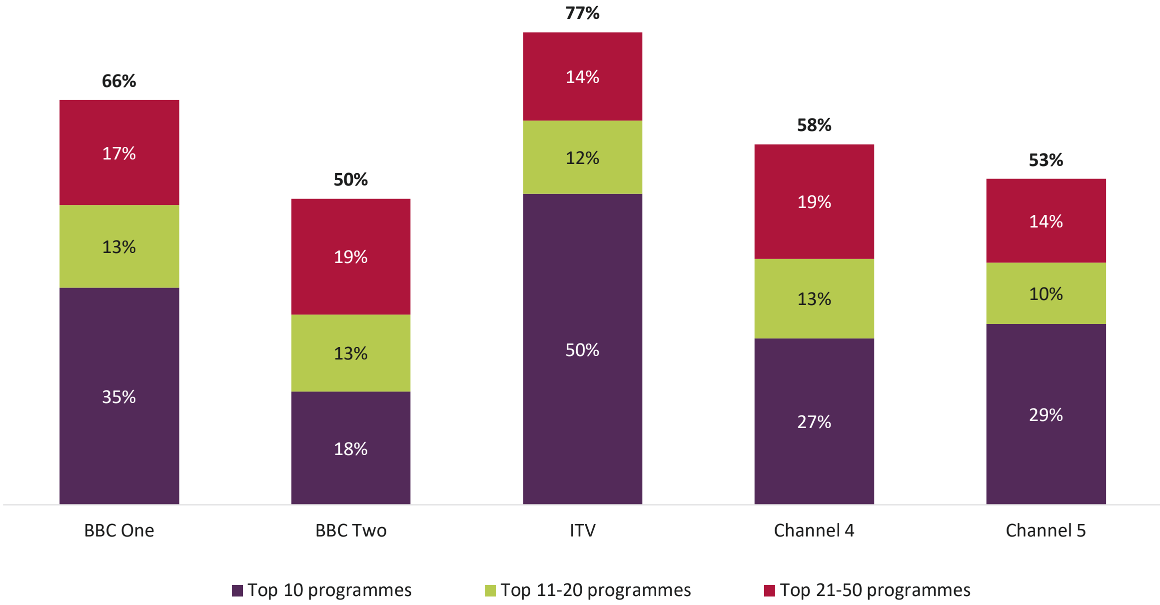
BBC One and BBC Two are less reliant than ITV on their most-viewed programme titles

Despite the decline in numbers of returning and new series in 2018, the BBC's wider portfolio of titles takes up a larger proportion of total minutes viewed on BBC One and BBC Two than other PSBs.

BBC One is not as heavily reliant as ITV on its top ten regular programme titles. *Breakfast, EastEnders, News at Six, News at Ten, The One Show, Pointless, Bargain Hunt, News at One, BBC News,* and *Homes Under the Hammer* collectively account for 35% of total minutes viewed on the channel and 7% of total output. BBC Two does not have many regular programmes, so its top ten most-viewed programmes account for only 18% of the channel's total viewing minutes. In contrast, the top ten programmes on ITV in 2018 accounted for 50% of total minutes viewed on the channel, but only 8% of total output. Channel 4 and Channel 5 rely less than ITV on their top ten programmes, at 27% and 29% respectively.

Overall, the top fifty programmes on BBC One accounted for 66% of total minutes viewed on the channel in 2018, and this figure drops to 50% for BBC Two; meanwhile, ITV's top fifty programmes took up 77% of total minutes viewed on the channel. BBC Two's wider portfolio of series titles means that its top 50 programmes accounted for a lower proportion of total minutes viewed than on either Channel 4 (58%) or Channel 5 (53%).

Figure 59: Contribution of most-viewed programmes to PSB channels: 2018



Source: BARB, all individuals aged 4+, main five PSB channels excluding their +1 channels.

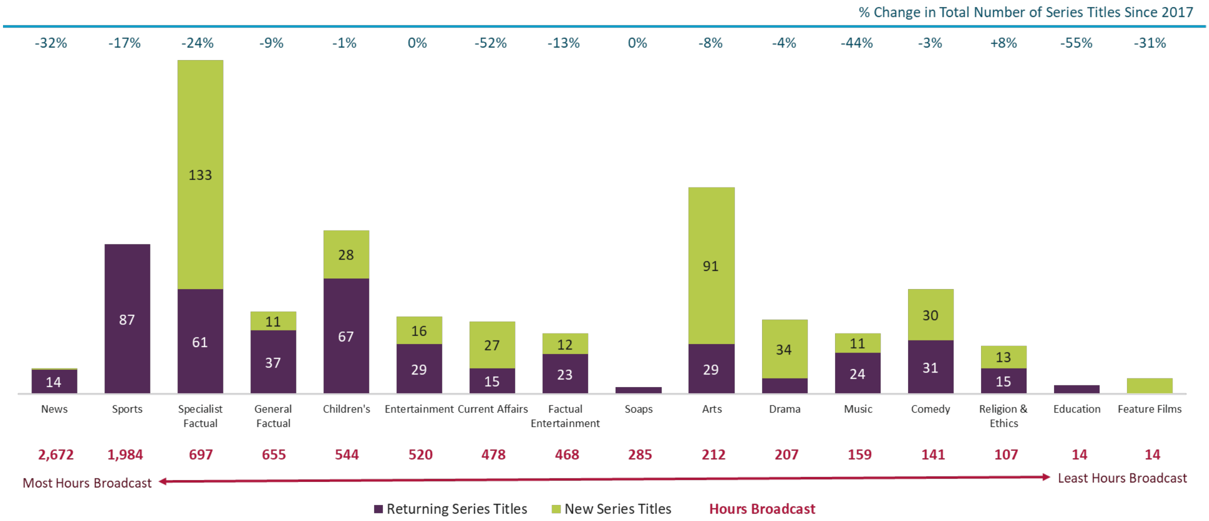
In 2018, the BBC commissioned the most new series within the specialist factual genre, while sports content dominated the returning series titles

Of the 415 new UK-originated series titles, 32% were commissioned in the specialist factual genre, with 133 new series launching in 2018, including *Dynasties*, *Defenders UK*, and *Million Pound Menu*. Arts and drama content accounted for the next highest numbers of new titles launched in 2018, including titles such as *Civilisations* and *Wanderlust*.

Returning series in 2018 were dominated by sports, children's and specialist factual content, cumulatively accounting for 49% of the total returning content. The BBC's sports programming had 87 returning series titles for 2018[59]; the largest number of returning titles. This was matched with a high number of broadcast hours (1,984); the second-highest of any genre.

[59] Sports titles such as the FIFA World Cup and Olympic Games are defined as returning series as they are series' which have returned from any year.

Figure 60: **Number of new/returning series titles across BBC TV by genre, by most to least hours broadcast: 2018**



Source: Ofcom/BBC. Note: figures include originated content only and reflect number of individual programme titles broadcast in 2017 and 2018 for BBC One, BBC Two, BBC Four, CBBC, and CBeebies. Data for 2017 have been restated so that figures are comparable with 2018 data. Figures exclude repeats, nations'/regions' programming, and party political broadcasts. Note: the number of titles per genre is slightly inflated due to data duplication when a single programme has been recorded under multiple genres; this affects fewer than 15 individual titles across new and returning series' figures.

The BBC used 308 different production companies in 2018, the highest recorded since 2012

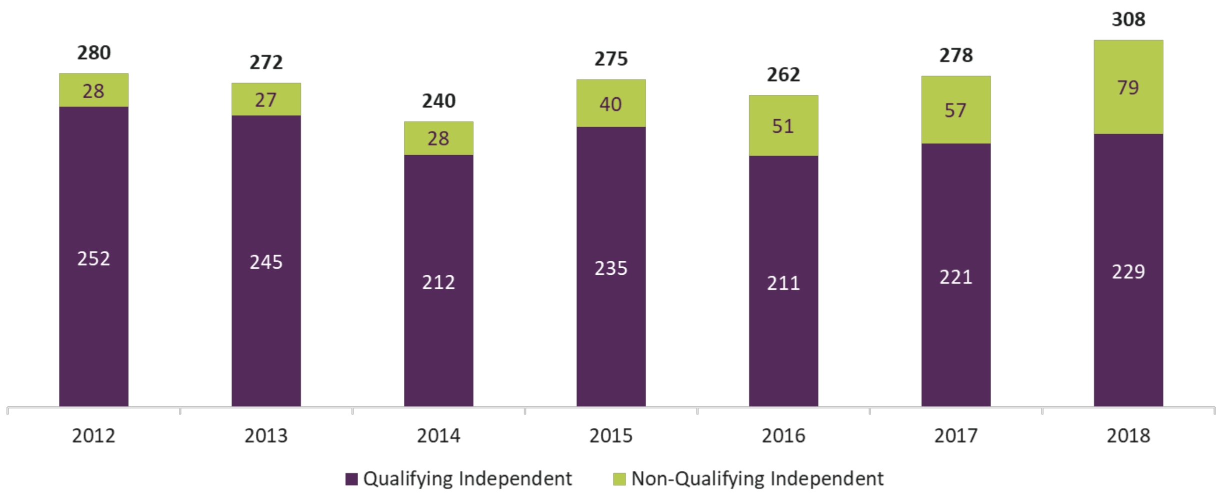
The BBC has increased the range of companies it uses to produce BBC TV content; in 2018 it worked with 308 independent production companies, up by almost 11% since 2017. Given the wider range of producers involved in making TV content, this may indicate that output has become more creative and diverse.

External producers are grouped into qualifying and non-qualifying independent production companies, according to their relationships with UK broadcasters.[60] As outlined in The Broadcasting (Independent Productions) Order 1991, qualifying indies are companies that are less than 15% owned by companies holding UK broadcasting licences.

Since 2012 the number of both qualifying and non-qualifying indies has increased, but the number of non-qualifying indies has increased the most. The number of non-qualifying independent production companies used by the BBC has risen to 79, the highest level in this period and 22 more companies than in 2017. There has also been an increase in the extent of the BBC collaborating with qualifying independent production companies, which indicates greater risk-taking and innovation on the part of the BBC and counts toward meeting the BBC's independent production quota. The BBC worked with 229 qualifying indies in 2018, eight more than in 2017, although this was down from 252 in 2012.

[60] The full definitions of qualifying and non-qualifying independent production companies are found in The Broadcasting (Independent Productions) Order 1991.

Figure 61: Number of independent production companies used by the BBC: 2012-2018



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

Range of audiences served

Almost two-thirds of UK adults rate the BBC highly for serving a range of audiences, though those in Scotland and Northern Ireland are less happy

Around two-thirds of UK adults think the BBC performs well in serving a range of audiences. There are differences depending on where people live; those in England are more likely than the overall population to think the BBC does a good job, whereas those in Scotland and Northern Ireland are less likely to think so.

Figure 62: Audience opinions about BBC delivery on serving a wide range of audiences, by demographics

		Provides television, radio and online content which appeals to a wide range of different audiences across the UK	
		2017/18	2018/19
All		65%	64%
Age	16-24	69%	66%
	25-34	63%	68%
	35-44	64%	63%
	45-54	67%	69%
	55-64	66%	62%
	65+	62%	57%
Socio-economic Group	AB	72%	71%
	C1	69%	67%
	C2	64%	60%
	DE	55%	57%
Nation	England	66%	65%
	Scotland	53%	55%
	Wales	72%	67%
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Disability	Not disabled	65%	65%
	Disabled	63%	64%
	Disabled age 65+	60%	55%
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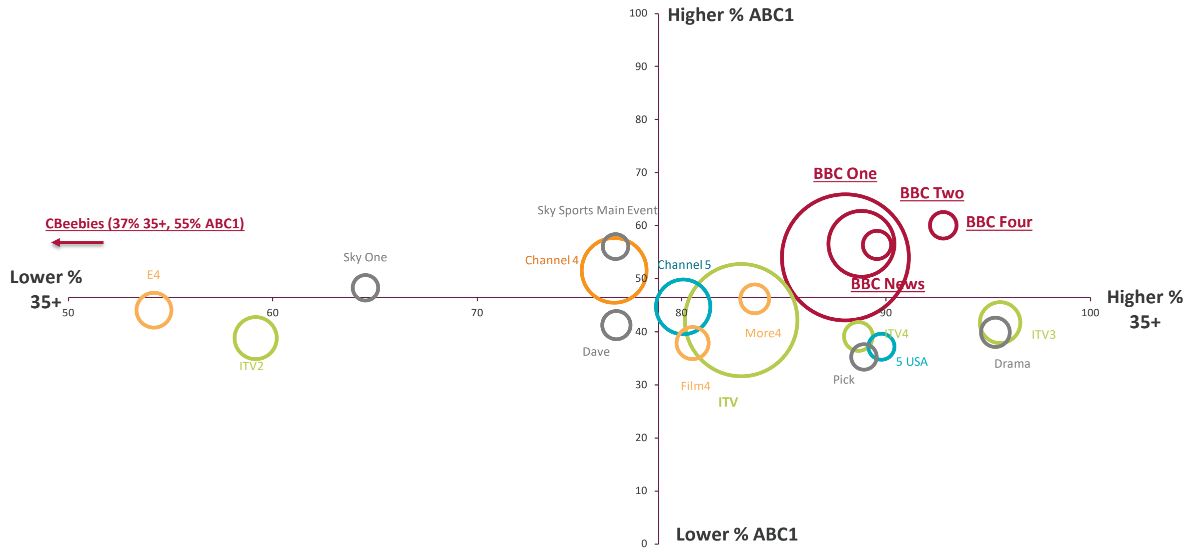
Of the top 20 most-watched channels, BBC channels are more likely to have audiences who are older and with higher socio-economic backgrounds

Figure 63 shows the age and socio-economic audience profile of the 20 most-watched channels in 2018, with the share of each channel depicted by the size of the bubbles. ITV and Channel 5 skew towards C2DE audiences, while BBC One, BBC Two and Channel 4 skew in the other direction, with ABC1 profiles of 54%, 57% and 52% respectively, higher than the proportion of ABC1 audiences for the total TV average (46%). Of the top 20 most-watched channels, BBC Four has the largest ABC1 profile, at 60%. With the exception of ITV2, all channel audiences have become older since 2010.

Figure 63: Age and socio-economic audience profile of the 20 most-viewed channels: 2018



Source: BARB. Individuals 4+. Based on the top 20 channels ranked by share. Size of bubble relates to share among individuals 4+. Profile based on age: % 35+, SEG: % ABC1. Axes cross at the average age/SEG profile of Total TV. Includes HD variants where applicable and +1 variants.
Note: CBBC not included on the chart as it is not within the top 20 channels (it ranks 39)

Excluding the FIFA World Cup, BBC provided four of the top five programmes for adults in 2018-19

Across the 2018-19 period and excluding FIFA World Cup content, BBC One featured five times in the top ten programmes across any channel based on average audience, topping the list with the drama *Bodyguard*. The BBC dramas *Line of Duty* and *Doctor Who* also featured in the top ten, with the *Strictly Come Dancing* final and the *New Year's Eve Fireworks* claiming the other spots. On ITV, Ant and Dec are the main draws; *I'm a Celebrity: Get Me Out of Here* and *Britain's Got Talent* both appear in the top ten, while the acquisition of *The Great British Bake-Off* by Channel 4 accounts for Channel 4's only appearance in the list.

However, there are some notable differences in the top ten lists, by audience, in the extent to which BBC content appears, and the type of programmes included. There are differences between the viewing habits of 16-19s and 20-24s. For the younger group, although ITV tops their top ten with *I'm a Celebrity*, there are more programmes from the BBC compared to the overall adults' top ten list. *Strictly Come Dancing* does not appear on the list for 16-19 year olds, but *The Apprentice*, the natural history documentary *Dynasties* and the *New Year's Eve concert by Madness* all perform well for the BBC among 16-19 year-olds. In contrast, only three of the 20-24 year-olds' top ten programmes are from the BBC, with six programmes from ITV, including two on ITV2 (both *Love Island*).

Figure 64: Top ten programmes (excluding FIFA World Cup), adults 16+: 2018/19

Rank	Programme	Channel
1	**Bodyguard**	**BBC One**
2	I'm a Celebrity...Get Me Out Of Here!	ITV
3	**Strictly Come Dancing: The Final**	**BBC One**
4	**New Year's Eve Fireworks**	**BBC One**
5	**Line of Duty**	**BBC One**
6	Britain's Got Talent (Series 12)	ITV
7	**Doctor Who**	**BBC One**
8	The Great British Bake Off	Channel 4
9	Coronation Street	ITV
10	Manhunt	ITV

Figure 65: Top ten programmes (excluding FIFA World Cup), 16-19s: 2018/19

Rank	Programme	Channel
1	I'm a Celebrity...Get me out of here!	ITV
2	**New Year's Eve Fireworks**	**BBC One**
3	**Doctor Who**	**BBC One**
4	Love Island (series 4)	ITV2
5	Britain's Got Talent (series 12)	ITV
6	**The Apprentice**	**BBC One**
7	The Great British Bake Off	Channel 4
8	**Dynasties**	**BBC One**
9	**Bodyguard**	**BBC One**
10	**Madness Rock Big Ben Live**	**BBC One**

Figure 66: Top ten programmes (excluding FIFA World Cup), 20-24s: 2018/19

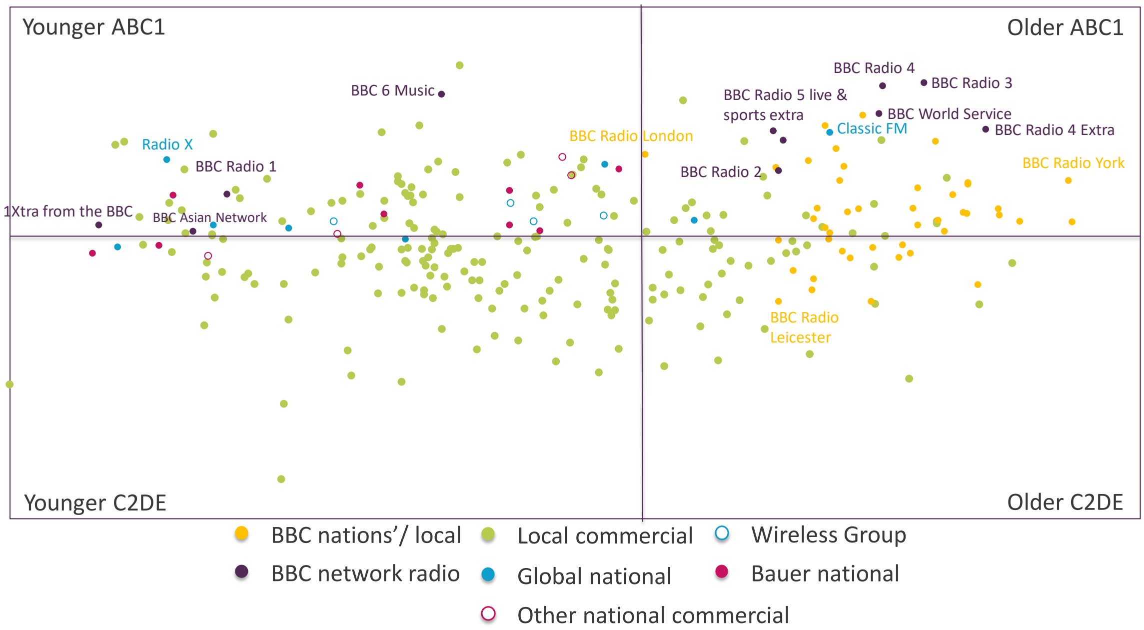
Rank	Programme	Channel
1	I'm a Celebrity...Get me out of here!	ITV
2	The Great British Bake Off	Channel 4
3	Love Island (series 4)	ITV2
4	Britain's Got Talent (series 12)	ITV
5	**New Year's Eve Fireworks**	**BBC One**
6	**The Apprentice**	**BBC One**
7	Coronation Street	ITV
8	The X Factor	ITV
9	**Doctor Who**	**BBC One**
10	Love Island: The Christmas Reunion	ITV2

Source: BARB. Includes +1s channels, where applicable. Ranked by average audience size of the highest-occurring episode of each title. For full details of each episode and the performance figures please refer to the viewing section of the interactive report.

The majority of BBC radio stations tend to have audiences that skew older than 45 and have a higher socio-economic background

Figure 67 compares the audience profiles for local and UK-wide stations from the BBC and commercial radio. It shows that local commercial radio stations are spread across the age spectrum and BBC local services largely have older listeners; BBC UK-wide services are at either end of the age spectrum and all appeal to a more ABC1 audience.

Figure 67: Weekly reach profiles of UK radio stations based on age and socio-economic group: 2018



Source: RAJAR, Q4 2018, 12-month weight

BBC online is more likely to be used by people aged 35 and over and in higher socio-economic groups

BBC sites[61] on average were visited by more than 40 million internet users aged 18+ in the UK in March 2019, a reach of 92% of the total online audience, the same as the previous year. Users of the BBC sites are more likely to be aged 35 and over (67% of users) and in the ABC1 socio-economic groups (64%). Overall reach is highest to those aged 35-44 (94%) although the reach of BBC news online is notably higher for the 45-54 age group (73% vs. 64% for 18%)

[61] Source: Comscore MMX Multi-platform, Age: 18+, March 2018 & 2019, UK. BBC Sites reach and minutes exclude sites produced as part of the BBC's commercial activities

Distinctiveness and comparisons with other broadcasters

There have been improvements among some demographics in opinions about the BBC providing distinctive content

Compared to last year, the perceptions about the BBC's provision of distinctive content have improved significantly among 25-34 year-olds and disabled people, especially those under 65.

Figure 68: Audience opinions about BBC delivery on providing distinctive content, by demographics

		Provides distinctive programmes and content	
		2017/18	2018/19
All		63%	64%
Age	16-24	63%	67%
	25-34	59%	69% △
	35-44	62%	63%
	45-54	65%	69%
	55-64	67%	63%
	65+	61%	57%
Socio-economic Group	AB	70%	70%
	C1	67%	69%
	C2	63%	61%
	DE	52%	56%
Nation	England	63%	65%
	Scotland	53%	57%
	Wales	70%	67%
	Northern Ireland	59%	55%
Disability	Not disabled	64%	65%
	Disabled	58%	65% △
	Disabled age 65+	59%	55%
	Disabled age under 65	58%	70% △

△ ▽ Significant increase / decrease compared to 2017-18 last year   Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C8. This set of statements are about the BBC's responsibility to provide the most creative, highest quality and distinctive content. 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:
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022), England (3104/2892), Scotland (358/349), Wales (337/327), Northern Ireland (300/339), not disabled (2980/2803), disabled (940/946), disabled age 65+ (258/276), disabled under-65s (682/670)

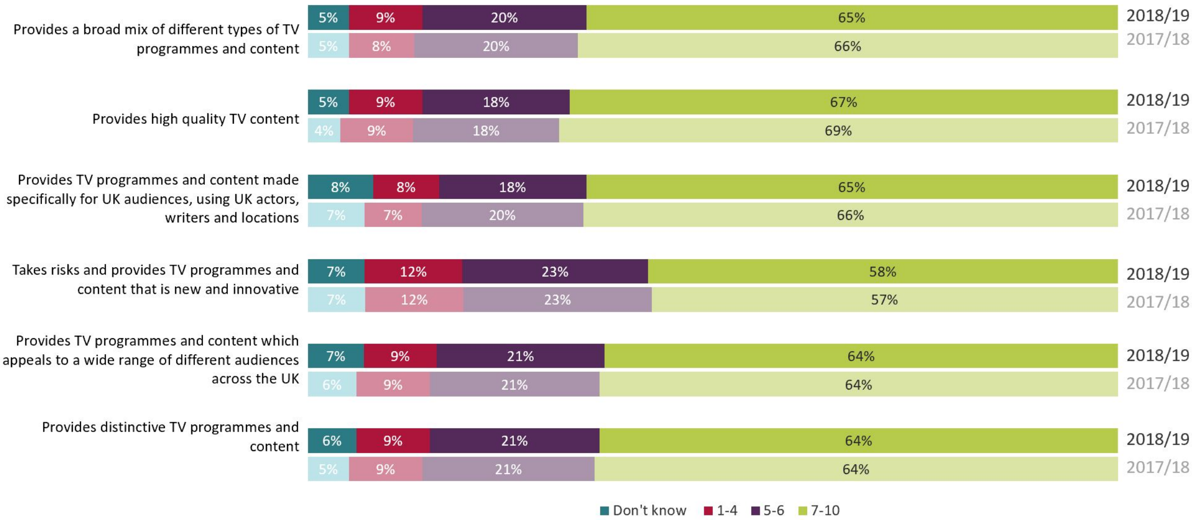
Television

BBC TV continues to be rated highly in comparison to other providers, although taking risks remains the lowest-performing area

When asked how BBC TV compares to other providers in terms of Purpose 3, the majority of viewers rated BBC TV highly across all areas. Taking risks and being new and innovative was the lowest-performing area; 58% rated this area highly.

BBC television viewers were asked whether BBC TV services offered something that other providers didn't. Both BBC Three (75% vs. 79%) and BBC iPlayer (66% vs. 69%) have improved on this measure this year.

Figure 69: Competitive delivery for BBC TV vs. other TV providers (among BBC TV and on-demand viewers)



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019 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

Base: BBC TV and on-demand viewers in the last three months (3566/3440)

Radio

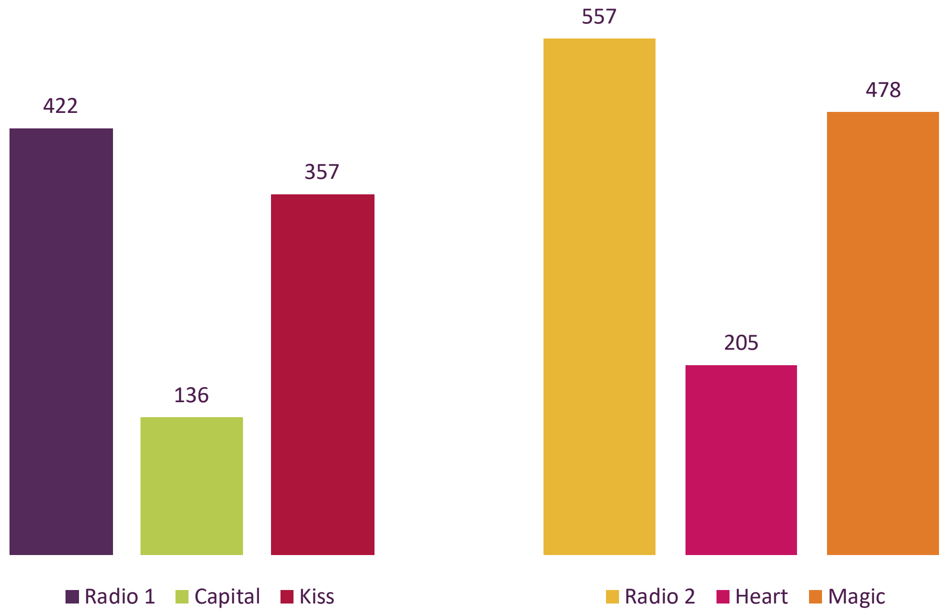
BBC radio services continue to be rated highly in comparison to other providers, but as with TV, listeners are less likely to feel that the BBC takes risks or is innovative

When BBC radio listeners were asked to think about how BBC radio compares to other radio providers in terms of Purpose 3, the majority continue to rate BBC radio highly (7-10) compared to other stations. There has been very little movement year on year. Eight in ten listeners say that BBC radio provides high-quality radio output, with around three-quarters of listeners (79%) rating BBC radio highly on this measure. Like television viewers, listeners are less likely to say that BBC radio takes risks or provides radio content that is new and innovative, although two-thirds agree with this (65%).

Radio 1 and Radio 2 play a broader range of music than selected commercial stations

In March 2019, there were 288 commercial radio stations available on analogue and 51 BBC stations, with further services available online and on DAB. The majority of these services are music-based. In such a crowded market, it is crucial that the BBC's radio stations provide distinctive output. We compared the variety of music played on Radio 1 and Radio 2 to that on selected commercial stations and found that in all the three weeks analysed the BBC stations played a greater number of different music tracks than their commercial rivals.

Figure 70: Average number of unique tracks played on Radio 1, Radio 2 and selected commercial stations in daytime each week



Source: Ofcom/RadioMonitor. Analysis of data for 20-27 July 2018, 13-19 October 2018 and 2-8 February 2019. Daytime refers to 0600-1900 Monday-Friday, and 0800-1400 Saturday-Sunday.

BBC online

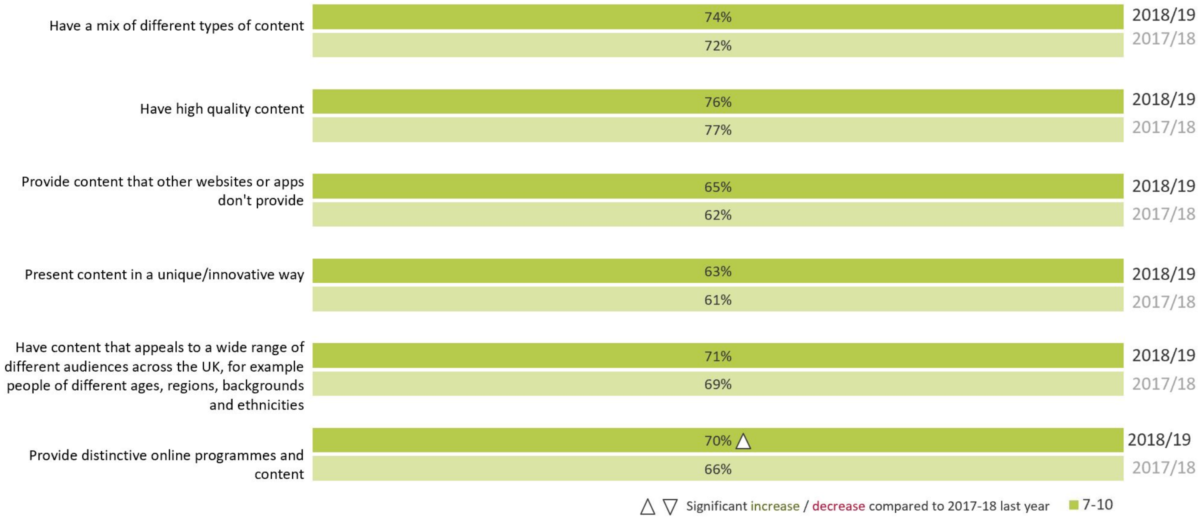
BBC websites and apps are compared favourably to other providers and there has been a significant improvement in users saying that the BBC website and apps are distinctive

Users of BBC websites and apps continue to compare the BBC's provision favourably to other providers. Ratings are largely unchanged, year on year, with the exception of providing distinctive online programmes and content. This has increased significantly, from 66% to 70%.

Three-quarters of users rate the BBC website and apps highly (7-10) for providing high-quality content (75%) and for having a mix of different types of content (74%). The statements which are ranked the lowest are about presenting content in a new or innovative way (63%) and providing content that other websites or apps do not offer (65%).

Users of BBC websites and apps were also asked about the distinctiveness of these services. The results are largely in line with 2017-18.

Figure 71: Competitive delivery for BBC vs. other websites/apps (among BBC website/app users)



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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
Base: BBC web/app users in the last three months (2018/1906)

6. Purpose 4: reflecting, representing and serving the diverse communities of the UK

Summary

Purpose 4 is to reflect, represent and serve the diverse communities of all of the UK's nations and regions and, in doing so, support the creative economy across the UK: the BBC should reflect the diversity of the UK both in its output and services. In doing so, it should accurately and authentically represent and portray the lives of the people of the UK 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 UK'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 UK. 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: audiences

•Overall perceptions of the BBC's delivery of this purpose have not changed over the past year

•The BBC continues to perform highest on the provision of relevant content and least well on the statements relating to portrayal.

•Overall, BBC services continue to be more likely to be used by older people and those from higher socio-economic backgrounds. Broadly, those in lower socio-economic backgrounds, people living in the nations and older people are more likely to have concerns about the BBC's delivery of the purpose.

•When considering demographics in more detail:

Age: In last year's report we detailed that older women did not always feel adequately represented or authentically portrayed on the BBC and television in general. This year, women aged 55+ continue to feel there are problems with portrayal and provision of relevant content. Men aged 55+ also rate their portrayal by the BBC lower than average this year, suggesting that there is a broader issue of portrayal of older people in general. In contrast, younger men are more likely to think the BBC provides a good range of authentic programmes that include people like them and are about where they live.

Socio-economic group: People in lower DE socio-economic groups continue to rate the BBC lower than average on all aspects of representation and portrayal. C2 socio-economic group audiences also rate the BBC lower than average on its performance in this area this year. The largest gaps in perceptions between ABs and DEs are in relation to the BBC's provision of *'programmes and content that are relevant to me'* and providing "*a good range of programmes and content that includes people like me'*.

Ethnicity: There have been improvements in the perceptions of Purpose 4 delivery among people from a minority ethnic background, particularly in opinions towards the BBC offering *'a good range of programmes and content that include people like me'*. This improvement is largely driven by more positive opinions among the Asian communities.

Disability: Positive opinions towards the BBC's delivery of purpose 4 have increased among disabled people and are now in line with the opinions of the general UK population, whereas previously they had been significantly lower. However, this improvement is limited to disabled people aged under 65. Disabled people aged 65+ continue to rate the BBC's delivery of this purpose lower than average, as do people aged 65+ in general, with opinions being particularly low regarding the authentic portrayal of *'people like me'*.

Our key findings: nations

•The BBC continues to produce half of its network content outside London, in line with the licence condition requirement.

•BBC spend on programmes for the nations and regions increased slightly in 2018.

•Despite an increase in first-run spend, total hours of non-network originations fell in 2018.

•Total BBC spend on BBC Alba increased by 6% in 2018.

•The representation and portrayal of Scotland, in terms of both people and places, is considered to be a particular weakness.

•There are some concerns that the BBC is not providing a sufficiently good range of programmes and content that represents people living in Wales.

•Opinions among people in England are above average for all purpose 4 statements but have remained stable year on year. Opinions among people in Northern Ireland have also remained stable.

Performance assessment

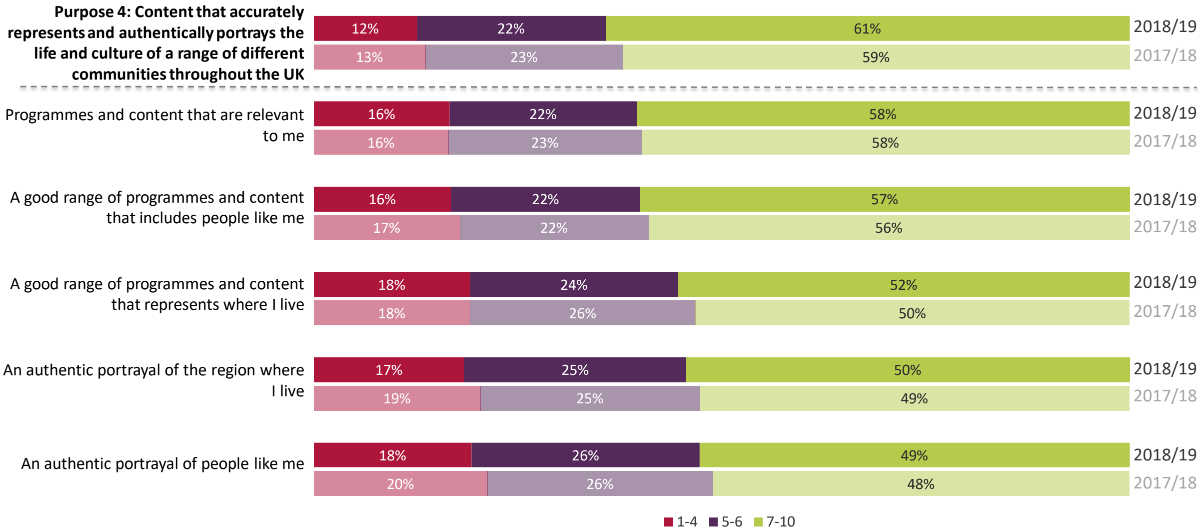
Audiences

Overall perceptions of the BBC's delivery of Purpose 4 have not changed over the past year

Looking at the adult audience overall, there is very little change in how viewers see the BBC delivering this purpose, with 61% rating the BBC highly (7-10) on its provision of content that represents and portrays a range of different communities across the UK.

When looking at the sub-statements that make up Purpose 4, the overall ranking of statements remains the same as last year. The BBC continues to perform best on the provision of relevant content, with around six in ten UK adults rating its performance highly on this. It performs least well on the statements relating to portrayal, with just under half of UK audiences feeling that the BBC performs well on authentically portraying people like themselves or the region where they live. Just under one in five rate the BBC low (1-4) on aspects of portrayal.

Figure 72: Overall audience opinion about the BBC's performance in serving diverse communities



Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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.
Base: All participants (4099/3907)

BBC consumption among audience groups

93% of all adults watch, listen to or read some BBC content each week, though this varies significantly by demographic

The BBC reaches 93% of adults each week but this varies by demographic. BBC reach is higher among people in the AB socio-economic groups than those in the DE groups. People in lower socio-economic groups hold less favourable opinions towards the BBC across all aspects of representation and portrayal, including the provision of relevant programming. BBC reach is also high among people aged 65+, who consume more television in general as they may be retired. Despite this high level of consumption, this group does not necessarily feel well portrayed in BBC content (as per the previous section). The BBC has lower reach among people from a minority ethnic background and among disabled people and LGB+ people.

Figure 73: Weekly reach of any BBC content, by demographic

Demographic	Weekly reach to any BBC service* 2018	Weekly reach to any BBC service* 2019
Socio-economic group: AB	96%	96%
Location: Rural	96%	96%
Time in UK: 21+ years	95%	96%
Age 65+	95%	95%
Ethnicity: White	94%	94%
Sexual identity: heterosexual	93%	93%
Time in UK: Born in the UK	93%	93%
All audiences (adults 15+)	**92%**	**93%**
Socio-economic group: C1C2	92%	93%
Location: Urban	92%	92%
Socio-economic group: DE	89%	88%
Ethnicity: minority ethnic	88%	88%
Sexual identity: LGB+	85%	86%
Disabled	90%	85%
Age: 15-24	85%	85%
Time in UK: 11-20 years	81%	80%
Time in UK: 2-10 years	75%	74%
Time in UK: Less than 2 years	49%	59%

Source: TouchPoints 2018, 2019

**BBC services measured:*

BBC TV = BBC One, BBC Two, BBC Three, BBC Four, 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, Local/nations radio

BBC iPlayer

BBC online news/sport via app or website

Demographics

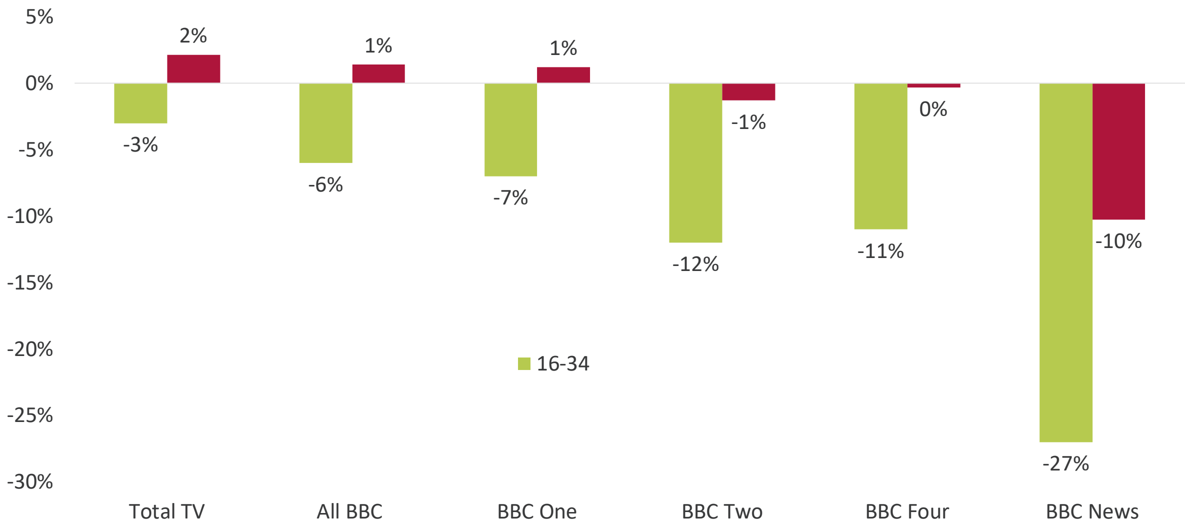
Age: The challenge of attracting young audiences to BBC TV continues

At the beginning of this report (see Figure 4) we highlighted that all PSBs have lost audiences across all age groups under the age of 55, and that the BBC has had a greater rate of decrease than ITV among 16-24 year-old viewers, with the BBC now reaching less than half of 16-24s each week. There are also some differences between 16-19 year-olds and 20-24s; the younger viewers are more likely to be watching TV with their parents and as a consequence are more likely to be watching BBC programmes.

Looking in more detail at these age groups and their viewing, no programme[62] has an overall audience profile with more than 10% of 16-19s.[63] In contrast, Channel 4's youth-oriented channel, E4, and ITV's equivalent channel, ITV2, have programmes with at least a third of their audience in this age group. On ITV2, some US programmes such as *American Dad* (formerly on BBC Three) are the most likely to have the highest proportion of 16-19 year-old viewers, while on Channel 4, again, US programmes are most likely to appeal to this age group.

Figure 74 shows that there has been a decline in the reach of younger adults across all BBC TV channels compared to last year with BBC News showing a 27% decrease in this audience.

Figure 74: Change in weekly reach (000s) to BBC TV channels, by age group: 2017 vs. 2018



Source: BARB; reach criteria: 15+ consecutive minutes

Nevertheless, despite the declining reach to younger audiences overall, among viewers who do consume BBC content, their perceptions of the BBC's delivery in providing 'content that includes people like me' continues to be higher than the perceptions of the overall population.

[62] Programmes with an average audience of <50k among the target group.
[63] Analysis does not include BBC Three whose programmes are not broadcast and not included in standard BARB data.

Figure 75: Delivery of the Purpose 4 sub-statements (7-10 ratings), by age

	All		16-24		25-34		35-44		45-54		55-64		65+	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 4: Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK	59%	61%	61%	62%	60%	65%	60%	61%	57%	63%	64%	63%	55%	56%
Programmes and content that are relevant to me	58%	58%	62%	59%	57%	62%	60%	58%	58%	61%	57%	58%	54%	50%
A good range of programmes and content that includes people like me	56%	57%	61%	61%	55%	61%	56%	57%	57%	58%	56%	57%	53%	50%
A good range of programmes and content that represents where I live	50%	52%	54%	56%	52%	57%	49%	55%	48%	54%	48%	49%	48%	45%
An authentic portrayal of the region where I live	49%	50%	49%	50%	51%	55%	46%	49%	50%	50%	49%	51%	48%	46%
An authentic portrayal of people like me	48%	49%	51%	53%	48%	52%	48%	49%	48%	51%	49%	48%	46%	41%

△ ▽ Significant increase / decrease compared to 2017-18 last year   Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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. 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:
Base: All (4099/3907), 16-24 (604/592), 25-34 (809/693), 35-44 (716/644), 45-54 (690/631), 55-64 (552/552), 65+ (728/795)

Gender: Women aged 55+ continue to feel there are problems with representation, portrayal and provision of content relevant to them, although their viewing of BBC TV is still high

Last year we reported that older women did not always feel adequately represented or authentically portrayed on both the BBC and television in general. Our tracking data confirms that women aged 55+ continue to be dissatisfied with representation, portrayal, and provision of content relevant to them. This year, men aged 55+ also rated the BBC's portrayal of them lower than average, suggesting there is a broader issue with the portrayal of older people in general.

In contrast, younger men are more likely to think the BBC provides a good range of authentic programmes that include people like them and are about where they live.

Figure 76: Audience opinion about the BBC performance in serving diverse communities, by age and gender

	All		Men 16-34		Men 35-54		Men 55+		Women 16-34		Women 35-54		Women 55+	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 4: Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK	59%	61%	59%	63%	58%	61%	58%	60%	62%	64%	59%	63%	59%	58%
Programmes and content that are relevant to me	58%	58%	57%	61%	58%	58%	52%	55%	62%	61%	60%	61%	58%	52%
A good range of programmes and content that includes people like me	56%	57%	56%	61%	55%	56%	53%	53%	60%	61%	58%	59%	56%	53%
A good range of programmes and content that represents where I live	50%	52%	51%	57%	50%	55%	46%	51%	54%	56%	48%	54%	49%	42% ▽
An authentic portrayal of the region where I live	49%	50%	51%	53%	49%	50%	47%	49%	50%	52%	47%	49%	50%	47%
An authentic portrayal of people like me	48%	49%	48%	54%	47%	48%	45%	44%	50%	50%	49%	52%	49%	44%

△ ▽ Significant increase / decrease compared to 2017-18 last year   Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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. 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:
Base: All (4099/3907), men 16-34 (659/612), men 35-54 (698/593), men 55+ (673/671), women 16-34 (749/670), women 35-54 (707/682), women 55+ (607/676)

The television viewing data reveal some interesting patterns which confirm the themes previously identified. Women aged 55+ are heavy consumers of television in general, and the BBC specifically, despite continuing to feel there are issues around representation, portrayal and provision of content relevant to them. Television viewing by women aged 55+ has dropped by ten minutes per day (compared to an average reduction of 12 minutes) and by 11 minutes per day for BBC television viewing specifically (compared to an average of 6 minutes). This has resulted in a small decline in the BBC's total share of television viewing among this group. This is an indication that older women are beginning turn to other service providers, and this may be partly due to their feelings about how they are represented and portrayed.

BBC television's share of total viewing by men has remained stable year on year.

Figure 77: Viewing, listening and online data for men, women and women aged 55+: 2017/18 vs. 2018/19

	Total TV		Total BBC TV		Total TV		Total BBC TV		Total BBC TV	
	Time spent per day				Average weekly reach				Share of total TV viewing	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 16+	3hrs 42m	3hrs 30m	1hr 11m	1hr 5m	91%	90%	80%	78%	32%	31%
Men	3hrs 24m	3hrs 14m	1hr 6m	1hr 2m	90%	88%	78%	76%	32%	32%
Women	4hrs	3hrs 45m	1hr 16m	1hr 8m	93%	91%	82%	80%	31%	30%
Women 55+	5hrs 36m	5hrs 26m	2hrs 3m	1hr 52m	97%	96%	94%	92%	37%	35%

	Total Radio		Total BBC Radio		Total Radio		Total BBC Radio		Total BBC Radio	
	Time spent per day				Average weekly reach				Share of all radio hours	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 15+	3hrs 1m	2hrs 58m	2hrs 13m	2hrs 10m	90%	89%	64%	62%	52%	51%
Men	3hrs 12m	3hrs 7m	2hrs 14m	2hrs 10m	90%	89%	67%	66%	52%	51%
Women	2hrs 50m	2hrs 50m	2hrs 11m	2hrs 10m	90%	89%	62%	59%	52%	51%
Women 55+	3hrs 34m	3hrs 32m	3hrs 2m	3hrs 1m	91%	89%	72%	69%	67%	66%

	Total Online		Total BBC Online				Total BBC Online		Total BBC Online	
	Time spent per day						March reach		Share of online time	
	Mar 18	Mar 19	Mar 18	Mar 19			Mar 18	Mar 19	Mar 18	Mar 19
Online adults aged 18+	3hrs 0m	3hrs 26m	4m 6s	3m 41s	-	-	92%	92%	2%	2%
Men	2hrs 55m	3hrs 19m	4m 37s	4m 24s	-	-	94%	92%	3%	2%
Women	3hrs 5m	3hrs 33m	3m 34s	2m 57s	-	-	90%	91%	2%	1%
Women 55+	2hrs 01m	2hrs 26m	3m 36s	3m 32s	-	-	77%	82%	3%	2%

Source: BARB, RAJAR 12-months weighting to Q1 of each year, Comscore MMX Multi-Platform, BBC sites (excluding commercial activities), March 2018 and March 2019, UK

Age and gender for radio: BBC stations have seen a decrease in listeners aged under 45, in particular those aged 25-34

There has been an overall drop in the weekly reach of BBC radio to all adults, from 64% to 62%. Two hours 10 minutes each day are spent listening to BBC radio on average across the UK. This drop in listening comes from all BBC radio stations, across age groups and among men and women.

In Figure 7 we saw that the BBC stations have seen a decrease in listeners aged under 45, in particular those aged 25-34, while national commercial stations have had increases across all age groups. Looking in more detail at which BBC stations have had the most noticeable decreases in this age group, BBC local radio, in particular BBC local radio in England, has had the highest decreases year on year. Across the UK-wide services, Radio 4 has lost a fifth of its audience in this age group since the previous year, particularly women (-26%). All other stations have also lost audience, but to a lesser extent.

Looking at the age /gender intersection, there are pronounced declines among young women (aged 16-34) and older women (aged 55+). This is driven by drops in listening to BBC Radio 1, and to a lesser extent BBC Radio 4 (younger women), and BBC nations'/local radio (older women). Women aged 16-34 are still the largest age /gender audience in terms of the proportion listening to BBC

Radio 1 each week, but weekly reach has declined from 33% to 31% over the past year. There has been a larger proportional drop in these young women listening to BBC Radio 4 (8% to 6% over the past year). Listening among older women has a different pattern, comprising mainlyf BBC Radio 4 and BBC local radio.

Socio-economic group: People in lower socio-economic groups continue to rate the BBC lower than all adults on all aspects of representation and portrayal

People in the DE socio-economic groups continue to rate the BBC less favourably than average across all aspects of representation and portrayal. The C2 socio-economic group audiences also rate the BBC lower than average on its performance in this area this year, while people in higher socio-economic groups are more favourable than the UK average towards the BBC overall. The largest gaps in perceptions between ABs and DEs continues to be in relation to the BBC's provision of '*programmes and content that are relevant to me'* and '*provides a good range of programmes and content that includes people like me'.*

Figure 78: Audience opinion about the BBC performance in delivering Purpose 4, by socio-economic group

	All		AB		C1		C2		DE	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 4: Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK	59%	61%	66%	68%	62%	64%	57%	58%	52%	54%
Programmes and content that are relevant to me	58%	58%	65%	65%	63%	62%	57%	53%	48%	49%
A good range of programmes and content that includes people like me	56%	57%	65%	65%	58%	60%	55%	52%	47%	50%
A good range of programmes and content that represents where I live	50%	52%	57%	59%	52%	55%	48%	48%	43%	45%
An authentic portrayal of the region where I live	49%	50%	58%	56%	48%	52%	49%	47%	42%	44%
An authentic portrayal of people like me	48%	49%	54%	55%	52%	52%	46%	45%	41%	42%

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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. 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:
Base: All (4099/3907), AB (1187/1090), C1 (936/1000), C2 (834/795), DE (1142/1022)

People in lower socio-economic groups hold less favourable views towards the BBC and have lower levels of reach across BBC services. Although they consume 44 more minutes of TV per day than average, the BBC features less in the range of channels they watch (26% share of total TV viewing compared to an average of 31%).

Radio: C2DE audiences appear relatively under-served compared to ABC1 audiences

Over the past year, BBC radio weekly reach to C2DE audiences has dropped from 56% to 53%. However, C2DE audience members who do listen to BBC radio listen to it as much as ABC1 audiences. This is because C2DE audiences listen to slightly more radio overall, and a lot of this extra time is spent listening to commercial radio.

Figure 79: Viewing, listening and online data for C2DE audiences 2017/18 v 2018/19

	Total TV		Total BBC		Total TV		Total BBC		Total BBC	
	Time spent per day				Average weekly reach				Share of total TV viewing	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 16+	3hrs 42m	3hrs 30m	1hr 11m	1hr 5m	91%	90%	80%	78%	32%	31%
C2DE	4hrs 328	4hrs 14m	1hrs 12m	1hr 6m	92%	91%	80%	77%	27%	26%

	Total Radio		Total BBC		Total Radio		Total BBC		Total BBC	
	Time spent per day				Average weekly reach				Share of all radio hours	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 15+	3hrs 1m	2hrs 58m	2hrs 13m	2hrs 10m	90%	89%	64%	62%	52%	51%
C2DE	3hrs 14m	3hrs 13m	2hrs 18m	2hrs 14m	87%	86%	56%	53%	43%	44%

	Total Online		Total BBC				Total BBC		Total BBC	
	Time spent per day						March reach		Share of online time	
	Mar 18	Mar 19	Mar 18	Mar 19			Mar 18	Mar 19	Mar 18	Mar 19
Online adults aged 18+	3hrs 0m	3hrs 26m	4m 6s	3m 41s	-	-	92%	92%	2%	2%
C2DE	2hrs 40m	3hrs 4m	2m 53s	2m 39s	-	-	80%	80%	2%	1%

Source: BARB, RAJAR 12-months weighting to Q1 of each year, Comscore MMX Multi-Platform, BBC sites (excluding commercial activities), March 2018 and March 2019, UK

Ethnicity: There have been improvements in the perceptions of people from a minority ethnic background on the BBC's delivery of this purpose

Significantly more people with a minority ethnic background are rating the BBC highly on its delivery of purpose 4 compared to last year. Ratings are now in line with the opinions of the general UK population, where they had been significantly lower. In particular, there have been improvements in opinions towards the BBC offering '*a good range of programmes and content that includes people like me*'. This improvement in opinion is largely driven by opinions among the Asian communities.[64]

Perceptions regarding the BBC providing '*a good range of programmes and content that represents where I live*' are also higher than the UK average among people from a minority ethnic background; about two-thirds of Asian adults rate the BBC highly on this.

[64] Significantly different at the 95% level of confidence.

Figure 80: Audience opinion about the BBC performance in serving diverse communities, by ethnicity

	All		White		Minority Ethnic Groups		Black		Asian	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 4: Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK	59%	61%	59%	61%	56%	63% △	57%	57%	56%	63%
Programmes and content that are relevant to me	58%	58%	58%	58%	53%	58%	54%	52%	52%	57%
A good range of programmes and content that includes people like me	56%	57%	57%	57%	51%	58% △	53%	51%	49%	61% △
A good range of programmes and content that represents where I live	50%	52%	49%	51%	53%	59%	55%	56%	51%	61% △
An authentic portrayal of the region where I live	49%	50%	48%	49%	54%	53%	53%	50%	53%	56%
An authentic portrayal of people like me	48%	49%	48%	48%	50%	52%	52%	51%	50%	54%

△ ▽ Significant increase / decrease compared to 2017-18 last year   Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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. 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:
Base: All (4099/3907), white (3408/3295), minority ethnic groups (672/598), black (126/99), Asian (excluding Chinese) (332/313) *CAUTION LOW BASE (UNDER 100)*

Adult viewers from a minority ethnic background watch only about half the amount of BBC TV (35 mins per day) as all UK adults (1 hour 5 mins). The weekly reach of BBC TV among this group dropped from 69% to 65% over the past year.

Some of the highest-profile programmes among minority ethnic audiences (not the highest numbers of minority ethnic viewers, but the highest proportion of the viewing audience who are minority ethnic) have a clear appeal to viewers who may not originate from the UK, such as *Searching for mum: India*, which was shown on BBC Two; 56% of its audience were from a minority ethnic group.

Ethnicity: Radio 2 has increased its Asian listeners by almost a third over the past year

A much lower proportion of ethnic minority audiences than all UK adults listen to BBC radio each week (44% versus 62%). And those who do listen spend less time doing so (1 hour 20 min vs. 2 hours 10 min per day). This is true for both Asian and black minority ethnic listeners.

However, Radio 2 has reversed its decline in Asian listeners, which have increased by almost a third over the past year. Radio 1, Radio 4 and 5 Live have all seen decreases.

Figure 81: Viewing and listening data for minority ethnic audiences: 2017/18 vs. 2018-19

	Total TV		Total BBC TV		Total TV		Total BBC TV		Total BBC TV	
	Time spent per day				Average weekly reach				Share of total TV viewing	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 16+	3hrs 42m	3hrs 30m	1hr 11m	1hr 5m	91%	90%	80%	78%	32%	31%
Minority ethnic	2hrs 39m	2hrs 23m	38m	35m	87%	84%	69%	65%	24%	25%
Black adults	3hrs 8m	2hrs 46m	44m	43m	87%	83%	71%	68%	23%	26%
Asian adults	2hrs 35m	2hrs 21m	36m	33m	89%	88%	70%	66%	23%	23%

	Total Radio		Total BBC Radio		Total Radio		Total BBC Radio		Total BBC Radio	
	Time spent per day				Average weekly reach				Share of all radio hours	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 15+	3hrs 1m	2hrs 58m	2hrs 13m	2hrs 10m	90%	89%	64%	62%	52%	51%
Minority ethnic	2hrs 16m	2hrs 8m	1hr 22m	1hr 20m	78%	76%	46%	44%	36%	37%
Black adults	2hrs 32m	2hrs 32m	1hr 34m	1hr 34m	83%	80%	46%	45%	34%	34%
Asian adults	2hrs 4m	1hr 56m	1hr 12m	1hr 12m	74%	71%	43%	42%	34%	36%

Source: BARB, RAJAR 12 months weighting to Q1 of each year

Disability: Positive opinions on the BBC's delivery of Purpose 4 have increased among disabled people and are now in line with the opinions of the UK population overall

This improvement is, however, limited to disabled people aged under 65. There has been no change among disabled people aged 65+, who continue to rate the BBC's delivery of this purpose lower than average, as do people aged 65+ in general.

Opinions have also improved since last year among disabled people aged under 65 across the majority of representation and portrayal statements, as well as the provision of relevant content. However, opinions among disabled people aged 65+ are significantly lower than the UK average, with the lowest opinion regarding the authentic portrayal of '*people like me*'. Opinions among people aged 65+ are also lower than those of younger age groups on this statement (44% compared to 51% - not shown on the figure below).

Figure 82: Audience opinion about the BBC's performance in serving diverse communities, by disability

	All		Not disabled		Disabled		Disabled age 65+		Disabled age under 65	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 4: Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK	59%	61%	60%	62%	54%	61% △	52%	53%	56%	65% △
Programmes and content that are relevant to me	58%	58%	59%	58%	52%	57%	49%	47%	54%	62% △
A good range of programmes and content that includes people like me	56%	57%	57%	57%	53%	56%	51%	44%	54%	62% △
A good range of programmes and content that represents where I live	50%	52%	51%	53%	46%	50%	48%	44%	45%	53% △
An authentic portrayal of the region where I live	49%	50%	50%	50%	46%	49%	47%	44%	45%	52%
An authentic portrayal of people like me	48%	49%	49%	49%	45%	47%	45%	37%	45%	52% △

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
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. 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:
Base: All (4099/3907), not disabled (2980/2803), disabled (940/946), disabled age 65+ (258/276), disabled under-65s (682/670)

Adults with a disability view more than six hours of TV each day on average, including 1 hour 44 mins of BBC programmes, a slightly lower proportion of their total viewing (28%) than UK adults as a whole (31%). BBC TV has a weekly reach to almost nine in ten disabled adults (87%), significantly higher than reach to all adults (78%). As for most other audience groups, BBC viewing among disabled adults is reducing (down by ten minutes each day in 2018 and down by two percentage points of reach), but the high amount of viewing does not indicate a significant turning away from BBC TV content by adults with a disability.

Figure 83: Viewing and listening data for disabled adults 2017/18 v 2018/19

	Total TV		Total BBC TV		Total TV		Total BBC TV		Total BBC TV	
	Time spent per day				Average weekly reach				Share of total TV viewing	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 16+	3hrs 42m	3hrs 30m	1hr 11m	1hr 5m	91%	90%	80%	78%	32%	31%
Disabled adults	6hrs 11m	6hrs 8m	1hr 54m	1hr 44m	95%	94%	89%	87%	31%	28%

	Total Radio		Total BBC Radio		Total Radio		Total BBC Radio		Total BBC Radio	
	Time spent per day				Average weekly reach				Share of all radio hours	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 15+	3hrs 1m	2hrs 58m	2hrs 13m	2hrs 10m	90%	89%	64%	62%	52%	51%
Disabled adults	3hrs 28m	3hrs 26m	2hrs 38m	2hrs 38m	90%	89%	54%	62%	54%	53%

Source: BARB, RAJAR 12 months weighting to Q1 of each year

Nations and regions

Output and spend data relating to nations' and regions' production

The BBC continues to produce over half of its network television programming outside London, in line with the licence condition requirement

The BBC achieved its regional production quotas in 2018, with 62.3% of its qualifying hours of network content meeting the criteria to be classed as made outside London. Its qualifying spend was lower (50.7%), but still above the 50% quota. This year is the first in which the BBC has been subject to nation-specific quotas, all of which were met.[65] As outlined in this report last year,[66] the BBC's production centres in the nations and regions of the UK have different characteristics and specialisms, but there have been some slight shifts in the types of productions made across the UK this year.

English regions: Drama spend was down in Northern England, because fewer drama titles were made in the region in 2018, although more sports programmes (including *Match of the Day*) came from this region, where BBC Sports is based. This variation in genre mix explains the slight increase in its share of hours and the slight decline in Northern England's share of spend; drama titles typically account for fewer hours but cost more to make.

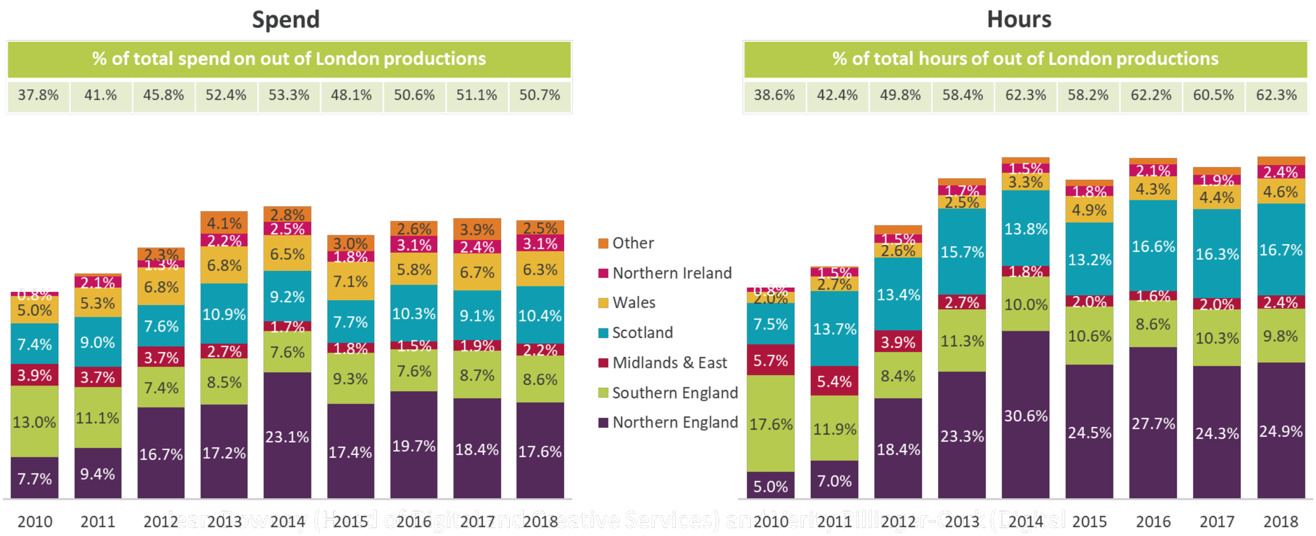
Northern Ireland: More drama titles – including *The Woman in White* and *Death and Nightingales* – were made in Northern Ireland in 2018. This is reflected in the increase of Northern Ireland's share for both spend and hours. The religious show *Sunday Morning Live*, previously made in England, was produced in Northern Ireland in 2018.

Scotland: Scotland is the BBC's second largest out-of-London production centre after Northern England. Both the share of spend and of hours increased here in 2018, helped by the return of comedy shows including *Two Doors Down* and *Still Game.*[67]

Wales: Programming spend on network productions made in Wales fell in 2018, resulting in a decline in Wales' share of total spend on out-of-London productions. This was mainly due to lower expenditure on network drama titles made in Wales during 2018.

[65] Further information is available in the *PSB Network Compliance Report*
[66] *BBC Performance Report: 2017/18*, p.100
[67] The BBC Scotland channel launched in February 2019 and is therefore not included in this performance assessment

Figure 84: BBC expenditure on, and hours of, originated network productions made outside London: 2010-2018



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 Ofcom Regional production and regional programme definitions

BBC spend on TV programmes for the nations and regions increased slightly in 2018

The BBC produces a range of non-networked programming for the UK's nations and regions. Across the UK, total spend on non-networked programming was £201m in 2018, up from £199m in 2017. This was driven mainly by increased spend in Wales, and partly by the BBC's replacement of regional segments of *Sunday Politics* with stand-alone half-hour programmes for the nations and regions, resulting in a minor boost to current affairs spend in both England and Wales.

English regions: In real terms, programme spend on content for the English regions was flat compared to 2017. As well as the increase in expenditure on current affairs content, programme spend outside news and current affairs increased in 2018, offsetting a decline in news spend. This spend increase was in line with a rise in non-news and current affairs hours, up from 43 to 62 in 2018, due to an increase in first-run documentary programming for the English regions.

Northern Ireland: As in 2017, expenditure on non-networked programming in Northern Ireland declined in 2018. This was particularly driven by a decline in spend on news content, which has followed a downward trend since 2015, falling from £8.7m in 2015 to £5.7m in 2018. In addition, spend on non-networked content on BBC Two in Northern Ireland decreased by 23% compared to 2017. An element of this is likely to be down to a drop in the number of hours of *Ulster Rugby Live* in 2018.

Scotland: Non-networked programme spend in the Scottish regions declined slightly in 2018, from £45.3m to £44.6m. This was particularly driven by a decline in news spend of 5.8% in real terms during 2018, in line with a fall in news hours. However, this was mainly due to the effect of election coverage during 2017.

Wales: A rise in total non-networked spend in Wales was the main driver of the increased programme expenditure on the nations and regions in 2018. This followed the BBC's announcement in early 2017 of increased investment in Wales through an additional £8.5m of funding.[68] In real terms, 2018 spend on non-networked content in Wales increased by 17% year on year. This mainly came from content for BBC One other than news and current affairs, with spend per hour in this category increasing by 19% since 2017. According to the BBC, the increase in non-networked programme spend in Wales was mostly on drama and comedy, with *Keeping Faith*, *Hidden* and *Tourist Trap* representing 82% of all the drama and comedy hours produced and broadcast in Wales in 2018.

Figure 85: BBC spend on non-network content; by nation (£m)

Source: Ofcom/BBC. Note: Spend data are provided in real terms. Figures do not include spend that cannot be attributed to individual programmes, such as presentation, commissioning, scheduling, copyright and helpline.

Despite an increase in first-run spend, output of non-network originations for the nations and regions fell in 2018

Total spend on first-run programming for the nations and regions increased slightly in real terms last year, from £198m to £199m.[69] However, as a proportion of total non-network hours broadcast, first-run UK originated content decreased for all nations during 2018.

English regions: The number of first-run originations made for the English regions increased slightly in 2018. In contrast to the other nations, nearly all English non-networked content (99.9%) is first-run, as has been the case in previous years. This is because content broadcast in the English regions is far more focused on news. In 2018, only 1.5% of English regional

[68] https://www.bbc.co.uk/mediacentre/latestnews/2017/wales-investment
[69] Full data on nations and regions spend is available in the interactive report.

content was *not* news- or current affairs-based. Other nations continued to have more variation in genre mix, with 39% of hours of non-news and current affairs in Northern Ireland, and 51% and 45% hours in Scotland and Wales respectively.

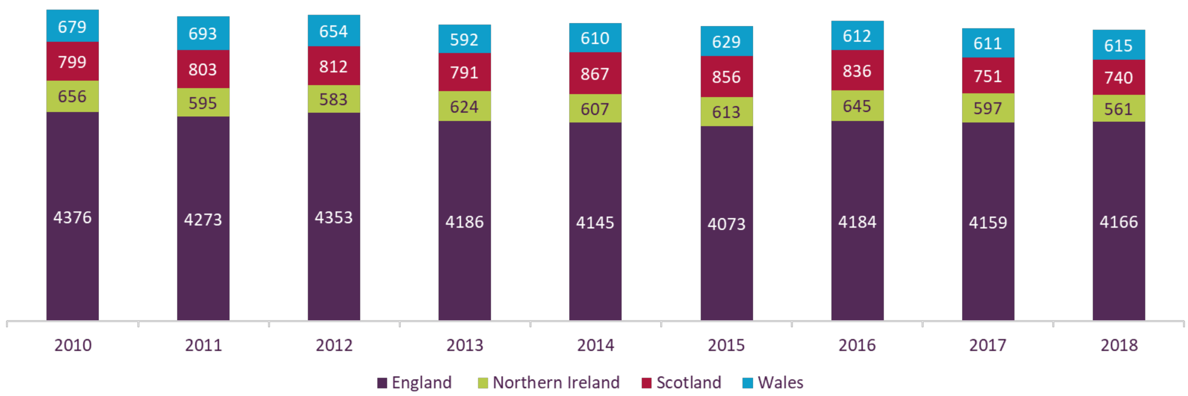
Northern Ireland: First-run hours in Northern Ireland declined during 2018. This was partly due to the effect of non-networked general election coverage in 2017, in addition to a decrease in first-run sports coverage in 2018. The drop in first-run hours was the main driver of a decline in total hours over 2018 (including repeats), from 728 to 690.

Scotland: As in Northern Ireland, a large part of the decline in first-run hours in Scotland was due to election coverage in 2017. Stripping out election-related programming, first-run hours in 2018 were at a similar level to 2017. Total hours for the Scottish regions, including repeated content, increased slightly from 888 in 2017 to 890 in 2018.

Wales: The overall number of non-network hours broadcast in Wales increased in 2018, from 677 to 713. This was largely due to an increase in the amount of repeated content in 2018, up 55% on 2017 to 97 hours in 2018. Many of these repeats (60%) were factual content – with consumer show *X-Ray* of particular note. However, there was a modest increase in first-run hours in Wales, from 611 to 615 hours, led by the investment in drama and comedy programming mentioned above. This was also the main driver of the increase in first-run spend across all nations and regions. Spend per hour on first-run content in Wales increased by 15% on 2017, reflecting the higher cost per hour of drama programming.

Figure 86: First-run non-network originations for BBC, by nation: 2010-2018

	2010	2011	2012	2013	2014	2015	2016	2017	2018
First-run hours (all nations)	6,510	6,364	6,402	6,193	6,229	6,171	6,277	6,118	6,082
First-run % of total hours	92%	92%	93%	94%	95%	95%	95%	95%	94%



Source: Ofcom/BBC

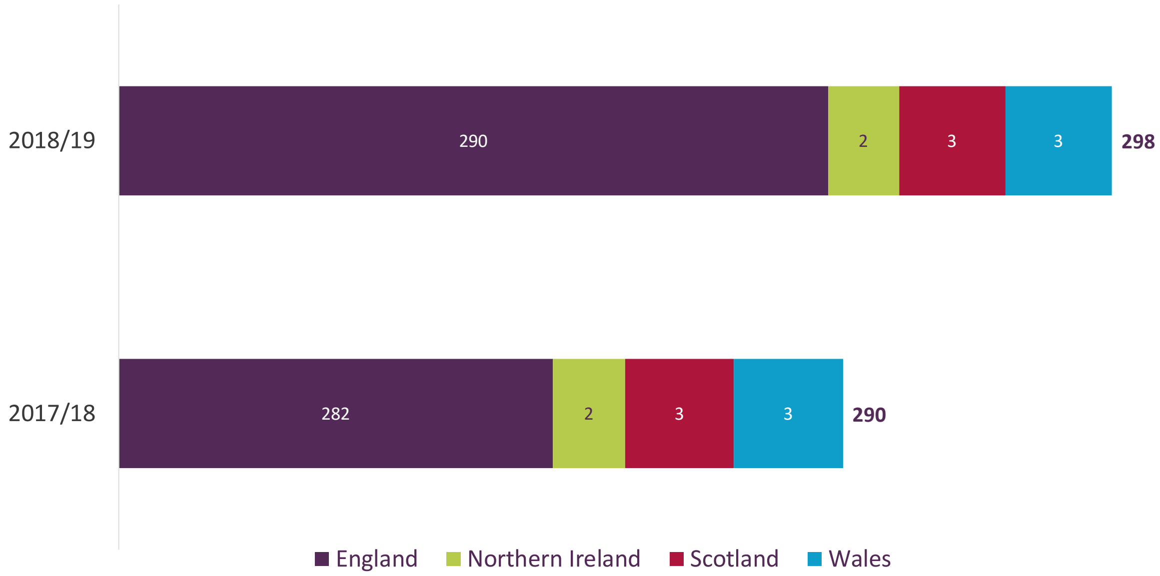
Total BBC spend on BBC Alba increased by 6% in 2018

BBC Alba, launched in 2009, broadcasts a range of Gaelic-language programming across Scotland and is a partnership between the BBC and the Scottish Government-funded MG Alba. In 2018, total broadcast hours on BBC Alba were down slightly, from 2,620 to 2,606. This decline came from fewer non-news and current affairs hours on the channel during 2018. However, first-run originated hours on BBC Alba increased from 648 to 650 in 2018, with first-run spend up by 6% in real terms to £16.7m. This was the highest level of cost per first-run hour since 2010.

Content spend on radio grew over the past year

The BBC spent a total of £298m on networked radio content for the nations and regions in 2018/19, up from £290m in the previous year. This was entirely due to an increase in expenditure on network content in England – where all the BBC's network stations are based. Network radio spend for other nations remained flat on the previous year.

Figure 87: BBC spend on network radio, by nation: 2017/18 vs. 2018/19

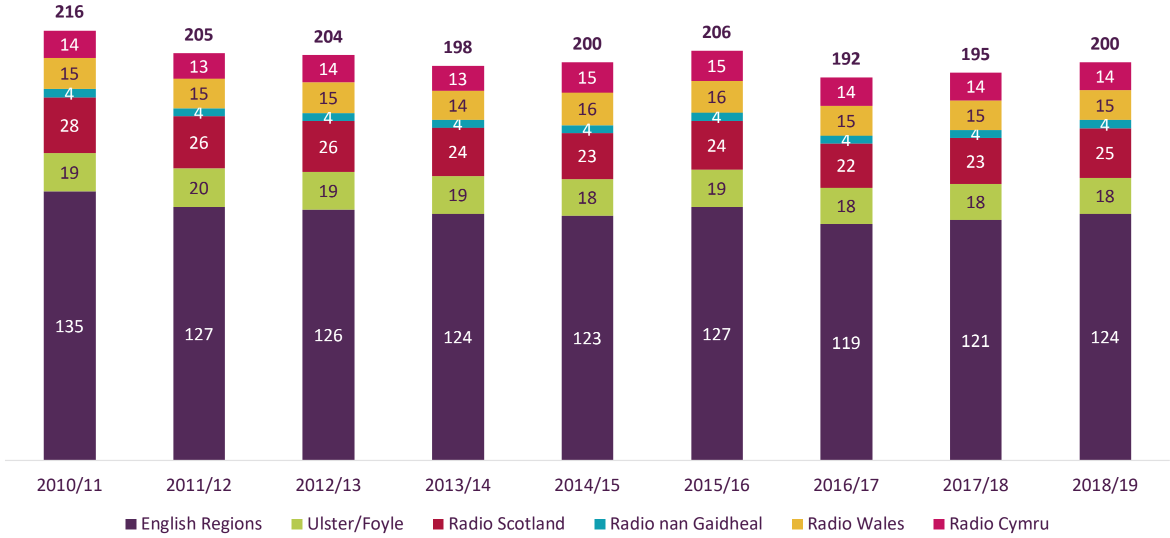


Source: BBC Annual Report 2018/19. Note: figures are expressed in real terms.

Total spend was also up for nations'/local radio stations across the UK, with the BBC's 39 local radio stations in England increasing their overall content expenditure since the previous year. This was reflected in an increase in non-networked radio hours in the English regions, from 216,023 in 2017/18 to 230,223 in 2018/19.[70] This was probably because from October 2018 the BBC replaced shared evening programmes with around 15 hours per week of new local programming.

[70] BBC Annual Report 2018/19

Figure 88: BBC spend on local and nations radio, by nation (£m)

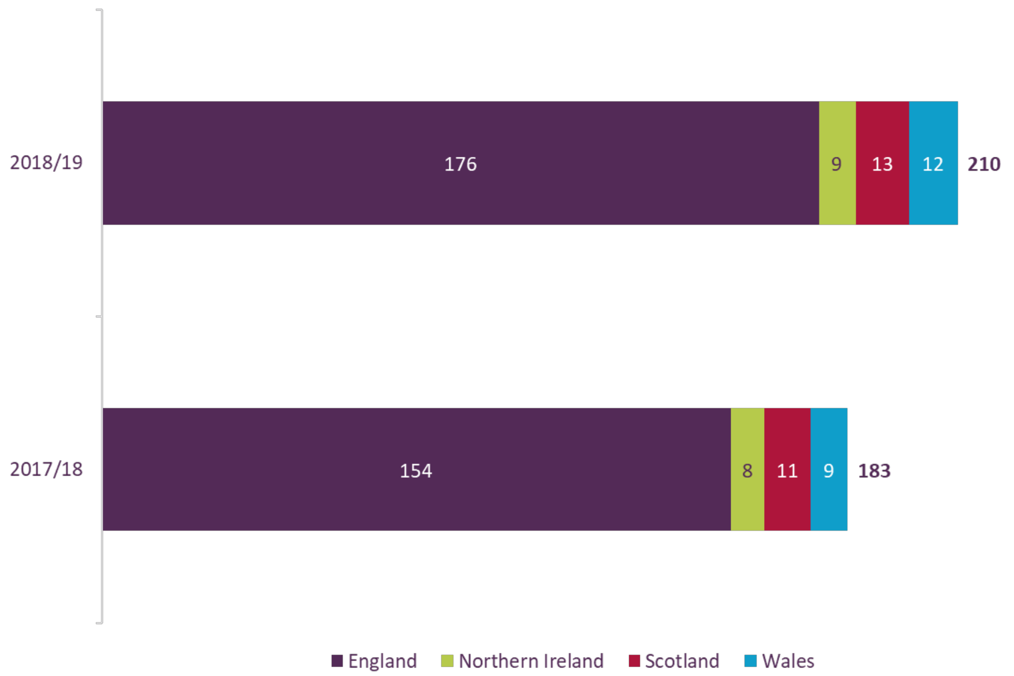


Source: BBC Annual Reports. Notes: figures are expressed in real terms.

Online and red-button spend increased for all nations and regions

The BBC's spend on online services and red button increased this year by 14.7% since last year. This included spend on network and non-network services for the nations and regions. The split of online spend was little changed since 2017/18, with the majority of spend (84%) coming from England.

Figure 89: BBC spend on online and red button, by nation: 2017/18 vs. 2018/19



Source: BBC Annual Report 2018/19. Note: Figures are expressed in real terms

Audience opinion in the nations and regions

Nations and regions: Viewers in Scotland continue to rate the BBC significantly lower than viewers in the rest of the UK for representing and portraying them and where they live

People in Scotland continue to rate the BBC less favourably than people in the other nations; about a quarter of people in Scotland rate the BBC unfavourably, particularly men and those in lower socio-economic groups. 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'*, 54% of people in Scotland rate it highly compared to 63% in England.

An '*authentic portrayal of the region where I live'* receives the lowest level of positive ratings among people in Scotland, with just over a third of the nation rating this highly and a similar proportion giving it a low rating. Those in lower socio-economic groups have the least favourable views.

Geographical representation through '*provision of a good range of programmes and content that represents where I live'* also achieves a weaker performance in Scotland and is also below average for people in Wales.

Opinions among people in England are above average for all purpose 4 statements and have remained stable year on year. Opinions among people in Northern Ireland have also remained stable.

Figure 90: Audience opinion about the BBC's performance in serving diverse communities, by nation

	All		England		Scotland		Wales		Northern Ireland	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Purpose 4: Content that accurately represents and authentically portrays the life and culture of a range of different communities throughout the UK	59%	61%	60%	63%	51%	54%	63%	58%	61%	56%
Programmes and content that are relevant to me	58%	58%	59%	59%	46%	46%	57%	57%	55%	54%
A good range of programmes and content that includes people like me	56%	57%	57%	58%	47%	46%	57%	55%	53%	52%
A good range of programmes and content that represents where I live	50%	52%	51%	54%	39%	39%	47%	46%	49%	47%
An authentic portrayal of the region where I live	49%	50%	50%	52%	37%	36%	46%	45%	47%	46%
An authentic portrayal of people like me	48%	49%	49%	50%	39%	42%	47%	44%	47%	47%

△ ▽ Significant increase / decrease compared to 2017-18 last year ■ ■ Significantly above / below 2018-19 All

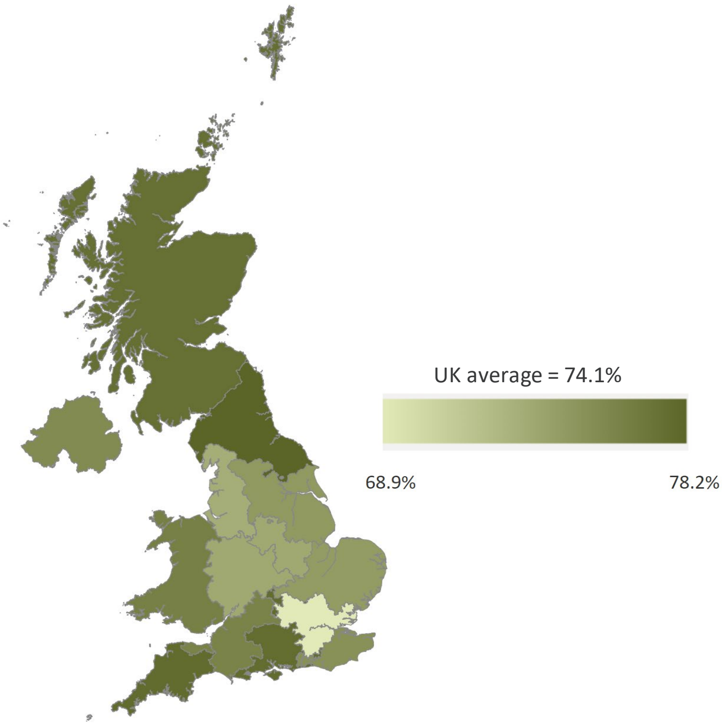
Source: BBC Performance Tracker, fieldwork: 9 October 2017 to 13 April 2018; 16 April 2018 to 10 April 2019
Question: C9. This set of statements are about the BBC's responsibility to reflect, represent and serve diverse communities within all the UK's nations and regions. On a scale of 1-10, where 1 means not at all well and 10 means extremely well, how well, if at all, do you think the BBC as a whole provides:
Base: All (4099/3907), England (3104/2892), Scotland (358/349), Wales (337/ 327), Northern Ireland (300/339)

Viewing and listening in the nations and regions

Nations and regions: BBC TV has a higher reach in Northern Ireland and the Midlands than in the rest of the UK

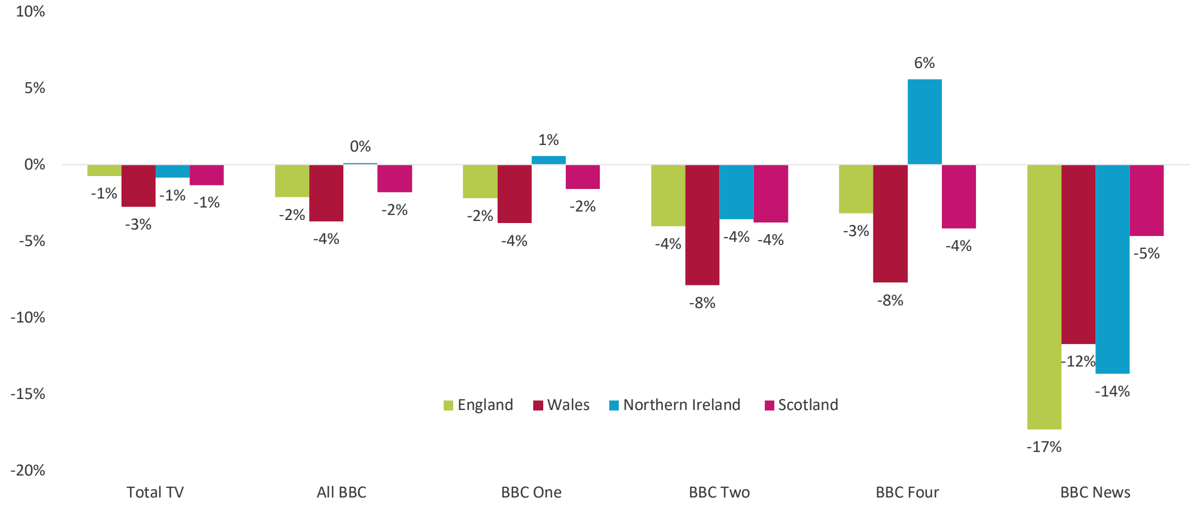
Figure 91 shows how the weekly reach of BBC TV varies across the UK with higher reach across the nations compared to the Midlands and London. Compared to last year, all BBC TV channels have fallen in audience reach and this is generally the case across each of the four nations of the UK. However, there are some variations: viewing of BBC Four in Northern Ireland increased slightly, reaching a similar level to the rest of the UK. There was also a widespread and significant decrease in viewing of the BBC News channel, although this decrease in percentage terms was less in Scotland than elsewhere.

Figure 91: **Average weekly reach of BBC TV across the UK**



Source: BARB Q1 2019, 15+ minutes reach criteria, all individuals 4+. BBC areas.

Figure 92: Change in average weekly reach (000s) to BBC TV channels, by nation: 2017 vs. 2018



Source: BARB; reach criteria: 15+ consecutive minutes, all individuals 4+, BBC areas

Figure 93: Viewing and listening data for audiences from the four nations 2017/18 vs. 2018/19

	Total TV		Total BBC TV		Total TV		Total BBC TV		Total BBC TV	
	Time spent per day				Average weekly reach				Share of total TV viewing	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 16+	3hrs 42m	3hrs 30m	1hr 11m	1hr 5m	91%	90%	80%	78%	32%	31%
England	3hrs 39m	3hrs 27m	1hr 10m	1hr 4m	91%	90%	80%	78%	32%	31%
Wales	4hrs 3m	3hrs 53m	1hr 22m	1hr 15m	92%	90%	82%	80%	34%	32%
Northern Ireland	3hrs 39m	3hrs 26m	1hr 3m	58m	92%	91%	81%	80%	29%	28%
Scotland	4hrs 8m	3hrs 51m	1hr 20m	1hr 13m	92%	90%	82%	80%	32%	32%

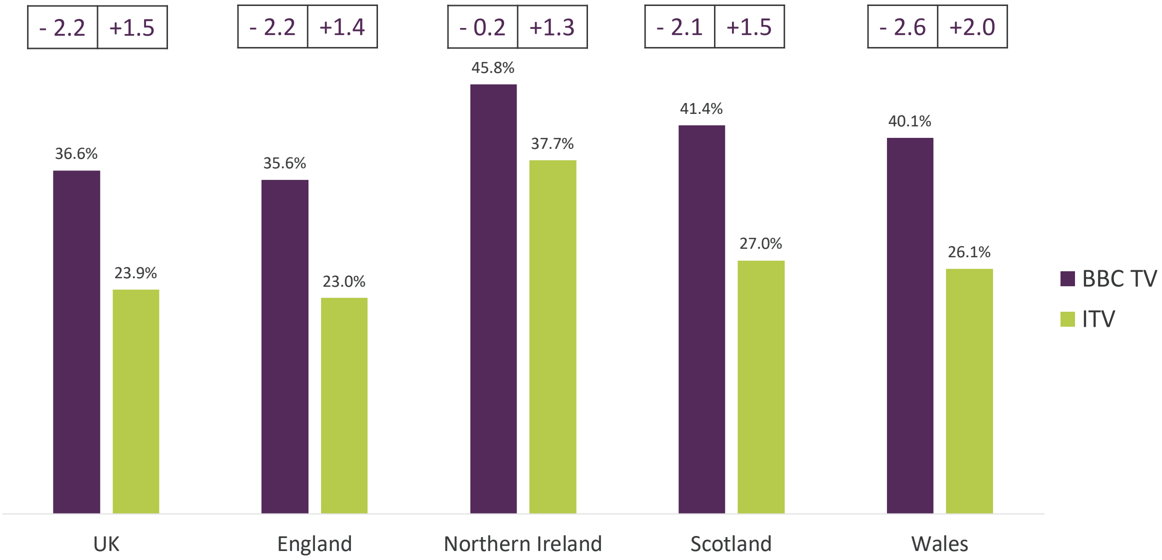
	Total Radio		Total BBC Radio		Total Radio		Total BBC Radio		Total BBC Radio	
	Time spent per day				Average weekly reach				Share of all radio hours	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Adults aged 16+	3hrs 1m	2hrs 58m	2hrs 13m	2hrs 10m	90%	89%	64%	62%	52%	51%
England	3hrs 1m	2hrs 58m	2hrs 14m	2hrs 11m	90%	89%	64%	63%	53%	52%
Wales	3hrs 11m	3hrs 11m	2hrs 20m	2hrs 26m	91%	91%	72%	68%	58%	57%
Northern Ireland	2hrs 53m	2hrs 50m	1hr 46m	1hr 44m	93%	92%	62%	61%	41%	40%
Scotland	2hrs 56m	2hrs 50m	2hrs 2m	1hr 55m	89%	86%	58%	54%	45%	42%

Source: BARB, RAJAR 12 months weighting to Q1 of each year

BBC regional news finds large weekly audiences, especially in Northern Ireland

Regional news, including news for the nations, reaches 37% of the UK each week but this varies significantly by nation. Each of the devolved nations has a higher regional news reach than England, with the highest in Northern Ireland (46%), despite the lower time spent viewing BBC TV overall. Regional news on BBC TV reaches more people than regional news on ITV, in each nation. This gap is smallest in Northern Ireland, perhaps indicating that regional news in general is felt to be more relevant to this nation.

Figure 94: Weekly reach of non-network (nations/regional) news in 2018: BBC TV vs. ITV



Source: BARB average weekly reach of non-network news programmes; individuals 4+; no minimum duration; BBC regions (%p change vs. 2017 shown in boxes)

Some BBC TV programmes are watched by a particularly high proportion of viewers in one nation when the subject is particularly relevant to them; for example, 18% of the total UK viewers for *Troubles: the life after* were in Northern Ireland. Some BBC TV news programmes appealed strongly to Scottish audiences; for example, *Review 2018* on BBC News – 54% of its audience was in Scotland. Sport also attracted strong interest; for example, 25% of the overall UK audience for the Rugby Union match Wales vs. South Africa was in Wales.

Northern Ireland has the lowest overall BBC TV viewing of the nations at 58 minutes per day. Scotland (1hr 13 min) and Wales (1hr 15 min) are the highest.

Radio listening: nations and regions

Adults in Scotland (54%) and Northern Ireland (61%) are less likely than adults in England and Wales to listen to BBC radio. This pattern also shows in the amount of time listeners in each nation spend listening to BBC radio.

There is a different story for local/national BBC radio; as Figure 95 shows, audiences in Northern Ireland are more likely to listen to BBC Radio Ulster/Foyle than other nations are to listen to their own local and national BBC radio stations. Local radio has the lowest weekly reach to audiences in England, with only just over one in eight adults listening each week.

Figure 95: Weekly reach to nations'/local radio: BBC vs. commercial

Source: RAJAR Q1 2019, 12-month weight; BBC local radio TSA in each nation (%p change vs. Q1 2018 shown in boxes)

A1. Sources

To inform our assessment of the BBC's performance, we have drawn on a variety of different sources. These are detailed here including a brief description of their methodology.

1. BBC output and spend analysis

Wherever possible, historical data have been provided for BBC One, BBC Two, and the BBC's portfolio channels: BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. BBC HD and BBC One HD have been excluded from the analysis in the report, as much of their output is simulcast from the core BBC channels and therefore would represent a disproportionate amount of duplicated broadcast hours and spend. Please refer to individual footnotes and chart details indicating when a smaller group of these channels is being reported on. BBC portfolio figures include BBC Three until it ceased broadcasting as a linear channel on 15 February 2016.

From 2017, we have also included first-run UK-originated content made available exclusively on BBC iPlayer.

Output hours

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three (until it ceased broadcasting as a linear channel) and BBC Four, peak time runs from 7pm (when broadcasting starts on these channels) to 10.30pm, except where otherwise stated.

Definition of slot time versus running time

Output hours are either based on slot time or running time. Slot time includes promos whereas running time excludes these minutes from programme output hours analysis. We have used slot time when analysing network output and running time when looking at nations' and regions' output and programme-level data.

Genre definitions

The output data provided by the broadcasters follow a set of programme genre definitions, as outlined below and agreed with broadcasters in 2006.1 Please note that these genres are defined for our monitoring and reporting purposes, and do not necessarily correspond to definitions used in broadcasting legislation, such as the Audiovisual Media Services Directive (AVMSD).

Outlined below are the definitions used for the output and spend data in this report:

News

- Newscast or news bulletin providing national, international or regional news coverage
- News magazines which may contain a range of items related to news stories, with comment and elements of general interest

- Coverage of parliamentary proceedings and political coverage
- Weather forecasts and bulletins, including reports on air quality, tide times etc.

Current Affairs

- A programme that contains explanation and analysis of current events and issues, including material dealing with political or industrial controversy or with public policy
- Topical programmes about business matters and financial issues of current interest
- Political debates, ministerial statements, party conferences

Arts

- A programme displaying or presenting a cultural or artistic performance or event
- Programmes providing information, comment or critical appraisal of the arts
- The subject matter can cover theatre, opera, music, dance, cinema, visual arts, photography, architecture and literature

Religion & Ethics

- All forms of programming whose focus is religious belief, for example: programmes intended to provide religious inspiration through words and/or music, and informational programmes explaining doctrine, belief, faith, tenets, religious experiences or topics providing a religious world view
- Coverage of religious acts of worship of all faiths
- Life experience: moral, ethical, spiritual - exploring one or more of the following issues at some point in the programme: (i) a recognisable religious perspective forming a significant part of the overall narrative; (ii) an exploration of people's daily lives whose attitudes could be said to be informed by a religious background or tradition; (iii) an exploration of people's perception of, and attitudes to, philosophies which address the big questions of life that affect them. These must demonstrate an approach that bears in mind a religious faith/belief context

Education

- Programmes with a clear educational purpose, usually backed by specially prepared literature publicised on screen and in other appropriate ways. Includes programmes for Schools, BBC Learning Zone and Open University programmes
- Programmes reflecting social needs and promoting individual or community action. Also includes Campaign weeks on particular subjects, e.g. bullying, drugs

Factual

- All types of factual programmes, included in the genres listed below:

Specialist factual

  - History - programmes about historical times or events, including programmes about archaeology
  - Nature and wildlife - natural history and programmes about environmental issues.

- Science and technology - programmes about scientific issues, new discoveries, medical matters and new technological developments.
- Business and finance – programmes about business/financial issues and developments.

General factual

- General factual programmes, including consumer affairs.
- Lifestyle programmes, hobbies and leisure interests, including makeover shows.
- Daytime magazine programmes and talk shows’
- Coverage of special events, not generated by the broadcaster, including commemorative events, royal events.

Factual entertainment

- Popular factual material, including reality shows, docu-soaps and other factual entertainment.

Drama

- All drama including comedy drama and TV movies but excluding soaps which are classified separately.
- Docu-drama - based on reality, telling the story of actual events.

Soaps

- Drama programmes with a continuous storyline and fixed cast, normally with more than one episode each week and shown every week of the year and usually (but not necessarily) of 30 minutes’ duration.

Films

- All feature films that have had a prior theatrical release including films commissioned by the broadcaster.

Entertainment

- All forms of entertainment programme, including panel games, chat & variety shows, talent contests
- Quiz and game shows
- Pop music video shows

Comedy

- All forms of scripted comedy, satire, stand-up, and sketch shows
- Situation comedy - dramatised entertainment in a humorous style, usually with a fixed cast and generally of 30 minutes’ duration.

Sport

- All forms of sports programming, including coverage of sporting events.

Music

- Classical and contemporary music - coverage of popular music events and performances, such as OB concerts or as-live studio-based shows.

Children's

- All types of programmes designed for a children's audience, including:
  - drama;
  - entertainment shows, including weekend magazines and animations and cartoons, including puppets which are designed for a children's audience;
  - general information programmes and news for children; and
  - education and factual programmes for pre-school children.

Spend data

Programme spend represents the total cost of production or acquisition, including rights costs but excluding third-party investment. In the case of commissions, it represents the price paid to the independent producer (and therefore includes a mark-up on production costs). Expenditure on costs not attributed to individual programmes, such as presentation, commissioning, scheduling, copyright and helpline, are not included in these figures. As such, genre spend figures differ from those published by the BBC in its Annual Report.

The data and information expressed in this report have been adjusted for inflation. It is important to adjust for inflation when comparing nominal data at different points in time because with inflation, increases in nominal figures may simply reflect higher prices rather than increased production or purchasing power. For example, if a book cost £5 ten years ago, but £10 today, we would say its price has risen 100% in nominal terms. But had inflation risen by 100% at the same time, halving the value of money, we would say that the price had not moved in real terms.

Trend data showing programme costs over a number of years are given in 2017 prices (i.e. taking account of inflation, using the Consumer Price Index, as provided by the Office for National Statistics).

All spend and output data are based on programmes broadcast in each calendar year, e.g. 2018 data reflect programmes broadcast during 2018.

Where financial year data is used, these figures come directly from the BBC's Annual Reports and represent content spend unless otherwise stated.

Ofcom analysis of BBC data is available to view in our interactive report.

2. Ofcom research

BBC Performance Tracker

The BBC Performance Tracker is conducted using a 50/50 mixed methodology – online and CAPI face-to-face data collection. Quotas are set on nation and region, gender, age, ethnicity and religion, internet use and working status (F2F only) using a combination of 2011 census data, data from the GfK Random Location (F2F) Omnibus and Financial Research Survey (FRS).

Ethnicity, religion and nation (Wales and Northern Ireland) are boosted. The survey is conducted annually on a rolling basis among 4000 respondents. Fieldwork for the first year of the BBC Performance Tracker was undertaken from 9 October 2017 to 13 April 2018 and for the second year from 16 April 2018 to 10 April 2019. The data are weighted to be nationally representative of the UK population.

The tracker provides Ofcom with an evidence base to assess audience opinions on the BBC's performance against its delivery of four public purposes. Data tables can be accessed on the Ofcom website.

News Consumption Survey

Ofcom's News Consumption survey has been conducted on a yearly basis since 2013, using a face-to-face omnibus methodology. In 2017/18 we changed the methodology to a standalone survey, using a mix of face-to-face CAPI and online interviews. This allowed us to increase questionnaire length and sample size in a cost-effective way. This enables, among other things, more granular sub-group analysis and a more detailed exploration of online news consumption. We continued this same methodology in 2018/19.

Jigsaw Research Limited conduct this mixed methodology approach, combining 2,535 online interviews and 2,156 face-to-face interviews. Nations were boosted during fieldwork to produce robust sample sizes for analysis. Interviews were conducted over two waves of research (November & December 2018 and March 2019) to achieve a robust and representative view of UK adults. Data tables and the report (including findings from the Children's News Consumption Survey) can be accessed on the Ofcom website.

Ofcom Children's Media Literacy Tracker

Ofcom's Children's Media Literacy Tracker is a face-to-face survey run once a year between April and June. In 2018, 1,430 in-home interviews with parents of 5-15s and children aged 8-15 were conducted, along with 630 interviews with parents of children aged 3-4. In April/ May/ June 2017, 1,388 in-home interviews with parents and children aged 5-15 were conducted, along with 677 interviews with parents of children aged 3-4.

The objective of the survey is to provide detailed evidence on media use and understanding among children and young people aged 5-15, as well as in-depth information about media access and use among children aged 3-4. It also includes data on parents' views about their children's media use, and the ways that parents seek – or not – to monitor or limit such use. The data are weighted to the national UK profile. The summary report can be accessed on the Ofcom website.

Podcast research

The podcast research was a survey conducted by Populus in March 2019. Using its online panel, 1,063 respondents aged 18+ who listen to podcasts each week were recruited.

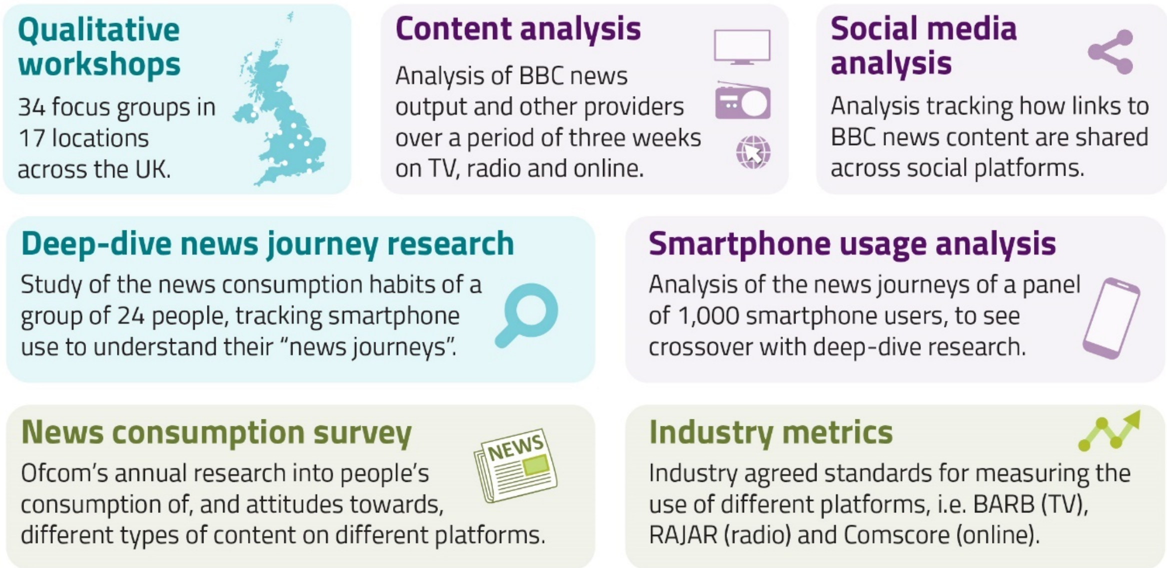
They were invited to take part in a 7-day diary around their consumption of podcast content. Those who agreed were asked to complete a short questionnaire to capture the key overarching behaviours and attitudes related to podcasts.

For the diary part of the research, respondents were sent an invitation each day to conduct a short 2-3 minute survey around the podcasts they'd listened to that day, if they'd downloaded them and how much of each podcast they'd listened to.

The questionnaire and its associated data tables are available in Ofcom Media Nations 2019.

Ofcom review of BBC news and current affairs

As part of our Annual Report on the BBC last year, we announced our intention to review the performance of BBC news and current affairs. As part of this review, we have spoken to people across the UK to understand their expectations of news and current affairs journalism and why they choose (or choose not) to use the BBC regularly. We have also conducted research into the news consumption patterns of a variety of people to understand how their habits and interests affect how they seek out and draw on different news sources.



Full summaries and reports providing further insight into the research and analysis underpinning this review are provided on the Ofcom website.

3. Industry currencies

BARB

Broadcasters' Audience Research Board (BARB) is a panel of approximately 5,300 homes providing the official broadcast TV measurement for the industry.

BARB analysis is based on viewing to scheduled TV programmes, such as those listed in TV listings magazines or on electronic programme guides (EPG), on TV sets. Unless otherwise stated, figures quoted are for the standard seven-day consolidated viewing. This includes viewing of these programmes at the time of broadcast (live) and from recordings such as on DVRs and through catch-up player services (e.g. apps on smart TVs) up to seven days after first broadcast (known as time-shifted viewing). Viewing of broadcast TV programmes through all devices attached to the TV set are included, but unless they are played through the TV set computers, laptops and tablets are not included. If an age breakdown is not stated, the figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

The viewing metrics used in the analysis are minutes/hours of viewing, average weekly reach as a proportion of the total universe, share of viewing and channel profile (the proportion of viewing split for example by age groups or socio-economic group).

Changes to the BARB reporting system in 2010 allows broadcasters to retrospectively amend the genre labelling of broadcasts they have aired. These changes will apply to all historic data for respective programmes/films. As a result of this, analysis within this report is based on a snapshot of data at a given point in time (i.e. when analysis was conducted).

Viewing through BBC iPlayer is included in the overall figures if it is on the TV set and is viewed within seven days of broadcast. The charts showing overall BBC consumption across platform (TV, radio and online) include an estimate of total BBC iPlayer viewing and this includes viewing across all devices and outside the usual seven-day BARB window.

Comscore

Comscore is an organisation that provides online audience measurement. UKOM, the body that sets and governs the UK standard for the online industry by the advertising industry, has endorsed some Comscore products as the established online measurement standards for digital media.

We have used three of the Comscore products:

a) For analysis of laptop and desktop computer internet activity only, we use Comscore Media Metrix (MMX) which employs Comscore's Unified Digital Measurement (UDM) methodology, explained below.

b) For analysis of mobile internet and app activity only, on Android and iOS smartphones, iPads and Android tablets, we use Comscore Mobile Metrix, which also employs Comscore's Unified Digital Methodology for Android and iOS smartphones and iPads. Android tablet use is captured on tagged entities.

c) For analysis of internet activity across platforms, we use Comscore MMX Multi-Platform which provides metrics on desktop video.

Comscore's Unified Digital Methodology (UDM) combines panel and census measurement techniques to obtain digital audience measurement statistics. UDM uses Comscore's UK measurement panel to determine audience reach and demographics. Census-level activity is captured from publishers' digital content, such as on websites, videos, and computer and mobile applications. Comscore combines census-level data with those captured from the panel to help provide a more accurate view of audiences and their consumption habits. This approach allows

Comscore to capture more accurate consumption activity from publishers, and attribute this to audience demographics in a way that is not affected by cookie deletion, blocking, or rejection.

In September 2017 Comscore updated the source for its UK universe estimates from National Readership Survey to the Audience Measurement for Publishers study run by The Publishers Audience Measurement Company. The Enumeration source is the data that Comscore use to produce universe estimates for Audience Analytics products. The change affects the UK universe estimates in Comscore MMX Multi-Platform, MMX, Video Metrix and Mobile Metrix products. The enumeration study change will result in trend shifts for UK Audience data. Data changes will vary by entity and platform.

Comscore does not measure online activity via a TV set.

BBC sites definitions

Within Comscore, ‘BBC Sites’ includes some sites that are not funded by the licence-fee, such as BBC Goodfood and BBC Earth. In order to assess the performance of the licence-fee funded sites, we created bespoke groupings within Comscore using the audience duplication tool. For March 2019, the sites (including their sub-sites) included were:

- BBC Bitesize
- BBC Food
- BBC Homepage
- BBC iPlayer
- BBC Media Player (Mobile App)
- BBC Music
- BBC News
- BBC Newsbeat
- BBC Radio
- BBC Regions
- BBC Search
- BBC Sounds: Radio & Podcasts (Mobile App)
- BBC Sport
- BBC Sport (Mobile App)
- BBC Teach
- BBC Television
- BBC Weather
- CBBC
- CBeebies

RAJAR

RAJAR stands for Radio Joint Audience Research. It is the official body in charge of measuring radio audiences in the UK and is owned and controlled by the industry. The overall adult 15+ sample is around 100,000 each year, with each respondent participating for only one week. We have applied a 12-month weighting to the data to provide annualised figures as necessary throughout the document. Further detail on the methodology and sampling can be found on the RAJAR website.

BBC radio programme genre definitions

RAJAR does not provide programme-level data though this can be derived by grouping 15-minute time slots accordingly. We reviewed the schedules for the five main BBC radio networks at a point in time during the analysis period and grouped programmes into broad genres (e.g. specialist music, news & current affairs, factual). The BBC verified the genre-allocations, indicating if there were any changes to be aware of across the year.

Total BBC minutes

Ofcom analysis

A. Total AV consumption

This analysis uses industry measures wherever possible to enable a repeat assessment to be made in the future. There are currently four main inputs:

1. BARB industry data: provides total TV screen time and sub-components for live television, time-shifted television up to 28 days, DVD usage, games console playing and all other TV usage.

2. BARB TV Player Reports: provides the total online minutes to broadcaster online players to PCs, tablets and smartphones. It is based on census data that are generated by software code embedded in TV Player apps.

3. TouchPoints: provides device profiling data only for subscription on-demand and broadcaster on-demand usage, as well as a ratio of YouTube to other online video content and a split of BARB time-shift between recorded content and broadcaster on-demand on the TV set. There are no absolute numbers from TouchPoints included in the analysis.

4. comScore Video Metrix data: provides online viewing data to PCs, tablets and smartphones for non-broadcaster video services and YouTube.

Other points:

- BARB has previously estimated that extended PVR playback provides around 1.3% of additional TV in PVR homes. This viewing has been added to recorded viewing.
- Total online minutes by device from BARB TV player report has been used alongside viewers per view device factors to turn device minutes into people minutes.
- Categories excluded from this analysis are cinema viewing and consumption of billboard and outdoor advertising video

B. Total BBC consumption

This analysis uses industry measures wherever possible to enable a repeat assessment to be made. It is likely that we may amend our approach in future to take account of different measurement possibilities as they emerge. There are several aspects of BBC consumption measured in this analysis:

- Live BBC TV on a TV set from BARB
- Estimated DVR viewing using BARB TV time-shift viewing and modelling from TouchPoints
- BBC iPlayer from BARB TV player report (non-TV set) plus modelled TV time-shift viewing left over from above
- BBC on SVoD uses total SVoD figures from total AV methodology above and uses GfK viewing data to apply a fraction of BBC viewing of the whole
- BBC on YouTube uses comScore VMX multiplatform data looking at certain BBC channels within YouTube. Audience is 18+/18-34

- BBC radio – from RAJAR. Audience is 15+/15-34
- BBC websites uses comScore MMX multiplatform data – offline population not accounted for, audience is 18+/18-34
- BBC Three – not included, no methodology found to calculate minutes used

4. Other third-party sources

TouchPoints

TouchPoints is an annual survey commissioned by the Institute of Practitioners in Advertising. With a sample of approximately 6,000 adults 15+ across Great Britain it uses a seven-day diary to capture media consumption and other daily activities every half hour. In addition, it also uses a self-completion questionnaire which includes attitudinal statements.

RadioMonitor

RadioMonitor is a service that monitors airplay of music tracks on UK radio stations. It provides logs of music tracks played on a radio station within a given time period, and aggregated charts of the music tracks ordered by number of plays. Each music track is labelled with its artist, and other data points where available, such as the artist's nationality, release date, and record label.

Official Charts Company

The Official Charts Company compiles the Official Singles Chart. Total physical sales, downloads and streams of singles (and the equivalent music videos) from the preceding seven days (Friday to Thursday) are compiled to provide the week's singles chart. 100 streams (either audio or video) of a track via a subscription service equate to one sale. 600 streams (either audio or video) of a track on an advertising-funded service equate to one sale. Where data are not available for certain days from streaming services in a given week, the data for the other days is upweighted.

Ofcom analysis

To conduct our analysis of 'new music' and proportion of tracks from the Top 10 of the UK singles chart played on radio stations, we have reconciled data from RadioMonitor and the Official Charts Company. We have used the definitions of daytime and peak listening time, and for 'new music' set out in the BBC Operating Licence.

In analysing the music output on radio, we have considered the:

- number of different music tracks played;
- number of total plays of music tracks;
- repeat rate of music tracks – the average number of times each different music track is played;
- proportion of music by UK artists – using the number of plays of music tracks performed by UK artists;
- proportion of music from the Top 10 of the UK singles chart – using the number of plays of music tracks which were in the Top 10 at the start of the sample week (i.e. for the sample week 3-9 February 2018, we used tracks announced in the Top 10 on 2 February 2018); and
- proportion of 'new music' – using the number of plays of music tracks defined as 'new' according to the BBC Operating Licence.