

1. Introduction

The BBC welcomes the opportunity to contribute to this review of radio in Wales. Too often, radio is a medium which does not get the recognition it deserves despite its enduring audience appeal and impact.

Despite the changing media landscape, BBC Radio remains an integral part of daily life for many. Across the UK, it informs, educates and entertains nearly 35 million people each week. And 95 years since the first radio broadcast in Wales, BBC Radio continues to make a vital contribution to society, culture and national life in Wales.

We note that the review has outlined a number of areas it wishes to examine. This evidence is intended to provide the committee with an overview of the BBC's radio provision overall in Wales. This portfolio encompasses our national radio services – BBC Radio Wales, BBC Radio Cymru and the recently launched Radio Cymru 2 – as well as the BBC's network radio services.

2. BBC Radio audiences in Wales – an overview

BBC Radio attracts more listening in Wales than any other UK nation. Around 70% of adults in Wales hear any BBC Radio each week – a figure well above the other nations: Northern Ireland (59%) and Scotland (60%). In terms of market share, BBC Radio accounts for 56% of all listening hours each week in Wales (with network stations accounting for 48%, and Radio Wales/Radio Cymru adding a further 8%). Again, this is higher than anywhere else in the UK.

This strong performance is largely attributable to the appeal of network services such as Radio 1 Radio 2 and Radio 4 – and the relative weakness of commercial radio.¹ In particular, the audience growth of Radio 2 in recent years has been striking. In 2016–17, 37% of adults in Wales tuned to Radio 2 each week (around 1 million listeners), with each listener spending 12.5 hours per week on average with the station.

¹ *BBC Annual Report and Accounts (2016/17)*, 2016/17, p.39

2.1 Radio Wales and Radio Cymru audiences

Our national radio services, Radio Wales and Radio Cymru, perform an indispensable role within the BBC radio portfolio. Both stations support BBC Wales's commitment to support and strengthen citizenship in Wales, with a powerful and comprehensive commitment to news, current affairs, sport, music and culture.

On average, 372,000 people listen to **BBC Radio Wales** each week (RAJAR average for 2017). Radio Wales's share of all radio listening in Wales is around 5% and it is the fifth most-listened to station in Wales behind BBC Radio 1, BBC Radio 2, BBC Radio 4 and Heart South Wales. On average, Radio Wales listeners tune in for around 8 hrs each week.

BBC Radio Cymru reaches 127,000 adults in Wales – with the average listener spending over 11 hours each week with the station. Radio Cymru is the most popular station of all with fluent Welsh speakers, accounting for 20% of all their radio listening in 2017. Forty years on, Radio Cymru also continues to be the bedrock of overall Welsh language media provision, accounting for more than 60% of all the Welsh language media hours consumed by audiences.

3. BBC Radio Wales

BBC Radio Wales was established as a standalone national service in November 1978 – an event which the historian Dr John Davies described as arguably ‘...the single most important happening in the history of Welsh broadcasting’.²

From its initially meagre 45 hours a week back in 1978, Radio Wales now provides a full speech-led service for adults, offering a wide-range of genres that reflect the issues, events, culture and interests of the people of Wales. In 2016/17, the operating budget for Radio Wales was £14.2m with 7,593 broadcast hours. Of these hours, 1,868 are News and Current Affairs, with general programming accounting for a further 5,725 hours.

At the end of 2016, Colin Paterson was appointed as the new station Editor. Work has now begun on strengthening the station's position in Wales, ahead of its 40th birthday in 2018. This includes a focus on *Good Morning Wales* – supporting journalism which is relevant to our audience, sport which brings the nation together, a greater range and depth on daytime output, and reinforcing BBC Wales' s support for original comedy.

² *Broadcasting and the BBC in Wales*, John Davies, Cardiff, 1994, p. 347

New presenters already announced by the station include *BBC Wales Today* presenter Lucy Owen, Olympic athlete Colin Jackson, singer Connie Fisher and former BBC Radio 2 host Janice Long.

3.1 News and Sport

Radio Wales plays a crucial role in informing Welsh audiences with high-quality news and sport programming.

The mainstay of the station's news output is the *Good Morning Wales* programme with news bulletins throughout the day up to and beyond *Good Evening Wales*. Both these flagship programmes draw upon the BBC's newsgathering centres across Wales, including Wrexham, Bangor, Carmarthen and Swansea, as well as our network of district reporters.

Topical issues are also covered with the Jason Mohammad/Dot Davies morning phone-in programme. *Eye on Wales* provides current affairs programming and has recently covered challenging and important topics such as post-partum psychosis.

Radio Wales' political coverage is provided by BBC Wales's political team based in Cardiff and at Westminster. With the UK set to leave the European Union, Radio Wales also benefits from the addition of two additional Brexit reporters – part of the BBC's new Charter reinvestment plans. On Sundays, Vaughan Roderick presents the political discussion programme, *Sunday Supplement*, which covers Welsh, UK and international issues.

Radio Wales' sports coverage is equally extensive. Trusted voices such as Rob Phillips and Nathan Blake bring the latest in domestic and international Welsh football (men and women's) whilst Gareth Charles and Nick Webb cover domestic, Pro14 and International Rugby Union matches. Glamorgan County Cricket coverage is streamed live on iPlayer radio whilst T20 and T40 games are broadcast on Medium Wave. In April this year, the station will be devoting extensive coverage to the Welsh team's efforts at the 2018 Gold Coast Commonwealth Games.

3.2 Music

Radio Wales is a major patron of Welsh culture across its music, entertainment and arts programming.

The development and promotion of Welsh music is integral to its mission across daytime programmes such as Wynne Evans and Eleri Siôn as well as other more

specialist outputs, such as Bethan Elfyn and *Celtic Heartbeat* presented by Frank Hennessy.

In 2017, Radio Wales strengthened the work it does championing new Welsh music, with the introduction of 'The Welsh A List' which makes up 40% of the music on our fortnightly produced playlist of new music. The 'Welsh A List' gives four Welsh artists, performing in English or Welsh, equal exposure across the schedule.

Over the last four years, Radio Wales has also supported a joint music initiative between BBC Wales and Arts Council Wales. Artists from across Wales are selected each year to be part of the Horizons project, which helps to develop and fast-track new contemporary music in Wales. Horizons artists are featured on the Janice Long programme, broadcast from Wrexham every weekday evening, and at various other points in the schedule.

Live music is also an integral part of the station's output. Live performances run across weekdays and, with up to four live sessions per month on Janice Long's show. We also broadcast from key Welsh festivals including Proms In The Park, Festival No 6, Focus Festival and the Green Man Festival

In May this year, BBC Radio Wales will work with colleagues from BBC Radio 1 to ensure that the Biggest Weekend event held in Swansea features the best of UK and Welsh acts.

3.3 Entertainment, Arts and Documentary programming

Radio Wales is the biggest supporter of comedy in Wales. Some of the key names currently working with Radio Wales include Ruth Jones, Elis James and Steve Speirs. This year, we will also be partnering with BBC Radio 4 Extra to support the Machynlleth Comedy Festival.

Developments across the Welsh arts scene are regularly featured in our news and daily programmes, whilst Nicola Heywood Thomas presents weekly reviews, reports and analysis on the *Radio Wales Arts Show*. In April, we will be launching a brand new monthly arts review programme. It will be presented by Gary Raymond, the Editor of the *Wales Arts Review*.

BBC Radio Wales also produces a range of factual and history programmes. Recent features have included the story of Blanche Parry, Queen Elizabeth 1's confidante, and a comprehensive look at Edward Thomas by fellow poet Gwyneth Lewis on the centenary of his death in the Battle of Arras.

4. BBC Radio Cymru

It is difficult to overstate the importance of BBC Radio Cymru to Welsh speakers. Forty years after its launch, it remains the most popular radio station of all among fluent speakers with its remarkable blend of music, debate, entertainment, culture and hard-hitting news.

For Welsh speakers, it's been our debating chamber, our theatre, our concert hall, our sports stadium, our chapel, our town square, our library, our comedy club, and our local pub all rolled into one. This diversity and distinctiveness is best encapsulated in some of Radio Cymru's programme titles: from entertainment *in Sioe Tudur Owen*, communal hymn singing on the long-running *Caniadaeth y Cysegr*, and Beti George's probing interviews on *Beti a'i Phobol*.

In its fortieth year, the station has an operating budget of £13.6m per annum and broadcasts 7,262 hours.³ This includes 1,335 hours of News and Current Affairs, whilst 5,927 hours feature music, speech, arts and entertainment programming.

4.1 BBC Radio Cymru 2

BBC Radio Cymru 2 recently launched in January 2018 and is a key part of BBC Wales's new Charter reinvestment plans.

The service offers an alternative breakfast service on DAB, DTV and BBC iPlayer Radio nationally. While the main Radio Cymru service continues to focus on news at breakfast, Radio Cymru 2 now offers a mix of entertainment and music for listeners.

The strategic intent behind Radio Cymru 2 is to offer an alternative choice in the Welsh language for existing and, potentially, new Radio Cymru listeners. Daf and Caryl present *Y Sioe Frecwast* (Mon–Thursday) whilst Huw Stephens presents on Friday mornings. Lisa Angharad and Lisa Gwilym respectively present on Saturday and Sunday mornings.

4.2 News and Sport

Radio Cymru provides a trusted news service for its listeners starting with *Post Cyntaf* in the morning, presented by Kate Crockett in Cardiff and Dylan Jones in Bangor. The *Post Cyntaf* programme is complemented by the evening *Post Prynawn* programme, presented by Dewi Llwyd and Nia Thomas from Bangor.

³ *BBC Annual Report and Accounts*, 2016/17, pp.39 and 94 (n.b. these hours do not include the recently launched Radio Cymru 2).

The news output blends Welsh, UK and international reporting. The programmes also draw upon the totality of the BBC's newsgathering resources as well as the remarkable ability of Radio Cymru to find Welsh speakers across the world. In recent years, this has seen Radio Cymru offer high-quality coverage of significant events such as the Brexit Referendum, the Paris Terrorist attacks and the election of Donald Trump as US President.

Garry Owen hosts the lunchtime *Taro'r Post* phone-in programme whilst the *Manylu* strand consistently delivers high-impact current affairs programming. *Hawl i Holi*, chaired by Dewi Llwyd, offers a *Question Time*-style programme from venues across Wales whilst *O'r Bae* under Vaughan Roderick's stewardship provides a weekly round-up of events in Cardiff Bay and Westminster.

Camp Lawn on Saturdays offers comprehensive coverage of Welsh sport, including domestic and international football and rugby union. Match commentaries and live coverage are supplemented by the Saturday football show, *Ar y Marc*, and regular week-night coverage of key football games.

4.3 Music programming

Since the very beginning, Radio Cymru has been a consistent champion of Welsh language music. It does so on a daily basis and has provided a shop-window to new and established acts on its programmes. The range of Welsh language music broadcast extends from morning strands such as Sian Cothi's programme to more specialist shows such as Rhys Mwyn or Georgia Ruth's evening shows.

With the advent of Radio Cymru 2, Radio Cymru now offers the greatest volume and choice of Welsh language music in its history. In January 2018, BBC Radio Cymru announced that it had secured a five year deal with royalties agency, Eos, to cover the use of music for BBC Wales' new Welsh language station Radio Cymru 2 as well as the BBC's other broadcasting services across the UK.

The other major partnership is the Gorwelion/Horizons initiative described earlier. Since 2014, this initiative has helped many new Welsh language acts, including Casi, Yr Eira and Candelas, with bursaries, masterclasses and broadcast media exposure.

Music is also the bedrock of Radio Cymru's extensive coverage of both the Urdd and National Eisteddfod. This year, Radio Cymru will work closely with the organisers of both the Urdd Eisteddfod in Brecon and Radnorshire, and the National Eisteddfod in Cardiff to ensure that both festivals get comprehensive broadcast coverage from their innovative locations.

Finally, Radio Cymru is at the centre of a productive partnership with Maes B at the National Eisteddfod with *Brwydr y Bandiau* – ‘the Battle of the Bands’ – providing an unique opportunity for young bands to perform on a bigger stage.

4.4 Entertainment, Arts and Documentary programming

BBC Radio Cymru is responsible for a number of important artistic commissions, particularly in genres where there is very little other Welsh language provision.

Drama and comedy writing is a particularly important area with the station having recently commissioned writers such as Siôn Eirian, John Ogwen and Manon Steffan Ros. Weekly arts show *Stiwdio*, presented by Nia Roberts, is an opportunity for more in-depth discussion of these issues whilst *Talwrn y Beirdd* is a hotly contested weekly poetry competition from venues across Wales. *Llyfr Bob Wythnos* features a newly published book each week and is delivered in partnership with the Welsh language book publishers’ body, Cwlwm Cyhoeddwy.

Taking pride in Wales’ unique history has been a constant thread throughout BBC Radio Cymru’s history. Ifor ap Glyn’s *The History of the Welsh Language in 50 Words* charted the development of the language in 50 short pieces. The station also marked the 300th anniversary of the birth of hymn writer, William Williams Pantycelyn.

5. BBC Radio network production in Wales

Alongside the work of Radio Wales and Radio Cymru, BBC Wales is also a major producer of network radio programming for BBC Radio 3 and BBC Radio 4 across drama, factual, music and the arts.

During 2016/17 we produced a total of 379 hours of programming for these UK networks.

In radio drama, under the leadership and expertise of Alison Hindell, we work with established writers but also nurture new writing talent, working closely with Writersroom Wales.

Highlights from last year include *Tracks*, a conspiracy thriller series, set in Wales. The first series (broadcast in summer 2016) was a major priority for Radio 4 and all 9 episodes were offered as an ‘iPlayer First’ opportunity to download the next episode immediately after the weekly episode had gone out. This had such high download numbers it reached number 1 in the iTunes podcast chart, and the second series was released online for download several weeks ahead of radio broadcast (in December 2017). The 3rd series will begin in autumn 2018.

Another key editorial project recently delivered was *Curious Under the Stars* – a series originally created by the late Meic Povey. Set in a fictitious village on the West Wales coast, it is a warm comedy drama which incorporates twists on Welsh myths and legends with a magical realist touch.

Already commissioned for the next 12 months we have a new dramatisation of *The Mabinogion* for Radio 3; *The Castle of the Hawk*, the beginning of a major and ongoing series dramatizing the history of the Habsburg dynasty and *The Life and Times of Maya Angelou*, with all 6 volumes of Angelou's autobiography dramatized in serial form for Radio 4.

We also regularly deliver factual programmes for Radio 4, with network radio editor Martin Smith working closely with Radio 4 and Radio 3 commissioners in London.

Highlights for Radio 4 from 2017 include *The Black Chair*, a documentary programme about Hedd Wyn presented by poet Mab Jones; *Snapshots*, part of a series on photography featuring a workingman's club in Port Talbot; *Wintertide*, a specially-commissioned work, read by Cynan Jones and *Can yr Adar: Song of the Birds*, a music collaboration between [Kizzy Crawford](#) and [Gwilym Simcock](#).

Already commissioned and in production for later this year for Radio 4 we have: *Behind the Scenes: Kully Thiarai* – following the new director of National Theatre Wales – *On and Off the Valleys Lines*, focused on the lives of people who travel on the Valleys Lines trains, and *Opening Night*, a programme featuring the opening nights of theatre venues across Wales.

BBC Wales also produces a number of network radio programmes for Radio 3. In 2016/17 highlights included the *Young Musician* finals in Cardiff; BBC Cardiff Singer of the World; the Hay Festival lunchtime concerts; the *Choir of the Year Final* from the Wales Millennium Centre; *In Parenthesis* by Welsh National Opera; and a Sunday Feature: *I Know an Island: R M Lockley* with Jon Gower visiting Skokholm Island off the coast of Pembrokeshire.

5. Terrestrial radio broadcasting in Wales

While Radio Wales and Radio Cymru now enjoy carriage across BBC iPlayer Radio, Freeview, Cable and Sky platforms, the coverage of the services on FM and DAB has been the source of considerable public debate and concern in recent years.

5.1 FM coverage

On FM, Radio Cymru enjoys 95% coverage across Wales, similar to BBC network stations. However, BBC Radio Wales has always lagged behind as it opted for Medium Wave provision at launch in 1977 and has, since then, been playing catch up.

In 2017, BBC Wales announced plans for a major expansion to BBC Radio Wales FM coverage – building the station’s footprint from 79% to 91% of households. It is anticipated that the boost to BBC Radio Wales’s coverage on FM will particularly benefit listeners in North East Wales and Mid Wales. The expansion will be achieved by using a small number of existing network FM frequencies, currently allocated to BBC Radio 3.

5.2 DAB

In 2017, we completed our expansion of the BBC’s National DAB network. This included 20 transmitters based in Wales, increasing the coverage of BBC network services in Wales to 92% households and 72% major roads.

Radio Wales and Radio Cymru are carried on capacity reserved by Ofcom on local commercial multiplexes not operated by the BBC. The BBC also supported the expansion of these commercial multiplexes in Wales – committing substantial funding until 2030. This has supported the build or modification of 19 transmitters to date, with one or two more to be completed as part of this phase of work. Following recent enhancements, coverage of BBC Radio Wales and BBC Radio Cymru on DAB has increased to 82% of households and 61% of roads.

5.3 The future of analogue radio (FM and Medium Wave)

Any broadcast infrastructure discussions need to be taken in the context of DDCMS’s Analogue Switchover (ASO) plans. We expect digital (DAB, online, DTV) listening to reach 50% in the first quarter of this year, triggering a DDCMS review into whether or not to set a date for switchover.

The BBC’s position on this matter is that we recognise the importance of such a review to the supply chain, but we think the UK Government needs to take careful consideration of evolving audience habits, particularly younger audiences, and the UK’s infrastructure ambitions around 5G.

Should DDCMS make the decision to begin a switchover process, then the BBC has committed to ensure that substantially the same proportion of households in the UK that receive BBC national radio services in analogue form (MW/FM) can receive those services digitally, subject to a full value for money assessment by the BBC.

6. Looking ahead – the digital challenge

Despite the enduring appeal of radio with most listeners, consumption patterns among younger audiences are being impacted by increased broadband connectivity, the growth of music streaming services and near-universal smartphone take-up, resulting in increasing competition for leisure and entertainment time⁴.

Whilst radio continues to reach young audiences in large numbers, the overall number of hours being consumed is in decline. In 2011, 15–19 year olds across the UK listened to the radio for an average 14 hours 49 minutes per week. By 2016, this figure had fallen to 10 hours 50 minutes – a loss of 239 listener minutes per week.⁵

Younger audiences now split their time between different types of audio provision. Music streaming services, digital tracks, and music videos all make up larger proportions of listening for 15–24s than for the total adult audience. As these behaviours become more widespread, the BBC will need to reimagine the future of radio, harnessing new technical capabilities and developing new audio content in order to remain relevant to audiences.

Our national radio services (including Radio Cymru 2) already benefit from the scale and technical capability of the BBC Radio iPlayer. But personalisation and sign-in have the clear potential to deliver further advances in this area with data-driven algorithms allowing us to better target our listeners.

Over recent years, BBC Wales has also expanded its on-demand audio provision in response to the changing market. These include Elis James' football podcast, as well as *Pigion* for Welsh language learners. We will be announcing further expansion in this area shortly.

Alongside developing new content, we also need to ensure Welsh language programmes can be found easily on new audio devices, particularly those that are voice controlled. It is heartening that Radio Cymru 2 is already available via Amazon's Alexa.

Inevitably, our ability to innovate in Wales – and to provide a greater range of on-demand and personalised media services – will depend to a large extent on the broadband infrastructure available. In particular, radio distribution in the next 10–

⁴ Enders Analysis, *Radio's relevance to young adults in danger*, p.4, July 2016

⁵ RAJAR Q3 2011–2016

15 years is likely to be increasingly focused on 5G broadband technologies – an area where Wales is currently underserved compared to other parts of the UK.⁶ Progress on this issue will be critical to ensure Wales can keep pace with a fast-moving consumer marketplace.

⁶ Ofcom *Connected Nations Report*, Wales (2017), p.40