



RadioCentre
SHAPING COMMERCIAL RADIO'S FUTURE

ACTION STATIONS

THE OUTPUT AND IMPACT OF COMMERCIAL RADIO



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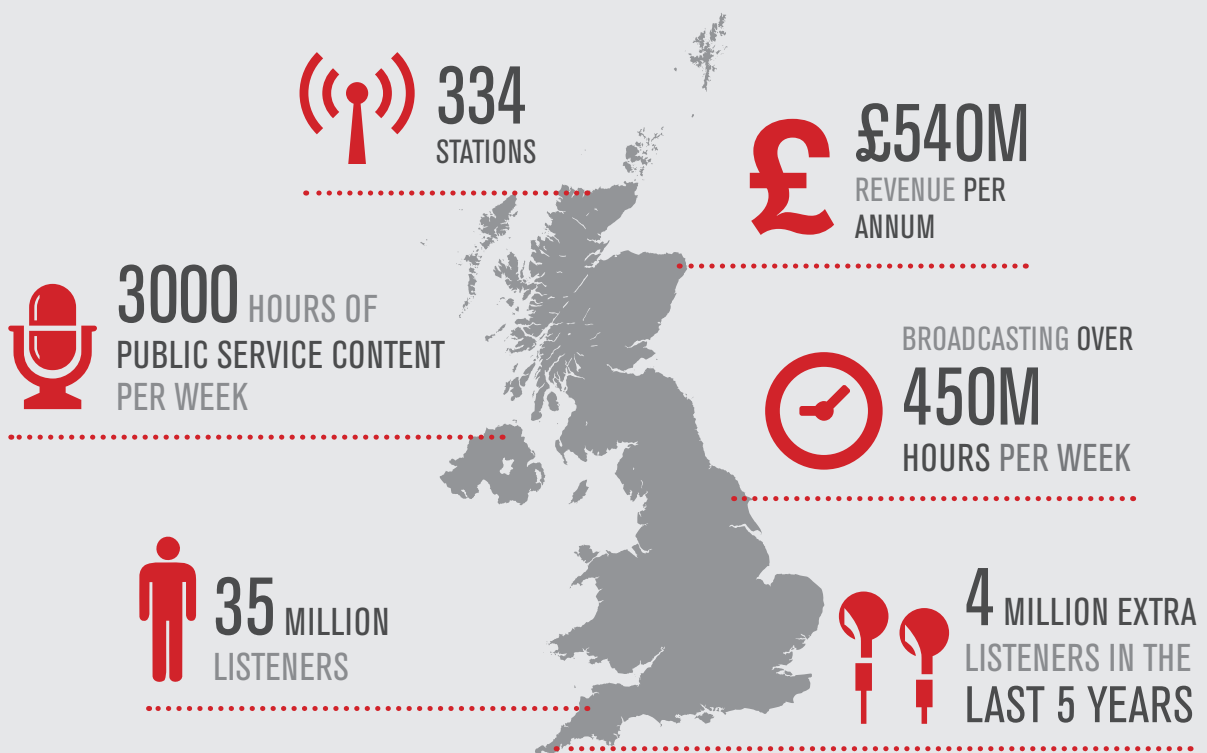
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ECONOMIC VALUE

OVERVIEW

Despite the proliferation of new media available in the UK today, commercial radio has record audiences – reaching 66% of the population – and its stations are a valuable part of the media ecology.

Local commercial stations continue to provide up to the minute news and event information, whilst regional brands now offer a valued mix of music and entertainment for listeners.



Last summer, RadioCentre surveyed commercial stations to get a full picture of the output provided across the industry, to understand the important role it still plays in the media, culture and communities of the UK.

Alongside this work, Kantar Media were commissioned to conduct a major survey of commercial radio listeners, to gauge what the audience thinks of commercial radio output today; more than 40 years on from when it was first launched in late 1973.

Results from these two pieces of research show that commercial radio has evolved to become an incredibly valuable medium for advertisers and millions of listeners.

Its content is exceeding audience expectations across the board; with high levels of satisfaction in all the areas that commercial radio is known for – whether it is news and information, music and events or community involvement.

When listeners were asked to put a monetary value on commercial radio content, the average suggested figure was £3.54 a month. Grossed up across the whole commercial radio audience, this represents a value in kind of £1.5bn a year provided by the industry to listeners.



FOREWORD

ED VAIZEY MP, MINISTER FOR CULTURE, COMMUNICATIONS AND
CREATIVE INDUSTRIES

2013 marked the 40th year of commercial radio and I am pleased that it continues to be such a valuable part of people's lives in the UK. Not only does it provide a relevant mix of entertainment and music, but as this research highlights, it continues to be a valuable source of high quality national and local news, travel, sport, and weather reports to 35 million listeners across the UK every week.

When they took those first tentative steps into broadcasting in October 1973, I doubt that many at LBC or Capital Radio could have imagined how far advertiser funded radio would come. The passage of the Sound Broadcasting Act in 1972 created a framework for commercial radio – a sector that now has grown to more than 300 stations; serving a variety of geographic communities, musical tastes and social backgrounds.

Commercial radio stations are excellent examples of the important economic role small businesses play in our economy, particularly in local communities. They support local businesses by giving them powerful means of communicating with local customers, and act as a breeding ground for the creative talent which go on to make the internationally renowned music, TV and films that become the cornerstones of UK cultural identity.

Whether they are large or small, national brands or local stations embedded in their communities, these stations have an outstanding record of promoting charities and galvanizing support for social action campaigns. Some of the funding raised for good causes described in this report simply would not have occurred had it not been for the passion and willingness of commercial stations to go that extra mile.

I would therefore like to thank commercial radio for the huge contribution their stations make within their local communities, and to the wider UK economy. As this report makes clear, commercial radio will remain an important a source of entertainment, information and public value in the UK in the future, as it has been for the last 40 years.



COMMERCIAL RADIO STATIONS BROADCAST
AN AVERAGE OF 10 HOURS 21 MINUTES OF
PUBLIC VALUE CONTENT EACH WEEK



FOREWORD

HELEN GOODMAN MP, SHADOW MINISTER FOR CULTURE,
MEDIA AND SPORT

Music provides the backdrop to our lives, and there is no doubt that commercial radio has been a crucial part of the soundtrack to the last 40 years of UK culture. While commercial radio does many things – enriching the lives of individuals, reinforcing a sense of local community, and playing an important role in local economies – it is the music that is often at its heart.

The British music industry generates more than £3.5 billion a year. UK music is a global success – a great British success story – but even in the age of YouTube, the majority of the artists that outsell competition globally would not be where they are now without the support of commercial radio.

The UK's creative economy is a great example of how we can use our skills and competitive advantage to be a genuine world leader. Cities such as Liverpool, Manchester and Glasgow – as well as London – have all set the tone for world music trends, and many of these artists have depended on the support of commercial stations.

Looking at this report, it is great to see how many commercial stations continue to bring all types of mainstream and specialist music genres to their listeners. Stations do not simply perform this role by broadcasting music, but also by sponsoring numerous live events: from hosting the smallest gigs so that local artists have their first shot at performing, to sponsoring concerts in every part of the country that give listeners the chance to see their established favourite artists.

I look forward to the commercial radio sector continuing to do what it does best; providing local content and playing a key role in supporting the UK's efforts to remain a world-leading creative force.



FOREWORD

JOHN LEECH MP, LIBERAL DEMOCRAT SPOKESPERSON
FOR CULTURE, MEDIA AND SPORT

Radio is the theatre of the mind and stations are at the heart of the community with the ability to reach out to everyone. We are really lucky in Manchester to have some fantastic commercial radio stations and it is vital we continue to listen and support them.

In a multimedia, multiplatform, globalised world it is important not to lose sight of the value of localism. A thriving and sustainable local media sector is a vitally important part of the democratic landscape, and commercial radio has been at the heart of this for four decades. Therefore it is encouraging to read in this report that stations continue to invest in local journalism in order to fully engage with local issues, news and sport.

Some of the ground-breaking campaigns and investigations mentioned within this research would have gone unnoticed had it not been for the attention of local radio reports. Specialist radio programming such as this stimulates communication and debate, and is a valuable part of local democracy.

These stations remain an important part of local communities, both as a source of entertainment and as a source for good, whether through their charitable work or playing their part in building social cohesion. It is understandable why, despite all the other media competing for their interests, commercial radio stations now attract over 35 million listeners every week, and that these listeners are interacting with their stations more than ever before.

I commend the work carried out by the commercial radio industry and I look forward to stations continuing to play an important role both in the communities they serve, and as everyday companions for their devoted listeners.



“COMMERCIAL RADIO STATIONS ARE EXCELLENT
EXAMPLES OF THE IMPORTANT ECONOMIC ROLE
SMALL BUSINESSES PLAY IN OUR ECONOMY,
PARTICULARLY IN LOCAL COMMUNITIES.”

Ed Vaizey MP



INTRODUCTION

MATT PAYTON, DIRECTOR OF EXTERNAL AFFAIRS, RADIOCENTRE

I am delighted to introduce the findings from the latest RadioCentre Action Stations survey.

.....
Results from this research show that commercial radio remains an increasingly valuable medium, both for advertisers and millions of listeners across the UK.

We already knew that commercial radio listening was in good health. Despite the proliferation of new media available to the UK population today, it has record audiences – 35 million people each week – and its stations are a valuable part of the national media ecology.

What this research also shows is how commercial radio stations help their communities and continue to produce real public service broadcasting. Without the benefit of a licence fee or government subsidy, commercial stations broadcast an average of 10 hours 21 minutes of public value each week.

This is not to say every station is the same. Our stations vary just as much as our listeners. Our survey found that on an average weekday commercial radio stations broadcast 2 hours 11 minutes of editorial speech, yet LBC in London broadcasts 100% speech, whilst Jack 2 in Oxford runs a service of mainly music and few live presenters outside peak times.

What is the same, in every one of our stations, is the commitment to the listener. To provide a service which delivers the very best music, entertainment and range of public value possible for the audience.

Crucially this public service content and the millions raised for charity each year are not a function of a station's Ofcom licence or regulation, but are provided because that is the content that audiences demand from their radio station. This continuing demand for commercial radio content, and the emotional connection that radio achieves, ensures that it is in a strong position to face the challenges of the future.

BACKGROUND

Commercial radio in the UK goes from strength to strength.

Despite a seemingly endless supply of new digital media competing for audience time, a record 35 million people each week listen to commercial radio through their radios, PCs, TVs, mobiles and tablets.

There are now 334 licensed stations across the country (on FM, AM and DAB); sharing revenues of around £540m advertising per annum.

These stations range in size from established national services serving millions such as Classic FM and Absolute Radio, to Two Lochs Radio in remote Wester Ross, Scotland. They range in genre from the urban beats of Capital Xtra, to Liverpool's speech and sport station City Talk, to the Asian community programming of Sunrise Radio Bradford.

Not only are commercial stations a valuable source of music and entertainment, but they also play a vital role in communities and broadcast a range of public service content.

The term "public service broadcasting" refers to content of broader benefit and value rather than for purely commercial concerns.

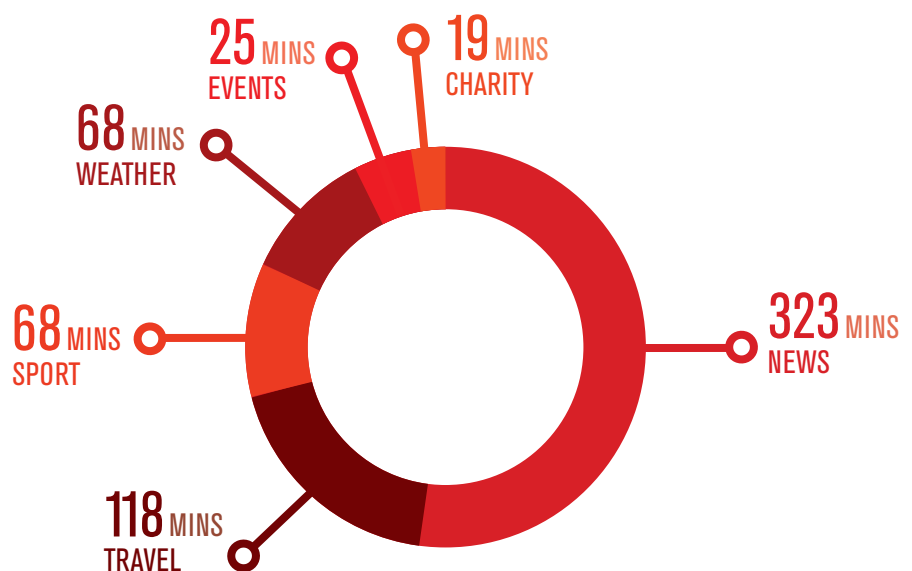
Communications regulator Ofcom requires that certain television and radio broadcasters fulfil public service requirements as part of their licence to broadcast. Yet whilst the BBC public service broadcasting in the UK is funded by a licence fee, commercial radio produces content of significant public value using revenue generated by advertising alone.

This report shows that commercial radio is a significant producer of public service content and a fantastic medium for increasing awareness of social action and wider public value broadcasting.

This contribution comes in the form of each station on average broadcasting an average amount of:

10 hours 21 minutes of public service content every week.

The average output of public service content on a UK commercial station.



NEWS, WEATHER & TRAVEL



£27M
PER ANNUM SPENT ON
JOURNALISM



92% OF STATIONS
FEATURE LOCAL NEWS
ON THEIR WEBSITES

300 FULL TIME
JOURNALISTS



210 HOURS
OF NEWS OUTPUT
PER DAY

97% OF STATIONS BROADCAST
12 OR MORE NEWS
BULLETINS A DAY

In 1973 LBC began broadcasting in London as a 24-hour service for international, national and local news. Forty years later, and commercial stations of all sizes and formats continue this commitment to news and current affairs.

From our survey, 97% of commercial stations broadcast 12 or more news bulletins a day and more than half of stations broadcast more than 24 news bulletins each day.

This is news designed for the commercial radio listener, and distinct in the modern media landscape: short bulletins at relevant times. For example, 91% of stations broadcast 2 bulletins an hour during breakfast time to keep their peak time audience informed.

This frequency and style of presentation is appreciated by audiences, with 83% of those surveyed by Kantar Media agreeing that commercial radio news is useful and easy to digest.





JOURNALISM

On average, stations broadcast around 23 news bulletins a day, which are typically around two minutes in duration. Alongside this, on average 5 sports, 17 weather and 16 travel bulletins are broadcast on each station each day.

Across the industry, this grosses up to some impressive figures: 210 hours of news output per day, almost 5,000 travel bulletins, and 34 hours of sport.

We found that all this content needs considerable investment. Stations invest, on average, over £80,000 in news per annum. This is in line with recent Ofcom research highlighting that commercial radio has 300 journalists and spends £27m per annum on journalism.

While commercial stations such as LBC in London and CityTalk in Liverpool specialise in speech radio, stations across the country also continue to engage their communities on politics and social issues important to their areas.

Stations invest, on average, over £80,000 in news per annum.

COCAINE UNWRAPPED

Cocaine Unwrapped was an ambitious project investigating cocaine use across the North West of England. Over a 12-month period in 2012, Real Radio journalists swab tested public toilets in buildings across the region to uncover the widespread nature of the problem.

The results of the investigation made headlines in scores of regional newspapers, whilst Shadow Health Secretary Andy Burnham used the study to call on the Government to look in detail at the results and use them to help formulate new policy on substance misuse.



PM VISITS LOCAL STATIONS IN NORTH-WEST

Local commercial radio stations are often a key staging post for national politicians in talking to voters.

On Thursday 8 August 2013 Global Radio hosted an exclusive Q&A with Prime Minister David Cameron at its Capital FM and XFM studios in Manchester. The Prime Minister spent more than half an hour answering questions from an audience of thirty local listeners and staff on topics ranging from cyber-bullying, apprenticeships, the bedroom tax, child care costs and his legacy through to his all-time favourite album and his musical guilty pleasure.

In January 2014 the Prime Minister also visited City Talk in Liverpool. He told listeners that he is committed to helping the city battle its financial problems, and faced questions about the 'bedroom tax' and youth unemployment.



CALL CLEGG

In January 2013, LBC undertook a radio first when Deputy Prime Minister Nick Clegg joined LBC 97.3 for a weekly live phone-in with Nick Ferrari. 'Call Clegg' is the first time a senior member of Government has agreed to be called by listeners every week on a radio station.

The show has become a hit with listeners, already the most popular commercial breakfast show in London, 10,000 callers a week now try to pose questions to the Deputy PM. The show makes headlines on almost a weekly basis due to the frank and open way the Liberal Democrat leader discusses issues.



CLARE'S LAW

After Clare Wood was murdered by her ex-boyfriend in 2009, it was later revealed he had a history of violent convictions she did not know about. Manchester station Key 103 successfully petitioned for parliament to introduce legislation, which meant that UK citizens will be given the right to ask police if their partner has a history of domestic violence.



ON AIR

LOCAL NEWS

82% of local commercial radio listeners surveyed in the Kantar Media research stated that local news was important to them, and stations continue to be committed to this important role in serving local communities for news, weather and travel.

The overwhelming majority of radio stations include local news in their bulletins. More than 90% of stations update their local news at least every half hour at the crucial time of breakfast listening and update their local news at least every hour through the day. 60% of all news stories on local stations are about local issues, whilst 92% of all stations feature local news on their websites.

Commercial radio is a trusted source of local information. Kantar Media's research found that 80% of our listeners said their station provides travel news they can rely upon when making a journey, whilst 71% were pleased with weather updates broadcasted by stations.

WEATHER WARNINGS

Local commercial radio comes into its own during extreme weather:

When the country was brought to a stand-still as heavy snowfall caused widespread disruption across Britain in early 2013, stations were staffed around the clock to bring listeners the latest information on school closures and transport issues. Jack FM Oxfordshire and Capital South Wales were just some of many stations who extended their breakfast shows to take listener calls and share closure information.

In Yorkshire, which saw up to 20cm of snow, the team at Capital FM went above and beyond the call of duty, taking to the streets with a gritting squad at 2am to treat roads across Harrogate, Bradford and Leeds.





LOCALNESS OR LOCATION?

Commercial radio's commitment to local news remains as strong as ever, but the way this news is delivered is changing due to advances in technology and newsgathering.

Regional 'news hubs', with reporters on the ground in local areas, use the latest broadcast technology to deliver targeted local news bulletins and information – whether or not they have a studio in that area. The Kantar Media research we commissioned confirmed that this sort of focus on station output is what listeners want.

In our research, stations 'providing local news and information' was three times more important for listeners than 'local studio location'.

Despite changes in technology and shifting audience expectations, Ofcom still requires radio stations to meet local production quotas – producing a minimum of 7 hours on weekdays (including breakfast) and 4 hours in weekend daytime from a specific studio or location.

More flexibility from Ofcom on how and when local hours are required would allow commercial stations to focus on delivering news and information, and enable them to develop a better resourced alternative to the BBC at peak times – including more genuinely national breakfast shows.

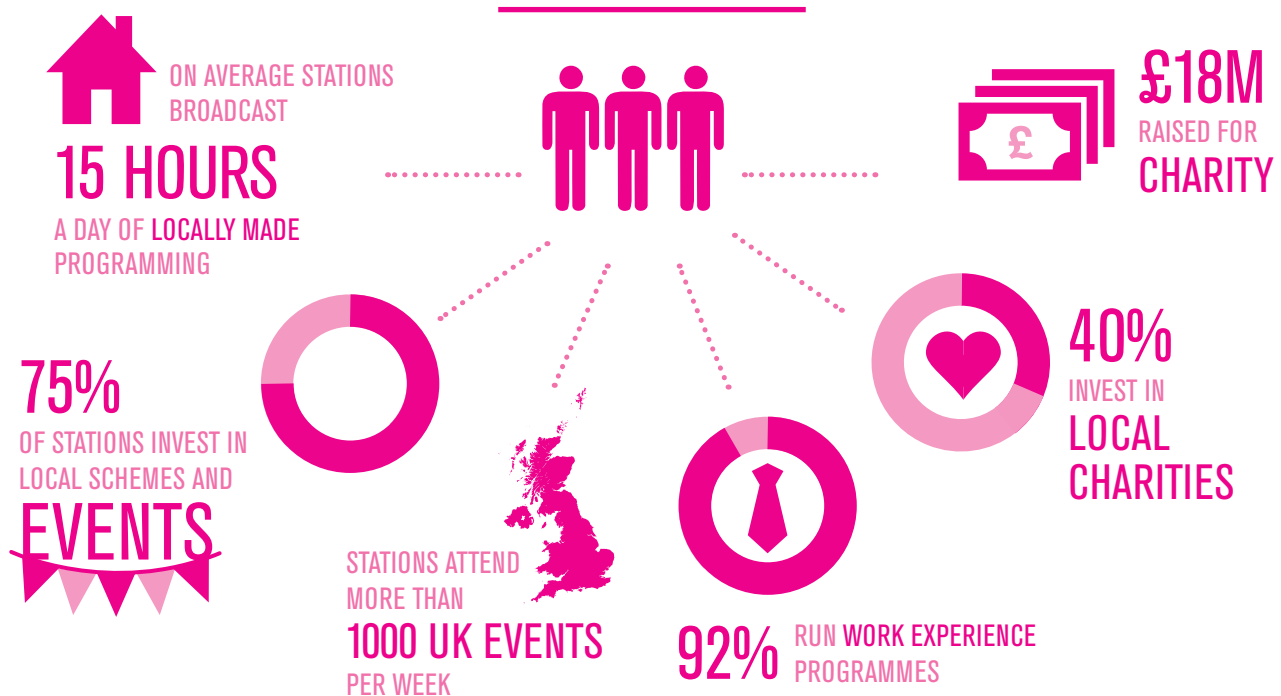
VIKING FM BEATS THE FLOODS

In December 2013 Hull station Viking FM highlighted how local content remains important no matter where a commercial station broadcasts. The station continued to broadcast to local residents updates about flooding, despite the staff themselves needing to abandon their studio due to the floods.

The staff had resorted to a back-up generator before being relocated to Key 103 in Manchester when this failed, where they continued to broadcast vital information and news on the floods for listeners in Humberside.



COMMUNITY & SOCIAL ACTION

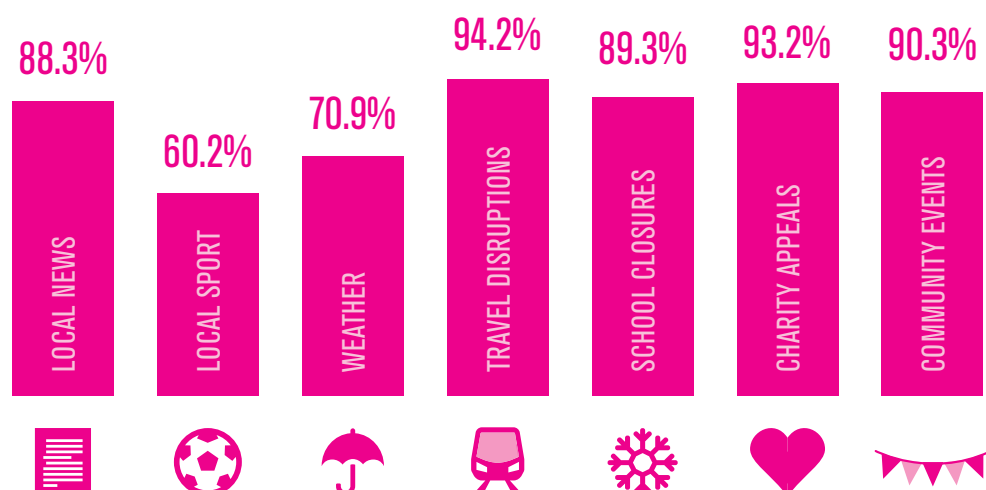


With 38 local commercial stations in Scotland, 10 in Northern Ireland, 19 in Wales and 228 in England, the commercial radio industry still has localness very much at its heart.

Stations across the country continue to play central roles in their respective communities through financial investment, community events and other community engagement. In fact, 86% of stations report that listener interaction has increased in the last two years.

Stations invest time and money in their communities, and this commitment is recognised by listeners. Over 90% of stations in our survey said that their listeners contacted them about charitable events, travel disruption and community events in their area. Similar numbers contact their station about local news and school closures.

Stations contacted by listeners (by topic)



Kantar Media research found that 66% of commercial radio listeners believe the medium makes a positive contribution in their communities.



WHAT'S ON?

Commercial radio has always been proud of its ability to inform and entertain listeners, and it is therefore unsurprising that 'What's on' event information remains a core part of community focused output for many stations. 84% of stations broadcast event updates; with 16% highlighting that they provide this information on more than 50 occasions every week.

Commercial stations do not only report on these events; they are active attendees and investors. As well as the plethora of opportunities for electronic engagement, stations also get out and about, attending an average of 3-4 local events a week; whilst 85% of stations invest financially in not for profit events and schemes in their local communities.

Today, according to Kantar Media, 56% of our listeners believe that broadcasting local events is important, whilst 75% surveyed agreed that commercial radio keeps them up to date with what's going on locally.

85% of stations invest financially in not for profit events and schemes in their local communities.

LINCS FM'S BIG MONTH OUT

Commercial stations reach out to listeners any way they can. In August 2013 Lincs FM embarked on its biggest challenge ever: to be within 10 miles of every listener in the Lincolnshire county all month. Every day of August the team at Lincs were in 31 different areas within the station's broadcast area, from the market of Grantham to the beaches of Skegness.



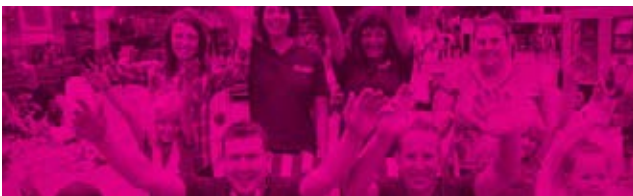
ABSOLUTE'S OLYMPICS COVERAGE

Commercial stations are at the centre of major events. Throughout two very special weeks in glorious mid-summer 2012, when British athletes recorded an unprecedented haul of medals in a home Olympics, Absolute celebrated the two greatest things Great Britain has given the world – sport and music – broadcasting live every day from the Olympic festival in Hyde Park, London



YOUNG ACHIEVER AWARDS

Commercial stations encourage social action in their communities. Swansea Bay's local radio station Nation Hits! annually recognises the success of local young people with the 'Swansea Bay Young Achiever Awards'. Young people from across the Swansea Bay area received awards for success in a range of categories from community and voluntary work to business, education and the arts.





CHARITY FUNDRAISING

Community events do not just mean entertainment. Radio has always been a strong “call-to-action” medium, and commercial stations continue to galvanize charity campaigns. Whether it’s raising money for a good cause or raising awareness of a particular issue, your local commercial station is always at the forefront of the campaign.

One third of stations broadcast appeals for charities more than 10 times a week. The work doesn’t stop there. Around half of stations promote their own charity appeals at least once a week, and 87% of stations host information about charities or other good causes on their websites. Two in five of stations also invest in local charitable events in their local areas.

Airtime charity promotion has a real impact: over £18 million was raised for charity by commercial radio stations in 2012.

All the money raised does not go unnoticed. Alongside the press coverage and community support, listeners see the impact. 67% of commercial listeners surveyed by Kantar recognised that commercial radio raises money for good causes, with 45% seeing charities in their communities benefitting directly from commercial radio fundraising.

HAVE A HEART

Have a Heart, the dedicated charity of the UK’s Heart network, saw listeners donate more than half a million pounds to help disadvantaged children. The 2013 appeal was supported by celebrities such as Nicola Scherzinger, The Wanted, Lawson, The Saturdays, Geri Halliwell, as well as athletes Louis Smith and Beth Tweddle.



“SOME OF THE FUNDING RAISED FOR GOOD CAUSES DESCRIBED IN THIS REPORT
SIMPLY WOULD NOT HAVE OCCURRED HAD IT NOT BEEN FOR THE PASSION AND
WILLINGNESS OF COMMERCIAL STATIONS TO GO THAT EXTRA MILE.”

Ed Vaizey MP



CASH FOR KIDS

Bauer Radio's 'Cash For Kids' is a banner which allows a network of local charities operating across 21 areas around the UK to raise money. The most recent 2012 figures showed that stations raised more than £11 million in 12 months.

In December 2012, Bauer's 'Mission Christmas' campaign, a nation-wide fundraiser in aid of local children and young people who are suffering from neglect and those in poverty, was supported by celebrities such as Sir Cliff Richard, Dame Helen Mirren and Ant & Dec. Hamley's toy stores in London even donated £1 for every bear bought in store during that shopping period.

In April 2013 many of Bauer Media's local radio stations across the country devoted their broadcast days to their Cash for Kids charities. In Scotland, Radio Forth, Tay and Northsound committed their support to the work of CLIC Sargent, the UK's leading cancer charity for children and young people, and their families.



HELP A CAPITAL CHILD

Capital FM's 2012 'Help a Capital Child' appeal raised over £500,000 for teenagers living with cancer across the UK. In November 2012, the 'Help a Capital Child Weekend' featured three days of special programming, with money-can't-buy auction prizes, amazing online prize draws at capitalfm.com, and a whole host of hit-music and celebrity guests such as The Wanted, Little Mix and Olly Murs.



FEEL GOOD HOSPICE CARE WEEK

In 2013, specialist programming on the Feel Good Network of stations (Splash FM, Sovereign FM, Bright FM and Arrow FM) included Hospice Care Week. This annual event, celebrates and highlights the work carried out by Hospices throughout the UK and has provided a vehicle to raise much needed funds for these organisations that rely heavily on charitable donations and fund-raising events to ensure their survival.



HELP FOR HEROES

Several commercial networks have raised money for the veterans' charity Help for Heroes over the past couple of years. Global Radio's LBC 97.3 raised £100,246 after a week of special programming and fundraising. Along with text and online donations, the money was raised through a host of exclusive auction lots; including a pair of Help for Heroes pants signed by the Mayor of London Boris Johnson!

The Real Radio network always had a long-term commitment to Help for Heroes. In September 2013 their fourth annual Help for Heroes Day boosted the total funds raised by commercial stations for the wounded soldiers' charity to over one million pounds in total.



FREE RADIO WALKS

Orion Media's West Midlands stations have raised more than £1.5m for good causes since they brought back the traditional summer walkathons to the region in 2010.

In 2012, the annual walks were named after each broadcast area, such as The Walk of Warwickshire and The Walk of the Black Country. Between them they raised £766,804 for local children's charities with 23,000 people taking part.

Such was the funding raised, that the 2013 events were able to support a plethora of charities including: Birmingham Women's Hospital, Cure Leukaemia for Kids, Help Harry Help Others, Acorns Children's Hospice, Russells Hall Hospital, Promise Dreams, Hope House, the Children's Emergency Department at University Hospital Coventry & Warwickshire, Megan Baker House and New Hope.



SMOOTH STARLIGHT SUPPER

For the past 4 years, Smooth Radio has been encouraging listeners to hold a dinner party to the soundtrack of the station, and then make a donation on the evening which is collected by the station and sent to Macmillan Cancer Support. Thanks to over 7,000 dinner parties held, the appeal has raised more than £400,000 for charity.





EDUCATION

Commercial radio plays a crucial role in discovering and nurturing new talent in the community in both broadcasting and journalism.

37% of stations invest in courses to train young people in radio, and more than three quarters of stations (78%) visit schools and colleges to speak to pupils, or host open days at their stations. An impressive 92% of stations also run work experience programmes to inspire tomorrow's broadcasters and radio professionals.

37% of stations invest in courses to train young people in radio.

GLOBAL ACADEMY

Specific initiatives, such as the Global Academy, provide a structured and tangible programme which offer young people an opportunity to get experience in radio. Through work experience and internships, in the last 2 years it has helped over 450 passionate people experience radio broadcasting first hand.

In early 2014 it was announced that off the back of this success Global will launch a full University Technical College tailored to jobs in the digital broadcasting industry. It is expected there will be 800 students in attendance by 2016.



KEY 103 MEDIA TRAINING

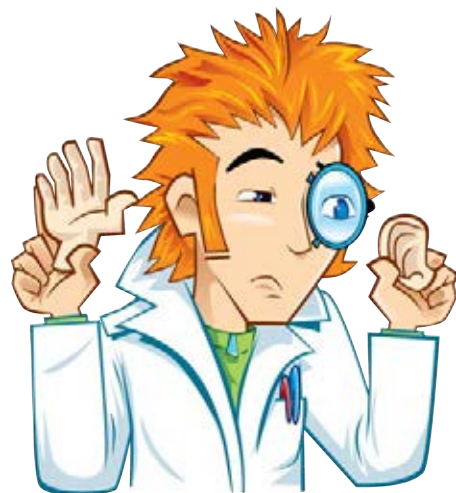
In 2013 a major collaboration to deliver training and development programmes was established at Key 103. Salford Professional Development Limited, a wholly owned subsidiary of the University of Salford, works with Key 103 to offer cutting edge Crisis PR and Media Training. The course focuses on management and proactive positive media relations, and students have the opportunity to try these skills out first hand at Key's central Manchester studios.



FUN KIDS EDUCATION

As the only radio station dedicated to children in the UK, Fun Kids is unique, and feels it has a responsibility to the families which listen.

With the help of guest characters created by educational partners such as the Wellcome Trust, the station runs Fun Kids Education, a programming strand of original speech content for children aged 6+ helped introduce school children to a wide range of educational subjects they will encounter in their school lives in the future.



KISS CHOSEN ONE

Now in its third year, the 'Kiss Chosen One' competition invites listeners across the UK to audition for the chance to win a three month freelance presenter contract with the station.

Since 2011, thousands of young people have applied to become the next Kiss presenter and broadcast to more than 4 million every week. This year, Charlie Tisma beat hundreds of auditioning hopefuls in the Presenter Academy to become breakfast presenter on Kiss' spin off station, Kiss Fresh.



THE HITS STUDENT STAR

The Hits Radio, part of Bauer Media, undertakes an annual search for a new presenter from the UK's university talent in association with the Student Radio Association. The winners of the Student Star search are given the chance to present two shows on The Hits Radio, as well as one-to-one coaching from What Goes On Media, all vital experience in becoming the radio talent of tomorrow.



ROUTE INTO RADIO

Creative Skillset's Route into Radio project is supported by commercial radio stations; who offer lessons and case studies on how to have career in radio, or advice about next steps in a radio career. Since 2012, producers, journalists, engineers, sales executives as well as presenters from stations such as XFM, Key 103 and Fun Kids have taken part in online tutorials and forums for aspiring radio talent.



SOUND WOMEN

Sound Women is a networking and development group for women working in UK audio and radio. Commercial radio stations across the country support events committed to raising the profile of women who work in the radio and audio industry; developing talent, and celebrating achievement. Alongside events, Sound Women also runs a mentoring scheme for women in audio and conducts research about women in the industry.





LISTENER VALUE

Commercial radio is a vital part of a community. Listeners have shared interests and tastes; ranging from geographical, to musical to social. Stations act as unifiers in communities; they bring people together under one banner.

For many, commercial radio is not just another broadcast medium, it is a trusted friend. Indeed, Jack FM stations reported in our survey that the majority of their listeners relate to the stations as a person; addressing station staff simply as 'Jack' when they contact them.

The Kantar Media survey found that 63% of our listeners believe commercial radio offers something they could not get elsewhere, and 78% would miss it if it was not there.

Indeed, when listeners were asked to put a monetary value on commercial radio content, the average suggested figure was £3.54 a month. Grossed up across the whole commercial radio audience, this represents a value in kind of £1.5bn a year provided by the industry to listeners.

PREMIER'S 'TOGETHER NOW'

As an example of how strongly listeners feel about their commercial stations, 2013 a six-day radio-thon appeal by Premier Christian Radio raised a total of £304,315 to help with the station's transmission costs. 4,149 individual donations, including thirty of £1,000 each, went to the national transmission fund that helps to keep it on air throughout the UK and on digital radio.



HELPING HISTORY IN HIGH PEAK

Derbyshire stations High Peak and Ashbourne Radio offer free on-air promotion for local not-for-profit and charitable causes through their ongoing 'High Peak Helpline' and 'Community Noticeboard' features. The 2013 Royal Shrovetide Football Match, which has occurred annually on Shrove Tuesday and Ash Wednesday in Ashbourne since the reign of Henry II, benefitted immeasurably from the £6,000 the stations helped raise through these appeals.



ISLE OF FRIGHT RADIO

On 31 October 2013, for one day only, Isle of Wight Radio was rebranded on air as 'Isle of Fright Radio' in support of a new Halloween initiative from Visit Isle of Wight.

In a bid to attract new visitors to the island during the half term holiday, the Island's destination management organisation teamed up with dozens of Isle of Wight businesses to offer a week of Halloween themed activities from ghost walks at haunted manors to dinosaur rampages in electric woods.



£1M OF WORK

Several commercial stations have responded directly to the recent financial recession by promoting job opportunities in the area, and on air campaigns to generate more than £1m of work in salaries in a single day

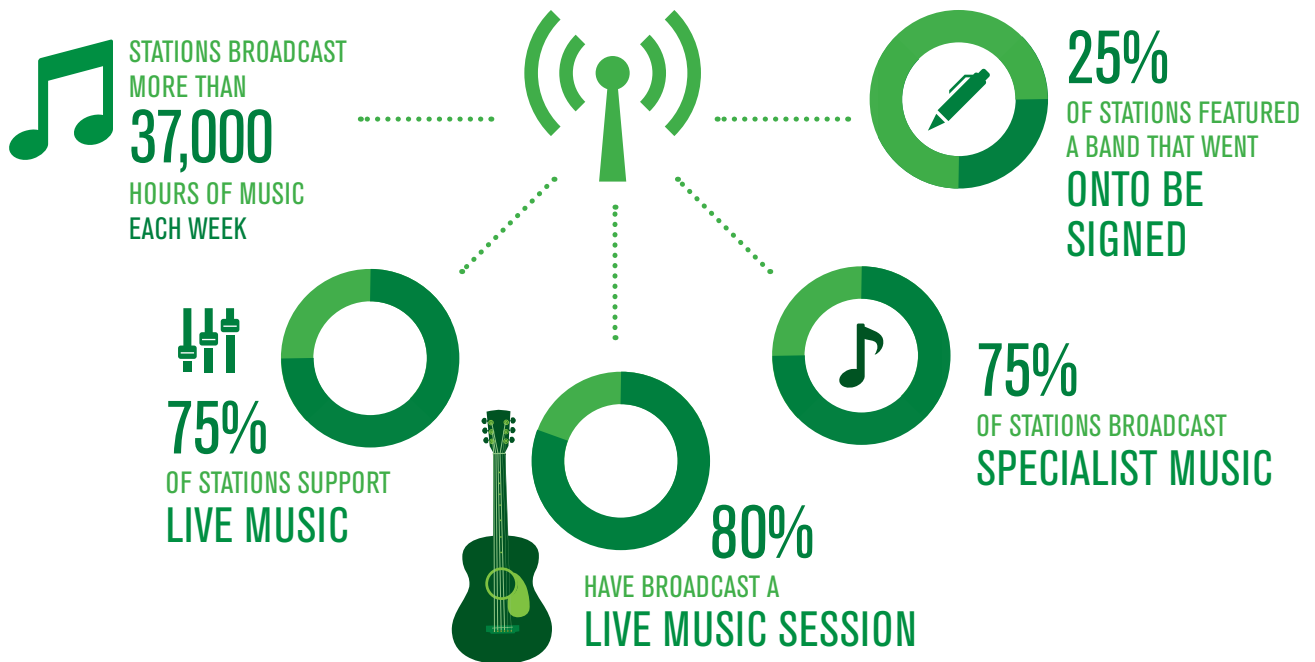
Metro Radio and TFM in the North East of England have promoted £66m worth of jobs in the past 5 years through this campaign, whilst Gem 106 in the East Midlands placed listeners in jobs worth over £1.6m, in a campaign which had backing from Prime Minister David Cameron.





OVER £18 MILLION WAS
RAISED FOR CHARITY
BY COMMERCIAL RADIO
STATIONS IN 2012

MUSIC



Music has always been a defining feature of commercial radio.

Throughout its history commercial radio has been the place where listeners have discovered new music, as well as listened to current hits and old favourites.

Commercial radio has continued to play a major, often underestimated, role in promoting the music industry, by breaking artists and promoting their music so that they have longevity both in the UK and worldwide.

Our survey found that this commitment to music remains today. Commercial stations play more than 40 minutes of music an hour during daytime and 95% of our stations devote more than half of their content to music.

This is what our audiences want. In the Kantar study, when asked about the main reason for listening to commercial radio, just over half (54%) stated spontaneously that music or entertainment was the most important draw. 79% of our listeners agreed that commercial stations play the music they like.

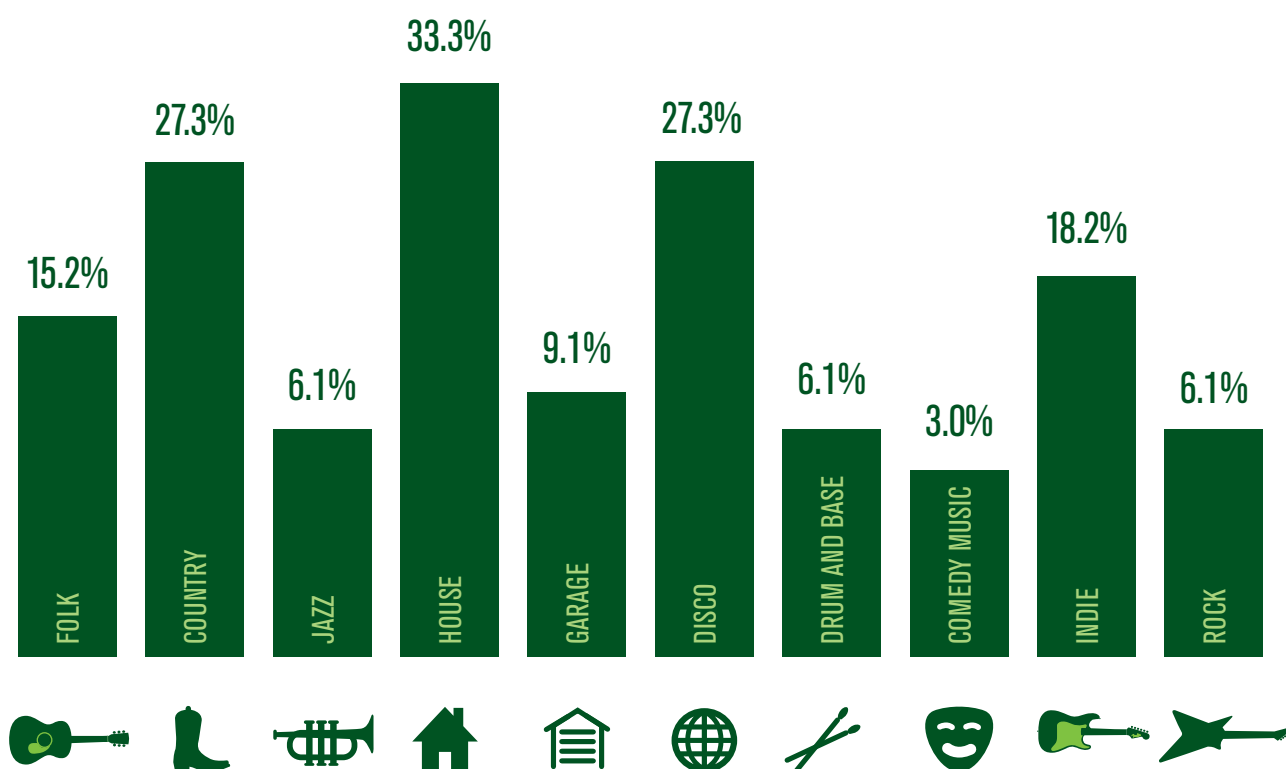


DIFFERENT GENRES

Despite the growth of online streaming services, radio continues to be as popular as ever as a place to find all types of music.

More than three quarters of stations broadcast specialist music. Those that broadcast specialist music do so an average of more than 10 hours per week. Whilst it is always difficult to define music genres, specialist music on commercial radio includes music from established favourites – such as indie, rock, and pop – to more niche choices – like jazz, folk, country, house and disco.

Stations with specialist music shows



LIVE MUSIC

Radio's biggest strengths are that it is live and free at the point of access, and commercial stations use this to its greatest effect by allowing the listener to hear live music as it happens on location or in the studio.

80% of the commercial stations we surveyed have broadcast a live music session from their studio and around half have broadcast a live gig.

Around a third of stations have supported a live music festival, with similar numbers of stations supporting 'battle of the bands' and events featuring unsigned bands. It is no wonder that 65% of our listeners told Kantar that commercial radio allows them to experience famous bands or singers in their regions.

Stations act as a conduit for the audience and live music in other ways too: 30% of stations link to live music on their websites, and almost three quarters of stations continue to promote live music in their locality, with 27% doing so more than 10 times a week.

ABBEEY ROAD SESSIONS

As part of the series of Abbey Road Studios Acoustic Sessions organised by Absolute Radio, listeners were given the opportunity to watch intimate live performances with some of their favourite bands in the legendary Studio Three, synonymous with legendary recordings from The Beatles.

Tom Odell performed in the shadow of his musical heroes at the Studios just weeks after receiving the prestigious Critic's Choice Award at the Brits. Listeners were also treated to exclusive performances from Liam Gallagher's Beady Eye, Miles Kane (right) and former Mercury Music Prize winners The xx.



CAPITAL FM BALLS

Capital's 2013 Summertime Ball attracted 80,000 listeners to Wembley from all over the UK. The event included performances from some of the biggest names in music today, including Coldplay, Cheryl and Katy Perry.

That December the Jingle Bell Ball, a cornerstone of festive preparations for many young Londoners, became a mini-festival, with two dates at the O2 in London. Saturday's line-up featured Katy Perry, Ellie Goulding and Tinie Tempah; whilst on Sunday Lady Gaga, Dizzee Rascal and Jessie J took the stage.



JINGLEBALL LIVE

Of course music remains a big draw for audiences in all parts of the UK. Key103's Jingleball Live returned on Thursday 12th December 2013 at the Phones 4U Arena, Manchester. Robbie Williams headlined, with special appearances from Jason Derulo, Rudimental, and Pixie Lott.



KISSBEACH

Bauer's Kiss teamed up with promoter Live Nation to bring urban artists to Great Yarmouth beach on Saturday 29th and Sunday 30th June 2013. Katy B, Iggy Azalea and Rizzle Kicks performed to an audience of nearly 50,000 local people and tourists over the course of two days.



LISSIE IN PARLIAMENT

American country rock group Lissie started their recent UK tour by joining commercial industry representatives and members of parliament to celebrate the 40th anniversary of commercial radio in October 2013.

The performance highlighted to parliamentarians the continuing importance commercial radio has in supporting live music and acting as a conduit between artists and UK audiences.



XFM WINTER WONDERLAND

For the past 10 years XFM's Winter Wonderland – two huge sell-out gigs in London and Manchester that bring together a stunning bill of the very best acts in the world – has been running in aid of War Child, the charity that provides life-changing support to the most vulnerable children in war zones across the world.

2013's acts included The Vaccines, Jake Bugg, White Lies, Primal Scream, The 1975 and CHVRCHES. Previous artists to play the shows have included Bloc Party, Kasabian, Editors, Kaiser Chiefs, Manic Street Preachers, The Cribs, The Charlatans and Biffy Clyro.



HELPING THE TALENT OF TOMORROW

The Kantar Media research highlighted that 75% of our listeners still discover new music on commercial radio.

A quarter of stations surveyed – the equivalent of around 75 stations across the UK as a whole – report having supported an unsigned act which then went on to be signed.

Commercial stations have featured a variety of UK music acts which are now major names in the industry, before they were signed by record labels.

In 2012 KMFM supported four piece 'Luminites', who went onto Britain's Got Talent and their first single in 2013; XFM have continued to champion a range of rock acts, including Everything Everything, who went on to be Ivor Novello award nominees; whilst Capital FM Nottingham was the first station to give a platform to local boy, and now multi-platinum selling folk-rock artist, Jake Bugg.

CLASSIC FM MUSIC TEACHER OF THE YEAR AWARDS

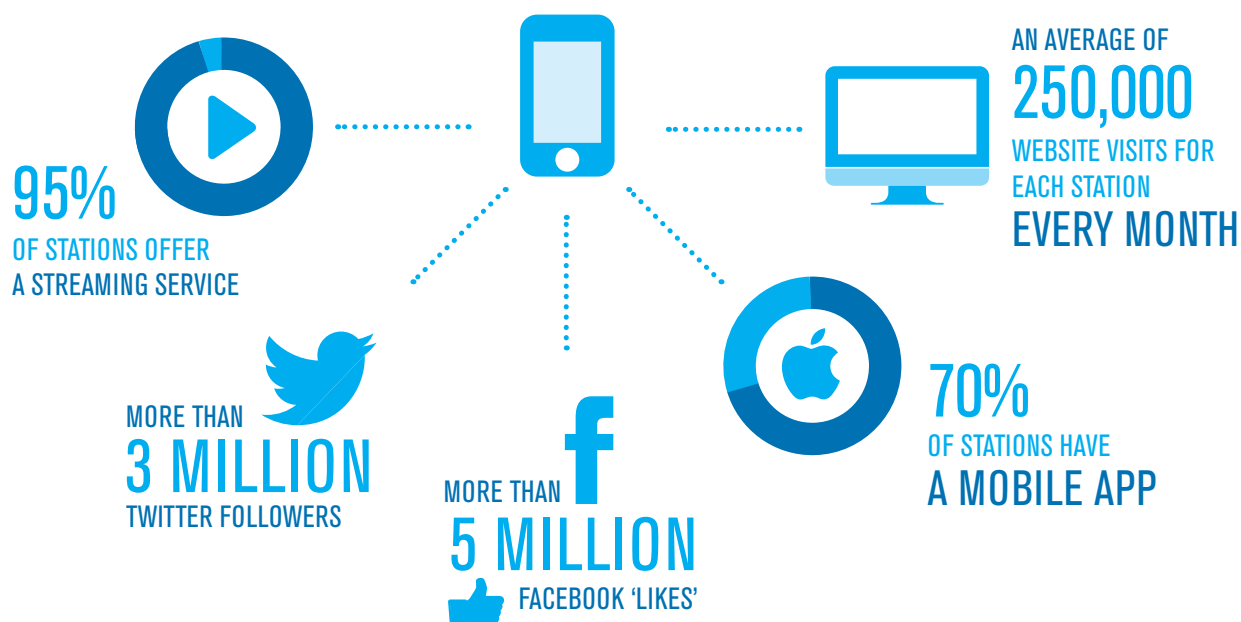
Commercial stations do not just help professional musicians, but help those encouraging the talent of tomorrow. For the past 15 years, Classic FM has run the Music Teacher of the Year Awards, to celebrate the work of primary and secondary school music teachers. In 2013, the awards were held over three nights in the Royal Albert Hall, with support from across the Arts, including film producer Lord David Puttnam, actor Damian Lewis and director Sam Mendes.





4 OUT OF 5 COMMERCIAL
STATIONS BROADCAST LIVE
MUSIC SESSIONS

NEW MEDIA



Commercial radio today is a multiplatform medium.

The radio industry continues to evolve to meet consumer expectation and tastes; hence the increased investment in digital radio and the development of online listening and apps such as Radioplayer.

Each week 36.1% of UK radio listening is undertaken digitally. This is not only via digital radios. Currently 5.2% of listening hours are via a TV and 5.8% is via a PC or tablet. In addition 24.9% of all adults have listened to the radio via a mobile phone at some point.

Commercial radio stations have recognised the need to respond to the digital revolution and continue to cater to audiences, on whatever platform they reside.

24.9% of all adults have listened to the radio via a mobile phone at some point.

RADIO DNS

Hybrid Radio is a seamless combination of broadcast radio (FM, DAB, DAB+, HD Radio) and the internet. RadioDNS is a not-for-profit membership association, set up and funded by UK commercial radio broadcasters, to promote hybrid radio here and around the world.





ONE GOLDEN SQUARE LABS

One Golden Square Labs is the creative hub of One Golden Square, where the technical experts from Absolute Radio Digital Media test their experimental projects. In the past few years the Labs have been responsible for setting up the Compare My Radio website; which tracks UK radio stations’ “now playing” information so that listeners can pick stations with output most aligned to their individual tastes.



WEBSITES

Commercial radio stations have always understood the importance of deepening engagement with listeners wherever possible, and it is not therefore surprising that 56% of stations feature blogs on their sites and 78% of stations produce their own videos for their websites.

This investment in station websites is beginning to pay dividends in terms of listener engagement. On average around a quarter of a million people now visit a commercial radio website every month.

Sites often prove the ideal place to host detailed local information; with more than 90% of stations reporting that they include local news and ‘what’s on’ information there for their listeners. Interviews, information about local charities and competitions are included by a similar amount of stations.

78% of stations produce their own videos for their websites.

JACK FM MOBILE TUTORIALS

Commercial stations are at the forefront of digital expansion, and want to help UK industries digitalise too. Jack FM Oxfordshire offers an online guide to making the websites of advertisers more mobile friendly. For no extra charge, the station will also analyse a client's site against six key mobile friendly criteria in order to make it more appealing to potential customers.



ABSOLUTE RADIO IN-STREAM

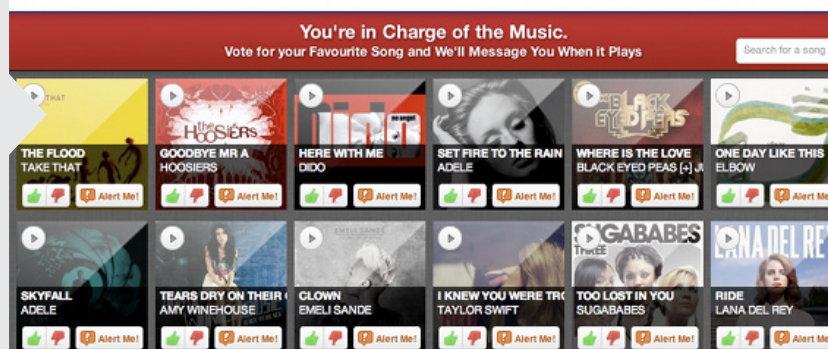
In-stream is the first foray into truly converging the radio and digital space; bringing the benefits of digital accountability, targeting and tracking to spot radio airtime. Whereas traditional radio dictates that a listener hears an advertising message at fixed, scheduled airtime spots, Absolute Radio in-stream – using newly available technology – offers listeners the opportunity to receive a better quality, contextual, visualised radio experience.

In exchange for listeners signing into Absolute Radio's subscriber page, and providing the station with a small amount of information about themselves, they receive fewer (and better targeted) ads and more music when listening online.



JACK 2 MUSIC SELECTOR

Jack 2 in Oxford allows listeners to select music in a very unique way. Listeners are encouraged to go online and vote for their favourite tracks in real time, with the option of highlighting their selections on social media. The track with the most cumulative votes is then automatically played through Jack's jukebox system.





DOWNLOADS

Commercial radio continues to be committed to providing stations with extra content, which listeners can access on-demand.

A third of commercial stations in our survey said that they make regular podcasts available to listeners for download, whilst a quarter surveyed stated that they offered other types of catch-up listening. Over 70% now offer listeners the opportunity to download apps, with two thirds having a YouTube channel and over half offering an audio clips service such as Audioboo.

Online platforms are also being used to increase listening opportunities, with almost 95% of commercial stations now offering a streaming service such as UK Radioplayer.

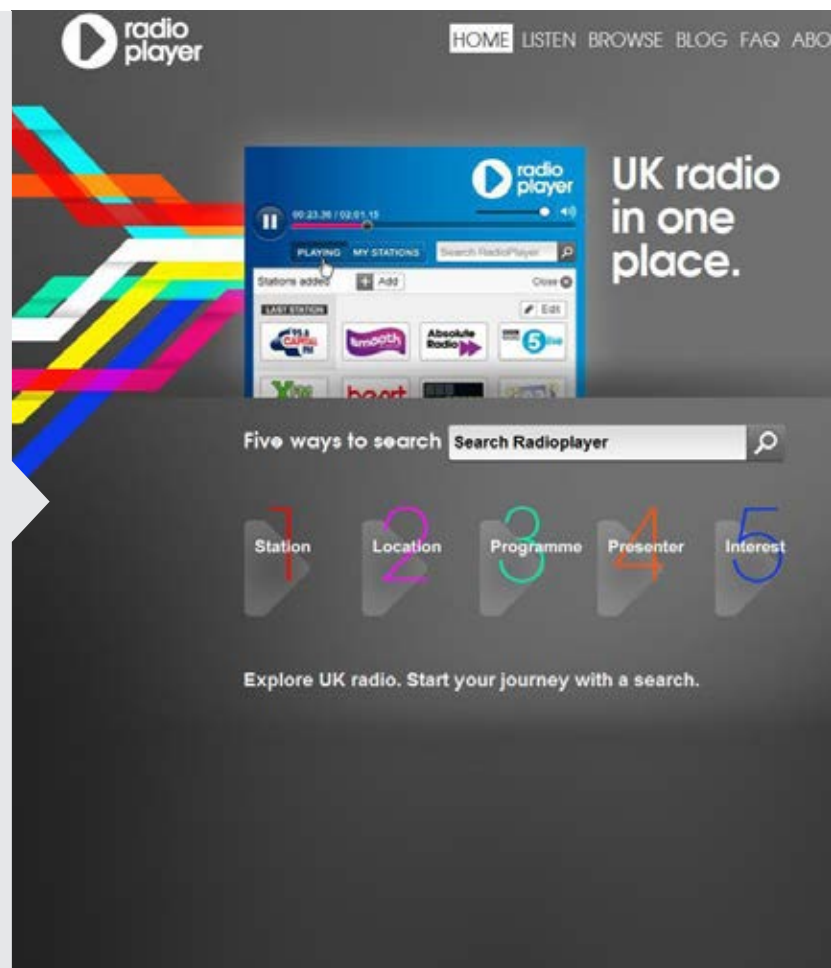
RADIOPLAYER

Radioplayer – a collaboration between commercial radio and the BBC – allows listeners to discover and listen to live and on demand radio from any Ofcom licensed UK radio station.

It now attracts an average of 7 million listeners each month, and the new Radioplayer app launched this year in the Apple app store and Google Play store, offers a truly fluid, intuitive and simple user experience, to navigate across all UK radio stations at the touch of a screen. It has been downloaded over a million times already.

Smartphones are crucial to radio's future. The free app boasts a range of features including an innovative 'station scroller', a powerful search engine to access live and catch-up radio, plus the ability for users to set up their favourite stations, browse radio that is local or trending, and share listening via social media. The app is designed to complement existing station branded apps and aims to help grow overall digital radio listening.

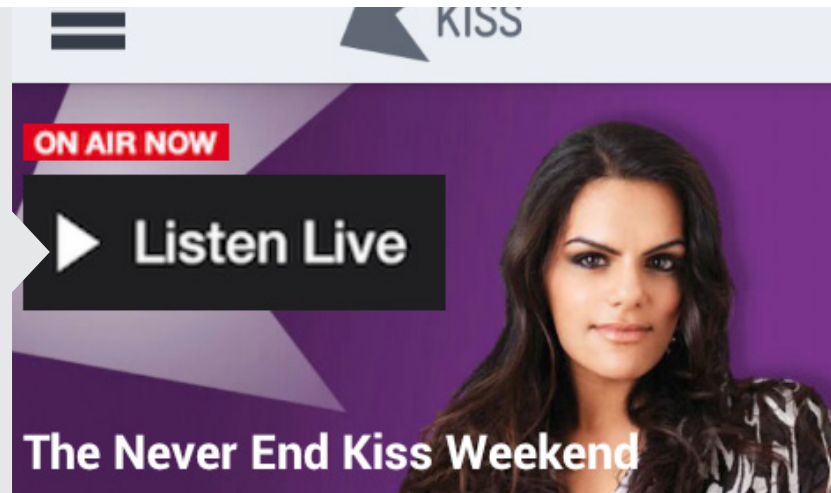
The common data and interface model that Radioplayer employs could also be hugely valuable for radio providers to develop connected technology in cars and move forward with internet hybrid radio in the future.



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KISS KUBE

The Kiss Kube Mobile app provides access to catch-up content and streams live info straight from the Kiss studio, so listeners can get the names of all the latest tracks, and see what their favourite DJs are getting up to. Through the app, listeners can also rate and purchase songs, and interact with other Kiss fans on social media.



FUN KIDS APP

The Fun Kids iPad app helps children under-ten work with touchscreen technology, by giving them access to the station's broadcast stream, but also non-radio content. Its 50 different podcast channels are available within the app, and users can also access a magazine-style section with news, videos, book reviews and events information, get in touch with the station and enter the station's competitions.

The app also includes an online game, supported by the Wellcome Trust, based on the station's popular Professor Hallux character – which was designed and written by the team at Fun Kids alongside the Wellcome Trust.





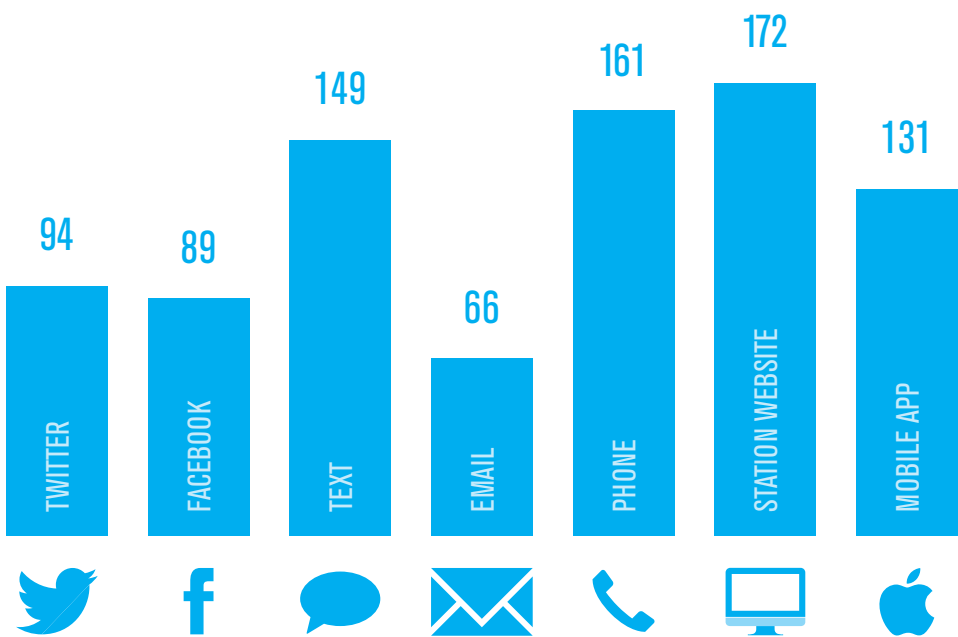
SOCIAL MEDIA

As the first medium to accomplish sharing information, opinions, and observations; radio can be considered as the forerunner to modern social media. Today this culture has continued, with stations now fully embracing social media platforms.

It is no wonder that 86% of stations report that listener interaction has increased in the last two years. Even the 11% of stations who reported not noticing an increase in listener interaction do acknowledge that the ways they communicate with their listeners has developed, due to social media and other new technologies.

Not limited to their own sites, commercial stations exist, and communicate, with listeners on Facebook – where commercial radio has over 5 million Facebook ‘likes’ – and with more than 3 million followers on Twitter.

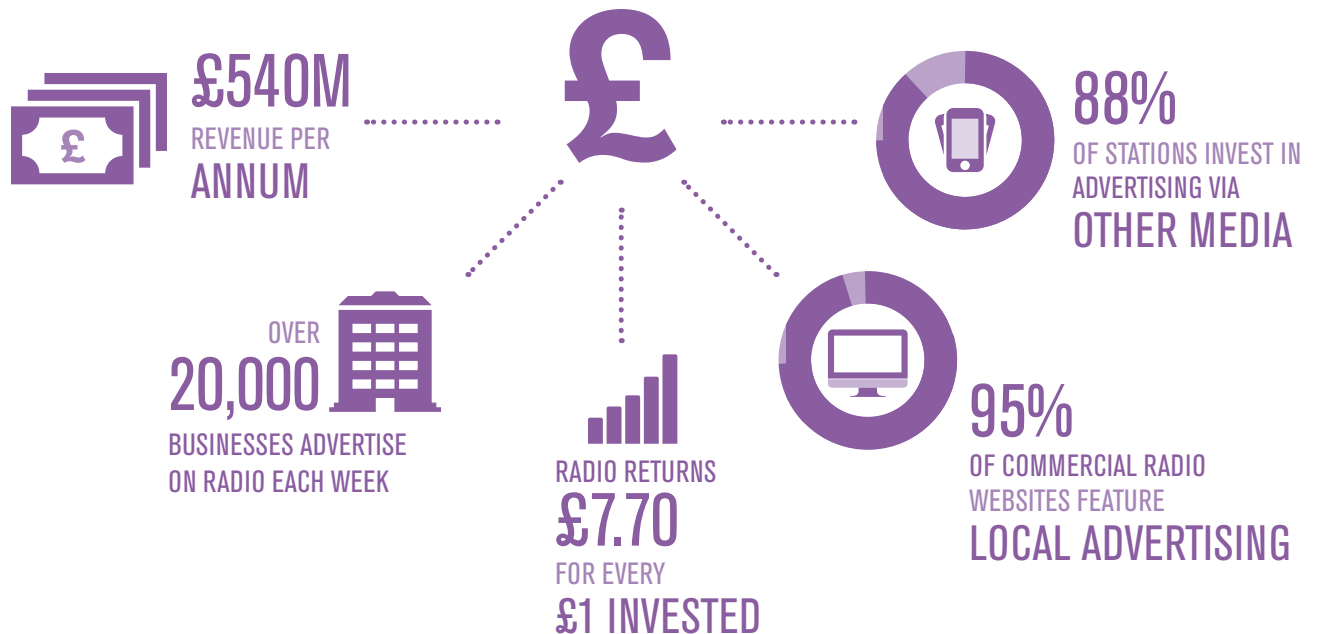
Average times a station is contacted per day



A top-down view of a desk with a laptop, keyboard, mouse, glasses, and a notebook. The text is centered over the image.

90% OF COMMERCIAL
STATIONS HAVE LOCAL
INFORMATION ON THEIR
WEBSITES

ECONOMIC VALUE



Commercial radio has been a key part of the UK media economy for more than 40 years.

Advertising on radio remains an affordable, accessible and effective way to promote brands and businesses to communities around the country, and advertisers recognise this by investing around £540m in radio annually.

On no other platform does a medium appeal emotionally and immediately to an audience like it does on commercial radio. This is why a recent Radio Advertising Bureau study has identified that the Return on Investment (ROI) for radio is £7.70 for every £1 invested in advertising.

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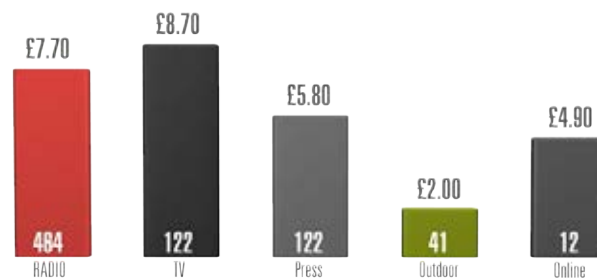
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ROI MULTIPLIER

In 2013, the RAB – alongside research partners Holmes and Cook – worked with specialist econometrics agencies representing all of the world's major media agency groups, to produce the definitive report on radio's ability to deliver a marketing return. It discovered that overall campaign ROI grows as radio investment increases, with the optimum returns coming with radio taking a 20% share of the total media budget; considerably more than the 5% currently being invested.

AVERAGE ROI FOR BRANDS ON RADIO IS £7.70



Source: Radio ROI Dataset (no. of cases shown in white)

WILLINGNESS TO PAY

The research undertaken for this report by Kantar Media found that listeners put a very high value on commercial radio content.

During the course of the audience research, respondents were asked how much they would be willing to pay per month for the content commercial radio provides if they were no longer able to access it for free. The mean response was £3.54 per month, which extrapolated to a year would be £42.48.

Grossed up across the whole commercial radio audience of 35 million, this represents a value in kind of £1.5bn a year provided to listeners.



Listeners value commercial radio's content at £1.5 billion.





LOCAL

Commercial radio continues to provide local and relevant advertising for small businesses in the UK.

Historically SME businesses have struggled to access advertising because the industry is mainly London based, and expensive. The distribution of commercial radio stations across the country means smaller businesses can mediate with station sales teams directly to target their local communities with cost effective campaigns.

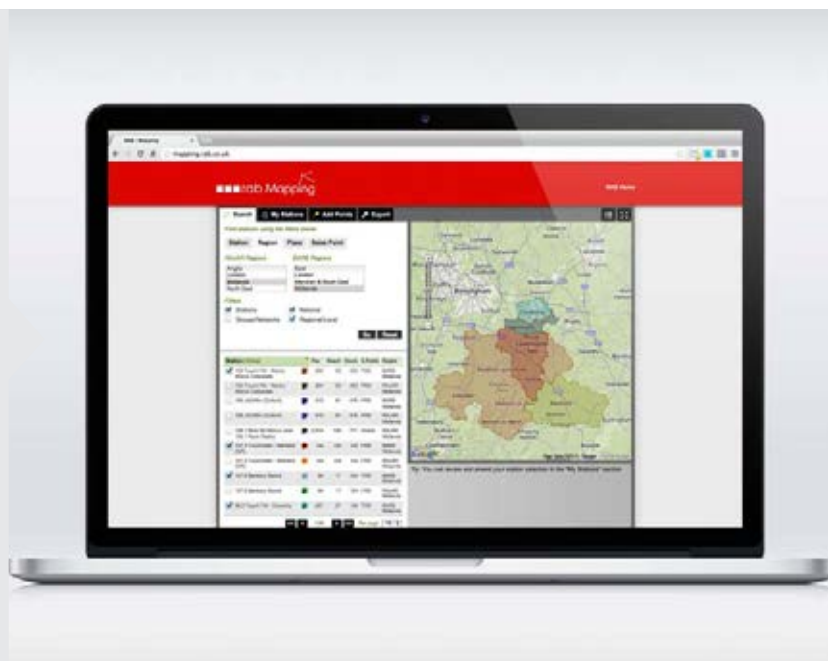
Unlike television, online or increasingly print – where sales are universally dealt with in central London offices – many commercial stations often deal directly with businesses in their locality. £159.7m of the £536.8m 2013 turnover came exclusively from local and regional advertisers.

This contribution is not just as a medium for advertising. It is often forgotten that stations are a vital part of the local media landscape, both as a local employer and advertiser. 88% of commercial stations invest in other marketing; with 28% using billboard ads and 28% investing in local press ads. This further fuels advertising businesses and economies across the UK.

RAB LOCAL ADVERTISER MICROSITE

Given the continued relevance of commercial radio as a platform for local advertisers, the RAB have launched a microsite, 'Commercial Radio & The Local Advertiser'. The site aims to provide local advertisers and agencies with research resources that help demonstrate the role radio can play and its effectiveness when included on a local marketing plan.

The content is designed to help local advertisers understand how to make more effective use of radio to enhance the efficiency of their marketing activity. By using commercial radio to communicate with local communities, local advertisers can increase awareness and stimulate interest in the local economy and the wealth of products and services available.





TARGETED

Added to radio's local structure, different station types offer different solutions for advertisers, as they tap in to communities that have shared tastes in common.

Radio targets audiences efficiently because different stations attract different listeners that are pre-defined communities with similar interests. The medium has a proven capacity to drive responses and its ability to connect with listeners at an emotional level. Listeners typically describe their favourite radio station as a friend.

Britain's love of radio means that the medium wields incredibly powerful emotional influence for advertiser brands. By being associated with a station, an advertiser becomes part of its community. It is therefore no wonder that the average commercial station features more than 62 different advertisers on air each week.

The average commercial station features more than 62 different advertisers on air each week.

THE MANUSCRIPT

Stations know their audiences intimately, and commercial brands want to be associated with the content they produce to target these listeners.

In summer 2013, Absolute Radio was able to create original content in partnership with Just for Men hair dye, which appealed specifically to the target market of the advertiser. 'The Manuscript: A Foolproof Guide To Being A Modern Man' was an ad-free comedy panel show featuring some of the UK's top comedians, and sponsored by Just for Men.

Over 6 weeks host Nick Hancock compiled the Manuscript guide using suggestions from his guests, all in front of a live studio audience. This innovative approach brought distinctive content to audiences, and gave the advertiser enhanced on-air coverage.





IMMEDIATE

Business conditions can change fast, and radio is well set to meet those changes.

On average commercial stations provide advertisers with over 2 hours of dedicated advertising time during the average day; which can be placed at specific times to best help an advertiser and most appeal to the right types of listeners.

This means that the local leisure centre can advertise on a Friday night when people are planning their weekend; a car dealership can target the 'drive time' to reach people in car; or a local retail outlet can advertise on Friday and Saturday morning to promote weekend offers.

Increasingly radio's real strength is talking to people who are one click away. Almost all stations surveyed by RadioCentre include advertising on their websites, with 95% of station websites containing advertising for local companies, and 97% ads for national businesses.

JACK SHOP

Previous RAB research showed that consumers exposed to radio ads had higher levels of brand browsing online, 52% higher than those who only saw the same campaign in other media. The Jack brand has taken this to another level by encouraging listeners to be part of its online Jackaholics community. By signing up online and listening to Jack, listeners are eligible to exclusive rewards; such as vouchers experiences or discounted luxury items, which are purchased directly from the Jack website.





RadioCentre
SHAPING COMMERCIAL RADIO'S FUTURE

radiocentre.org

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