



18th September 2015

Rona Fairhead CBE
Chairman, BBC Trust
BBC Trust Unit
180 Great Portland Street
London
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Dear Rona,

BBC Trust “Tomorrow’s BBC” Consultation¹

UK Music is the umbrella body representing the collective interests of the UK’s commercial music industry, from songwriters and composers to artists and musicians, studio producers, music managers, music publishers, major and independent record labels, music licensing companies and the live music sector. UK Music exists to represent the UK’s commercial music sector, to drive economic growth and promote the benefits of music to British society. The UK music industry contributes £3.8 billion to the UK economy and grew by 9% between 2012 and 2013.² The members of UK Music are listed in an annex.

The future of the BBC and the debates, negotiations and outcomes concerning Charter Review is of great interest to UK Music. We have recently launched a public facing campaign, #LetItBeeb, which highlights the music industry’s support for the ongoing diversity of the BBC’s music services.³

The BBC relies heavily across all its platforms (radio, television and online) on the music created and supported by our members, yet it also provides an important platform for listeners to access our member’s works. Any changes to the BBC’s services and values resulting from the next BBC Charter should strengthen and build upon the BBC’s important music services. Without these services there would be diminished music output which would fail to deliver the plurality of outputs so essential to meet the variety of tastes and interests of licence fee payers. It will also have far reaching cultural and economic implications for the UK, disproportionately impacting new

¹ <https://consultations.external.bbc.co.uk/bbc/tomorrows-bbc>

² <http://www.ukmusic.org/research/measuring-music/>

³ <http://letitbeeb.tumblr.com/>

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artists and reducing the UK's reputation globally. The BBC is also the single biggest employer of musicians in the UK. Virtually all members of the Musicians' Union will interface with the BBC at one stage of their career.

We believe that the BBC Trust will find it useful to receive our views on the "Tomorrow's BBC" consultation via this letter and hope that it will be considered as a submission. We confine our remarks to three specific questions posed by the online questionnaire.

- 3. *What ONE thing, if anything, would you most like to see the BBC do more of?*

The BBC has made significant steps in recent years to place music at the heart of its broadcast services, alongside news and sport. There are a number of different radio services available on the BBC that cater for audience demand for popular, classical and folk music. The recent BBC Trust Radio Service review into Radio 1, 1Xtra, 2, 3, 6Music and Asian Network acknowledged the extent to which these stations provide a necessary role in introducing new UK music to audiences and in developing musical talent.⁴

While the BBC's radio services are world leaders, the BBC could do more to increase music across its television services. At present televised music coverage is primarily focused on live events like Glastonbury and the Proms, with only a small handful of programmes, such as *Later...with Jools Holland*, across the regular schedule. Only BBC Four provides dedicated music programming on a Friday evening. This is the only type of programming of its kind on BBC television at present.

Therefore, there is a significant void on mainstream television for dedicated music programmes. The only opportunity for peak time audiences to see the charts televised and a showcase for popular artists and songs on the BBC is the annual Christmas and New Year's specials of *Top of the Pops*, a show that officially finished in 2006 but which is much missed.

Equally, because the BBC should be taking a more innovative approach with its television services, we believe there is a significant scope to utilise iPlayer and provide cutting edge programming that focuses specifically on specialist genres. Alongside existing digital-only shows such as *Charlie Sloth's Rap Up* or Marc Riley's *All Shock Up*, BBC technology could open up an even greater range of opportunities to upcoming talent.

According to UK Music's *Wish You Were Here 2015* report, music tourism to festivals contributed £1.7 billion to the economy in 2014.⁵ There are festivals in every region of the UK yet only a handful benefit from televised coverage on the BBC. More consideration should be given to extending televised coverage to small, boutique and independent festivals.

Increased televised music programming could also increase the demand for more commissions and performances of classical works.

We feel that the BBC implicitly acknowledge that they could be doing more music programming on television. The creation of the BBC Music brand and strategy last year

⁴ http://www.bbc.co.uk/bbctrust/our_work/services/radio/service_reviews/music_radio

⁵ <http://www.ukmusic.org/research/music-tourism-wish-you-were-here-2015/>

and further initiatives such as the BBC Music Awards underline this and are a step in the right direction. The BBC needs to be both properly funded and required to do more in this area.

- *8. The BBC is supposed to offer content and programmes which are high-quality. They should also be distinctive (fresh, new, original and different) from that provided by other broadcasters. Please tell us what you think about the quality and distinctiveness of the BBC's content and programmes.*

Collectively Radio 1, 1Xtra, Radio 2, Radio 3, 6Music, Asian Network, Proms, BBC Introducing, Glastonbury and festival coverage, music broadcast programming and documentaries represent a diverse range of services which provide access to a wide variety of programming and music for licence fee payers.

The BBC's radio services operate in a densely populated market, serving audiences alongside national, local commercial radio and community radio services. All parts of the market can, and do, meet the needs and expectations of listeners in different ways. However, the onus must always be on the BBC to ensure its services are distinctive.

Data from music licensing company (and UK Music member) PPL about the use of recorded music in radio broadcasts in 2014 indicates that:

- Over half the tracks played across Radio 1, Radio 2 and BBC national and local radio stations were not broadcast on commercial radio.
- For 1Xtra, that proportion was almost two thirds of the tracks played. For the Asian Network, it was three quarters. For Radio 3, it was 93%.
- 6Music was the most eclectic radio station, playing 29,000 distinct tracks.
- Overall, 75% of all tracks played across the full range of BBC radio services were not broadcast on commercial radio.

PPL's data also indicates that 64% of artists whose tracks were played on BBC radio did not have their tracks broadcast on commercial radio. For Radio 1, this was 39% of artists and, for Radio 2, 41%.

A further analysis provided to UK Music from *PRS for Music* about the use of musical compositions in radio broadcasts indicates that commercial radio stations played on average 1,800 unique songs in 2014⁶, whilst comparative figures were in excess of 13,000 songs for Radio 1 and, for Radio 2, over 21,000 songs.

Therefore, we believe the evidence supports the view that the BBC is sufficiently distinct from commercial radio in the music it plays and that while this distinctiveness is maintained both the BBC and commercial sector can grow and thrive together.

Crucially, output of individual BBC radio stations is also significantly distinctive from each other.

⁶ Based on a sample of four representative stations in 2014 and determined by reported song and music usage between 3 and 6 minutes.

For instance, although there is some minor overlap between Radio 1 and Radio 2, the majority of tracks played on each station remains unique. At the time of writing, the combined A, B and C Lists for both stations equate to a total of 69 individual tracks. Of these, there is a crossover of only 5.8% (or 4 tracks in total).

This is consistent with the findings from the BBC Trust in June 2014 that *“just 2% of the tracks played by Radio 1 and 2, and 2% of tracks on Radio 2 and 6 Music were shared. The overlap with 1Xtra was much lower, at just 0.7%. Of the 899 songs played across either Radio 1 or Radio 2, just 20 songs were played on both networks, and only five tracks were played more than five times on either.”*⁷

Similarly, the recent BBC response to the Charter Review, “British Bold Creative”, found that Radio 1 shares just 6% of music tracks with Radio 2, while Radio 2 shares 5% of tracks with Radio 1. Just 13% of the combined Radio 1 and Radio 2 audience listens to both stations.⁸

- 14. Are there any other values you feel the BBC should represent

At present “stimulating creativity and cultural excellence” is one of the BBC’s six public purposes. Under Charter Review, the Government will consider the case for reform of the public purposes and whether there should be a defined set of values. This should not be treated as an “either/or” exercise. Creativity should be at the heart of any values the BBC represents and be maintained as part of its public purposes.

The existing public purpose provides the BBC with a remit for output that is distinctive and creative on all its platforms and covering a wide range of cultural activities, as well as fostering creativity and talent across a wide range of genres. Through this remit it has been possible to launch the very successful BBC Introducing. More than 130,000 artists have uploaded music to the BBC Introducing website and 120 have performed at festival stages. 25 artists that started out on BBC Introducing have signed major record label deals and 8 have achieved number one albums.⁹ Florence and the Machine, George Ezra, Jake Bugg, Bombay Bicycle Club, Catfish and the Bottlemen, Royal Bood and James Bay have all benefited from this strand of the BBC’s work in helping launch their careers.

The public purpose also supports the work of the BBC Orchestras and Singers which last year gave 65 world premieres and a further 36 UK premieres via its weekly new music programme. Their budget, which is around 1% of the licence fee, is often under threat and requires the stability that the public purpose provides.

Also important is the purpose to “promote education and learning”. The likes of Ten Pieces¹⁰, that aims to open up classical music to 7 to 11-year-olds, Radio 2’s ‘learn to play guitar’ courses¹¹, Radio 1’s series of Academy workshops¹² and BBC Introducing’s

⁷ http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/our_work/music_radio/music_radio.pdf

⁸ <http://downloads.bbc.co.uk/aboutthebbc/reports/pdf/futureofthebbc2015.pdf>

⁹ http://www.bbc.co.uk/bbctrust/our_work/services/radio/service_reviews/music_radio

¹⁰ <http://www.bbc.co.uk/programmes/p01vs08w>

¹¹ <http://www.bbc.co.uk/programmes/articles/3yMSBMmDqBCJdVYLrMInCH3/radio-2s-guitar-pick-up-lessons>

¹² <http://www.bbc.co.uk/programmes/p017f6dt>

online tutorials¹³ all potentially complement the existing work of UK Music members and we would support and welcome further involvement in these and other initiatives. It is important that the younger generation learn about music in an engaging way and that programming is not seen as patronizing or dumbed down for children.

The BBC has estimated that £2.2 billion of the licence fee income is invested in the creative industries.¹⁴ Whilst it may not be possible to place an exact value on the BBC's contribution to creativity, it is clear that it is at the heart of much of what it does. The BBC's values and public purposes should be reflective of this.

Yours sincerely,



Jo Dipple,
CEO, UK Music

Annex

UK Music's membership comprises of:-

- AIM – Association of Independent Music - representing over 850 small and medium sized independent music companies
- BASCA - British Academy of Songwriters, Composers and Authors – BASCA is the professional association for music writers and exists to support and protect the artistic, professional, commercial and copyright interests of songwriters, lyricists and composers of all genres of music and to celebrate and encourage excellence in British music writing
- BPI - the trade body of the recorded music industry representing 3 major record labels and over 300 independent record labels.
- FAC – The Featured Artists Coalition – the voice of the featured artists.
- MMF - Music Managers Forum - representing 425 managers throughout the music Industry
- MPG - Music Producers Guild - representing and promoting the interests of all those involved in the production of recorded music – including producers, engineers, mixers, re-mixers, programmers and mastering engineers

¹³ <http://www.bbc.co.uk/introducing/advice>

¹⁴

http://downloads.bbc.co.uk/aboutthebbc/insidethebbc/reports/pdf/bbc_report_contribution_to_the_UK_creative_industries.pdf

- MPA - Music Publishers Association - with 260 major and independent music publishers in membership, representing close to 4,000 catalogues across all genres of music
- Musicians' Union representing 30,000 musicians
- PPL is the music licensing company which works on behalf of over 90,000 record companies and performers to license recorded music played in public (at pubs, nightclubs, restaurants, shops, offices and many other business types) and broadcast (TV and radio) in the UK.
- *PRS for Music* is responsible for the collective licensing of rights in the musical works of 100,000 composers, songwriters and publishers and an international repertoire of 10 million songs
- UK Live Music Group, representing the main trade associations and representative bodies of the live music sector

For more information please contact Tom Kiehl, Director of Government and Public Affairs, UK Music on tom.kiehl@ukmusic.org or 020 3713 8454.