

BBC Radio 1 & 2 Audience Research

October 2014

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1. Summary

1.1 What do Radio 1 and Radio 2 listeners think?

Headlines from new research of 1,000 Radio 1 and 1,000 Radio 2 listeners carried out by BDRG Continental.

Listeners think Radio 1 and Radio 2 should be more distinctive

77% felt that the BBC should produce content that is distinctive from commercial radio (78% for Radio 1 and 77% for Radio 2).

But listeners do not associate Radio 1 and Radio 2 with their public service remits

Only a third (35%) said that BBC Radio informs and educates the public. 36% simply identified the stations with playing the most popular music.

Listeners were asked about specific public service requirements laid down by the BBC Trust.

The response from Radio 1 listeners included:

- 6% said that they associated the station with **documentaries** and social action
- 26% said that they associated the station with accurate and impartial **news coverage**
- 25% said that they associated the station with this **programming for younger teenagers**
- The Radio 1 target audience is people aged under 29 years of age, BUT 30% of 35-44 year olds think it is aimed at them.

Radio 2 listeners:

- 21% said that they associated the station with **extending musical tastes**
- 11% said that they associated the station with **original comedy**
- 17% said that they associated the station with **arts programming**
- The Radio 2 core audience is supposed to be everyone over 35 years and older, BUT 31% of 25-34 year olds think it is aimed at their age group.

Instead listeners associate Radio 1 and Radio 2 with mainstream music output:

- 79% most associate the artist Rihanna with Radio 1.
- 80% most associate the band Queen with Radio 2.
- 60% agreed that Radio 1 'plays mostly chart music'.
- 49% of Radio 2 listeners said that BBC Radio simply 'appeals to everyone'.
- On hearing the top 5 tracks played on Capital FM in September – 60% said that they would most associate this music with Radio 1.
- On hearing the top 5 tracks played on Smooth Radio in September – 65% said that they would most associate this music with Radio 2.

2. Background

The BBC Trust is reviewing the BBC's radio services and is inviting interested parties (including the BBC) to respond to an invitation to help the BBC Trust in its review. RadioCentre commissioned this research to support the evidence it will submit to the BBC Trust. The purpose of this report is to cover the "Audience perception of Radio 1 and Radio 2."

RadioCentre's role is to support the interest of commercial radio in the UK and seeks to help stations to maximise their audience for the advertisers in the context of other media and the BBC. RadioCentre believes that BBC Radio output is such that it unfairly targets commercial radio's audience, by tailoring its output to maximise its audience share and reach. This means that the content of Radio 1 and Radio 2 in particular, may not be sufficiently distinct from the content of commercial radio stations.

3. Research Objectives

The objectives of the research projects are to provide robust and credible research data to examine RadioCentre's hypothesis outlined in the brief. In particular, RadioCentre would like to gather audience views on:

- Perception of music/speech content of Radio 1 and Radio 2
- Perception of target audience
- Perception of commercial stations and similarities with BBC stations
- Ownership of music styles by particular stations
- The effect of cross promotion activities on BBC TV and BBC Radio
- Value for money of BBC Radio 1 and Radio 2

The research will seek to understand what role the BBC music radio stations play in people's lives and what listeners think the BBC should be doing to deliver a distinctive public service output. Full details of the sample profile and listening habits are included as an Appendix.

4. Methodology

4.1 Survey Method

BDRC Continental conducted 2,000 online interviews between the 9th and 19th of September 2014 with Radio 1 and Radio 2 weekly listeners. This research sought to understand what role BBC music radio stations play in people's lives and what listeners think the BBC should be doing to deliver a distinctive public service output. The sample is proportionally representative of RAJAR figures for both music stations, and has been appropriately weighted by age, gender region and working status.

5. What is BBC Radio v Commercial Radio

At the start of the survey respondents were asked about their opinion of BBC Radio output in general.

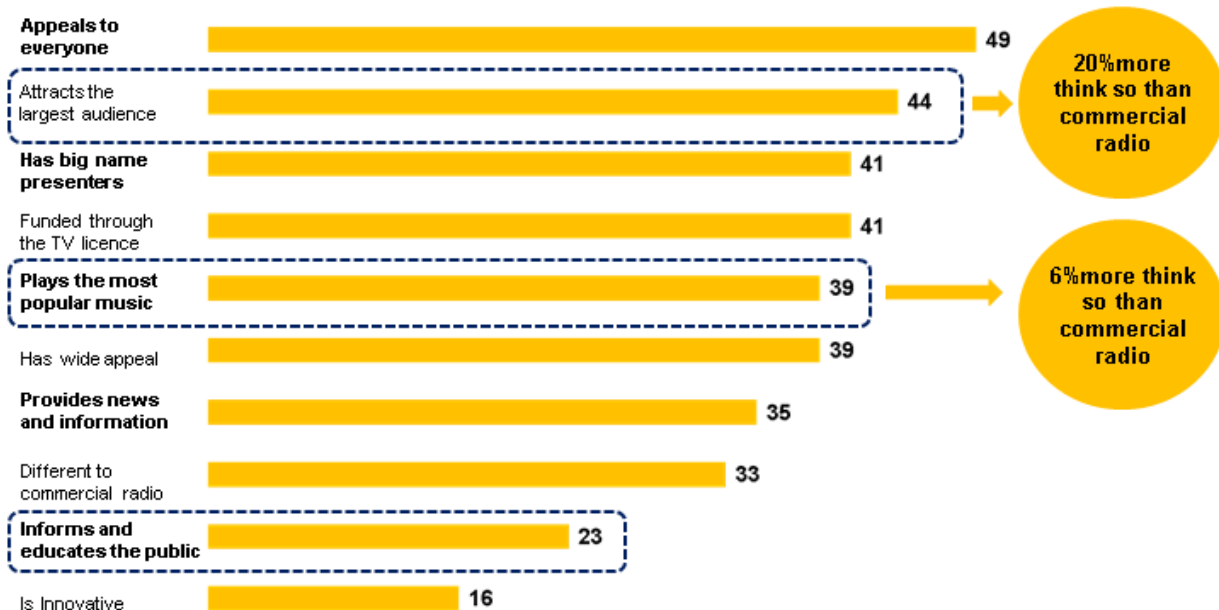
5.1 Radio 1 listeners attitudes to BBC Radio

When asked, only a third of Radio 1 listeners (33%) thought that BBC Radio was different to commercial radio and only 23% thought that it informed and educated the public.

2 out of 5 Radio 1 listeners considers BBC Radio to play the most popular music, more so than commercial radio



Which of these statements describes what BBC radio means to you?

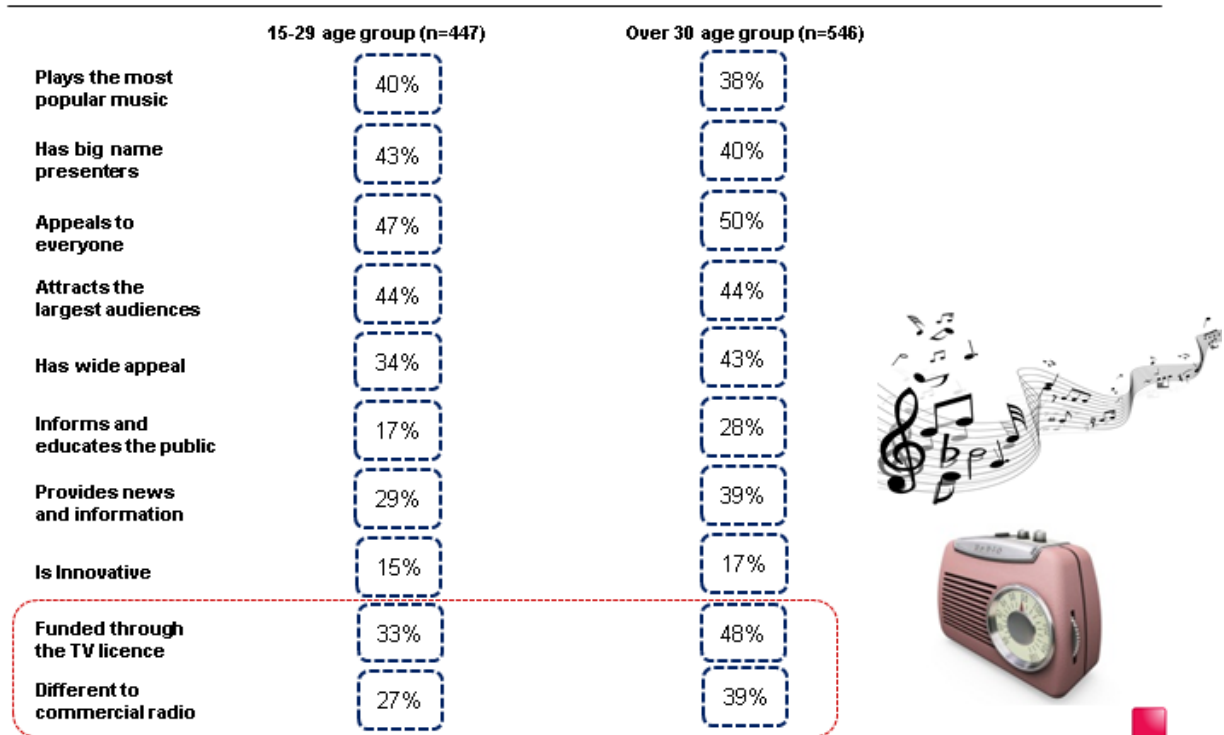


QA4b. Which of these statements describes what BBC radio means to you? Base: Radio 1 (993) Weighted



When looking at Radio 1 target audience (those aged 15-29) only 17% thought it informs and educates (compared to 23% overall) and only 27% thought that it was different to commercial radio (compared to 33% overall).

Under 30's and Over 30's – Their view on BBC Radio



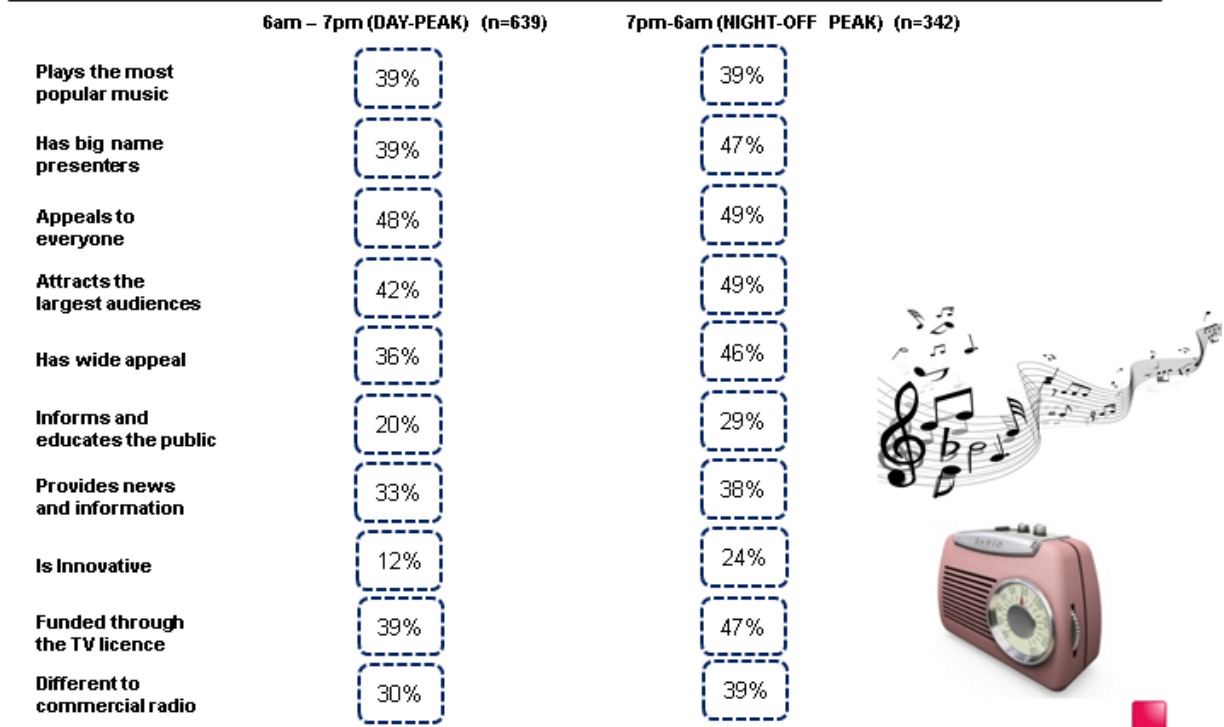
QA4b. Which of these statements describes what BBC radio means to you? Base:15-29 (447), Over 30's: (546) Weighted



In fact most of the average scores for these distinctive and 'public value' elements were higher with listeners over 30 – i.e. outside the Radio 1 demographic of 15-29. For example for providing news and information (39% for over 30s, 29% for 15-29); informs and educates the public (28% for over 30s, 17% for 15-29) and different to commercial radio (39% for over 30s, 27% for 15-29).

When looking at the differences between listeners at different day parts, off peak listeners (listening after 7pm) are most likely to say that BBC informs and educates the public (29%) but still a minority (39%) think that BBC Radio is different to commercial radio.

Peak and Off-Peak Listeners of Radio 1 – Their view on BBC Radio



QA4b. Which of these statements describes what BBC radio means to you? Base: 6am-7pm (639), 7pm – 6am (342) Weighted



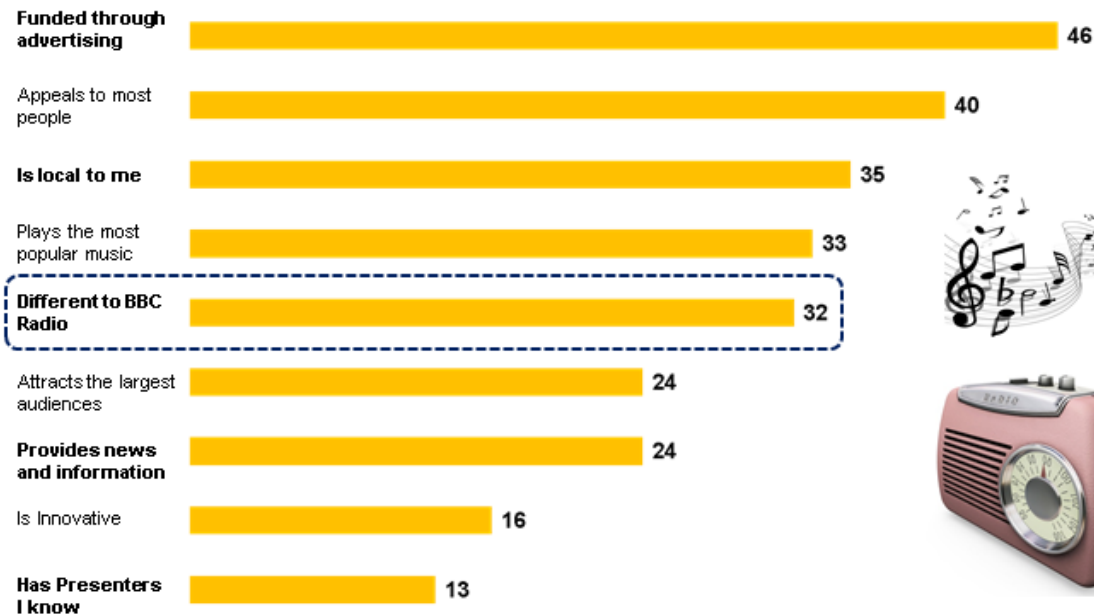
Among daytime only listeners, (20%) believes Radio 1 informs and educates the public, and 39% considers the station to play the most popular music.

5.2 Radio attitude to commercial radio

Less than a third of Radio 1 listeners think commercial radio is different to BBC Radio



Which of these statements describes what commercial radio means to you?



Q.A1a. Which of these statements describes what Commercial radio means to you? Base: Radio 1 (993) Weighted



When asked about commercial radio a similar pattern emerges regarding the similarity of BBC Radio to commercial radio, 40% thought it appeals to most people and only 32% thought it was different to BBC Radio. 35% mentioned commercial radio's localness.

Overall when Radio 1 listeners were asked to consider BBC and commercial radio in general, it appears that their perception is that they carry out a similar role – that they have wide appeal and play the most popular music. Consequently, the majority see BBC Radio as similar to commercial radio.

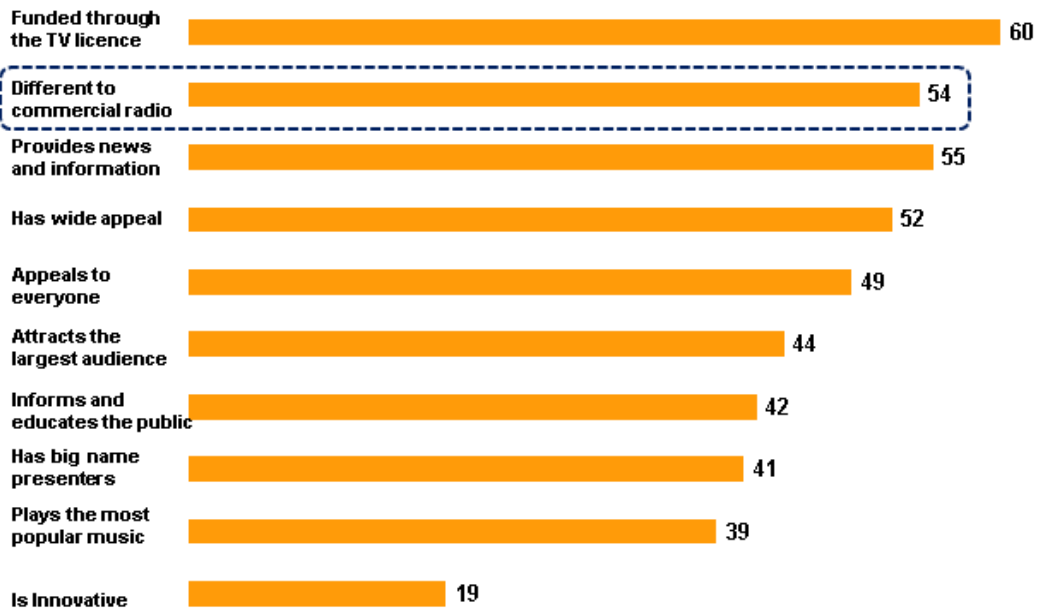
5.3 Radio 2 listeners attitudes to BBC Radio

Listeners to Radio 2 were also asked what statements best describes what BBC Radio means to them. 60% thought it was funded through the licence fee and just over half (54%) thought it was different to commercial radio (significantly more than Radio 1 listeners). 52% thought it had wide appeal and 49% thought it appealed to everyone. 42% also thought it informs and educated the public, however, only 19% thought that it was innovative as can be seen below.

2 out of 5 Radio 2 listeners considers BBC Radio to play the most popular music, more so than commercial radio



Which of these statements describes what BBC radio means to you?

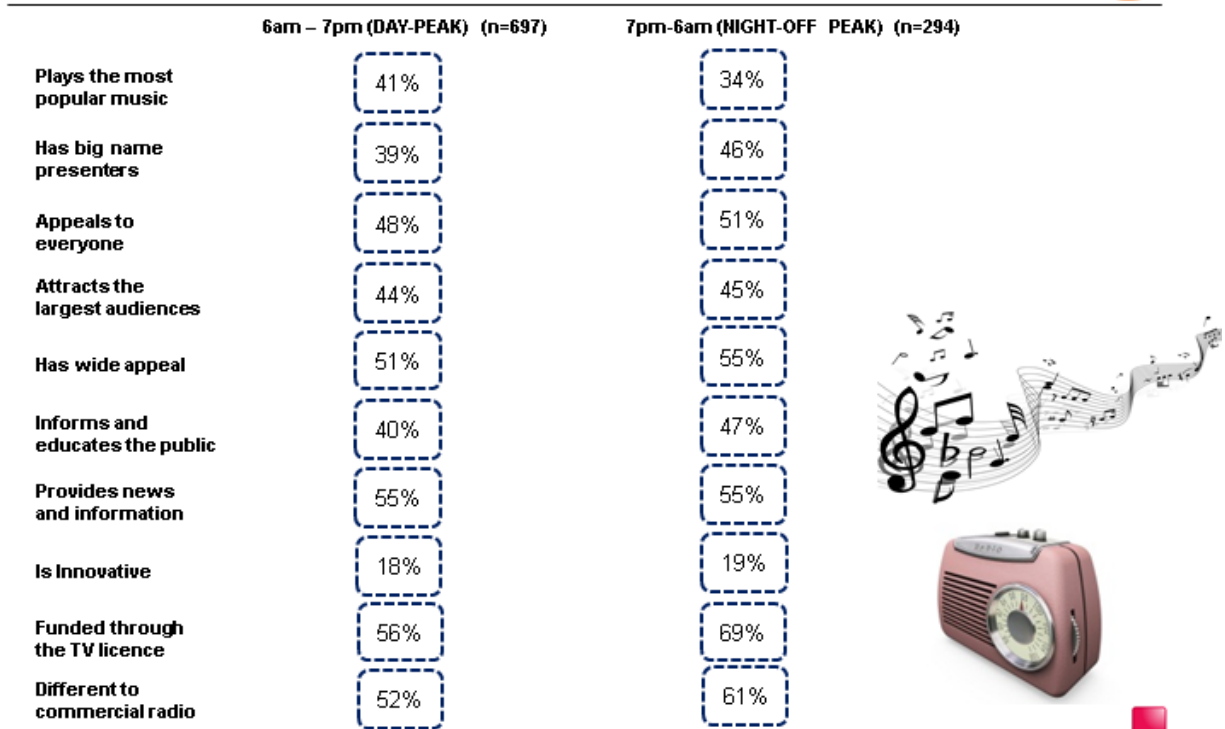


QA4b. Which of these statements describes what BBC radio means to you? Base: Radio 2 (998) Weighted



When looking at these statements by sub groups of listeners in different day parts, daytime only listeners (6am to 7pm) were more likely to say that BBC Radio plays the most popular music (40%) has wide appeal (51%). Off peak listeners (people who listen after 7pm) were more likely to say that BBC Radio is different to commercial radio (61%).

Peak and Off-Peak Listeners of Radio 2 – Their view on BBC Radio



QA4b. Which of these statements describes what BBC radio means to you? Base: 6am-7pm (697), 7pm – 6am (294) Weighted



When looking at different age groups (below), over 35 year olds are more likely to say that Radio 2 plays the most popular music (41%) and has wide appeal (54%). Over 35 year olds are more likely to say that it is different to commercial radio (57%) than other age groups. None of the age groups thought that Radio 2 was innovative (19%).

Under 35, 35-44 and Over 45 age categories Their view on BBC Radio



	U35 age group (n=170)	35-44 age group (n=172)	45+ age group (n=656)
Plays the most popular music	28%	37%	42%
Has big name presenters	43%	45%	39%
Appeals to everyone	44%	52%	49%
Attracts the largest audiences	38%	46%	45%
Has wide appeal	47%	50%	54%
Informs and educates the public	33%	37%	46%
Provides news and information	29%	48%	63%
Is Innovative	19%	20%	18%
Funded through the TV licence	41%	58%	65%
Different to commercial radio	43%	54%	57%

QA4b. Which of these statements describes what BBC radio means to you? Base: U35 (170), 35-44 (172), Over 45 (656)
Weighted

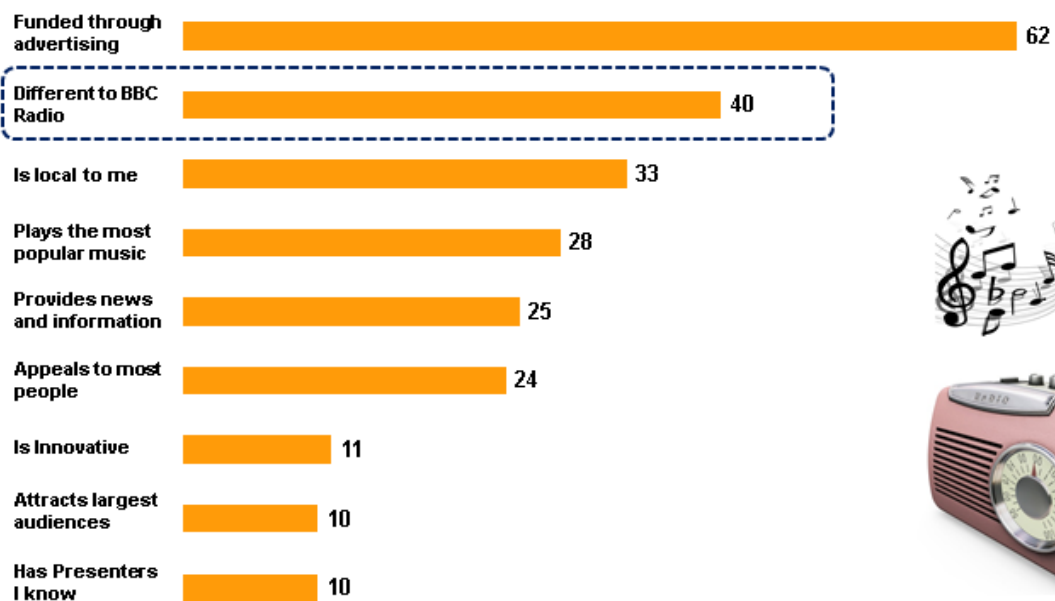


5.4 Radio 2 listeners attitude to commercial radio

When asked Radio 2 listeners about their views on commercial radio, 62% thought it was funded through advertising and a minority (40%) thought it was different to BBC Radio. 33% mentioned commercial radio's localness.

Only 2 in 5 of Radio 2 listeners think commercial radio is different to BBC Radio

BBC
RADIO



Q44a. Which of these statements describes what Commercial radio means to you? Base: Radio 2 (998) Weighted



However, it is also worth noting that Radio 2 listeners surveyed are less likely to listen to commercial radio than Radio 1 listeners and therefore awareness of commercial station content is likely to be lower.

6. Content

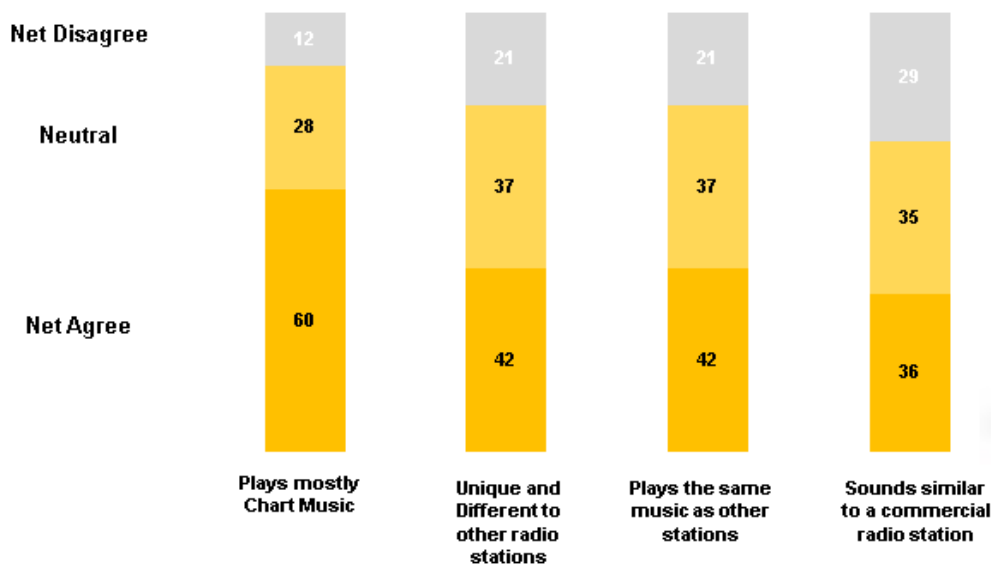
6.1 Content – Radio 1

Among Radio 1 listeners, there is a strong perception that Radio 1 is just like any other station. The majority of Radio 1 listeners didn't think that it was unique and different (only 42% thought it was) 60% of listeners identify Radio 1 with playing chart music; 42% thinking that it played the same music as other stations (this rises to 47% among the station's core youth audience of 15-29 year olds).

Less than a third of Radio 1 listeners disagree that it sounds similar to a commercial radio station.



Thinking specifically about Radio 1, please say how strongly you agree or disagree with the followings statements



QJ9. Thinking specifically about Radio 1, please say how strongly you agree or disagree with the statements on a scale of 1 to 5 where 5 means strongly agree and 1 means you strongly disagree Base: Radio 1 (993) Weighted



Of the 36% who agreed that BBC Radio sounded similar to a commercial radio, they were then asked why they said so through an open ended question. The word cloud below clearly indicated that it is the music BBC Radio plays that makes it similar to commercial radio.

You said that Radio 1 sounds similar to a commercial radio station, why do you think that?

BBC
RADIO



“(Radio 1) plays the same sort of music without the ads...”

“It sounds independent of the BBC”

“It plays a lot of very commercial, mainstream music that I hear on other channels”

“It’s very like other stations”

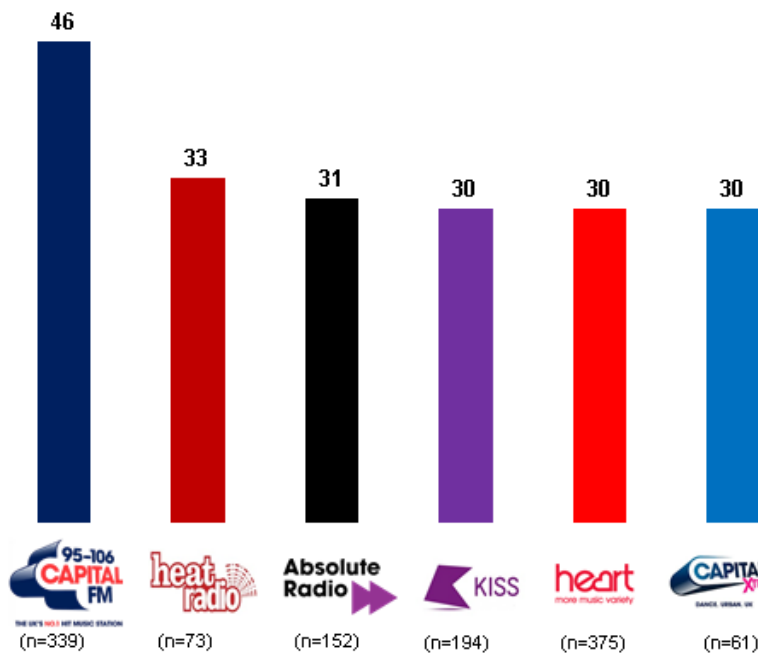
J9. You said that Radio 1 (R2) sounds similar to a commercial radio station, why do you think that? Base (358)



When asked about specific stations, nearly half of Radio 1 listeners (46%) thought that Radio 1 was the same or only slightly different to Capital FM. This was a sample of people who had experience of both Radio 1 and Capital Radio.

Almost half of those that listen to Radio 1 and Capital think that they are only slightly different or not at all different from each other.

Thinking about Radio 1, how different do you think this is from other commercial stations?
(Top 2 box: Not all different/Slightly different)



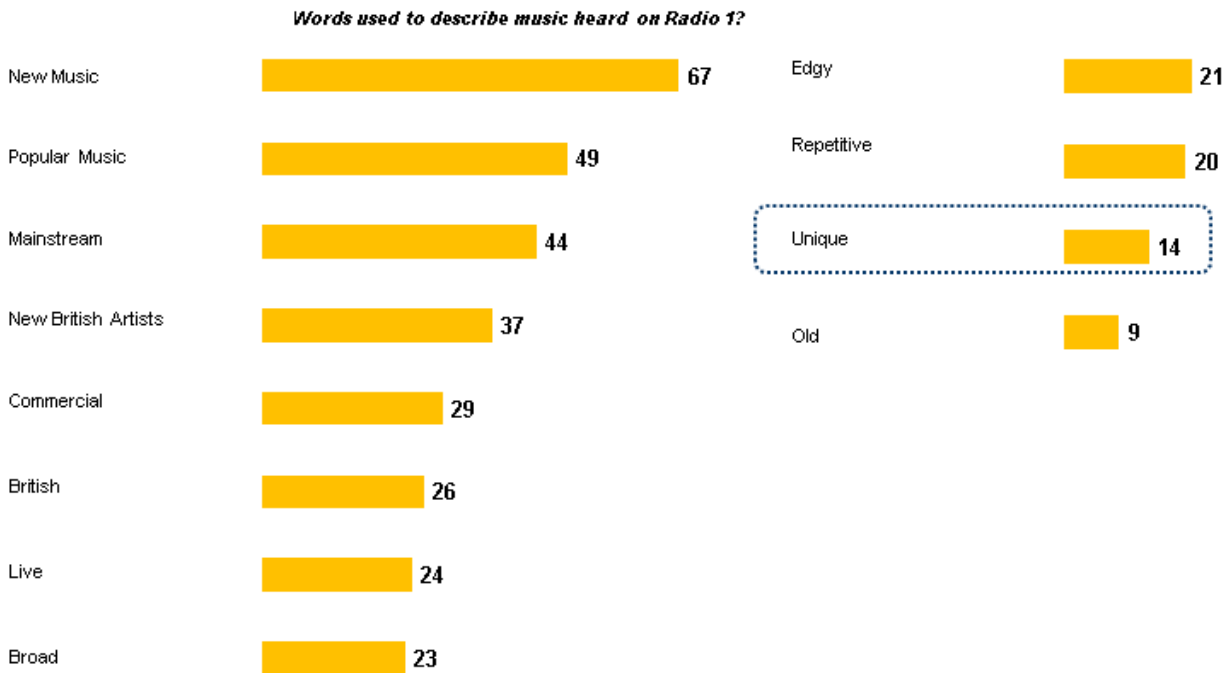
QC3. Thinking about Radio 1, how different do you think this is from other commercial stations?
Base: Radio 1 (993) Weighted

Looking across other stations, there does appear to be a large minority that see similarities between Radio 1 and its commercial rivals. One in three Radio 1 listeners think that the station is different (very different or extremely different) from its other main commercial rivals.

6.2 Music – Radio 1

Respondents were asked what words they would use to describe the music on Radio 1, 67% said that it played new music. However, 49% said that Radio 1 played popular music and 44% said that it played mainstream music. A minority of listeners (14%) stated that the music played was unique. This view was consistent across all listener groups. The chart below illustrates how Radio 1’s music rates.

Only 14% of Radio 1 listeners would describe the music played as “Unique”



G2. What words would you use to describe the music you hear on Radio 1? Base: (993)

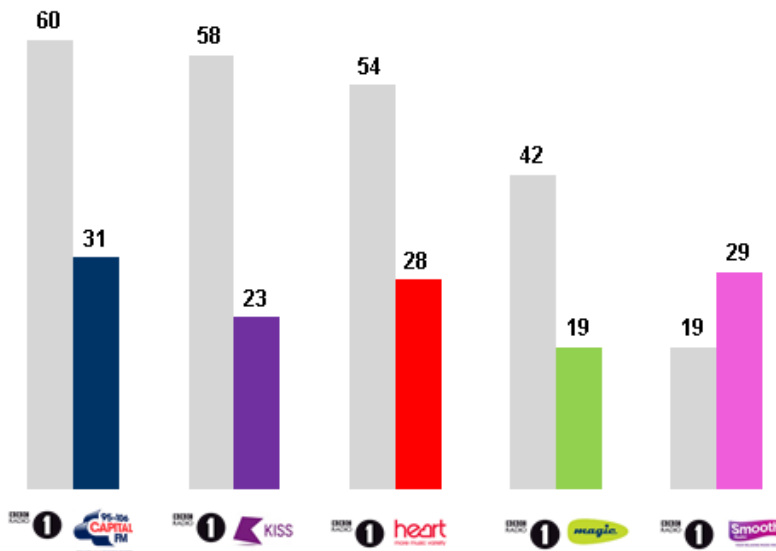


The respondents were played a series of montages of music containing the top 5 tracks played on the main commercial stations in the UK. When asked to identify which station is most associated with the top 5 chart hit music tracks played on Capital FM, 60% of listeners attributed these tracks to Radio 1. In addition, on hearing the top 5 tracks played on Kiss, 58% attributed this music to Radio 1.

Music played from commercial stations predominantly reminded listeners of Radio 1 instead.



Respondents listened to 5 clips representing music from 5 most played artists on Capital, Kiss, Magic, Heart & Smooth. Respondents were then asked : "Which radio station does it remind you of?"



QF3. Which radio station does it remind you of? Base: Radio 1 (993) Weighted

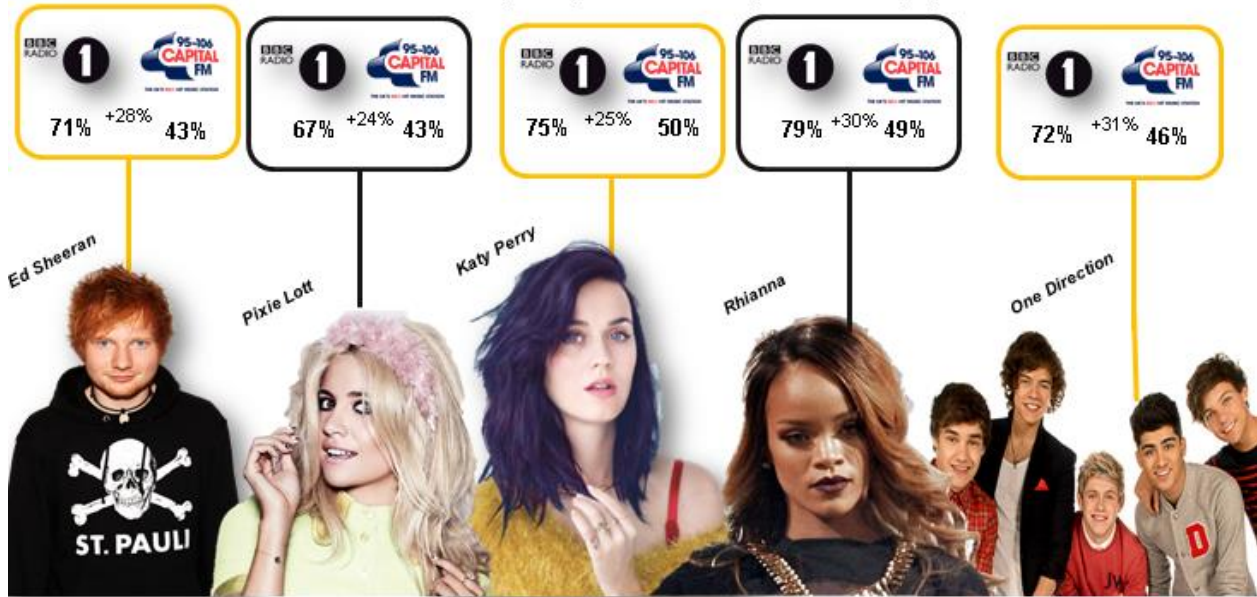


We also asked respondents to consider various artists and where they might expect to hear their music played. Nearly 80% attributed Rihanna to Radio 1. Three quarters thought that they would expect to hear a mainstream artist such as Katy Perry on Radio 1.

Mainstream artists are expected to be played on Radio 1, more so than any other station



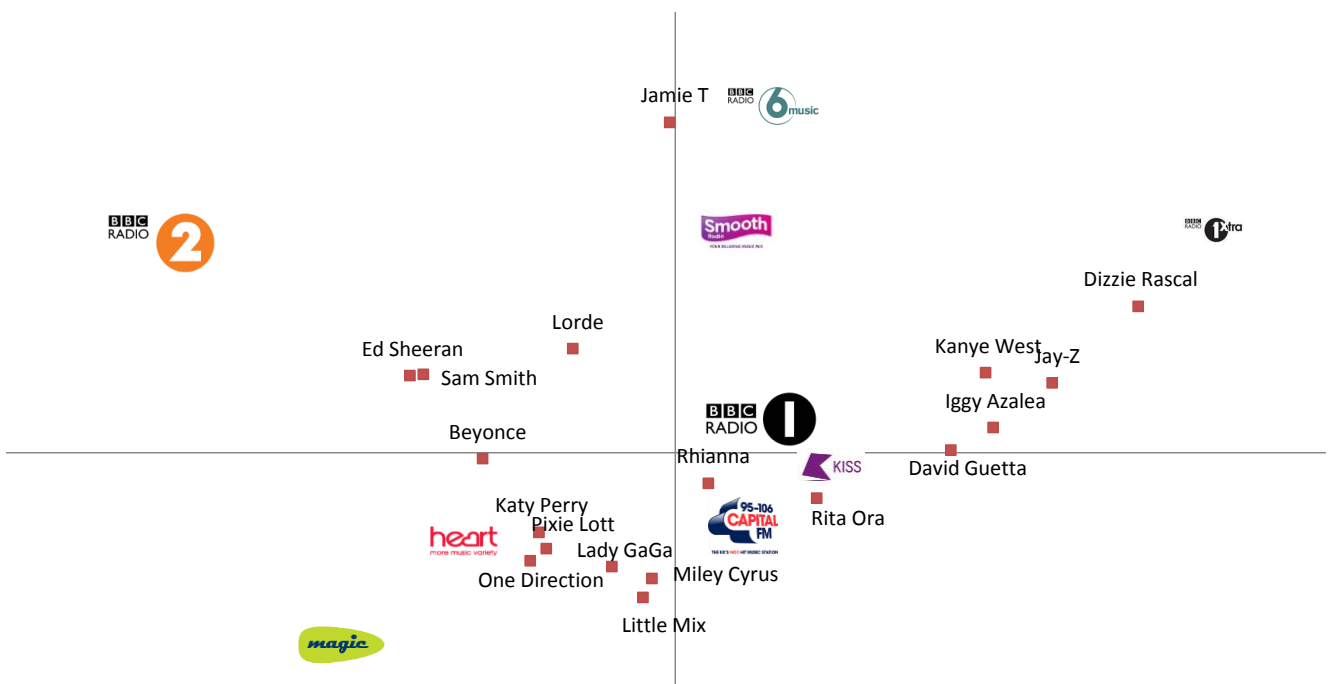
What station would you expect the following artists to be played?



QG1. On this screen are some music artists that you might hear on the radio. Click on the station where you would expect to hear them played. Base: Radio 1 (993) Weighted



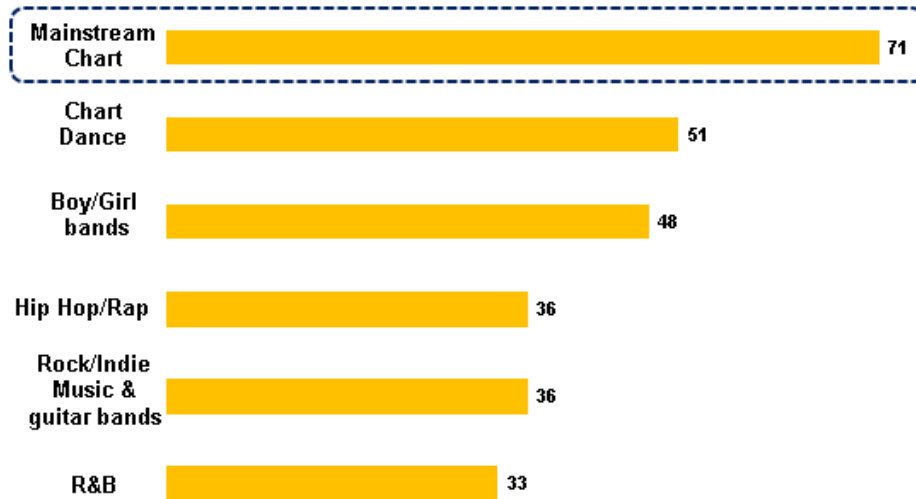
If this data is expressed as a correspondence map the picture is that there is a close association among Radio 1 listeners of particular artists and a high degree of overlap between Radio 1 and the main commercial stations.



Top 6 genres heard most often on Radio 1 – Mainstream Chart is the most commonly heard genre



Which of the following types of music do you often hear on Radio 1?



QF1. Which of the following types of music do you often hear on Radio 1?) Base: Radio 1 (993) Weighted



Respondents were asked to choose from an extensive list of music genres, and select the sorts of music they would expect to hear on Radio 1. The most common music was mainstream chart music (71%), followed by chart dance music (51%) and boy/ girl bands (48%).

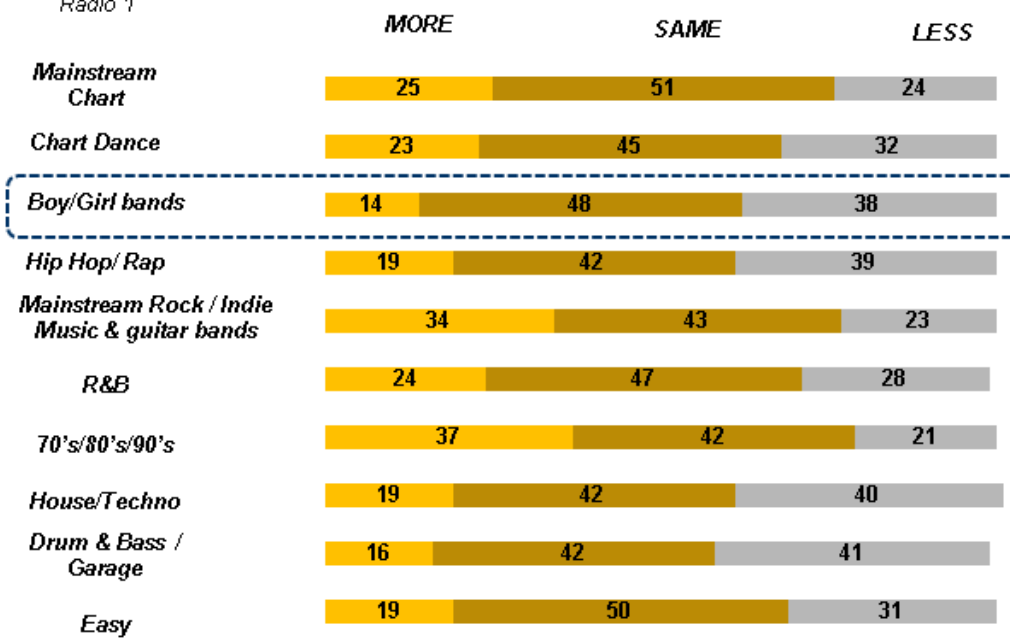
Among 15-24 year olds, 37% would like to have less boy and girl bands on Radio 1. 41% would like more guitar bands.

Over a third of Radio 1 listeners want less boy/girl bands being played



Listed by most heard genre on Radio 1

Would you like to hear more, less or the same amount of types of music on Radio 1?



QF2 For all the types of music on this list, whether you hear them on Radio 1 or not, would you like to hear more, less or the same amount of these types of music on Radio 1? . Base: Radio 1 (993) Weighted




There appears to be a desire to have more 70s/80s/90s music on Radio 1, (37% want more). However, this is the broadest category of music era and appears to be driven by over 35 year old listeners (41%).

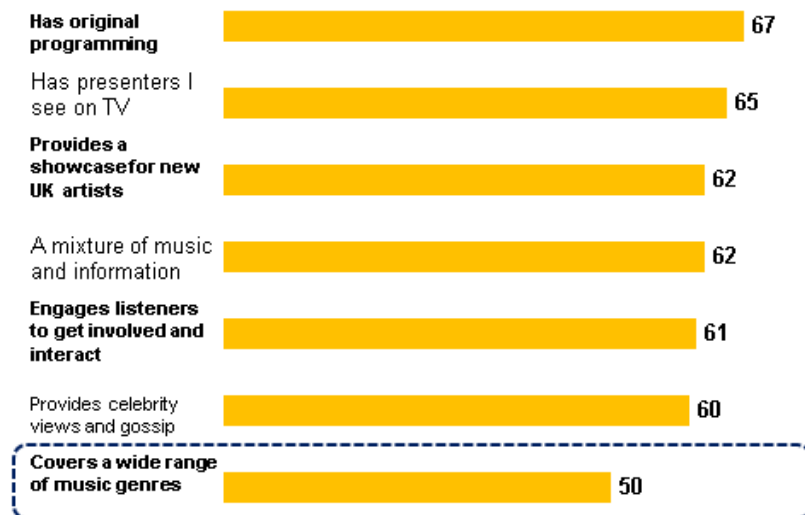
6.3 General Image of Radio 1

Through the research we tested how statements about the image of Radio 1 play in relation to other stations that listeners were aware of.

Looking at the content of Radio 1, the research shows that the station is more associated with providing celebrity views and gossip (60%) than covering a wide range of music genres (50%).

50% of Radio 1 listeners do not associate the station  to cover a wide range of music genres.

Which of the following statements do you associate with Radio 1?



QE1a. Which of the following statements do you associate with each of those statements? (Do not tick a box if you believe a statement does not apply to any station) Base: Radio 1 (993) Weighted

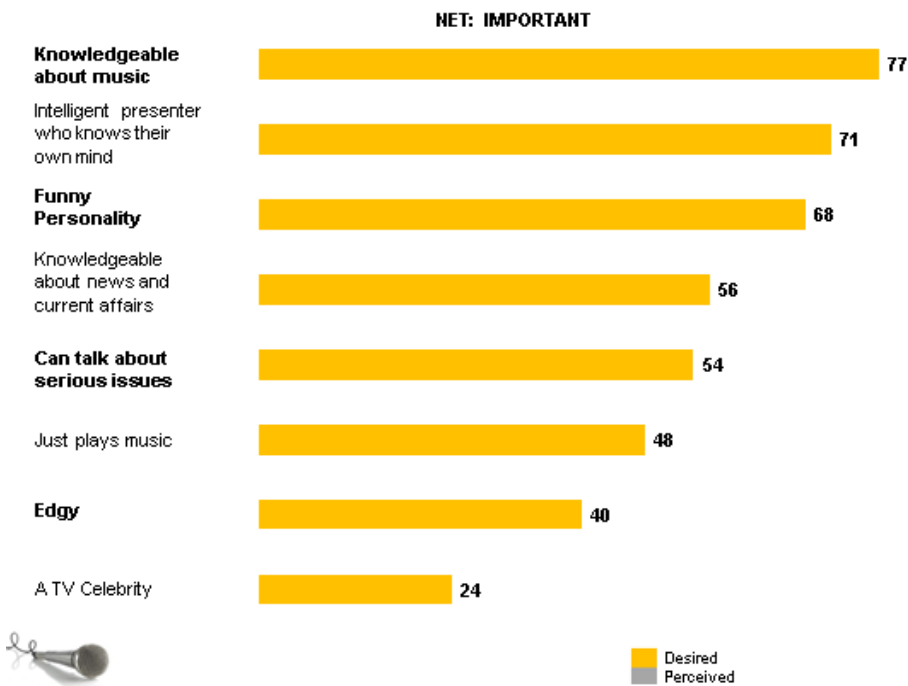


That said, it is clear that Radio 1 has ownership of TV presenters, original programming and being a showcase for British talent.

6.4 Presenters – Radio 1

Presenters are an important part of a radio station’s personality. Listeners are clear in what they regard as important qualities to a presenter. 77% say it is important for them to be knowledgeable about music; this rises to 79% for heavy listeners.

Radio 1 listeners want their presenters to be knowledgeable about music and intelligent



H1. Thinking about presenters on music radio stations and what they should be like. Using a scale of 1-to-5 where a "1" means you think an item is NOT IMPORTANT AT ALL and a "5" means you think it is VERY IMPORTANT. You can use the numbers 2, 3, or 4 if you feel in between. Base: Radio 1 (993) Weighted



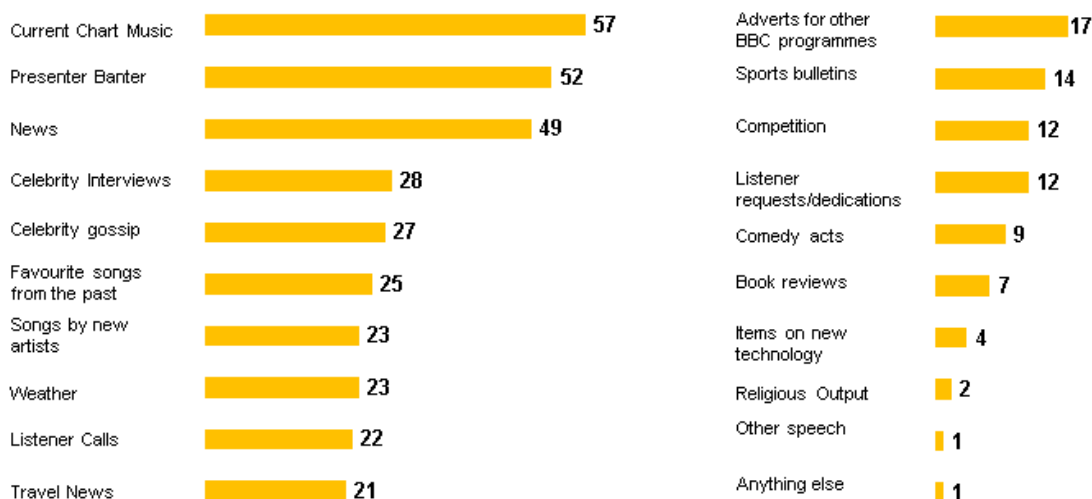
6.5 Radio 1 Breakfast

The 6am to 9am day part is a particularly important part of the radio day as it draws in listeners, which the station hopes will entice them to listen over a longer period. Radio 1 is no exception and it attracts nearly 6 million listeners a day. Those Radio 1 listeners that listened at breakfast were asked what they recall hearing on the show. The highest recalled aspect was current chart music (57%) followed by presenter banter (52%). Other key requirements, such as songs by new artists come out much lower (23%).

Celebrity content recall is higher than songs by new artists



What aspects do you remember from the show?

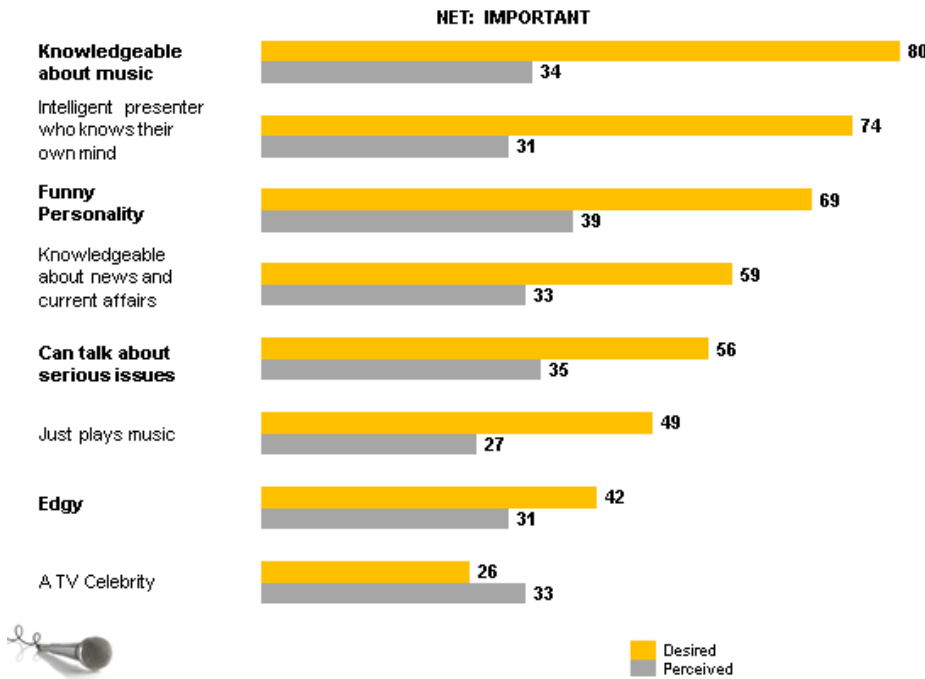


QD2/D3. What aspects do you remember from the breakfast show? (Do not tick a box if you believe a statement does not apply to any station) Base: Radio 1 (316) Weighted



Taking the statements regarding the sort of presenter that Radio 1 listeners want, we can see that the current breakfast presenter appears to fall short on a number of the factors that listeners would like. In particular, Radio 1 listeners would like their presenters to be very knowledgeable about music.

Significant disparity between desired and perceived qualities in presenter for Radio 1 breakfast show listeners



H1. Thinking about presenters on music radio stations and what they should be like. Using a scale of 1-to-5 where a "1" means you think an item is NOT IMPORTANT AT ALL and a "5" means you think it is VERY IMPORTANT. You can use the numbers 2, 3, or 4 if you feel in between. Base: Radio 1 (805) Weighted H2. Presenter most listened to characteristic



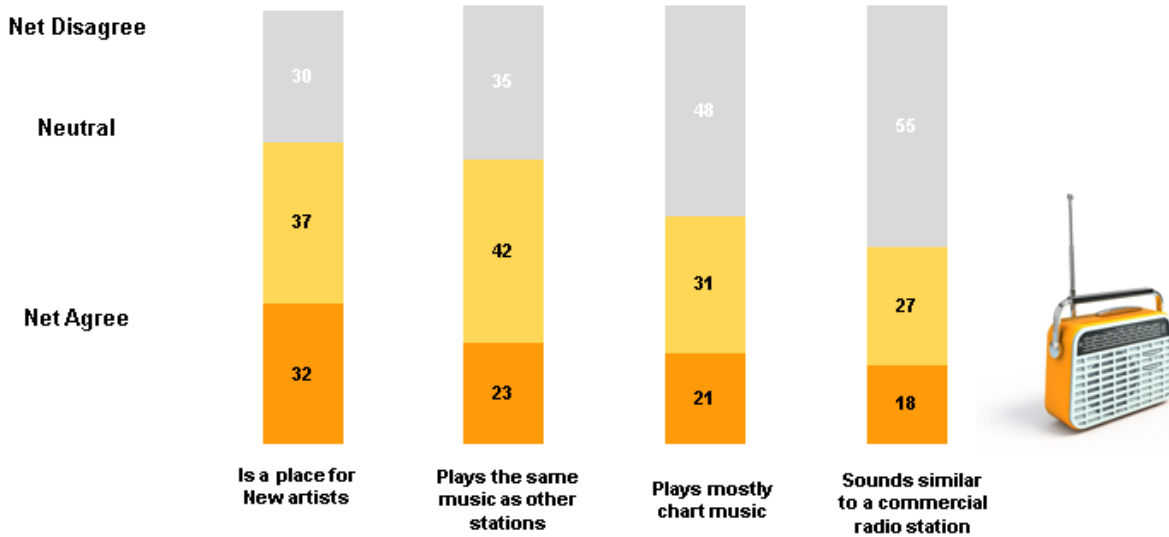
6.6 Content - Radio 2

Radio 2 listeners are less likely to think that their station sounds similar to a commercial station than their Radio 1 counterparts, with only 18% of Radio 2 listeners agreeing strongly. However, a quarter thought that it played the same music as other stations (this figure rises to 34% for under 29 year olds).

About 1 in 5 Radio 2 listeners agree that it plays the same music and sounds similar to commercial stations



Thinking specifically about Radio 2, please say how strongly you agree or disagree with the followings statements



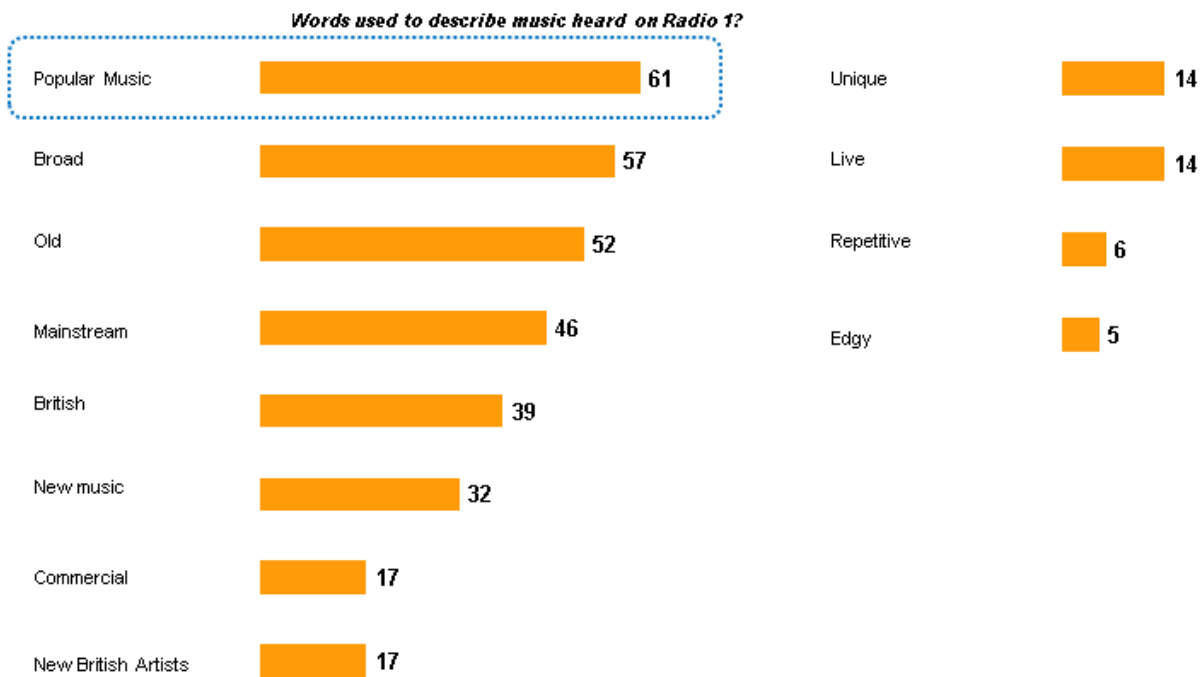
QJ9. Thinking specifically about Radio 2, please say how strongly you agree or disagree with the statements on a scale of 1 to 5 where 5 means strongly agree and 1 means you strongly disagree. Base: Radio 2 (998) Weighted



6.7 Music – Radio 2

Respondents were asked what words they would use to describe the music on Radio 2: 61% said that it played popular music, 57% said that it was broad and 46% said Radio 2 played mainstream music. Heavy listeners were more likely to say that Radio 2 played new British artists than listeners as a whole, however it is stressed that this was only mentioned by a quarter of heavy listeners. The chart below illustrates how Radio 2’s music rates.

Almost 2 out of 3 Radio 2 listeners would describe the music played as “Popular Music”



G2. What words would you use to describe the music you hear on Radio 2? Base: (998)

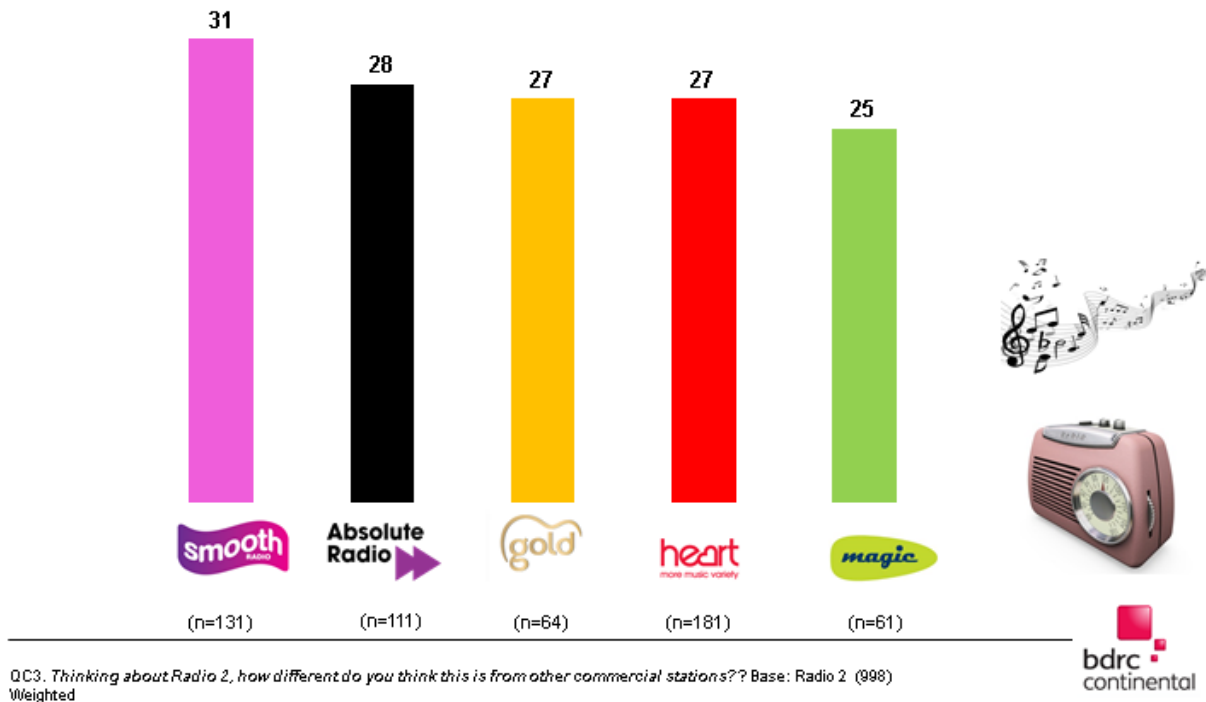


People with experience of both commercial radio and Radio 2 were asked how different the stations were between each other. Radio 2 listeners were less likely than Radio 1 listeners to admit that their main station of choice is similar to a commercial station. The station that is regarded as most similar to Radio 2 is Smooth Radio.

Radio 2 listeners think that its closest commercial competitor is Smooth Radio



Thinking about Radio 2, how different do you think this is from other commercial stations?
 (Top 2 box: Not all different/Slightly different)



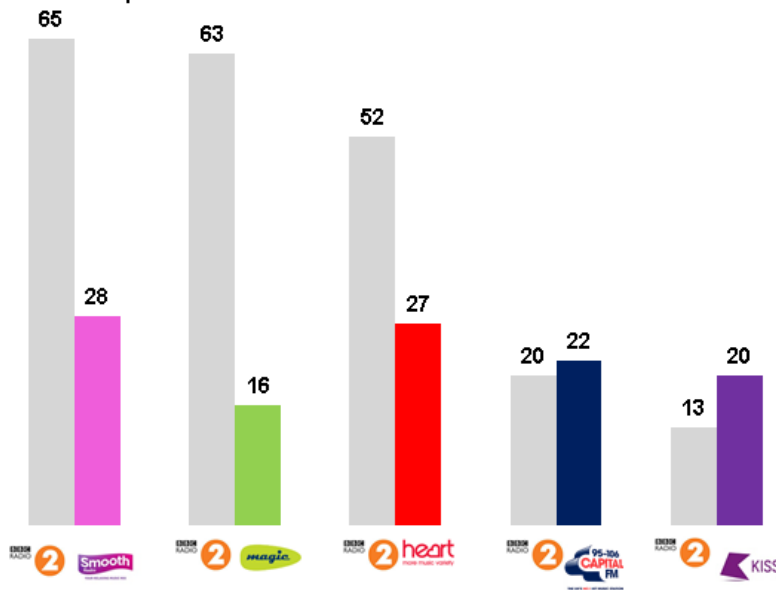
This perception was also borne out in responses to music. Listeners were played a series of montages of music containing the top 5 tracks played on the main commercial stations in the UK. When asked to identify which station is most associated with the tracks on hearing the top 5 tracks played on Smooth Radio, 65% said that they would most associate this music with Radio 2. Therefore, as far as music is concerned, Radio 2 listeners think that its closest commercial competitor is Smooth Radio.

Radio 2 was also highly associated with the top 5 tracks played on Magic (63%) and Heart (52%). Therefore it can be concluded that although Radio 2 listeners are less likely to say that Radio 2 is similar to commercial radio and does not play the same music, when they are actually played commercial radio music they are most likely to believe this to be Radio 2 output.

Music played from commercial stations predominantly reminded listeners of Radio 2 instead.



Respondents listened to 5 clips representing music from 5 most played artists on Capital, Kiss, Magic, Heart & Smooth. Respondents were then asked: "Which radio station does it remind you of?"



QF3. Which radio station does it remind you of? Base: Radio 2 (998) Weighted

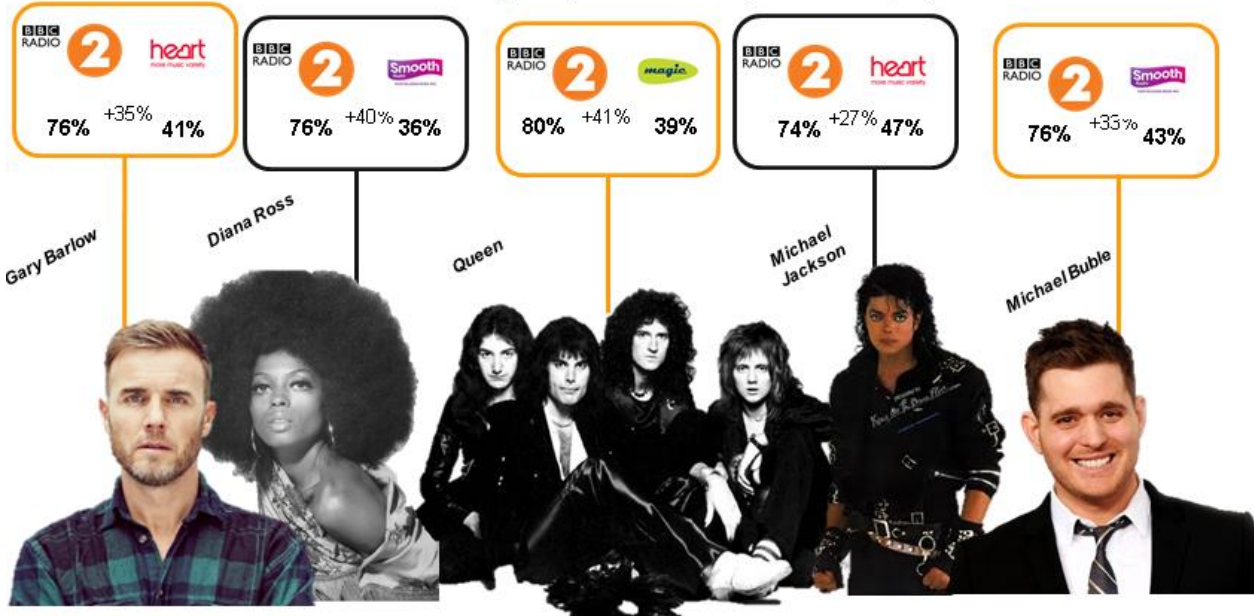


In addition to this, we asked respondents to consider various artists and where they might expect them to hear their music played. Nearly 80% attributed Queen to Radio 2 compared to the next highest Magic (39%). Just over three quarters stated that they would expect to hear Michael Bublé on Radio 2.

Artists are more often than not associated with Radio 2 than commercial stations



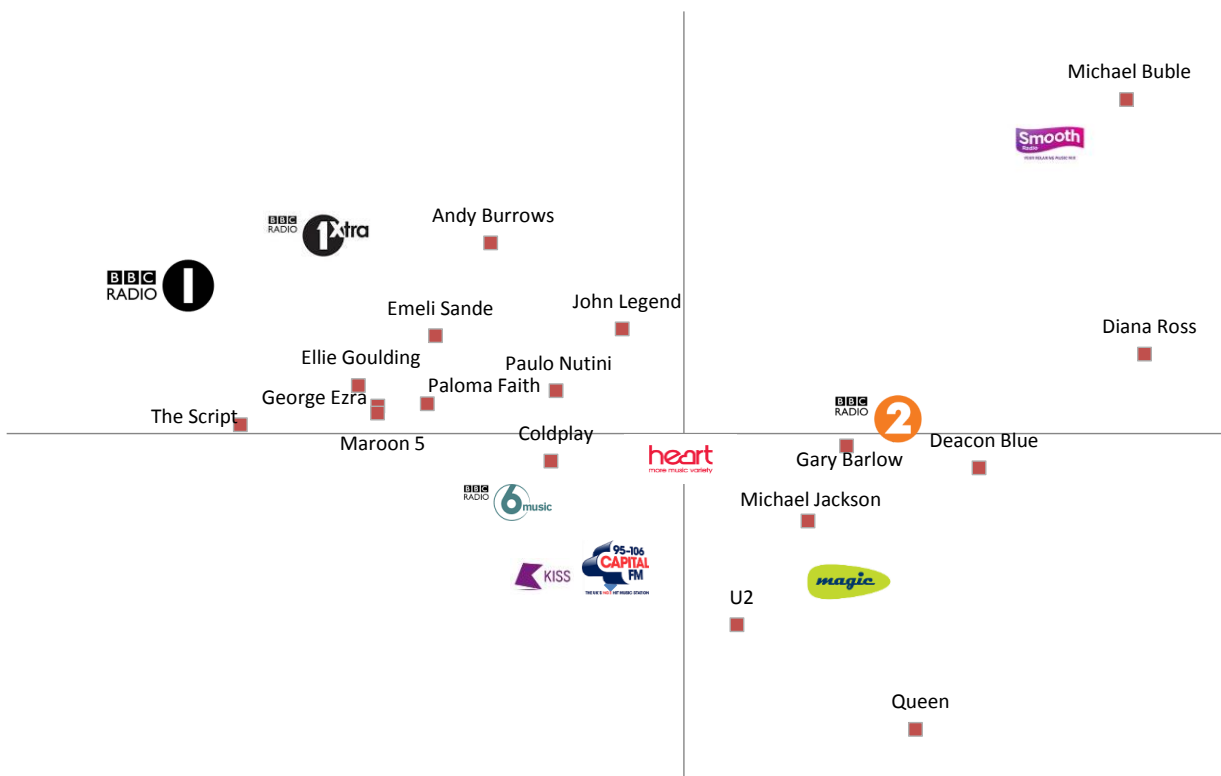
What station would you expect the following artists to be played?



QG1. On this screen are some music artists that you might hear on the radio. Click on the station where you would expect to hear them played. Base: Radio 2 (998) Weighted



Below is a correspondence map for the relationship between the artists and radio stations, based on responses from Radio 2 listeners. This further demonstrates that Radio 2 is perceived to be associated with artists that are also associated with Smooth and Magic as well as Heart.



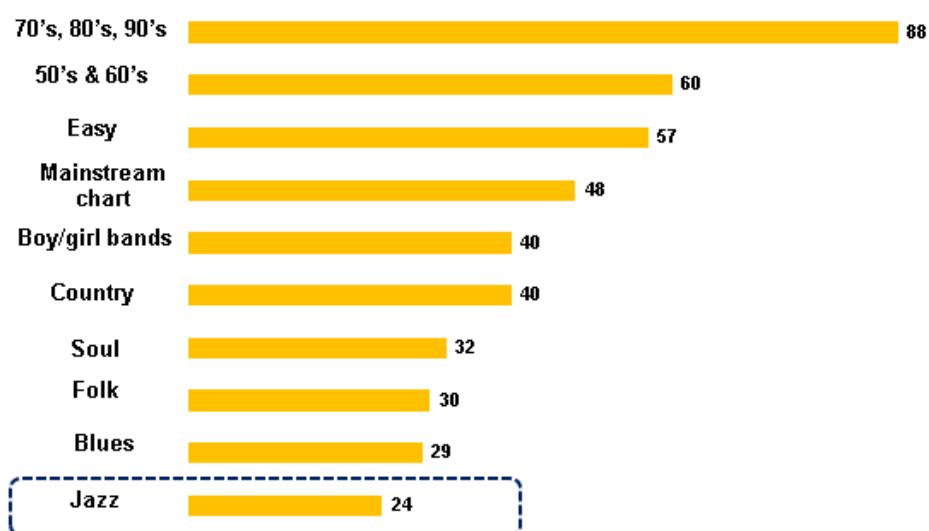
The most recalled music played on Radio 2 is 70s/80s/90s (88% recall hearing it on Radio 2). This is unsurprising given the breadth of this era and is highly recalled across all demographic and listener types (except for under 30 year olds where it drops to 65%). The next most recalled is 50s and 60s (59%) followed by Easy (57%). Not surprisingly the lowest mentioned genre was House /Techno (3%). Only 30% of listeners mentioned folk, which is significantly lower than Mainstream chart music (48%). Interestingly 53% of heavy listeners mention hearing this type of music on Radio 2.

Jazz is only the 10th most heard genre of music on Radio 2

BBC
RADIO



Which of the following types of music do you often hear on Radio 2?



QF1. Which of the following types of music do you often hear on Radio 2? Base: Radio 2 (998) Weighted



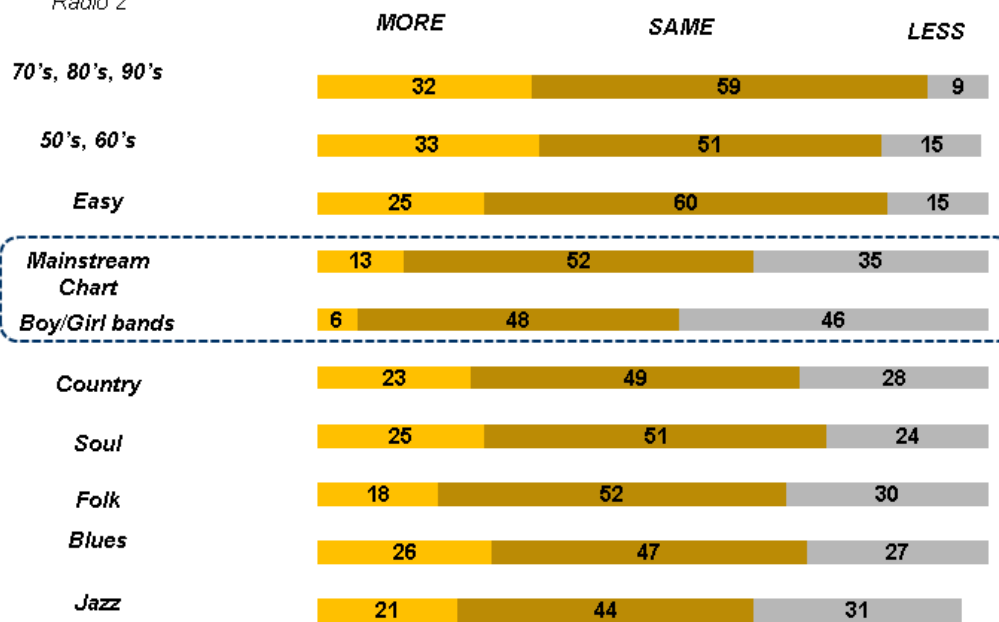
For the most recalled music era (70's, 80's and 90's) 59% want the same amount played with 32% wanting more. In specialist music genres Radio 2 is under-delivering to the demands of the audience. Only 21% of listeners surveyed said they had heard specialist music shows on the station. Indeed, a significant minority of listeners would like to hear more Blues (26%), (Jazz 21%) and Soul (25%) on Radio 2. Nearly a quarter (23%) would also like to hear more country (this is highest among the over 65s where 40% would like to hear more) on Radio 2. In contrast to this, the audience believes Radio 2 is over-delivering pop music content. For example, 35% of listeners would like Radio 2 to play less mainstream chart music and 46% want to hear fewer boy/girl band tracks.

1 in 3 Radio 2 listeners wish for less mainstream chart music



Listed by most heard genre on Radio 2

Would you like to hear more, less or the same amount of types of music on Radio 2?



GF2 For all the types of music on this list, whether you hear them on Radio 2 or not, would you like to hear more, less or the same amount of these types of music on Radio 2? . Base: Radio 2 (998) Weighted



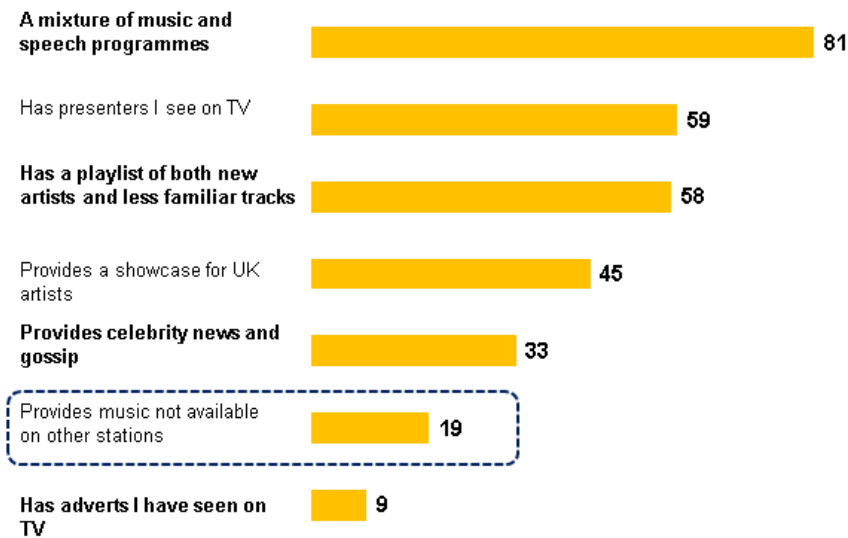
6.8 General Image of Radio 2

Unsurprisingly Radio 2 is most recognised for its general mission to provide a mixture of speech and music (81%) and its line-up of presenters who are also known for their TV work (59%). However, it is not perceived to play music that is not available elsewhere (19%).

Only 1 in 5 Radio 2 listeners state it provides music not available on other stations



Which of the following statements do you associate with Radio 2?



QE1b. Which of the following stations do you associate with each of these statements? (Do not tick a box if you believe a statement does not apply to any station) Base: Radio 2 (998) Weighted



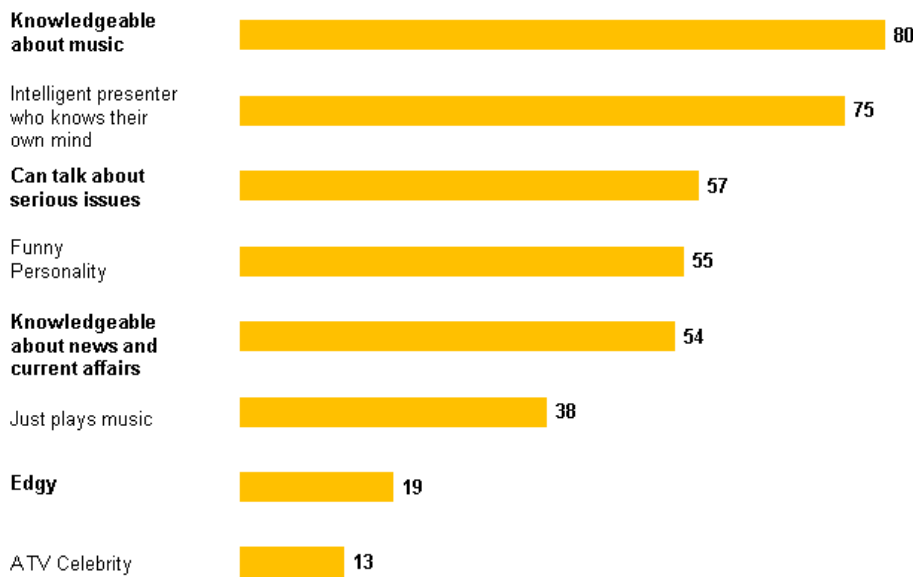
6.9 Presenters – Radio 2

When it came to Radio 2 listeners’ demands of radio presenters, 4 in 5 thought it was important that their presenter was knowledgeable about music. 3 in 4 also consider it importance that their radio presenter is intelligent and knows their own mind.

What do Radio 2 listeners want their presenters to be like?



NET: IMPORTANT



H1. Thinking about presenters on music radio stations and what they should be like. Using a scale of 1-to-5 where a "1" means you think an item is NOT IMPORTANT AT ALL and a "5" means you think it is VERY IMPORTANT. You can use the numbers 2, 3, or 4 if you feel in between. Base: Radio 2 (998) Weighted



Their ideal presenter would mix musical knowledge and talk seriously about the issues of the day but in complement to their fun side too. They do not want an edgy presenter nor someone who just plays the music.

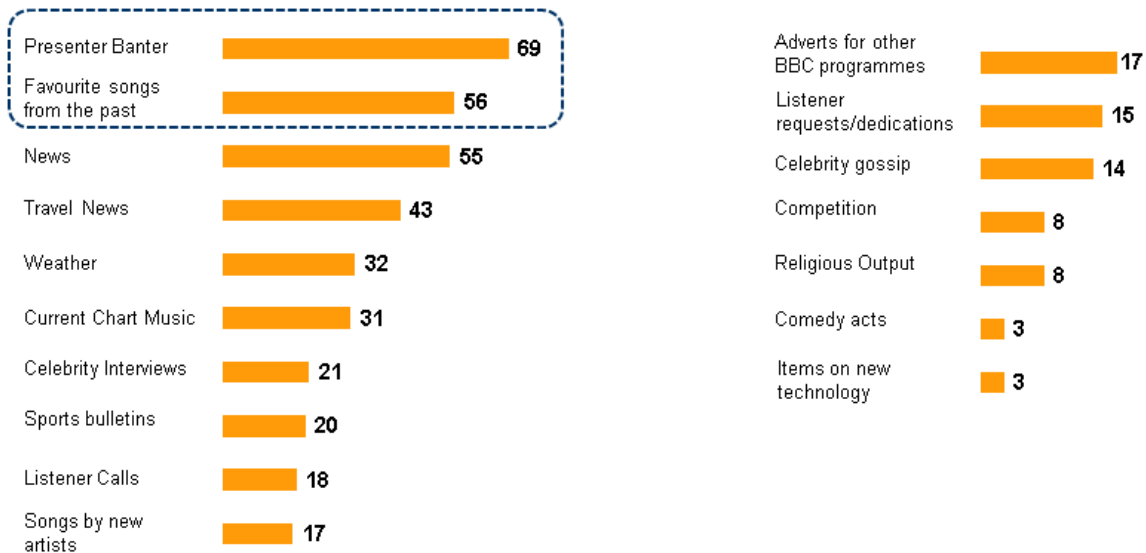
6.10 Radio 2 breakfast

The 6am to 9am day part is a particularly important part of the radio day as it draws in listeners, which the station hopes will stay with them for the day. Radio 2 is no exception and it attracts nearly 10 million listeners a day at breakfast. Those Radio 2 listeners that listened at breakfast were here asked what they recall hearing on the show. The highest recalled aspect was presenter banter (69%) followed by favourite songs of the past (56%) and then the news 55%. Other components recalled were adverts of other BBC shows (17%) and chart music (31%).

Listeners at breakfast are most likely to recall presenter banter (69%).



What aspects do you remember from the show?



GD2/D3. What aspects do you remember from the breakfast show? (Do not tick a box if you believe a statement does not apply to any station) Base: Radio 2 (350) Weighted



When comparing the desired attributes to the Radio 2 breakfast presenter, Chris Evans, is not seen as especially knowledgeable about music, although this is the main criteria for listeners. Radio 2 listeners are less interested in having a presenter who is a TV Celebrity and Evans over delivers on this attribute.

Significant gap between desired radio presenter characteristics and the reality say Radio 2 listeners

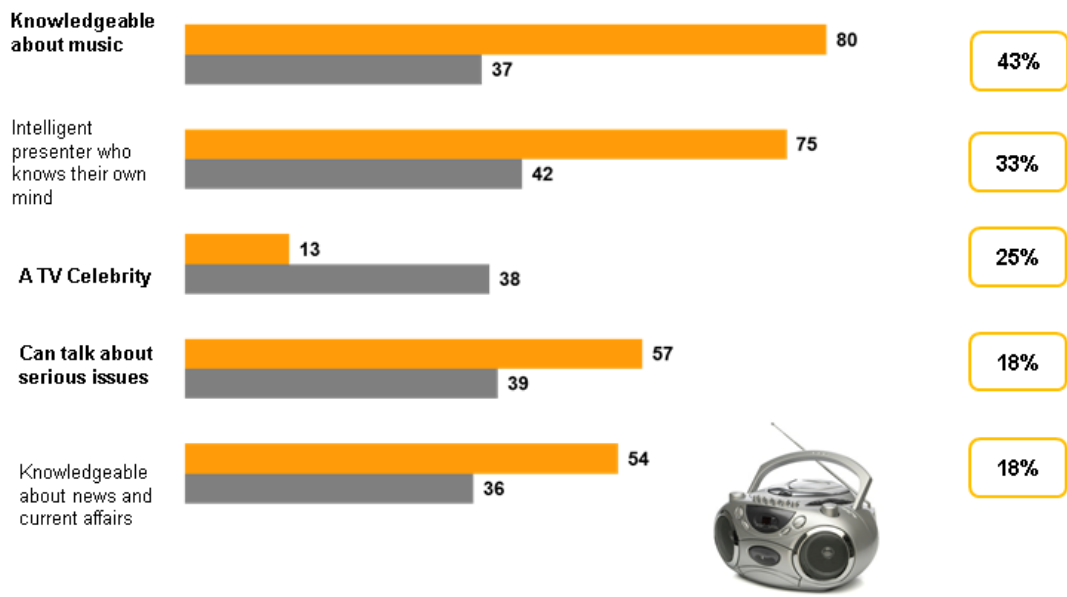
BBC
RADIO



Top 5 desired characteristics



Difference to aspired presenter characteristic and the reality (Radio 2 listeners who listen at breakfast time)



H1. Thinking about presenters on music radio stations and what they should be like. Using a scale of 1-to-5 where a "1" means you think an item is NOT IMPORTANT AT ALL and a "5" means you think it is VERY IMPORTANT. You can use the numbers 2, 3, or 4 if you feel in between. Base: Radio 2 (998) Weighted H2. Presenter most listen to characteristic Base Breakfast (601)



7. Service Licence

7.1 Service licence - Radio 1

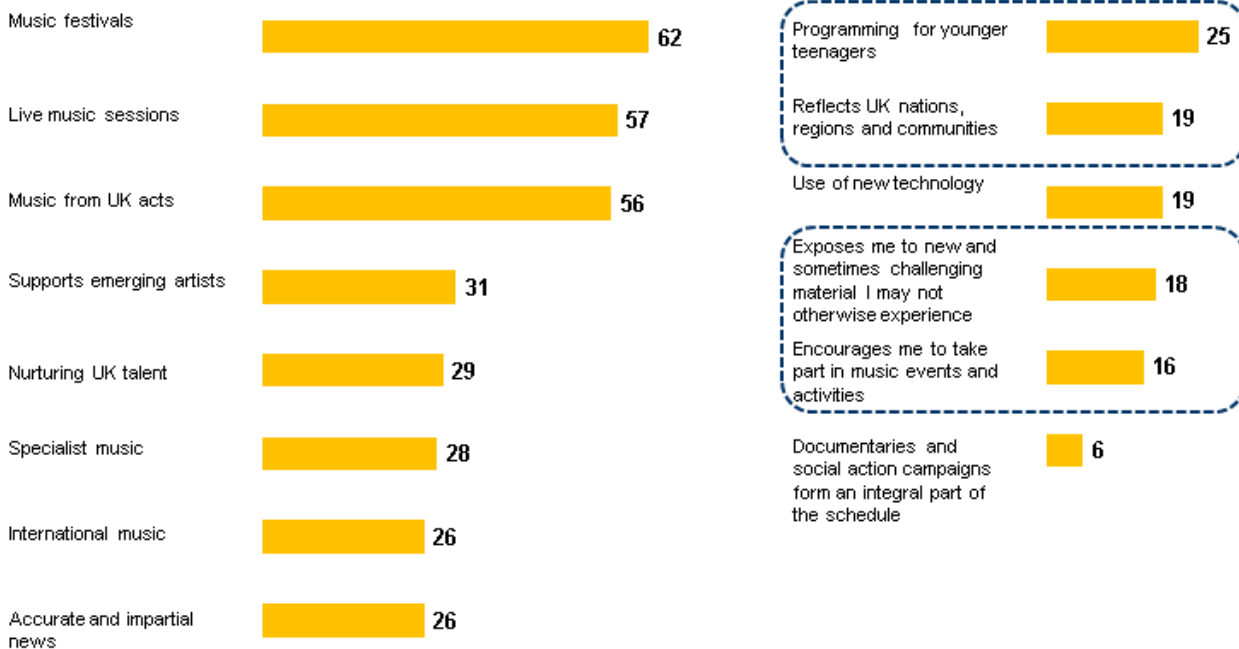
Radio 1 is governed by a service licence that requires the station to provide listeners with a range of content consistent with the BBC Charter and the delivery of its ‘public purposes’. In the research project we asked whether key elements of the service licence are associated with the station.

Radio 1 is not associated with certain elements of its public service remit by Radio 1 listeners. In general terms, only a third thought that BBC Radio informs and educates the public. More specifically, only 6% said that they associated ‘Documentaries and social action should form an integral part of the schedule’. Less than 1 in 5 (18%) believed Radio 1 was ‘exposing me to new and sometimes challenging material I may not otherwise experience’ and just a quarter (25%) said that they associated programming was for younger teenagers.

Most Radio 1 listeners (75% or more) do not associate it with key service licence agreements.



Which of the following do you associate with Radio 1?



J8 Which of the following do you associate with Radio 1? Base: (993)



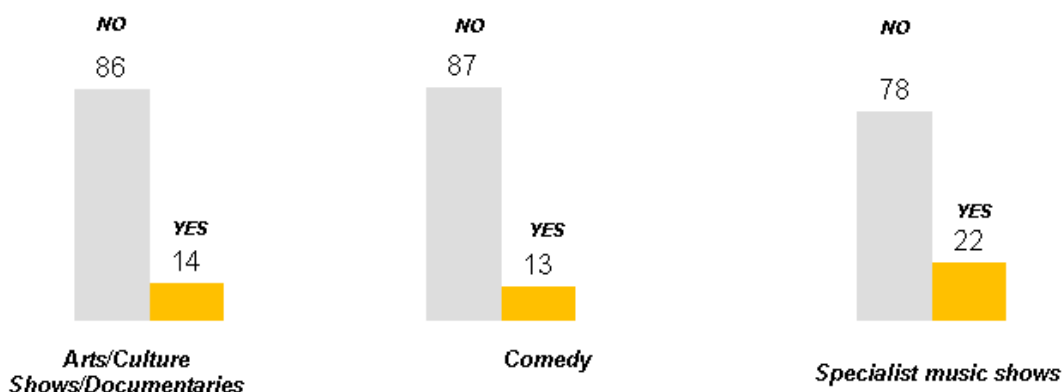
When asked about specialist shows broadcast on Radio 1 very few listeners could remember any:

- Arts /culture or documentaries (14%)
- Comedy shows (13%)
- Specialist music shows (22%)

Art, Culture and Comedy Content on Radio 1 put second to mainstream music



Can you name any of the following being recently broadcast on Radio 1?



J1a/J3a/J5aBase: (983)

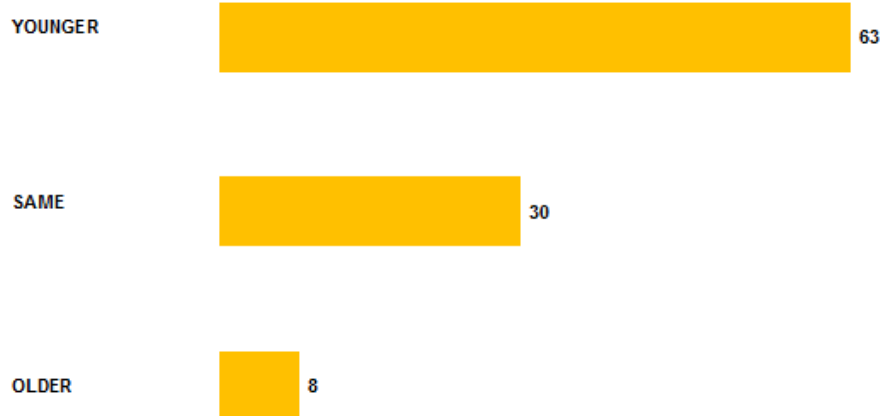


The findings above indicate that despite the fact that listeners think Radio 1 should be more distinctive from commercial radio, the content they hear means that this is not always the case, and where the content is different to the commercial stations, awareness of this content is low.

In addition, although Radio 1 is obliged to target listeners between 15-29 years of age, 38% of listeners over 30 years old think it is mainly aimed at people their age or older.

Do listeners aged over 30 think that other listeners are mainly older or younger than they are?

BBC
RADIO



C4. Thinking about the stations listed below please indicate if you think the listeners are mainly older than you, younger than you, or the same age as you?. Base: Radio 1 Over 30 (548) Weighted



7.2 Radio 1 Distinctiveness

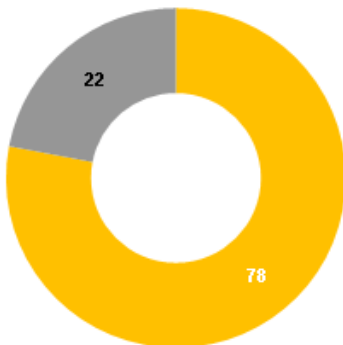
The findings from this report indicate that the majority of Radio 1 listeners do not think it is that different from commercial radio and they believe the music played is similar. When asked if Radio 1 should produce content that is distinct from commercial radio, 78% said they should. This figure is consistent across all listener types. Nearly half (46%) thought BBC Radio should be even more distinctive.

Over three quarters of Radio 1 listeners believe that the BBC budget (i.e. the licence fee) should be used to produce content that is different to commercial radio (78%). This once again is consistent across all Radio 1 listener groups.

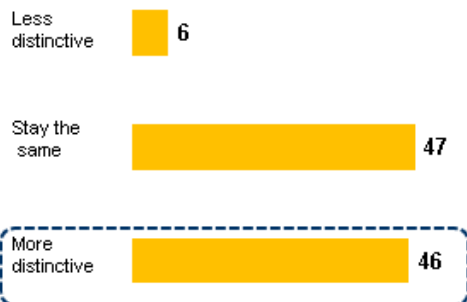
3 in 4 Radio 1 listeners think the BBC budget should be used to produce content that is distinctive from commercial radio – almost half say it should be more so than it is currently



Should the BBC budget be used to produce content that is distinctive from commercial radio?



Should the BBC budget be used to produce content that is more or less distinctive from commercial radio than it is currently?



K4 Base (993); K4a: Base (777)

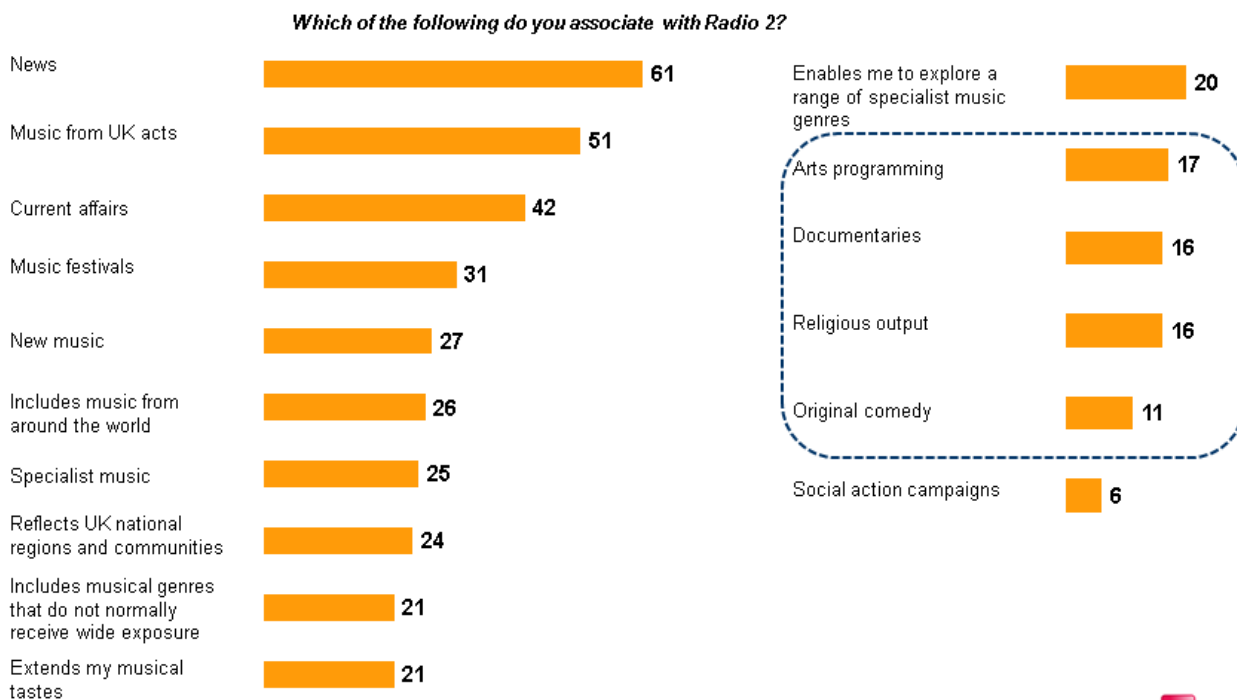


7.1 Service Licence - Radio 2

Radio 2 is governed by a service licence that requires the station to provide listeners with a range of content consistent with the BBC Charter and the delivery of its ‘public purposes’. In the research project, we asked whether key elements of the service licence are associated with the station.

There appears to be a perception among Radio 2 listeners that it is not associated with certain elements of its public service remit. A key condition of the Radio 2 service licence is ‘extending musical tastes’ but only 21% said that they associated the station with this. For ‘original comedy’, 11% said that they associated the station with this and ‘arts programming’ only 17% said that they associated the station with this.

Most Radio 2 listeners (75%-80%) do not associate it with key service licence conditions



J6b Which of the following do you associate with Radio 2? Base: (998)



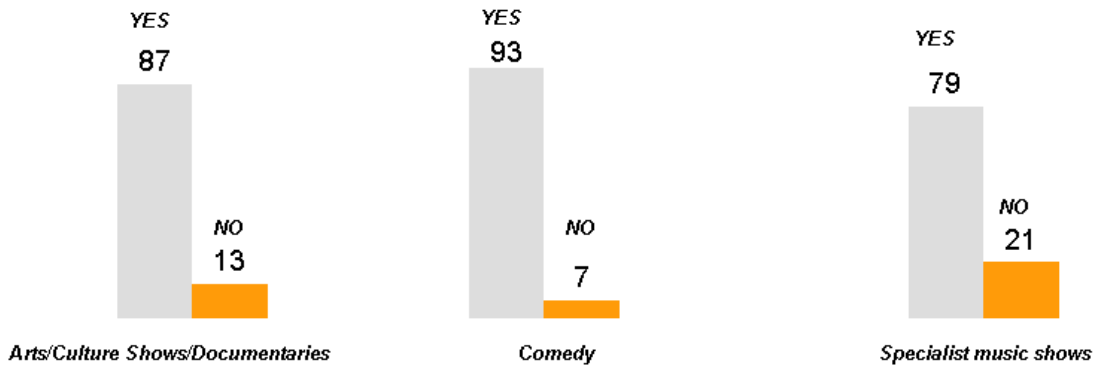
When asked about specialist shows broadcast on Radio 2 very few listeners could remember any:

- Arts /culture or documentaries (13%)
- Comedy shows (7%)
- Specialist music shows (21%)

Very little recall of cultural and comedy programming on BBC Radio 2



Can you name any of the following being recently broadcast on Radio 2?



J1a/J3a/J5a/J7 Base: (998)



Radio 2 is obliged to serve all age groups over 35, but 30% of under 35 year olds think it is aimed at their age group. In addition, 65% of listeners aged 35-44 believe it is aimed primarily at them.

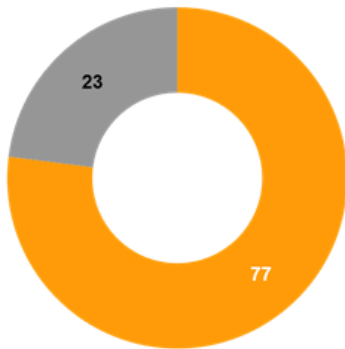
7.2 Radio 2 Distinctiveness

Over three quarters of Radio 2 listeners believe that the BBC budget (i.e. the licence fee) should be used to produce content that is different to commercial radio. This is highest among 45-54 year olds (84%) and people who listen after 7pm in the evening (80%).

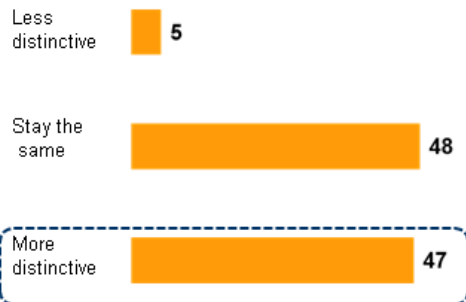
3 in 4 Radio 2 listeners believe BBC budget should be used to produce content that is distinctive from commercial radio – almost half say it should be more so than it is currently



Should the BBC budget be used to produce content that is distinctive from commercial radio?



Should the BBC budget be used to produce content that is more or less distinctive from commercial radio than it is currently?



K4 Base (998); K4a: Base (768)



Just under half of Radio 2 listeners think the BBC should spend its budget on producing content that is more distinctive from content from commercial radio. This is particularly true of heavy listeners, 52% of whom said Radio 2 should be more distinctive.

8. Advertising/promotion

8.1 Cross Promotion – Radio 1 and Radio 2

As part of our investigation, we asked BBC Radio listeners if they had seen advertising or promotion for radio stations recently. This sort of analysis will depend greatly on advertising or marketing campaigns that happen to be running at the time of the survey.

For Radio 1 listeners, although Heart was the highest with 20% recalling advertising or promotion, 15% of Radio 1 listeners claimed to have seen some sort of advertising for Radio 1. For Radio 2 listeners, awareness was lower, but still significant compared to other radio stations.

Awareness of Promotions and Adverts about Radio1 and Radio 2

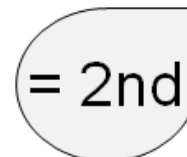


BBC
RADIO



15

Which station had you seen or heard the most?
(Ranking)



BBC
RADIO



8



I1. Have you seen any advertising or promotion about any of the following stations recently? Base: Radio 1 (993) Radio 2 (998)
I2. Which station had you seen or heard the most? Base: Radio 1 (993) Radio 2 (998)



When asked where they say this advert/promotion nearly 60% claimed they saw the advert between BBC TV shows.

Examples of the advertising seen and comments from listeners are included below.

Recall of BBC ads for television programmes, events and publications



You said you have seen or heard advertising or promotions of Radio 1/Radio 2, please tell me what the promotion was for?

"To promote Radio 2, their singer's latest albums and future gigs."

"Proms in the Park, Car-fest (north and south), beginning to talk of Children in Need."

"Playlist ad, also the Radio 2 magazine."

"Radio 2 weekly newsletter."

"I think it was for the new autumn TV and radio on BBC Radio 1."

"The Best Live Lounge Music."

What was the promotion for the other BBC show or event you heard?

"They advertise the live lounge on other BBC shows".

"Mainly things associated with Chris Evans as it is his show I listen to. Also charity events. Children in need and the proms"

"Glastonbury."

"Everyday they advertise for programmes – it's annoying."

"Great British Bake Off."

"Leeds/Reading festival on BBC 3".



Although awareness of advertising of Radio 2 was relatively low, advertising of other BBC shows and events on Radio 2 was much higher, over a third claim to have heard other BBC advertising on Radio 2. Radio 2 listeners were asked what BBC programme they recalled, the most common one mentioned was BBC Proms. Below is a word cloud of the mentions.

The Proms has high levels of recall by Radio 2 listeners



For Radio 1 this figure is similar, with 32% of Radio 1 listeners claiming that they had heard advertising of other BBC shows on Radio 1. Not surprisingly this was highest among heavy listeners (41%) and those listening after 7pm (41%).

Radio 1 listeners were asked what BBC programme they recalled, the most common one mentioned was Doctor Who. Below is a word cloud of the mentions.

Doctor Who is the most remembered programme by Radio 1 listeners

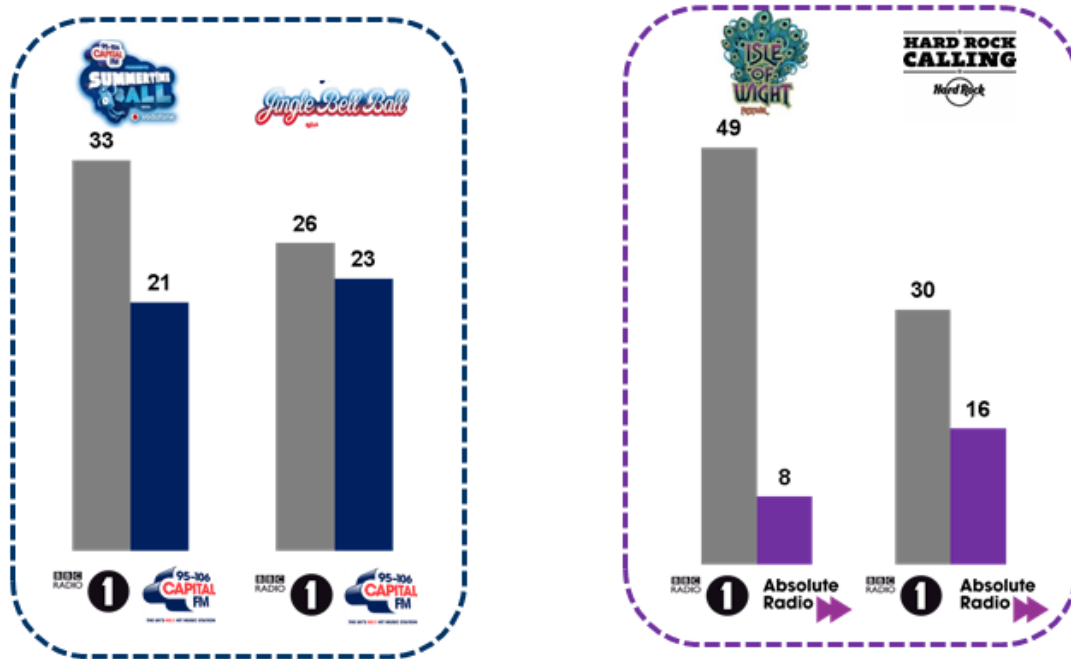


Radio 1 listeners were subsequently asked which radio station they associated with particular events. Radio 1 achieved a significant over claim on other stations events, for example Capital Radio’s Summer Time Ball; 33% thought it was a Radio 1 event and even 29% of heavy Radio 1 listeners thought it was a Radio 1 event.

Capital and Absolute associated events and festivals are perceived to be associated more with Radio 1



Which station do you associate with these events?



Q19. Which station do you associate with these events? Base: (993)



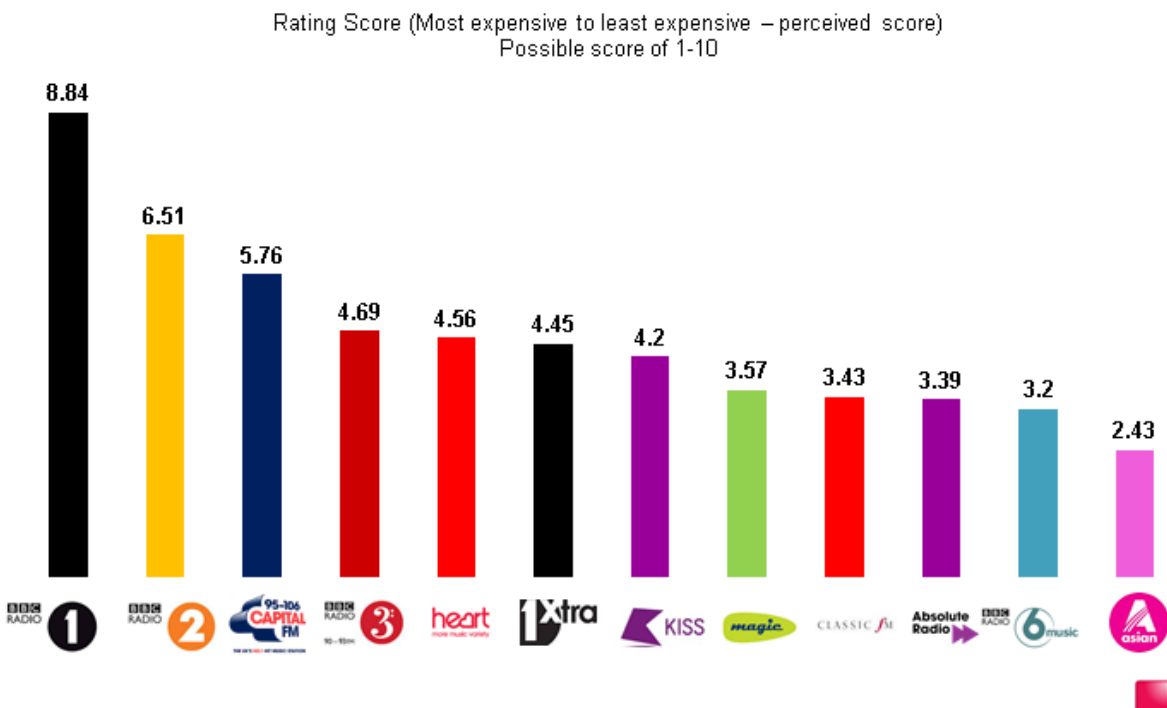
This clearly demonstrates a ‘halo-effect’ of Radio 1’s marketing and promotion of live events, and the impact on commercial stations seeking to invest in their own events, or sponsor exist concerts or festivals.

9. Cost of Radio

9.1 Radio 1

Respondents were asked to rank a list of stations in terms of how much they cost to run. As this was an online study, respondents could drag and drop stations into a position that they thought reflected the cost of that station in relation to the others. For 67% of respondents, Radio 1 is ranked as the most expensive station. The chart below gives a “ranking score” of all stations.

Radio 1 is perceived to be the most expensive to run by Radio 1 listeners



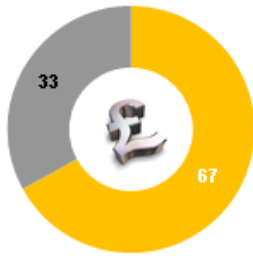
QK1. Please rank the following radio stations in the order of which you believe is the most expensive to run
Base: Radio 1 (993) Weighted



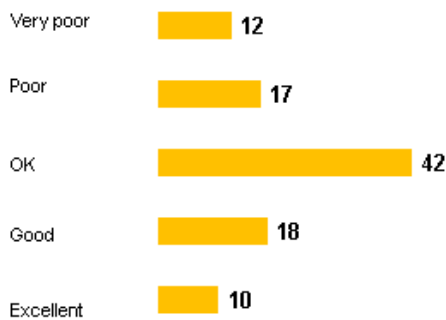
Respondents were asked how much they thought it cost to run Radio 1 for a year. About half of respondents estimated it at less than £10 million, with the average estimate of nearly £16 million. Heavy listeners and those listening after 7pm in the evening estimated the cost of Radio 1 to be higher than the average (just over £17 million), but this was still significantly lower than the actual content budget of over £40 million.

Radio 1 listeners underestimate cost of running the station by £24 million. 3 in 10 say this is poor value for money

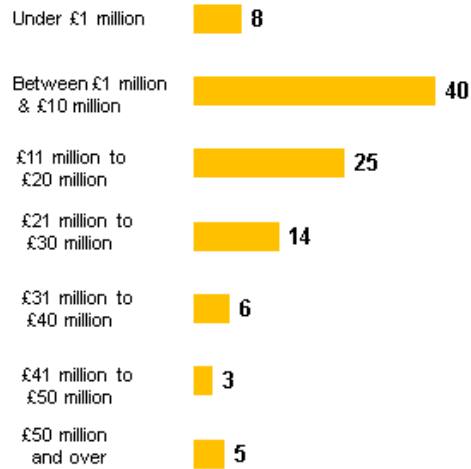
2 in 3 Radio 1 listeners ranked the station the most expensive to run



How would you rate Radio 1 in terms of value for money?



Estimated cost to run Radio 1



Average Estimate: £15.84 million

Actual cost: £40.2 million

K1. Please rank the following radio stations in the order of which you believe is the most expensive to run? Base: (993)
 K2a. How much would you estimate it costs to run Radio 1 for a year? Base: (993)
 K2b. You said Radio 1 costs (K2a answer). It actually costs £40.2 million to run Radio 1/Radio 2 for a year. On a scale of 1 to 5 where 5 is excellent value for money and 1 is very poor value for money, how would you rate Radio 1 in terms of value for money? Base: (993)

When asked what they thought of this figure in terms of value for money, only 10% thought that it was excellent value for money (16% for heavy listeners) with a further 18% saying it was good value for money. This is broadly the same as those who thought it was poor (17%) or very poor (12%) value for money. However, regular listeners such as those responding to this survey would normally be expected to score much higher than average on value for money.

9.2 Radio 2

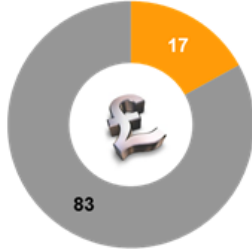
The same methodology was used to rank the cost of Radio 2 and other stations. For 17% of respondents Radio 2 is ranked as the most expensive station (39% ranked it as the 2nd most expensive after Radio 1).

Respondents were asked how much they thought it cost to run Radio 2 for a year. About half of respondents estimated it at less than £10 million, with the average estimate of just over £15 million. Men estimated the cost of Radio 2 at over £17 million. Heavy listeners and those listening after 7pm in the evening estimated the cost of Radio 2 higher than the average (just over £17 million), but this was still significantly lower than the actual cost of over £48 million.

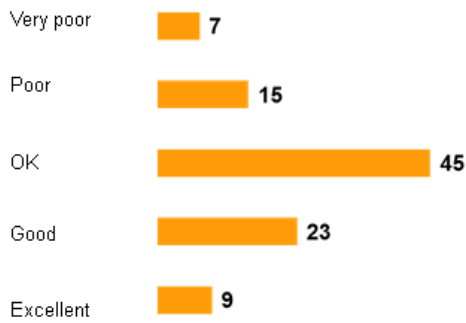
Radio 2 listeners underestimate cost of running the station by £32 million. 1 in 4 say this is poor value for money



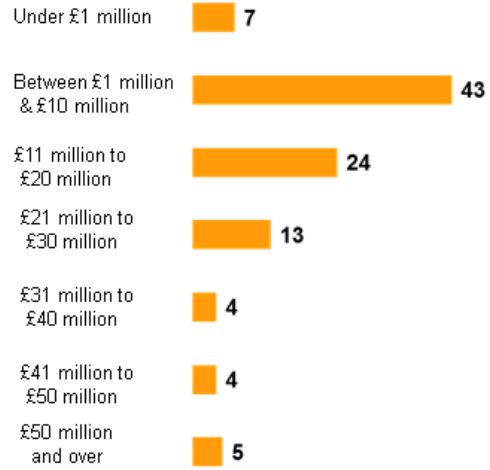
4 in 5 think Radio 2 is not the most expensive station to run



How would you rate Radio 1 in terms of value for money?



Estimated cost to run Radio 1



Average Estimate: £15.34 million

Actual cost: £47.8 million

K1 Please rank the following radio station in the order of which you believe is the most expensive to run? Base: (998)
 K2a. How much would you estimate it costs to run Radio 1 for a year? Base: (998)
 K2b. You said Radio 1 costs (K2a answer). It actually costs £40.2 million to run Radio 1/Radio 2 for a year. On a scale of 1 to 5 where 5 is excellent value for money and 1 is very poor value for money, how would you rate Radio 1 in terms of value for money? Base: (998)



When asked if they thought of this figure in terms of value for money, only 9% thought that it was excellent value for money this rises to 15% of heavy listeners and 12% of people who listen after 7pm thought that it was excellent value for money.

10. Appendix

10.1 Sample profile – Radio 1

Work Status: Full-time	Work Status: Part-time	Work status: Non-working	
7368.9	2111.9	6013.6	15494.4
48	14	39	%
Adults 15+	Reach (000's)	15496.3	
Men 15+	Reach (000's)	8132.1	
Women 15+	Reach (000's)	7364.3	
			%
Men 15-24	Reach (000's)	559.1	4
Men 25-34	Reach (000's)	932.9	6
Men 35-44	Reach (000's)	1384.9	9
Men 45-54	Reach (000's)	1878.6	12
Men 55-64	Reach (000's)	1566.9	10
Men 65+	Reach (000's)	1809.6	12
Women 15-24	Reach (000's)	416.7	3
Women 25-34	Reach (000's)	735.3	5
Women 35-44	Reach (000's)	1282.9	8
Women 45-54	Reach (000's)	1731.9	11
Women 55-64	Reach (000's)	1436.4	9
Women 65+	Reach (000's)	1761.2	11
P1/P2			
MAIN STATION (A3a)		50%	
OTHER (A3c)		50%	

Data also weighted by BBC Region

10.2 Sample Profile – Radio 2

Work Status: Full-time	Work Status: Part-time	Work status: Non-working	
7368.9	2111.9	6013.6	15494.4
68	20	56	%
Adults 15+	Reach (000's)	15496.3	
Men 15+	Reach (000's)	8132.1	
Women 15+	Reach (000's)	7364.3	
			%
Men 15-24	Reach (000's)	559.1	10
Men 25-34	Reach (000's)	932.9	17
Men 35-44	Reach (000's)	1384.9	26
Men 45-54	Reach (000's)	1878.6	35
Men 55-64	Reach (000's)	1566.9	29
Men 65+	Reach (000's)	1809.6	34
Women 15-24	Reach (000's)	416.7	8
Women 25-34	Reach (000's)	735.3	14
Women 35-44	Reach (000's)	1282.9	24
Women 45-54	Reach (000's)	1731.9	32
Women 55-64	Reach (000's)	1436.4	27
Women 65+	Reach (000's)	1761.2	33

P1/P2

MAIN STATION (A3a)

50%

OTHER (A3c)

50%

Data also weighted by BBC Region

10.3 Radio listening profile

Although the methodology was not meant to replicate RAJAR, the survey asked questions about radio listening and stations listened to and the findings were weighted to the demographic profile of weekly listeners. This listening profile was broadly consistent with listening habits measured by RAJAR, but a full breakdown is provided below, for both Radio 1 and Radio 2.

10.4 Profile – Radio 1

According to the survey, the mean age of Radio 1 listeners was 36 years old with 45% in the 15-29 year old age group. They listened on average just over 5 days a week with 46% claiming to listen everyday (including weekends). On an average weekday the Radio 1 listeners surveyed listened to just over 2 hours a day and 61% listened to the breakfast show.

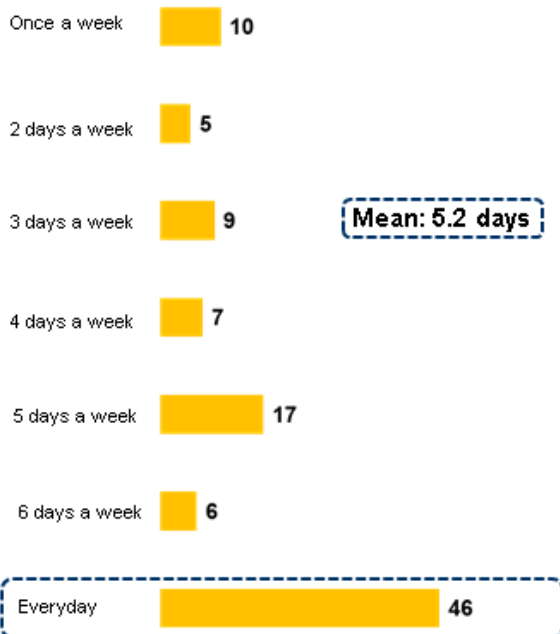
Only 34% of Radio 1 listeners listen outside peak hours (after 7pm) and very few (5%) exclusively listen off peak.

Almost half of Radio 1 listeners surveyed listen to the radio on a daily basis, a quarter listen between 1 and 2 hours

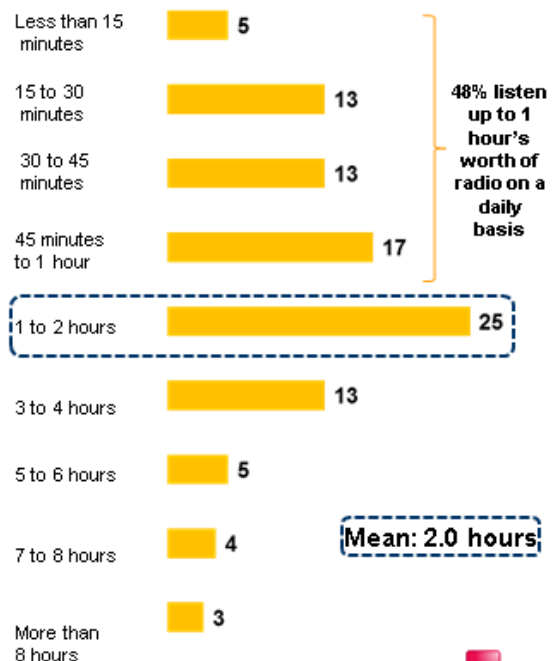
BBC RADIO



How often would you say you listen to the radio?



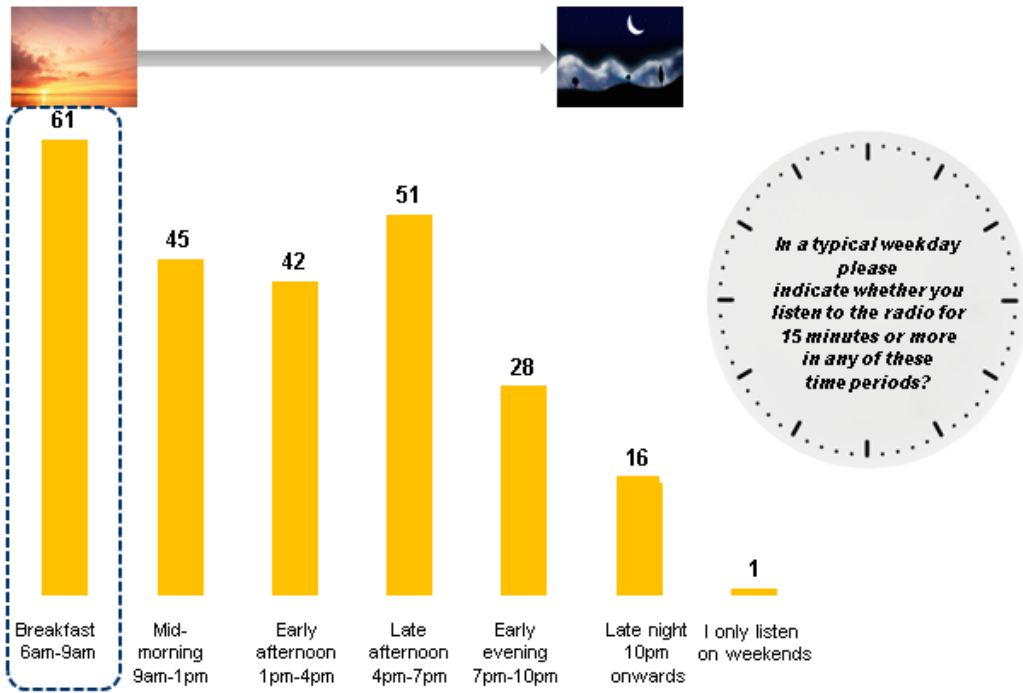
How much time do you spend listening to music radio on an average weekday?



QA1a. How often would you say you listen to the radio? Base: (993) Weighted
 QA1b. How much time do you spend listening to MUSIC radio on an average weekday Base: (993) Weighted



Almost 2 in 3 Radio 1 listeners surveyed listen to radio at breakfast time, over half listen in the afternoon



Q.A2. In a typical weekday, please indicate whether you listen to the radio for 15 minutes or more in any of these time periods? Base: (993) Weighted

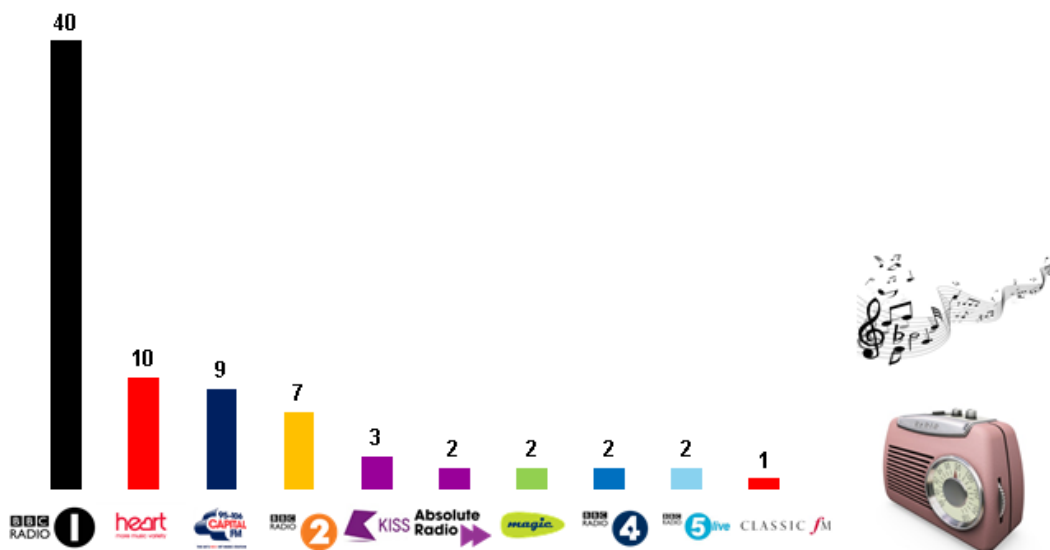


Respondents were asked which station was regarded as their main station that they had been listening to.

40% of respondents regarded Radio 1 as the main station they listened to in the last week



Over the past week, which radio station did you listen to most?



A3a. What radio stations have you listened to most in the last week? Base: Radio 1 (993) Weighted



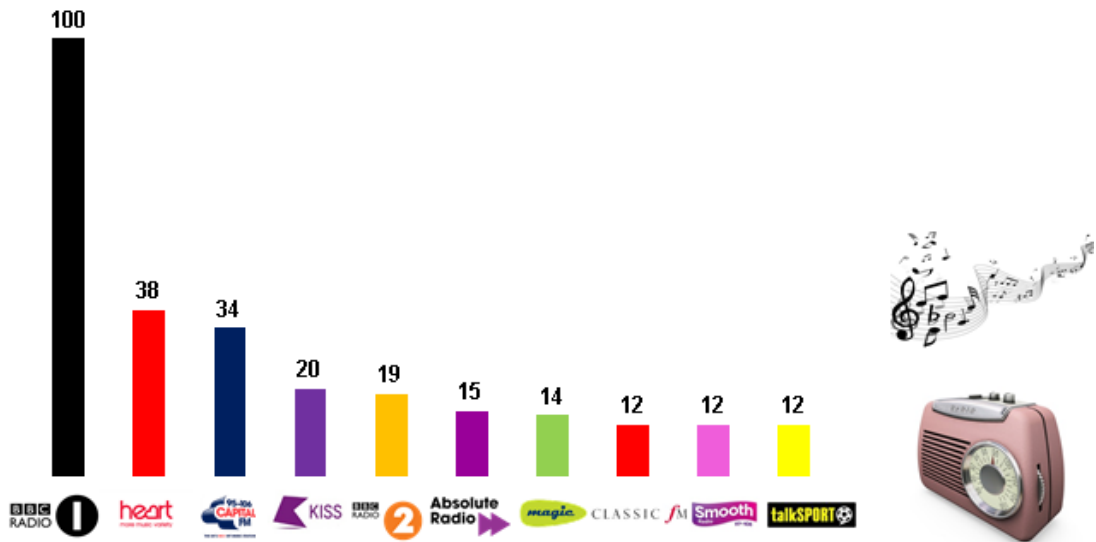
Listeners who listened to more than one station were then asked what other stations they listened to (*other than their main station.*) The chart below illustrates the ten “other” stations listened to.

Heavy listeners to radio are more likely to listen to other BBC stations, 29% of these listeners also listened to Radio 2 in the last week. Also 39% of all under 30 year old Radio 1 listeners had listened Capital Radio compared to 34% overall.

Heart, Capital and Kiss are the other main stations listened to by the other Radio 1 listeners surveyed.



What radio stations have you listened to in the last week?



A3a/A3c. Base: Radio 1 (993) Weighted



10.5 Profile - Radio 2

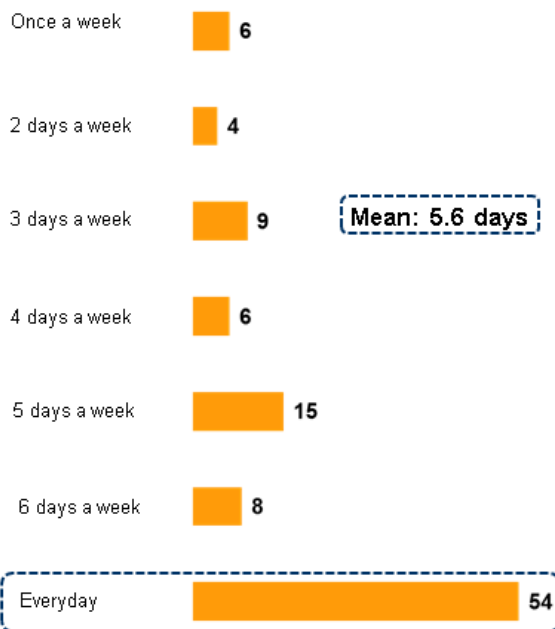
According to the survey, the mean age of Radio 2 listeners was 50.5 years old with 82% in the over 35 year old age group. Radio 2 listeners listened on average just over five and a half days a week with 46% claiming to listen everyday (including weekends). On an average weekday Radio 2 listeners surveyed listened to just over 2 hours a day and 60% listened to the breakfast show.

70% of Radio 2 listeners only listen to off peak programming. Only 29% of Radio 1 listeners listen outside peak hours (after 7pm). On average off peak listeners are slightly young than Radio 2 listeners as a whole (48.7 years compared to 50.5 years).

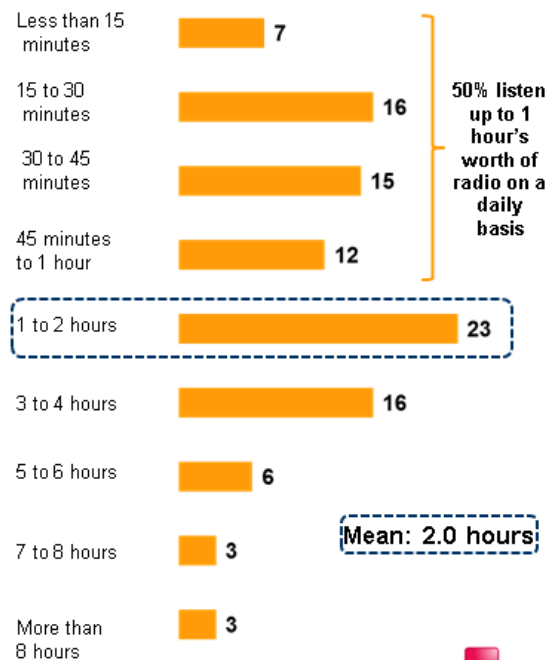
Over half of Radio 2 listeners listen to the radio on a daily basis, 50% listen to it for at least an hour



How often would you say you listen to the radio?



How much time do you spend listening to music radio on an average weekday?

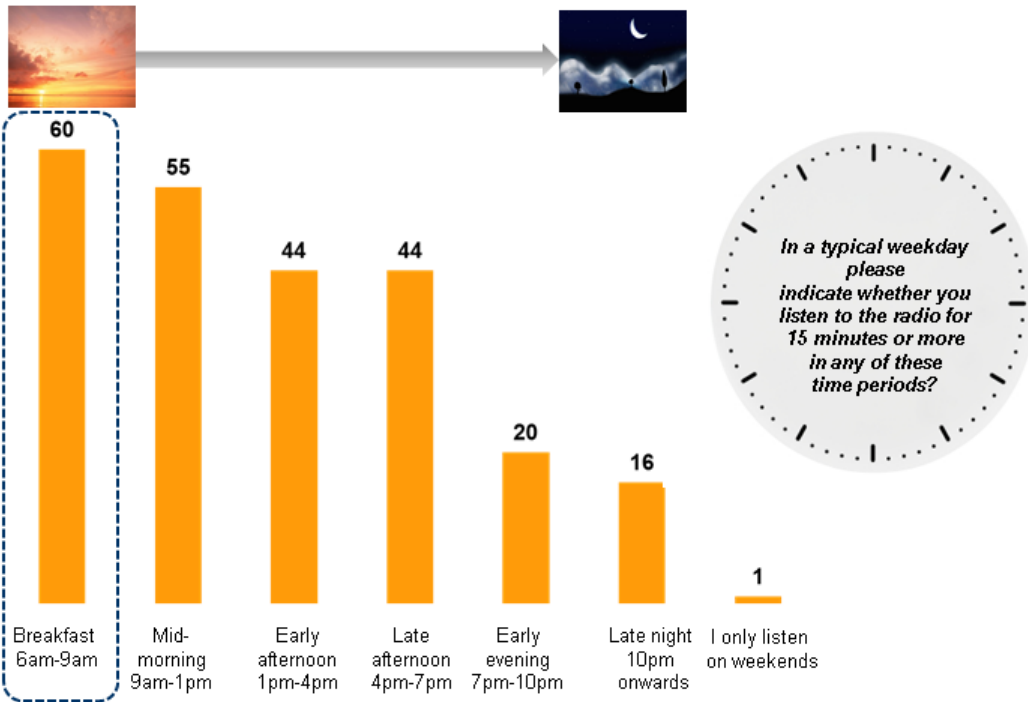


QA1a. How often would you say you listen to the radio? Base: (998) Weighted

QA1b. How much time do you spend listening to MUSIC radio on an average weekday Base: (998) Weighted



Almost 2 in 3 Radio 2 listeners surveyed listen to radio at breakfast time



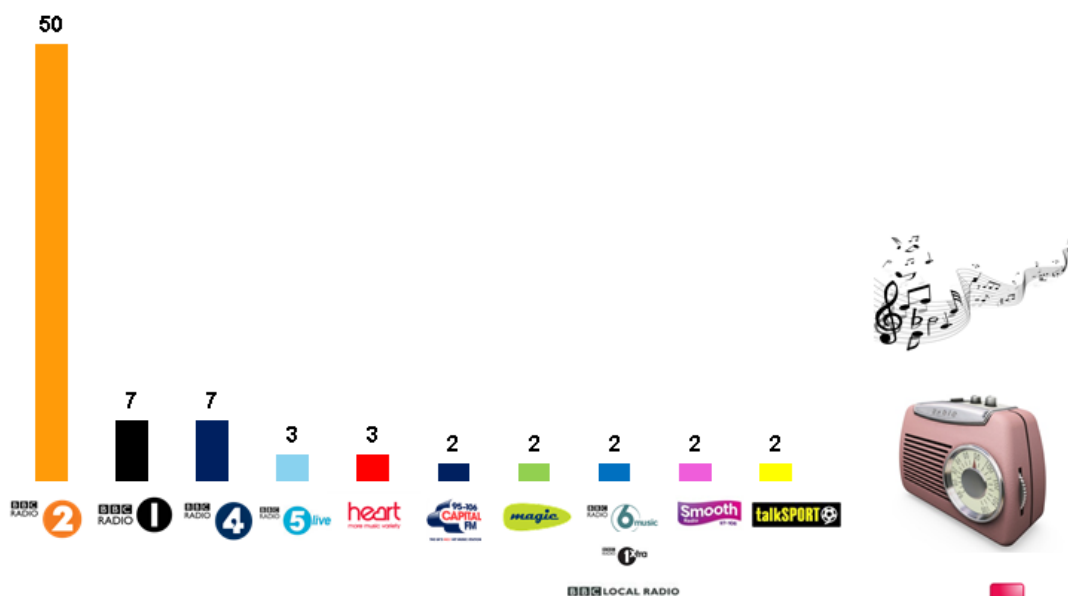
QA2. In a typical weekday, please indicate whether you listen to the radio for 15 minutes or more in any of these time periods? Base: (998) Weighted

The chart below illustrates the main stations they listen to along with Radio 2.

Half of respondents regarded Radio 2 as their main station listened to in the last week



Over the past week, which radio station did you listen to most?



A3a. What radio stations have you listened to most in the last week? Base: Radio 2 (998) Weighted

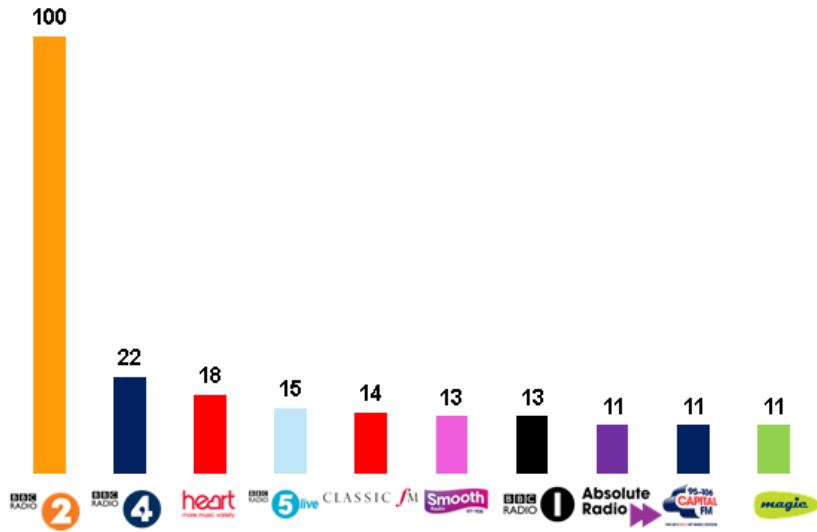


Radio 2 listeners are less likely to listen to other stations than Radio 1. Radio 4 is the most listened to 'other' station.

Heart, Classic FM and Smooth are the other commercial stations listened to by Radio 2 listeners surveyed.



What radio stations have you listened to in the last week?



A3a/A3c. Base: Radio 2 (998) Weighted



10.6 Questionnaire

201344 R1/R2 QUESTIONNAIRE V7 ***FINAL 050914***

11. About BDRC Continental

BDRC Continental is an award-winning insight agency. We help our clients get closer to their customers by translating data into actionable business intelligence. We do this through our range of market-leading insight tools, a dedicated suite of advanced analytics and over two decades of experience working with leading service sector brands across the globe.

Established in 1991, we have an unrivalled reputation as a full service research consultancy with specialist expertise across a number of sectors including hotels, meetings & hospitality, financial services, media & advertising, Government & not for profit, culture & leisure, tourism, travel & transport and sports & sponsorship. As well as undertaking bespoke research for a wide variety of clients, we conduct a number of syndicated studies and have developed proprietary techniques including Traktion, Grapevine, Service Intensity, the Business Opinion Omnibus, SME Finance Monitor and ZMET Visionary Thinking.

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